



Canal &  
River Trust

# Boat Owners Survey 2017

April 2017



bdrc  
continental

providing intelligence

# Introduction and methodology

## Background

Objective is to refresh the Canal & River Trust's understanding of the experiences, opinion, behaviours and preferences of licenced boaters

Particular focus upon boaters' relationship with the Canal & River Trust

Previous surveys:

- 2016
- 2014\*
- 2013
- 2011
- 2009

## Methodology



Online survey conducted in **late March / early April 2017**

**1,160 responses:**

- 155 continuous cruisers
- 1,005 home mooring

Invitations sent out via:

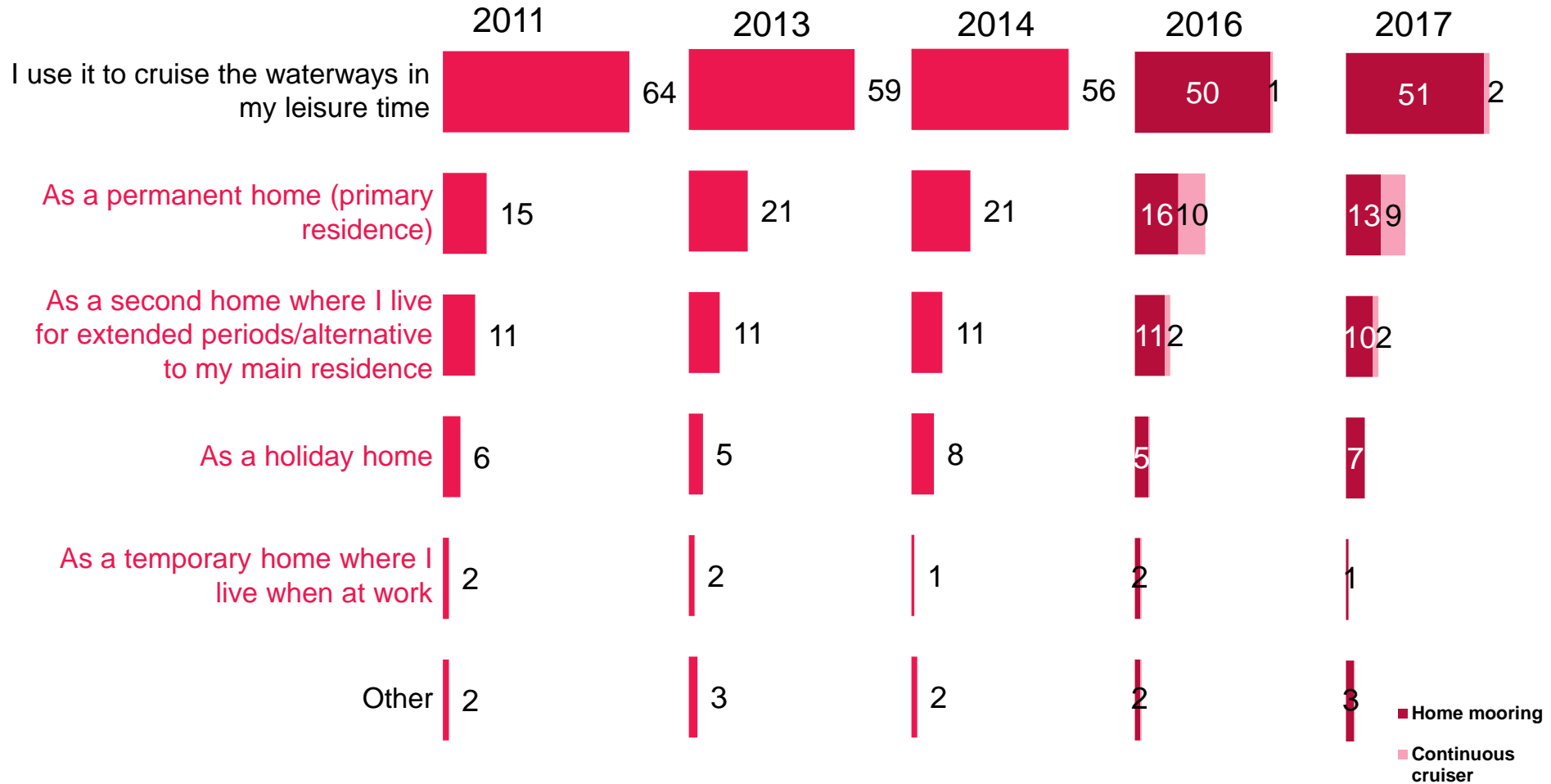
- **Email: 1,133 responses** from 8,632 contacts (13% response rate)
- **Post: 27 responses** from 1,413 contacts (2% response rate)

Data weighted to known profile of boaters by region of residence and continuous cruisers vs. home mooring (see Appendix).

\*3 waves of BOAT survey in 2014: data in this report is drawn from Wave 3 (most comparable survey period – December 2014)

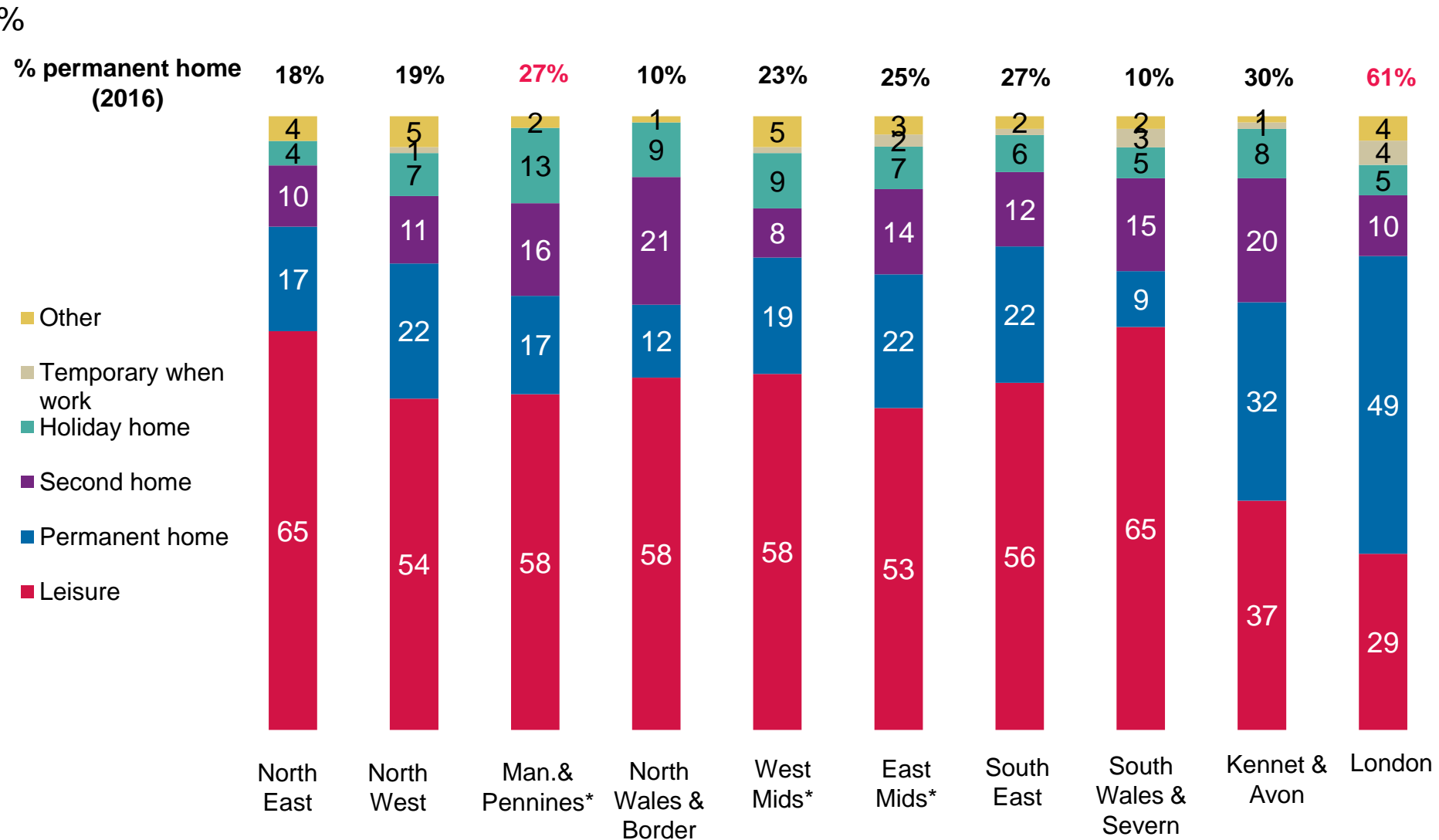
# Key context: around a quarter of boaters claim that the primary use of their boat is as a permanent home

%



Q40: How do you use your boat?  
Base: Boat owners 2017 n=1,160

# Type of use by region: incidence of use as a permanent home has dropped in London in 2017



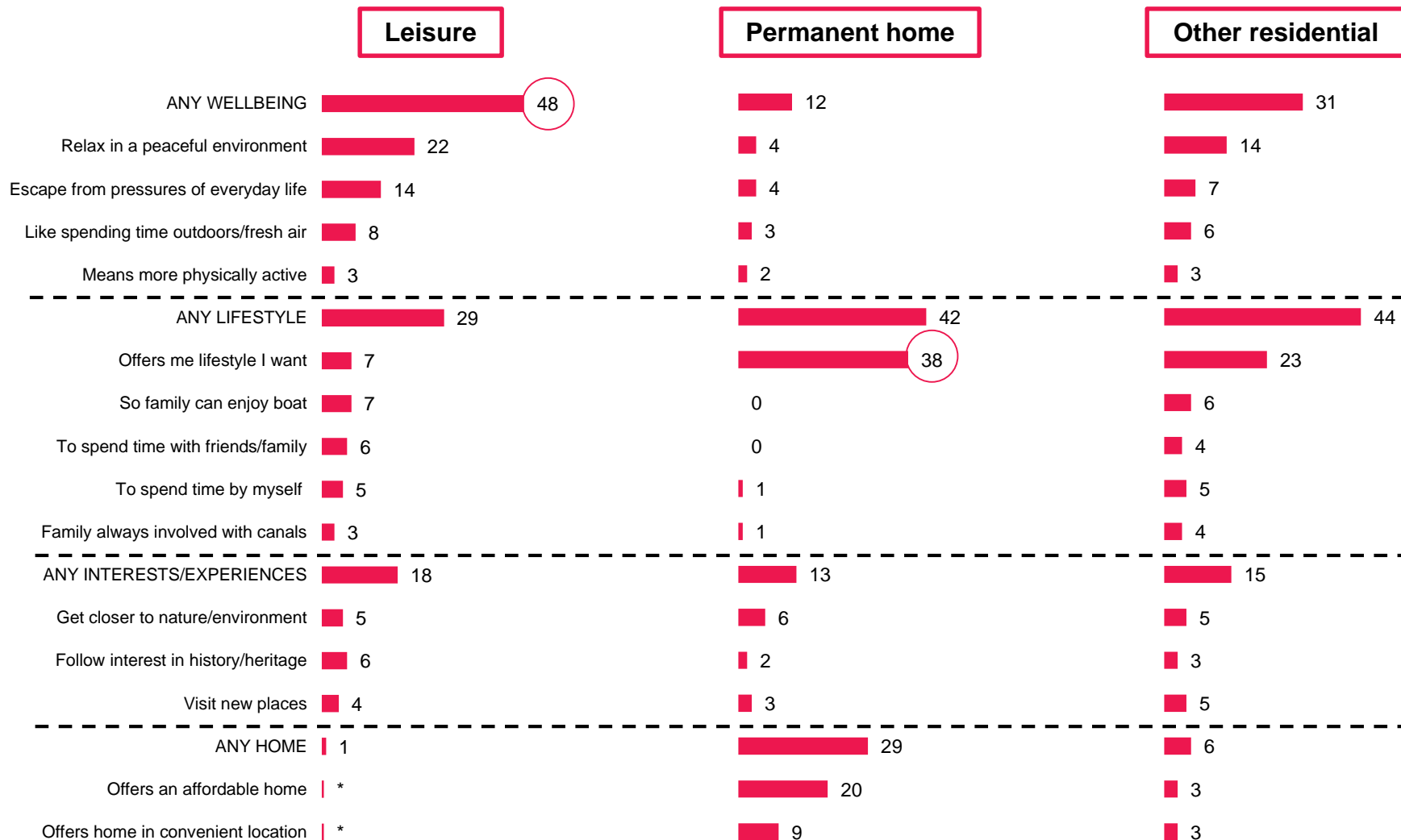
\* Central Shires region subsumed within these regions in 2017 (Central Shires appeared as a separate region in 2016)

Q40: Which of the following options best describes how you use your boat most of the time?  
Base: Boat owners 2017 n=1,160

# Those using their boat as a permanent home are more likely to be motivated by lifestyle than affordability

%

## Main reason for owning a boat (%)



Q34: Which of these describe the reasons why you personally own a boat?  
Base: Boat owners 2017 n=1,160



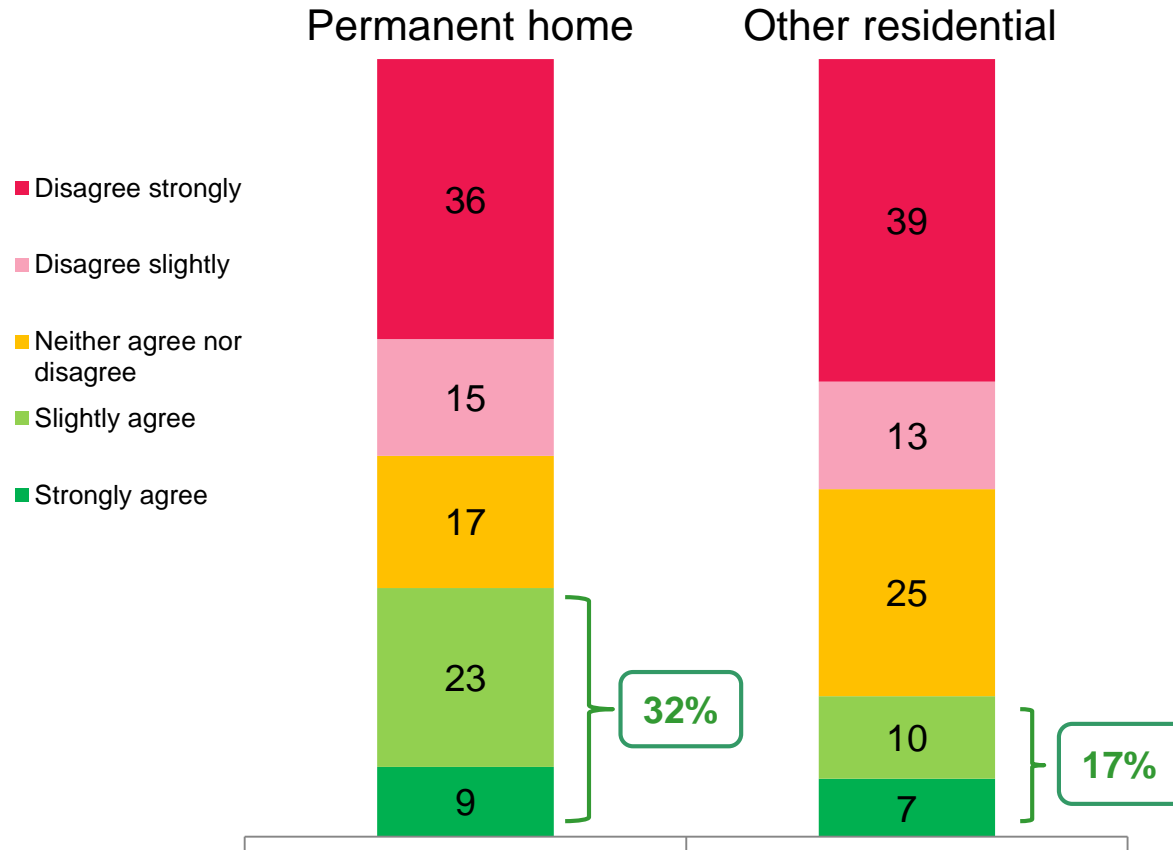
Canal & River Trust



# Lower cost of living is the main motivation for living on a boat for only a minority of those using as a permanent home

%

***“The lower cost of living is my main reason for living on a boat”***



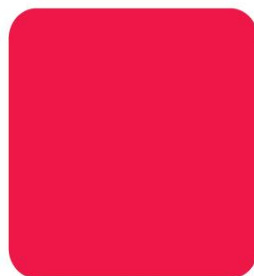
# Agenda

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- Relationship with the Canal & River Trust
- Experience along Canal & River Trust waterways
- Customer service
- Communications
- Boater demographics and behaviour



# Relationship with the Canal & River Trust



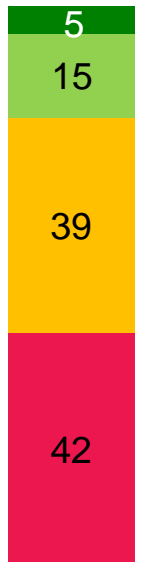


# Familiarity with the Canal & River Trust continues to grow among boaters, with 57% now knowing at least a fair amount about the Trust

%

## Waterway Engagement Monitor (E&W residents)

Apr '16-Mar '17



(% of all aware)

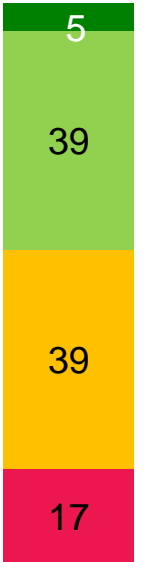
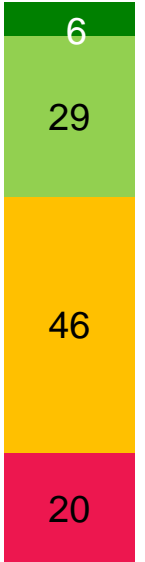
## Boat Owners' Views

2013

2014

2016

2017



- Know very well
- Know a fair amount
- Know just a little
- Heard of but know nothing about / don't really know well at all

Q4: How well do you feel you know the Canal & River Trust as an organisation i.e. not its waterways?  
Base: Boat owners 2017 n=1,160

# Overall opinion of the Trust also moving in a positive direction and less polarised than in 2016

%

## Waterway Engagement Monitor (E&W residents)

Apr '16-Mar '17



(% of all aware)

## Boat Owners' Views

2013

2014

2016

2017



- Very favourable
- Mainly favourable
- Neither favourable or unfavourable
- Mainly unfavourable
- Very unfavourable
- No opinion

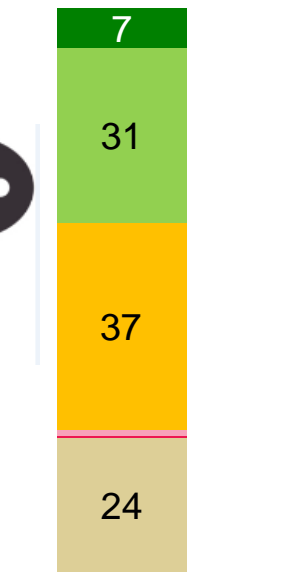
Q5: How favourable or unfavourable is your overall opinion or impression of the Canal & River Trust?  
Base: Boat owners 2017 n=1,160

# Similar positive movements in terms of advocacy of the Trust

%

## Waterway Engagement Monitor (E&W residents)

Apr '16-Mar '17



(% of all aware)

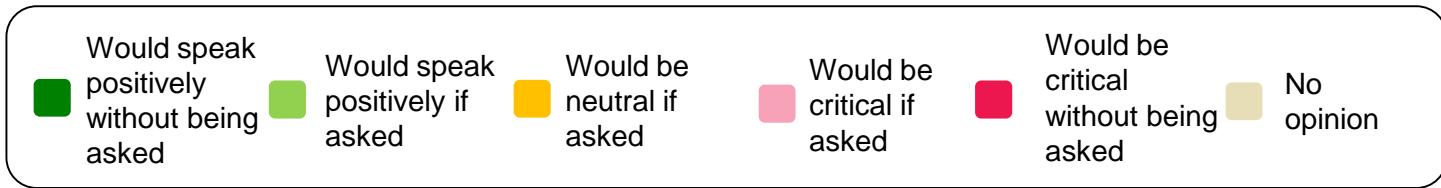
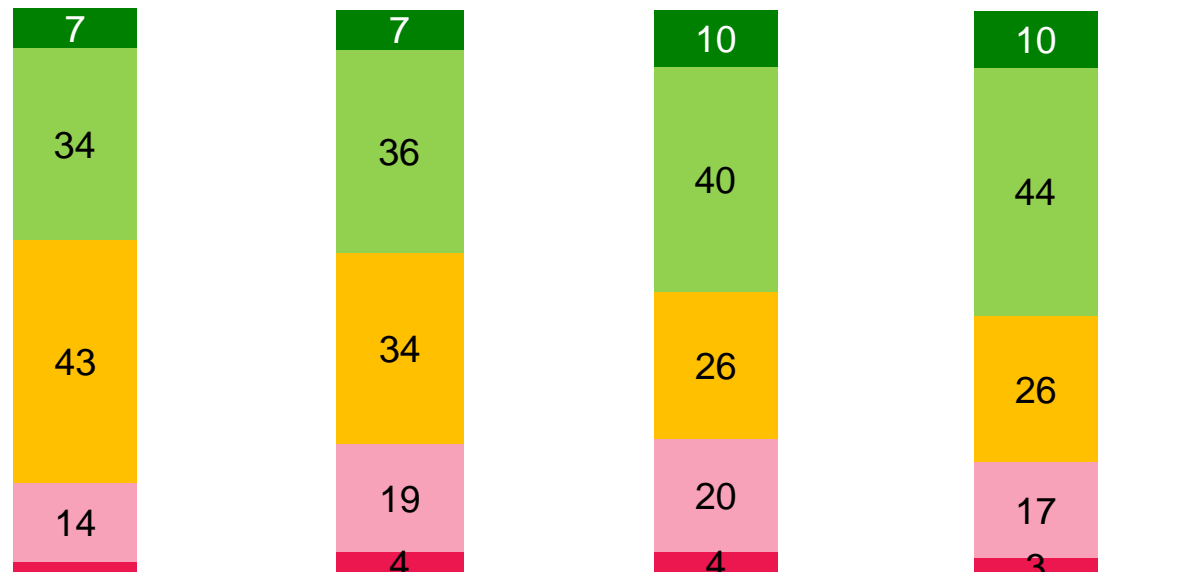
## Boat Owners' Views

2013

2014

2016

2017



Q6b: To what extent would you speak positively or critically about the Canal & River Trust?  
Base: Boat owners 2017 n=1,160

# Although advocacy has increased overall, this is driven by leisure boaters and those using their boats as second / holiday homes. Advocacy among those using as a permanent residence has not increased

%



- Would speak positively without being asked
- Would speak positively if asked
- Would be neutral if asked
- Would be critical if asked
- Would be critical without being asked

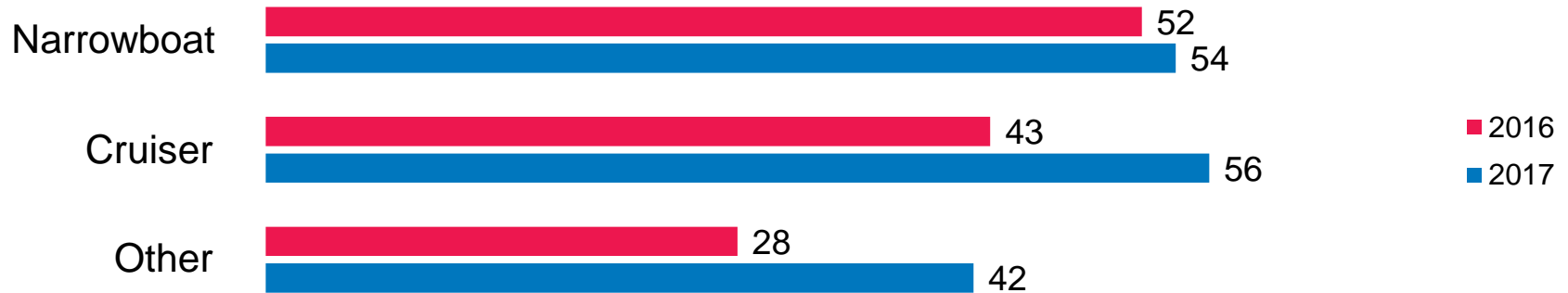
Q6b: To what extent would you speak positively or critically about the Canal & River Trust?  
Base: Boat owners 2017 n=1,160

# Improvement in advocacy driven by home moorers, not continuous cruisers

%

## Advocacy by subgroups (% would speak positively)

### Type of boat



### Boater type



London and K&A are the two regions with lowest advocacy. Notable improvements in M&P and East Mids, although they have picked up some of the old Central Shires region (which was 61% positive in 2016)

%

## Advocacy by region (% would speak positively)

Region boated in (last 12 months)

	2016	2017
North East	36	51
North West	50	51
Manchester & Pennines*	46	63
North Wales & Border	57	62
West Midlands*	61	61
East Midlands*	50	60
South East	47	53
South Wales & Severn	51	46
Kennet & Avon	40	44
London	30	33

\* Central Shires region subsumed within these regions in 2017 (Central Shires appeared as a separate region in 2016)

Q6b: To what extent would you speak positively or critically about the Canal & River Trust?

Base: Boat owners 2017 n=1,160



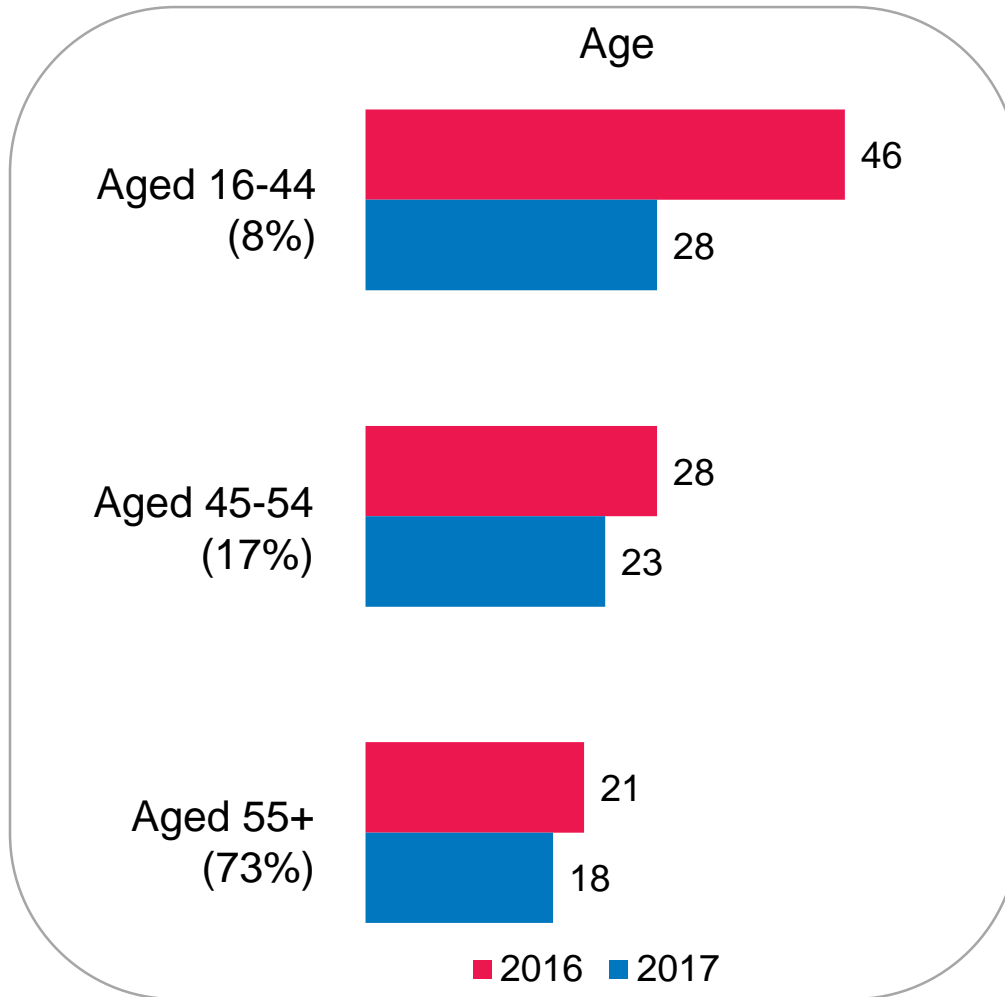
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# Younger boaters, with their high expectations, are still more likely to be critical, but not as significant as in 2016. Criticism more driven by permanent homes / continuous cruisers

%

## % speak critically



# Key Drivers of Advocacy (from 2014 survey)



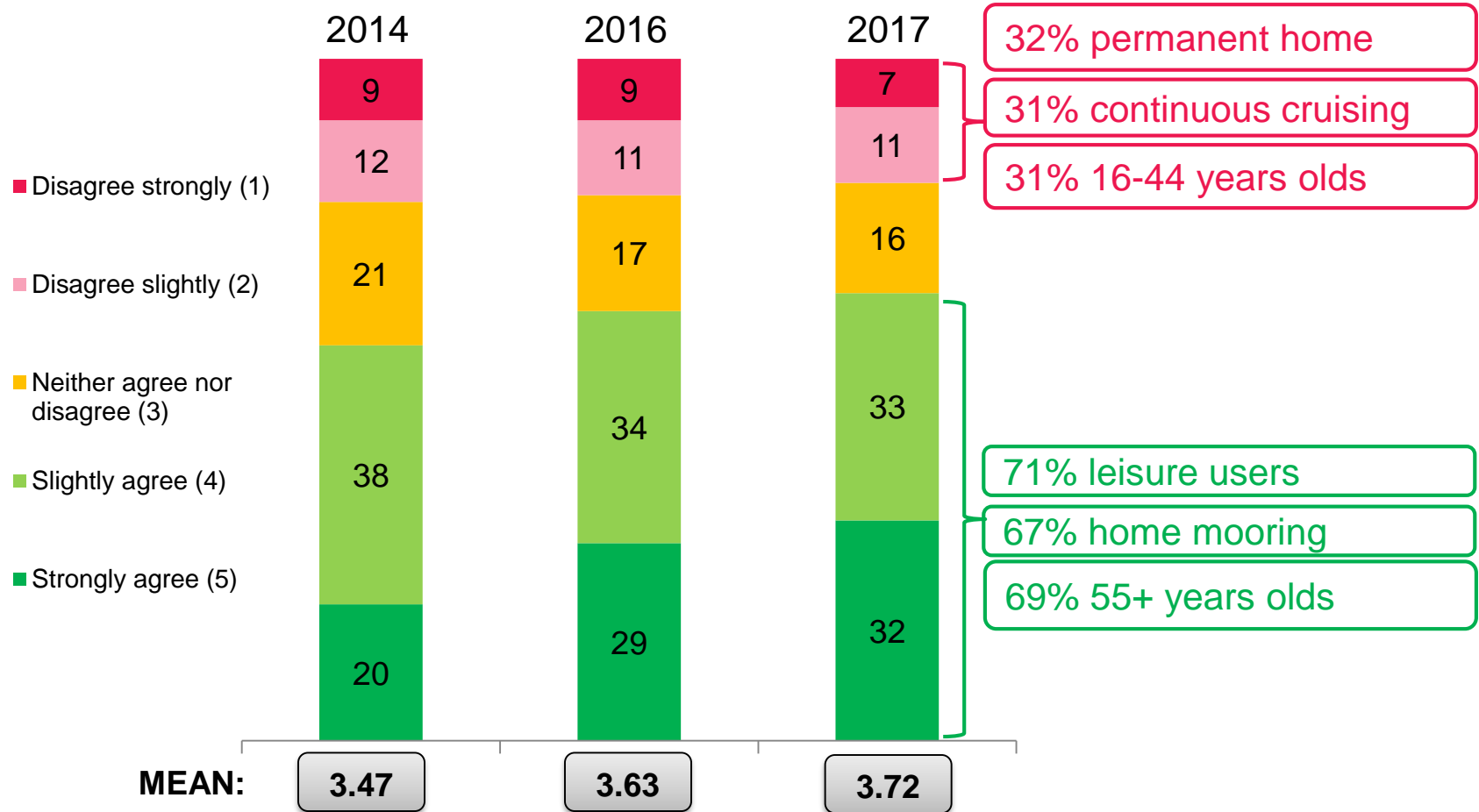
N.B. Elements in bold text were asked on the 2016 survey



# Trust in CRT to look after the waterways continues to increase, but lack of trust still noteworthy among those using as a permanent home / continuous cruisers

%

## “I trust the Canal & River Trust to look after the waterways”



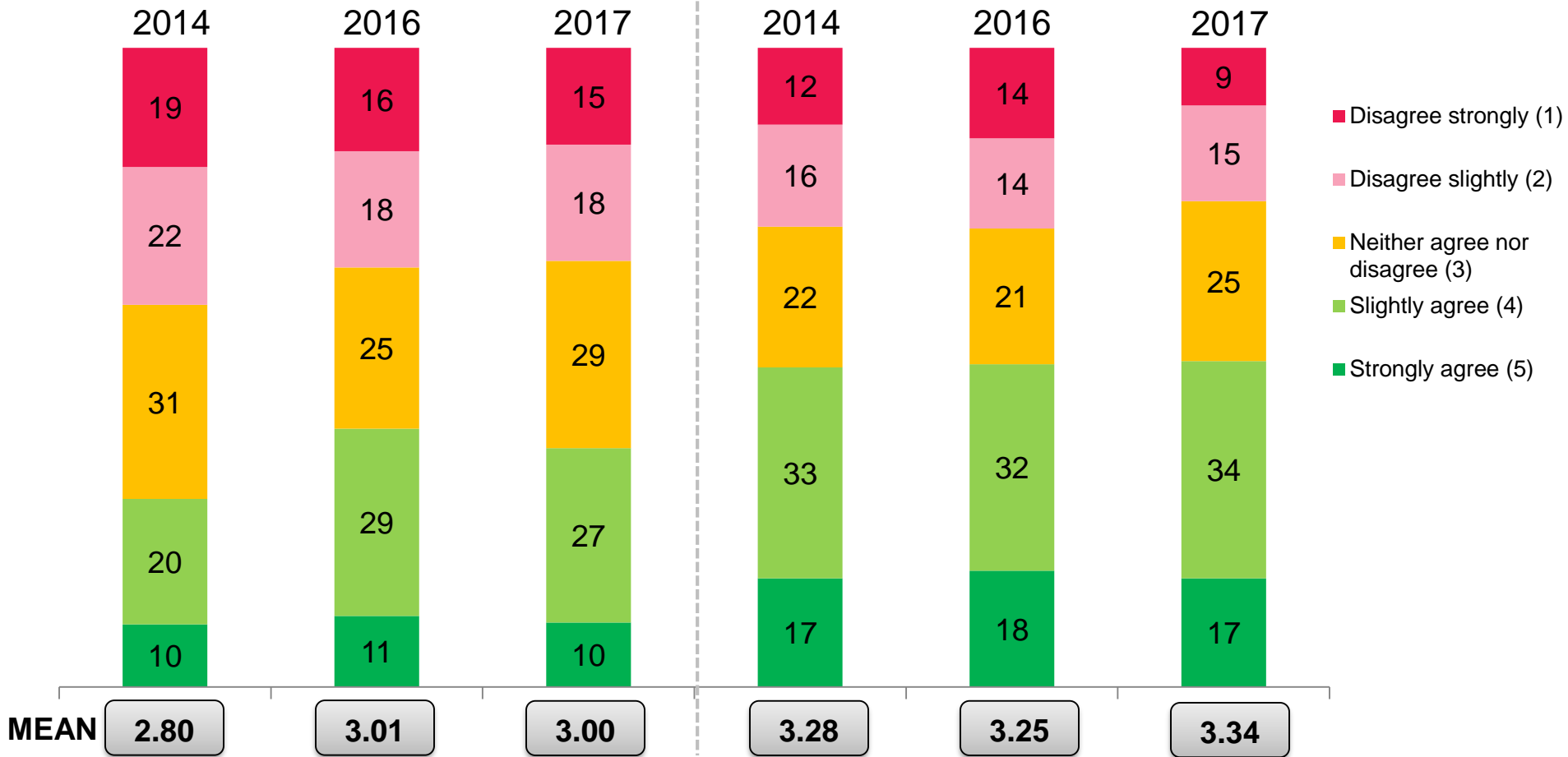
Q6: Here are some things that other boaters have said about the Canal & River Trust. To what extent do you agree or disagree with each?  
 Base: Boat owners 2017 n=1,160

# Less improvement in terms of valuing boater views or prioritising spending appropriately, but these are not key drivers of advocacy

%

*The Canal & River Trust prioritises its spending on what I feel is most needed*

*The Canal & River Trust values the views of the people who boat on its waterways*



Q29: Here are some things that other boaters have said about the Canal & River Trust. To what extent do you agree or disagree with each?  
 Base: Boat owners 2017 n=1,160

# Summary of main current feelings about the Canal & River Trust

## All who would speak **POSITIVELY** about the Canal & River Trust

Doing a good job  
- general (28%)

Excellent service from local  
staff / good service to  
telephone queries (5%)

The trust is moving  
in the right direction  
general - (8%)

## All who would speak **CRITICALLY** about the Canal & River Trust

The trust isn't taking  
proper care of the canals,  
e.g. many canals are still  
awaiting repairs (26%)

Persecution/  
boater harassment  
(12%)

Too much focus on non-boating  
aspects of canals, e.g. trying to  
please cyclists etc.(16%)

**NEW**  
Increasing fees are a bad idea/  
Trust is only interested in getting  
money from the public (13%)

The administration  
is out of touch with  
the needs of  
members (11%)

Too much bureaucracy /  
not organised  
(10%)

Financial resources  
being misdirected  
(7%)



Q: Please can you tell us in your own words how you feel about the Canal & River Trust at the moment and what makes you feel this way?

Base: Boat owners 2017 n=1,160



Canal &  
River Trust

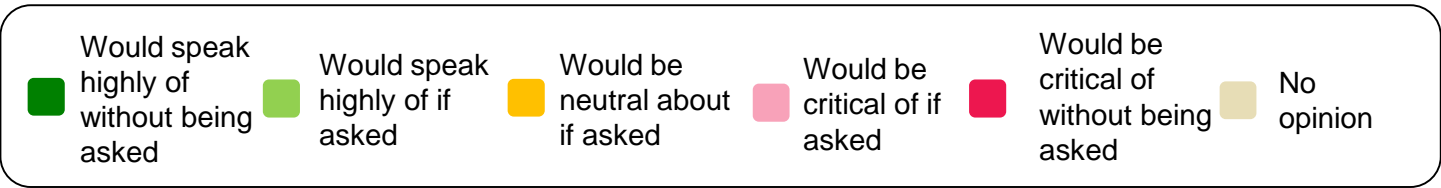
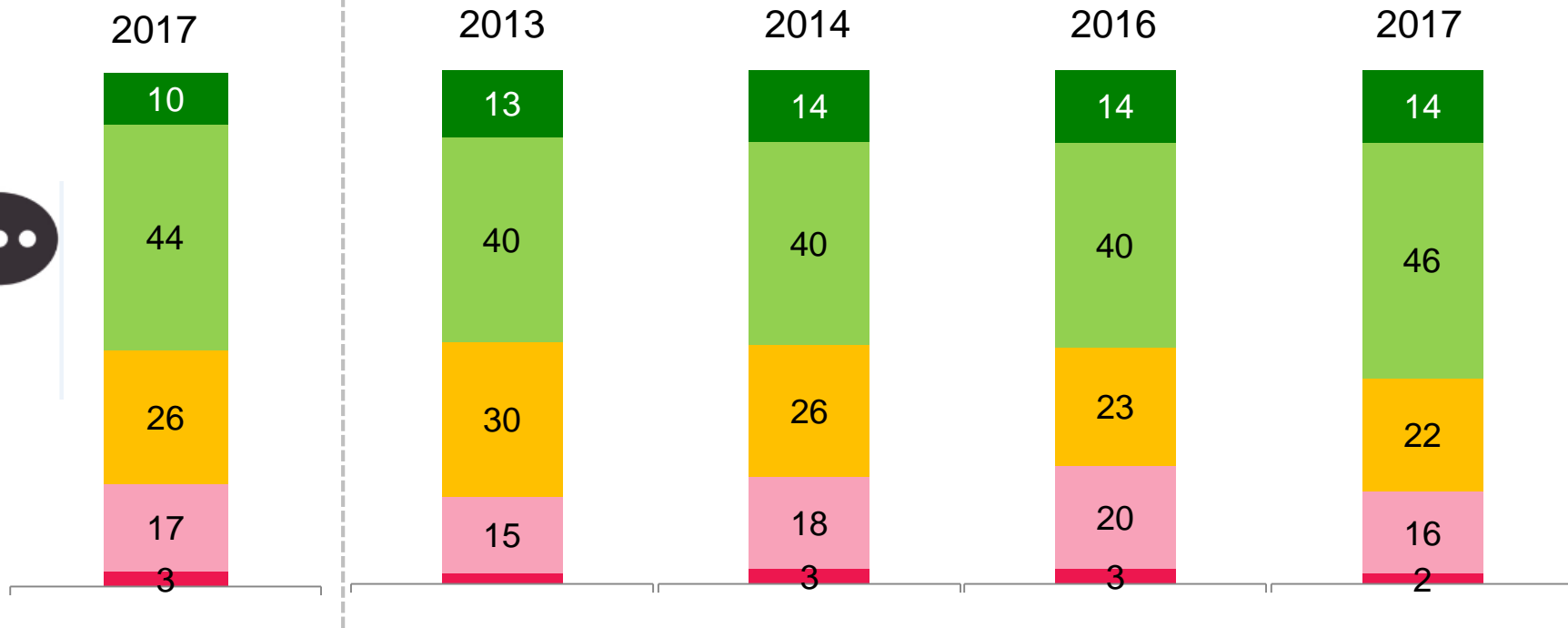
bdrcc continental 19

# Growth in positivity towards waterways looked after by the Trust for first time in 2017

%

## Canal & River Trust

## Waterways



Q6b: To what extent would you speak positively or critically about the Canal & River Trust?  
 Q7: To what extent would you speak positively or critically about the waterways looked after by the Canal & River Trust?  
 Base: Boat owners 2017 n=1,160

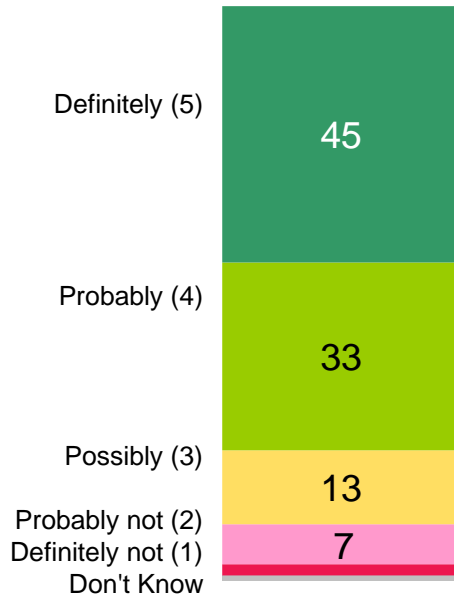
Experience along  
Canal & River Trust  
waterways



# Waterways experience: 2017 Summary

%

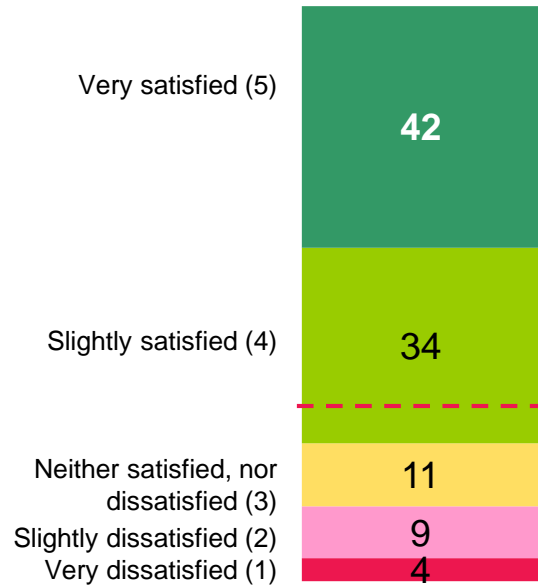
## Recommendation



**MEAN:**

4.14

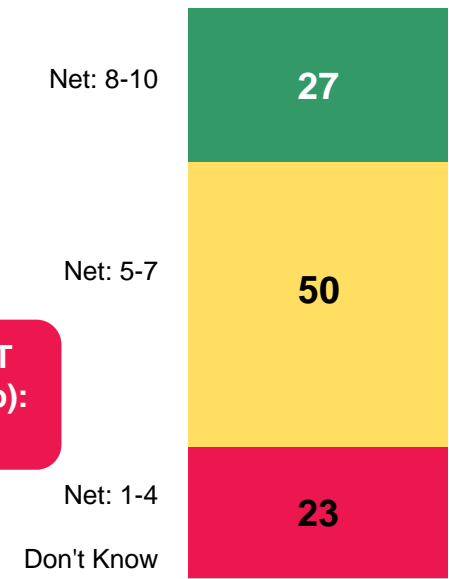
## Satisfaction



**TARGET  
(def/prob):  
70%**

4.02

## Overall upkeep



6.08

Q2: Thinking about your boating on the Trust's canals and rivers over the past year, overall how satisfied were you with your experiences?

Q3: How likely are you to recommend the Trust's waterways to other boaters?

Q8: Please indicate how you rate the Canal & River Trust for each of the following...

Base: Boat owners 2017 n=1,160

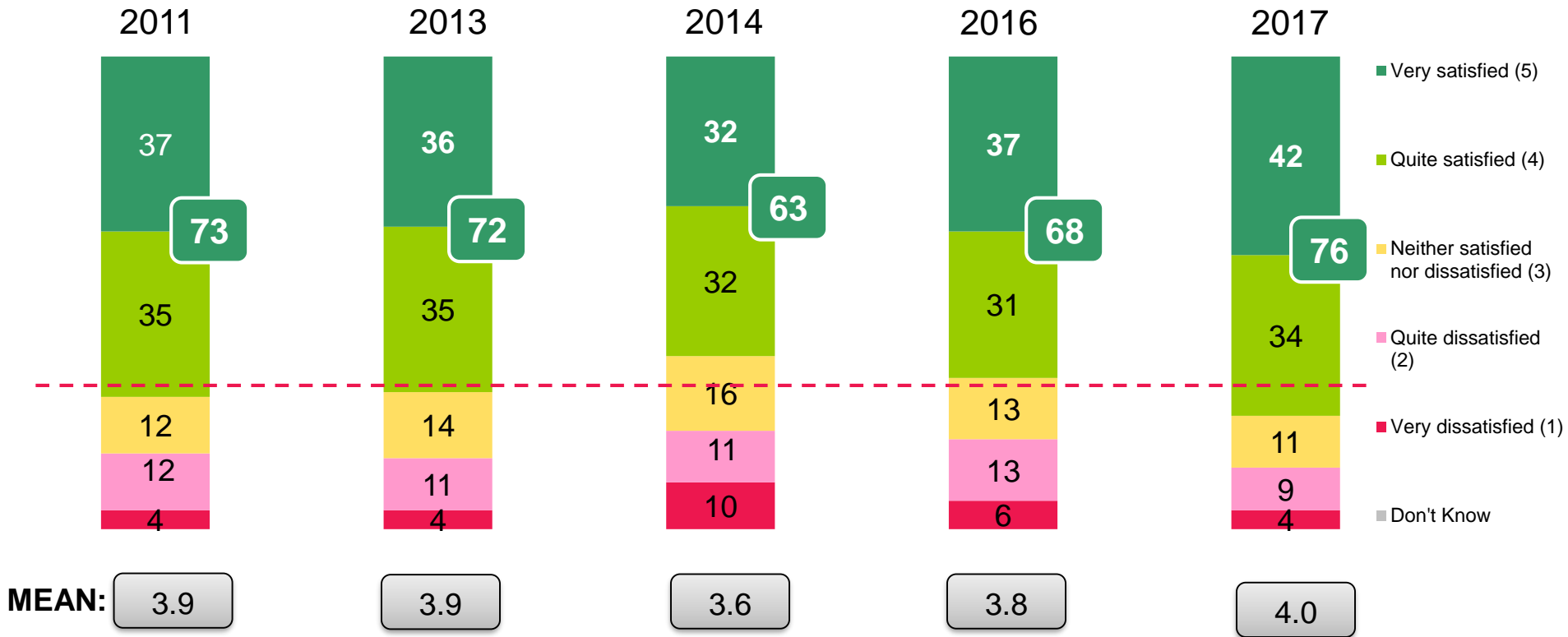


Canal & River Trust



# Satisfaction with waterway experiences taken a positive notable jump in 2017

%



MEAN: 3.9

3.9

3.6

3.8

4.0

# Satisfaction increased among all types of boater, including those using as a permanent home



Q2: Thinking about your boating on the Trust's canals and rivers over the past year, overall how satisfied were you with your experiences?  
 Base: Boat owners 2017 n=1,160

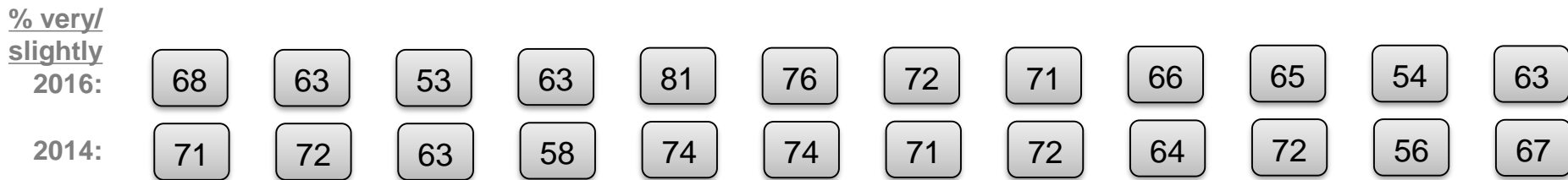


# As in the past, Wales & Border rated highest for satisfaction. Boaters in London least likely to rate satisfaction positively (and not improved), driven by the high proportion of permanent residents

%



\* Central Shires region subsumed within these regions in 2017 (Central Shires appeared as a separate region in 2016)

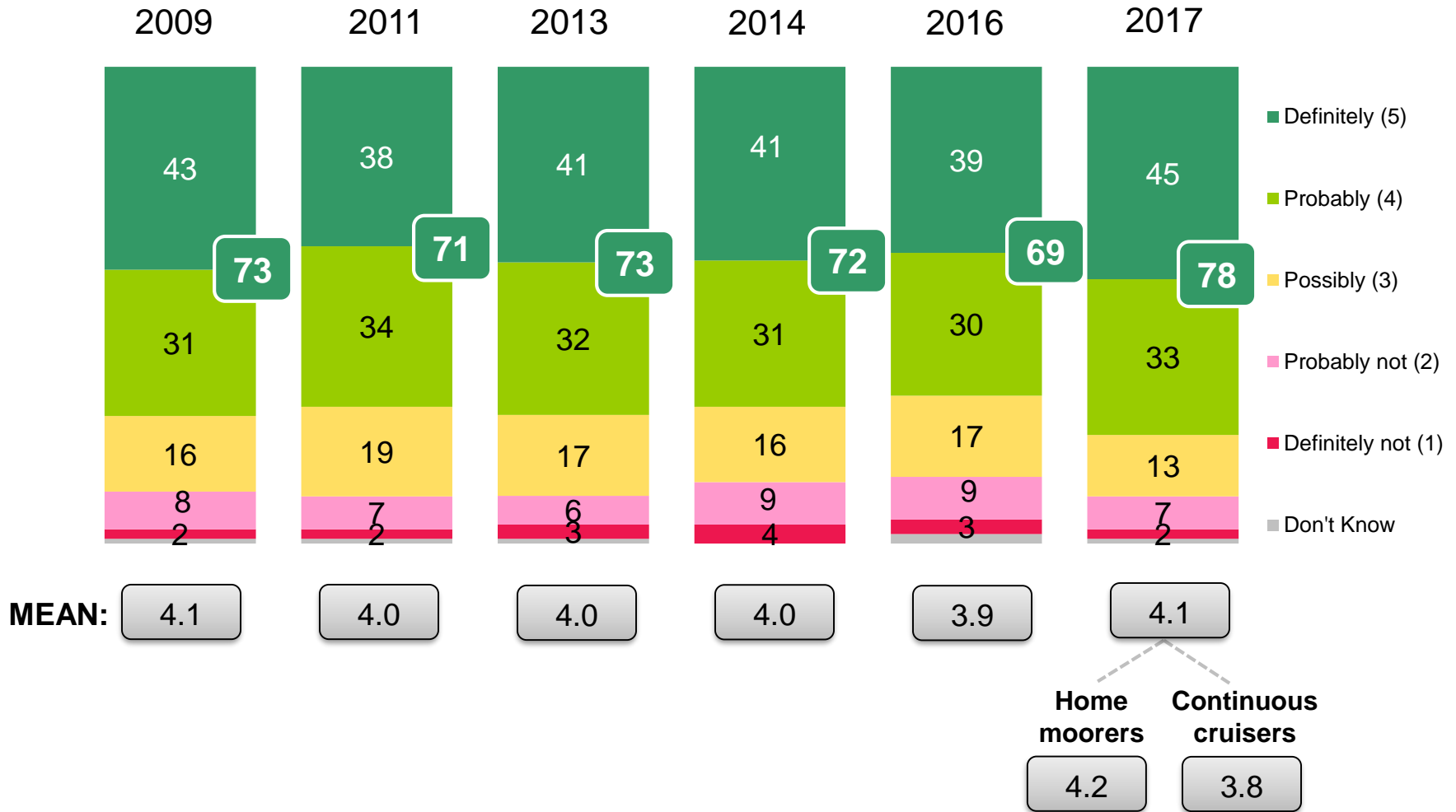


Q4: Thinking about your boating on the Trust's canals and rivers over the past year, overall how satisfied were you with your experiences?

Base: Boat owners 2017 n=1,160

# Levels of recommendation of the waterways also markedly improved

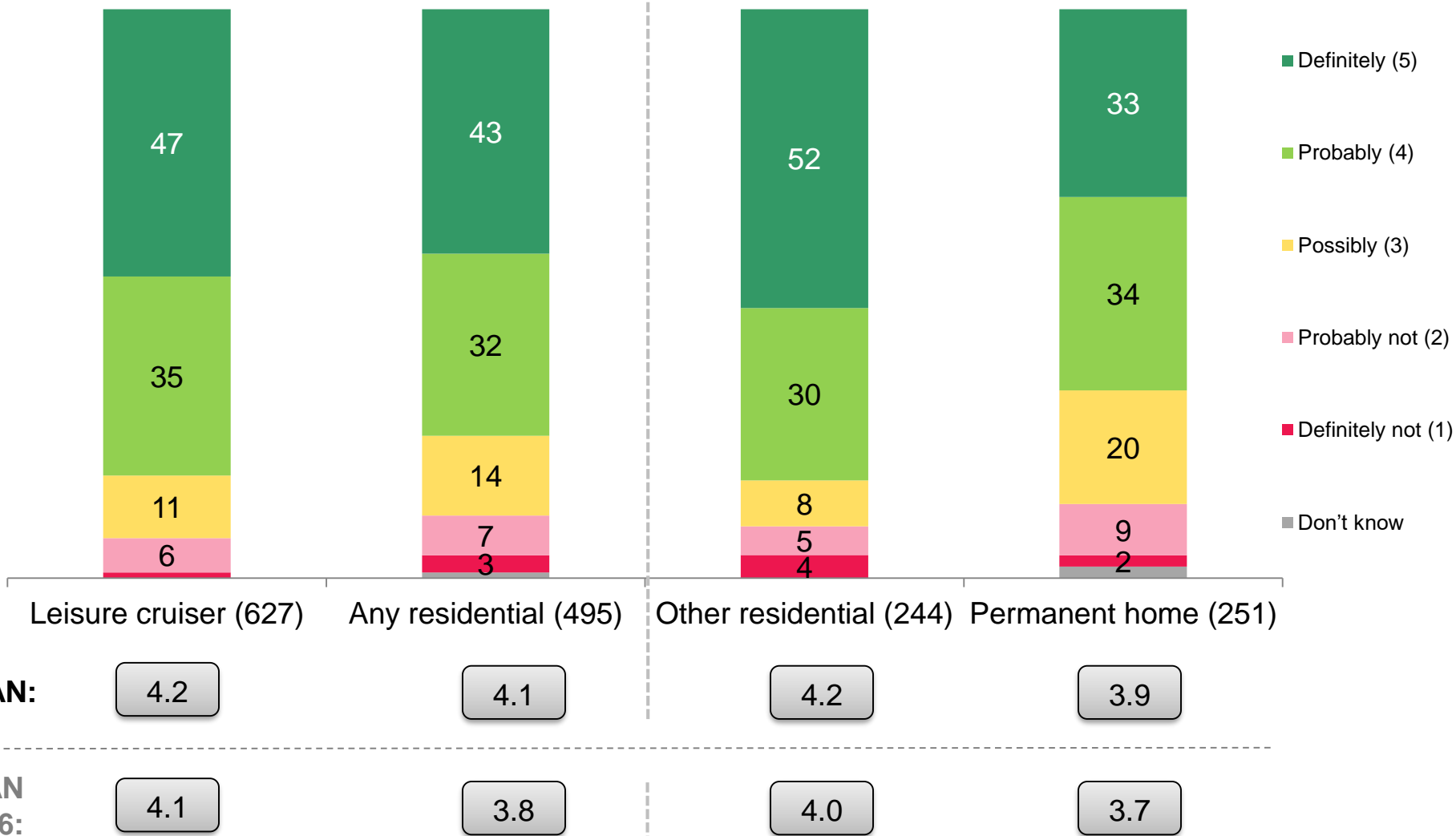
%



Q3: How likely are you to recommend the Trust's waterways to other boaters?  
 Base: Boat owners 2017 n=1,160

# Recommendation shown some notable improvements among residential boaters in 2017

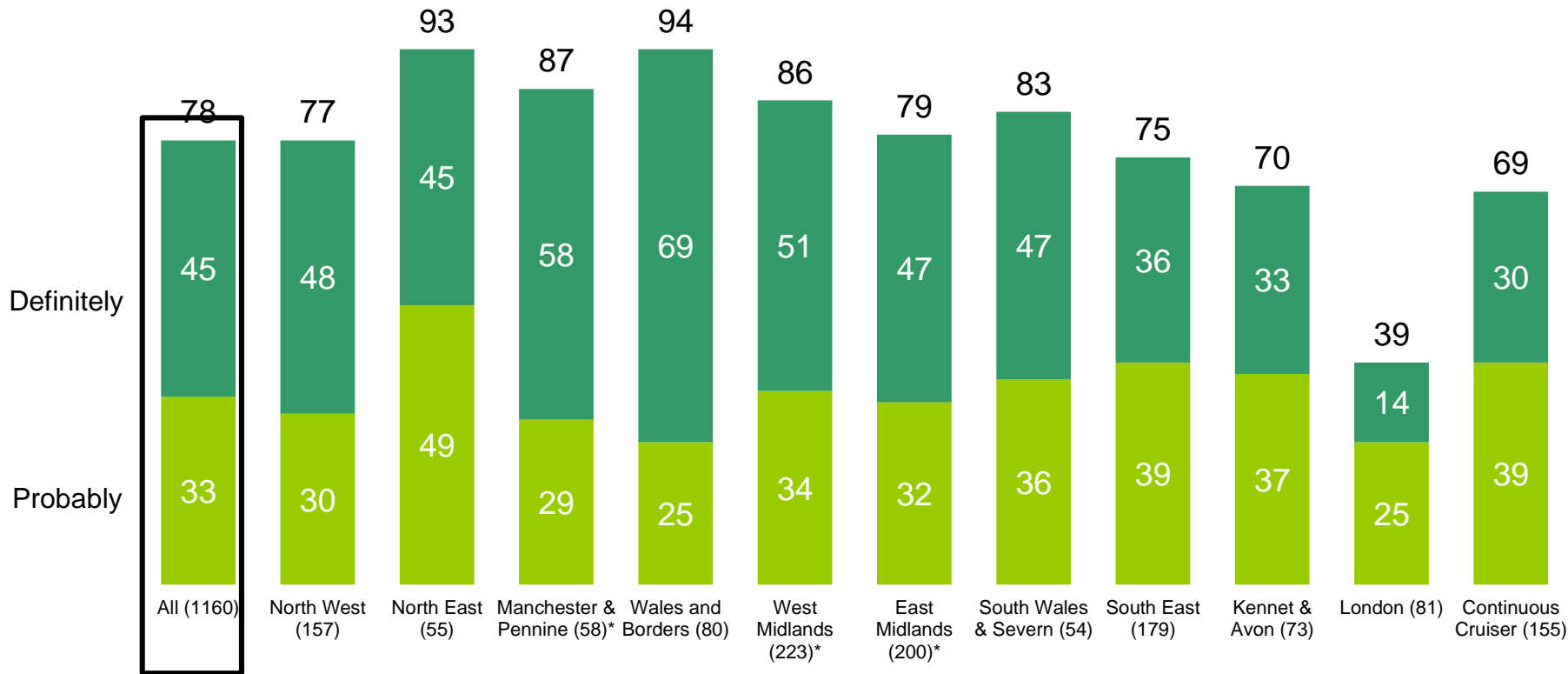
%



Q5: How likely are you to recommend the Trust's waterways to other boaters?  
 Base: Boat owners 2017 n=1,160

# Boaters in Wales & Borders most likely to recommend waterways in 2017. Boaters in London least likely and not improved on recent years

%



\* Central Shires region subsumed within these regions in 2017 (Central Shires appeared as a separate region in 2016)

% def/ prob

2016:



2014:

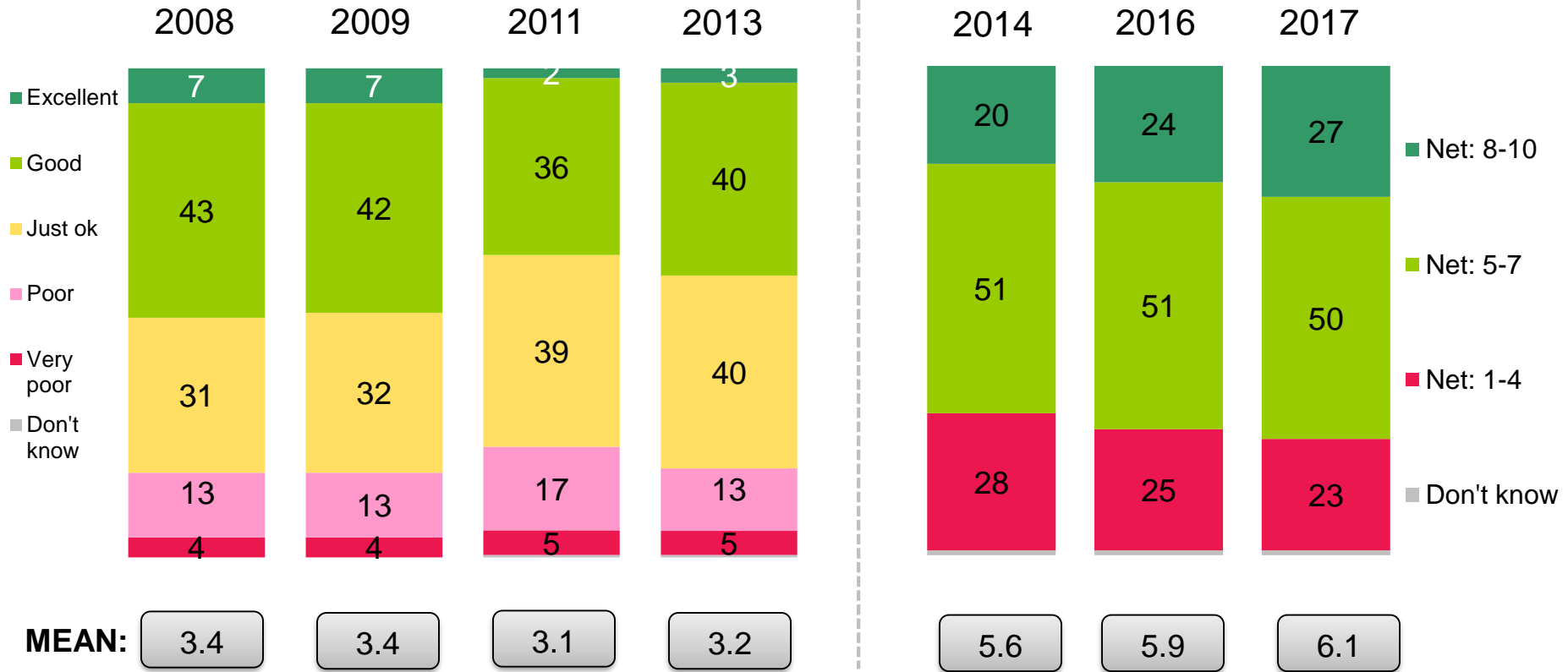


Q3: How likely are you to recommend the Trust's waterways to other boaters?  
Base: Boat owners 2017 n=1,160

'Overall upkeep' is a key driver of CRT advocacy and this also continues to improve. However, a quarter still rate this as less than 5 out of 10

%

### "Overall upkeep of the waterways"



CAUTION: Different scale used from 2014 onwards (10 point)

Q8: Please indicate how you rate the Canal & River Trust for each of the following...  
Base: Boat owners 2017 n=1,160

# Overall upkeep perceptions have improved among leisure boaters, but not among those using as a permanent home

%

## “Overall upkeep of waterways”



Q11: Please indicate how you rate the Canal & River Trust for each of the following...  
Base: Boat owners 2017 n=1,160

# Overall upkeep rated most positively by boaters in N.Wales & Borders and least positively in London and K&A. Major improvement seen in M&P

%

## “Overall upkeep of waterways”



\* Central Shires region subsumed within these regions in 2017 (Central Shires appeared as a separate region in 2016)

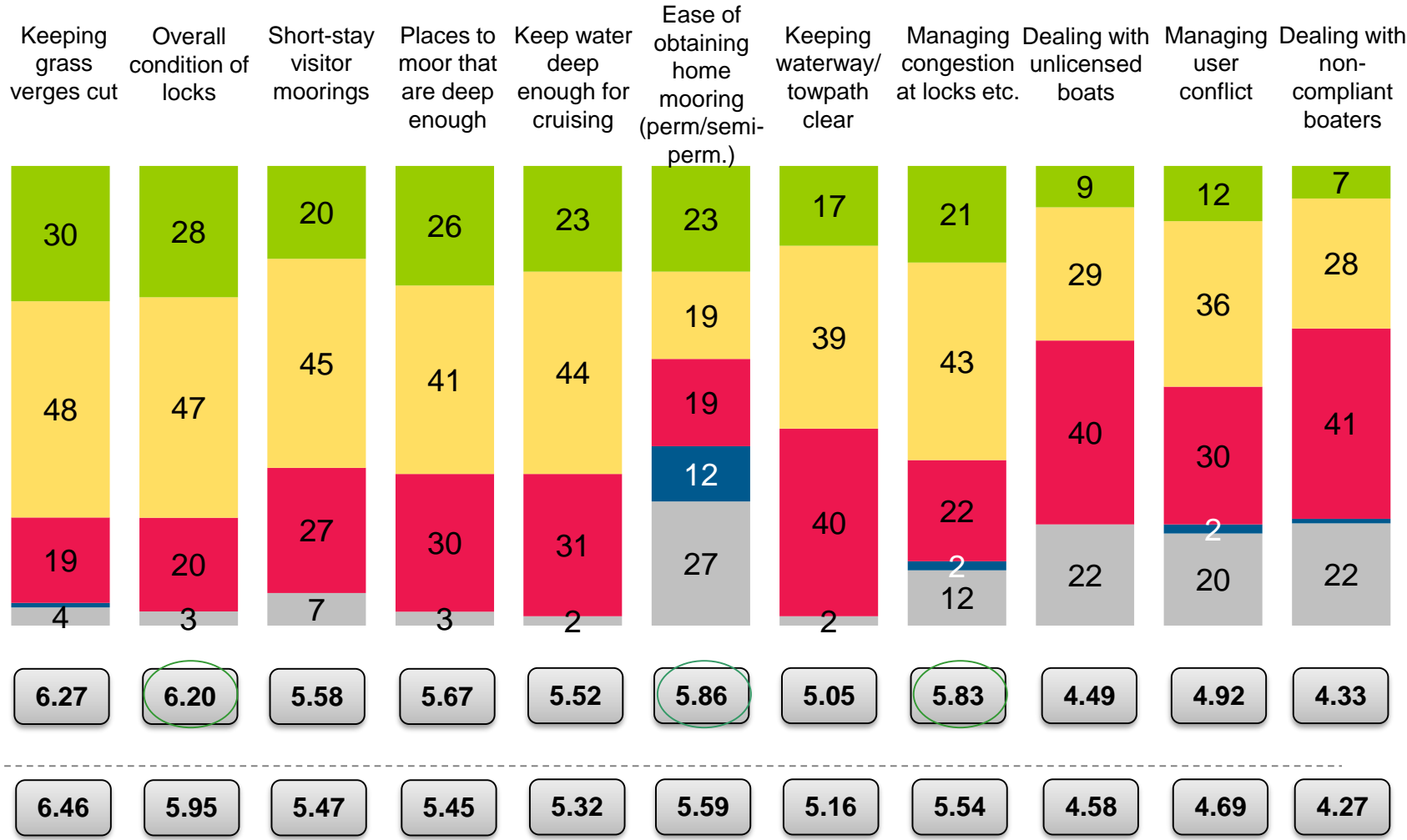
Mean  
2016:



# Mooring provision seems to be improving, as are locks. Still notable proportions rating less than 5 on most dimensions, especially issues around compliance

%

## Rating of the Canal & River Trust's responsibilities



Q8: Please indicate how you rate the Canal & River Trust for each of the following...  
Base: Boat owners 2016 n=1,024



# Ease of obtaining permanent mooring improving, but still high latent demand for moorings among continuous cruisers

Mean Score/10



## Demand for permanent / long term mooring if available

%	Continuous Cruisers	Non-CC (residential)
Definitely interested	20	7
Fairly interested	32	5
Already have, but would like to move	-	14
Already have, would like to stay	2	67
Not interested	46	7

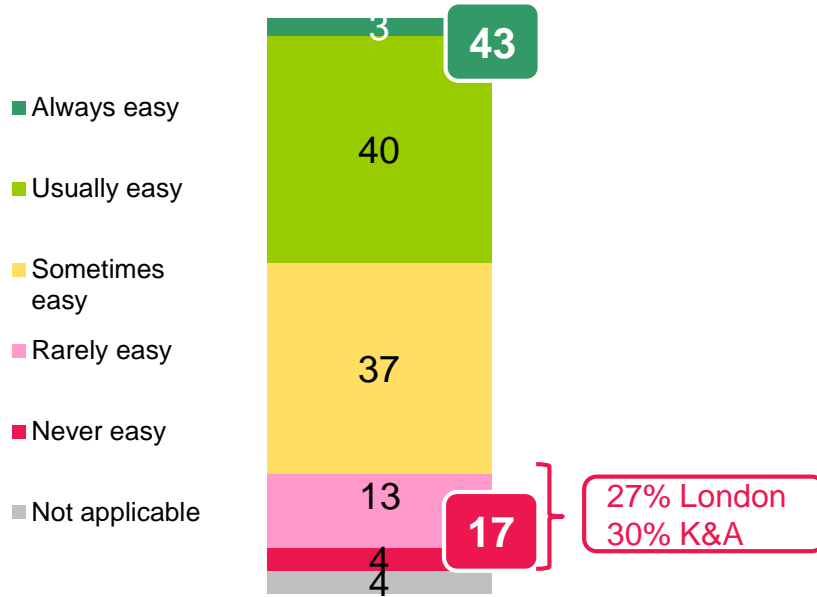
Those who are interested in a permanent mooring but don't currently have one are much more likely to be critical of the Trust than those who already have one – a key driver of dissatisfaction among continuous cruisers

# A minority have an issue with visitor moorings, particularly in London

%

## Visitor moorings

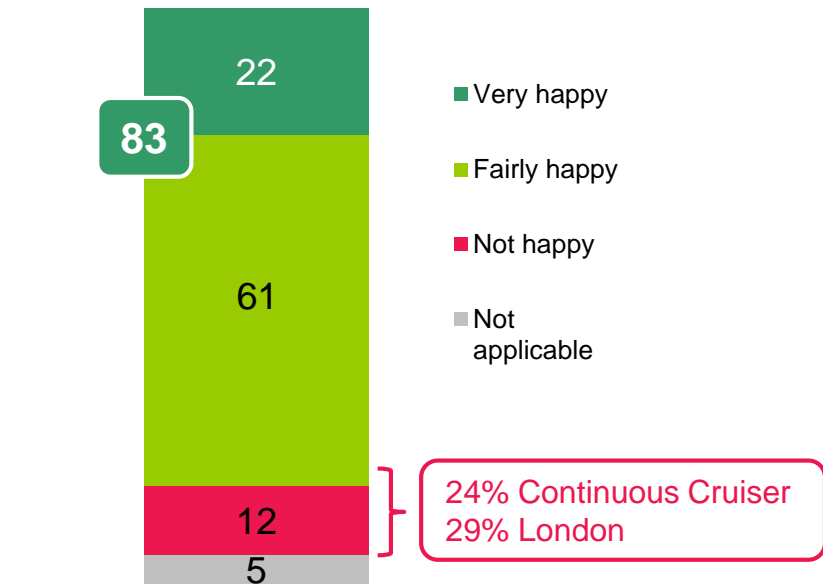
### Ease of finding space to moor up



% rarely/never easy  
2016

**17**

### Happiness with mooring times



% not happy  
2016

**17**

Q11: Thinking specifically about visitor moorings over the past year how easy has it been to find space to moor up?  
 Q14: Overall, how happy are you with the current mix of mooring times? 4hrs at key attractions, shopping points etc., 2 day or 7 days at other popular sites, 14 days elsewhere  
 Base: Boat owners 2017 n=1,160

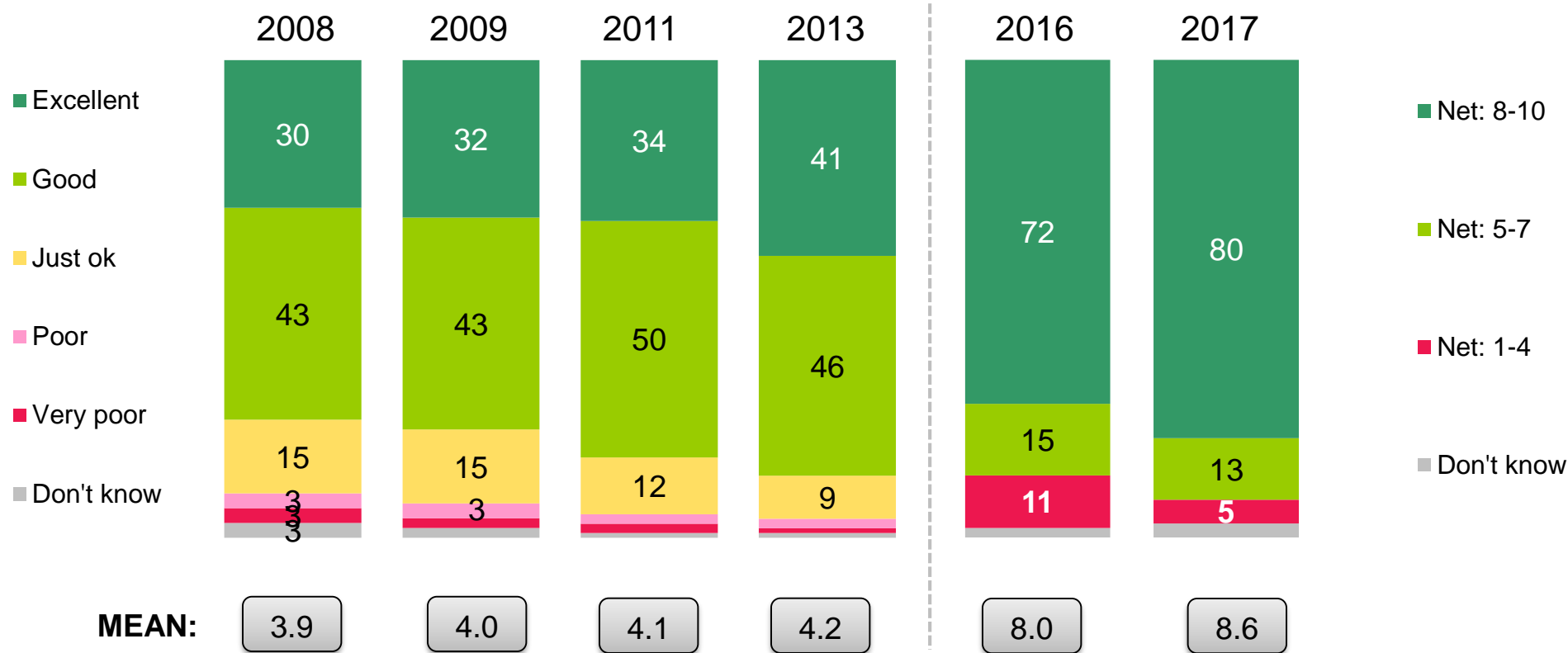
Customer service



# Some strong improvements in ratings for licence renewal process, with 80% now rating at least 8 out of 10

%

## Rating of boat licence renewal experience



**CAUTION: Different scale used from 2016 onwards (10 point)**

Wording 2008-2013: Overall, how do you rate the following aspects of our boat licensing administration/overall service received from the CRT when applying for/renewing your licence?

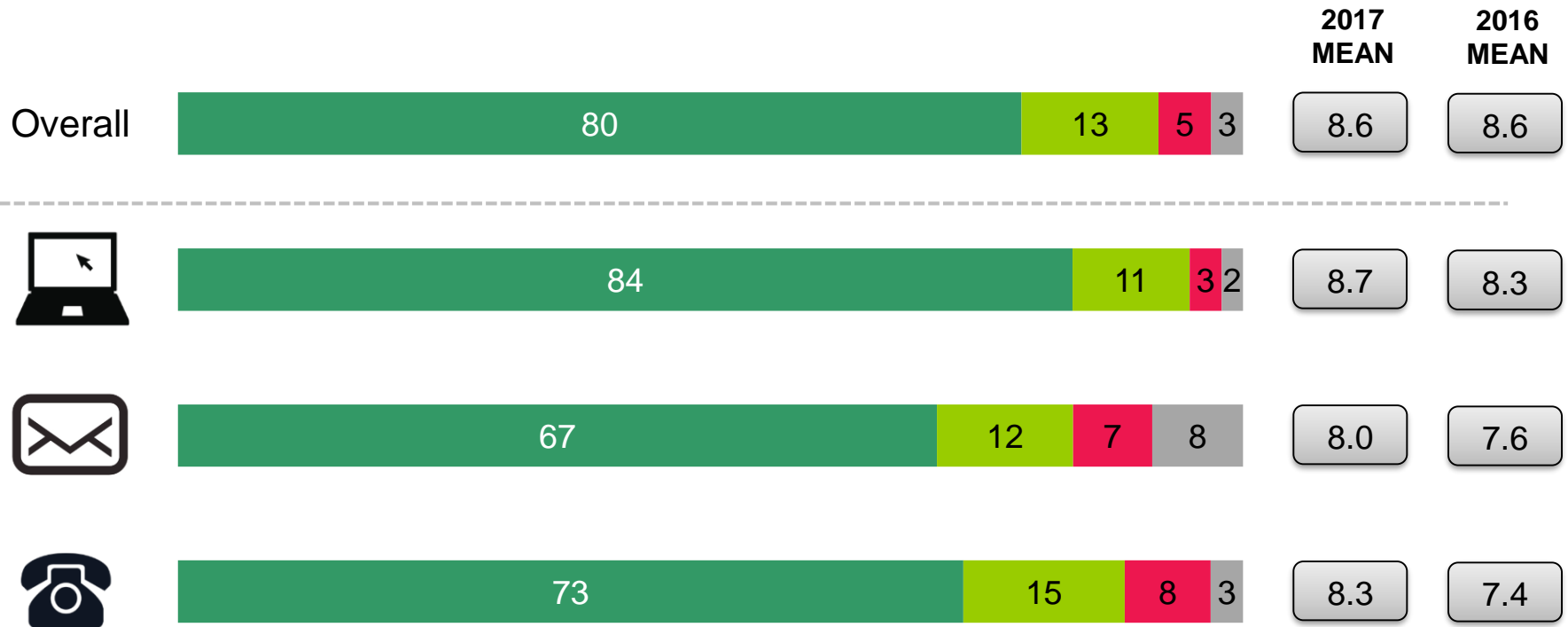
Q19: How would you rate your last experience of renewing your boat licence?

Base: Boat owners 2017 n=1,160

# Those renewing online have comfortably the best renewal experience

%

## Difference in renewal experience by medium

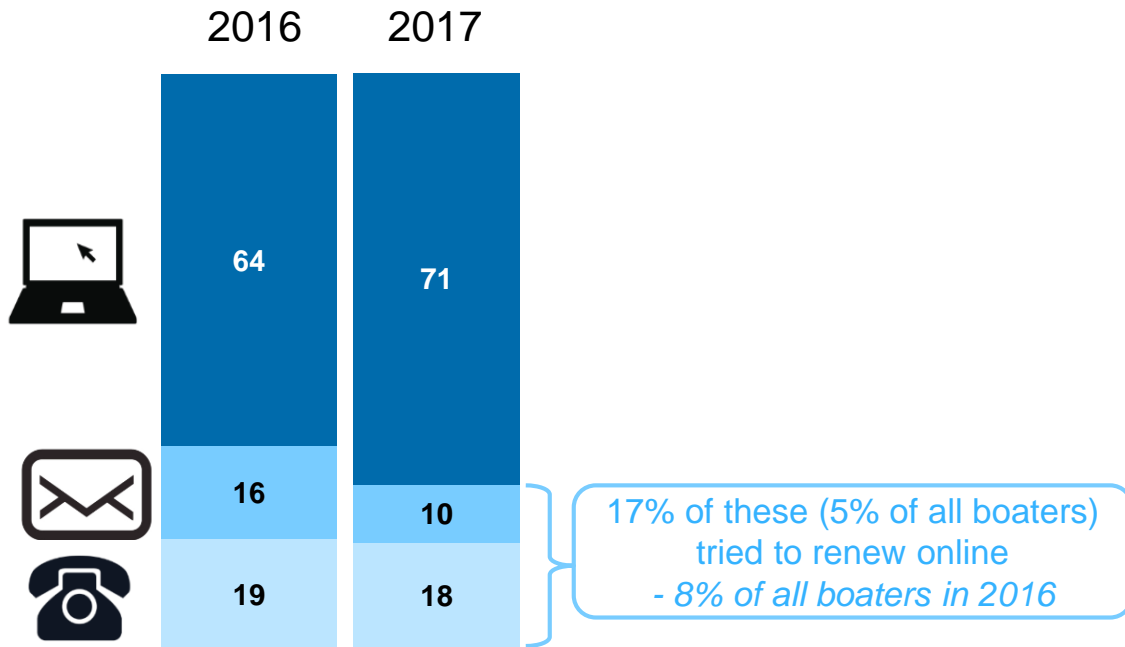


Q18: How did you last renew your boat licence?  
 Q19: How would you rate your last experience of renewing your boat licence?  
 Base: Boat owners 2017 n=1,106

# Online renewals increasing at the expense of postal, with those trying but failing to renew online dropping from 8% to 5% of all boaters

%

## Renewal method summary



### Reasons for not renewing online

All who tried online  
(5% of all boaters)

- Website froze/went down (29%)
- Complex request/particular problem (12%)
- Poor/complex website (9%)
- Easier by phone (7%)
- Advice required (6%)
- Password/login issue (5%)

All who didn't try online  
(24% of all boaters)

- Third party renewal (20%)
- No/little computer access (15%)
- First/new license (9%)
- Easier by phone (9%)
- Reliable/secure (payment) (8%)
- Would rather speak to a person (7%)

Q18: How did you last renew your boat licence?

Q20: Did you try to renew your boat licence online on this last occasion?

Q20a: And why did you not renew online on this last occasion?

Base: Boat owners 2017 n=1,160; all who renewed by post/phone n=328

# Very few suggestions for improving renewal process

## Improvement suggestions for renewal process

Nothing (69%)

Fine as it is (7%)

Send actual  
licence  
(2%)

Website more  
user friendly  
(2%)

Notification/reminder  
for renewal  
(in due time/clear)  
(2%)

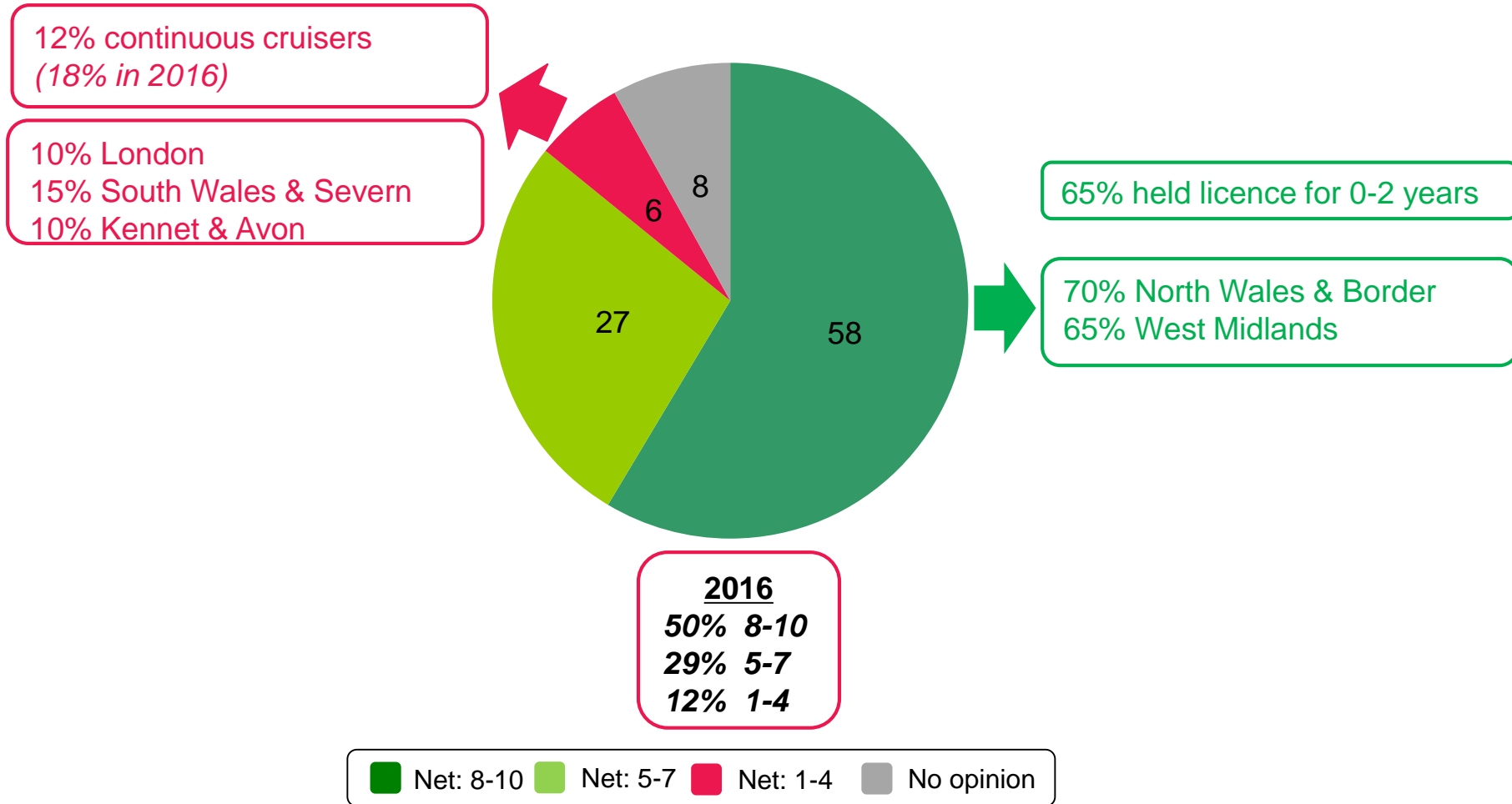
Simplify  
process  
(2%)



# Low ratings for customer service (score 1-4) have halved since 2016

%

## Rating of customer service overall in past year



Q28: As a boater, how would you rate the customer service you have received from the Canal & River Trust over the past year?

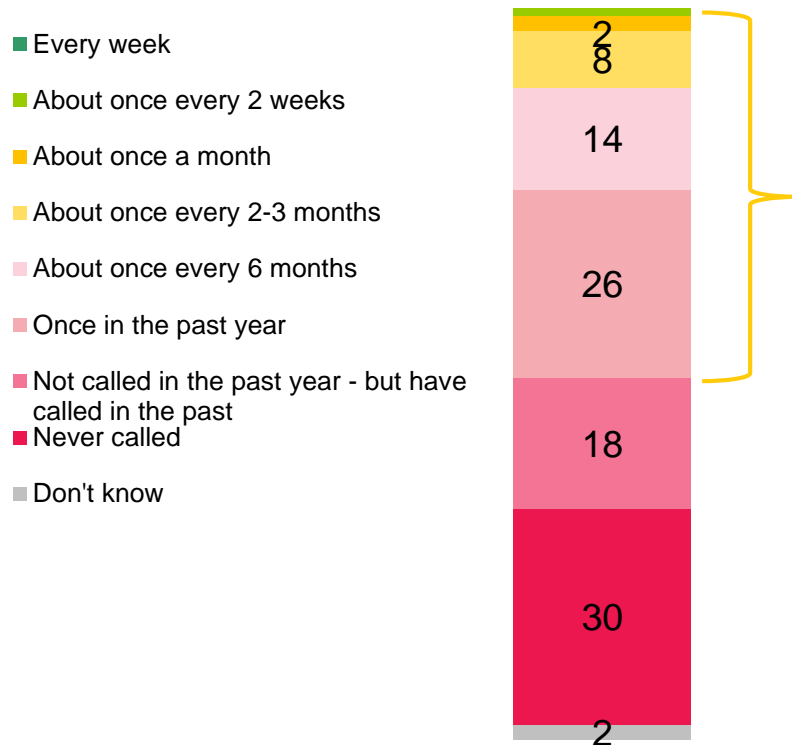
Base: Boat owners 2017 n=1,160



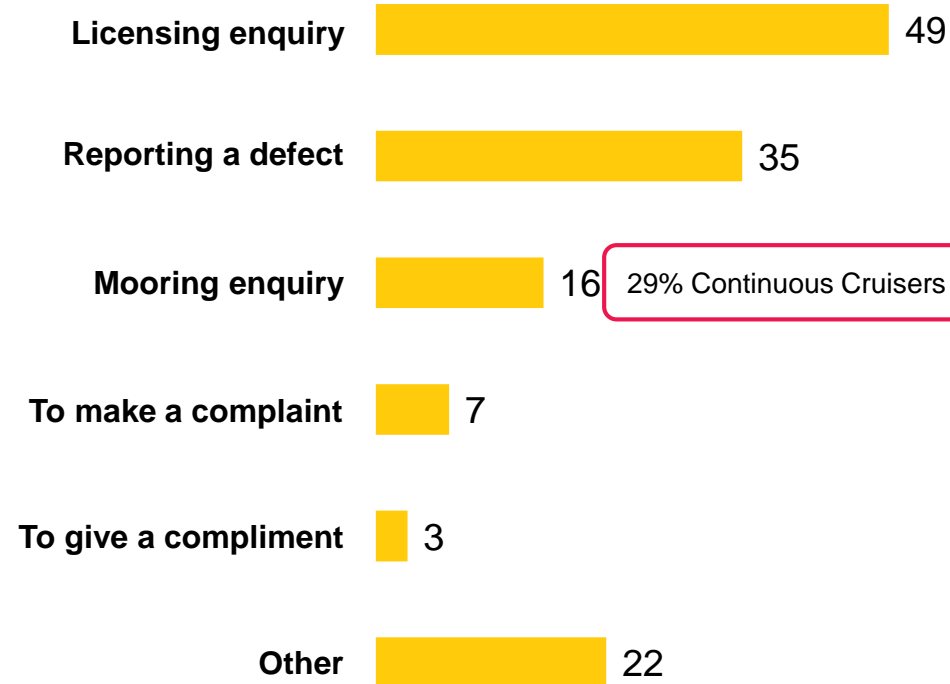
# 51% of boaters claim to have called the customer service number in the past year. Main enquiries are very similar to 2016 and tend to focus on licensing and defect reporting

%

### Frequency of calling customer service: 0303 040 4040



### Reasons for calling customer service (%)



**N.B. 69% of continuous cruisers called in the past year**

Q22: The Canal & River Trust's main telephone number is 0303 040 4040. Over the past year, approximately how often have you called this number for customer services?

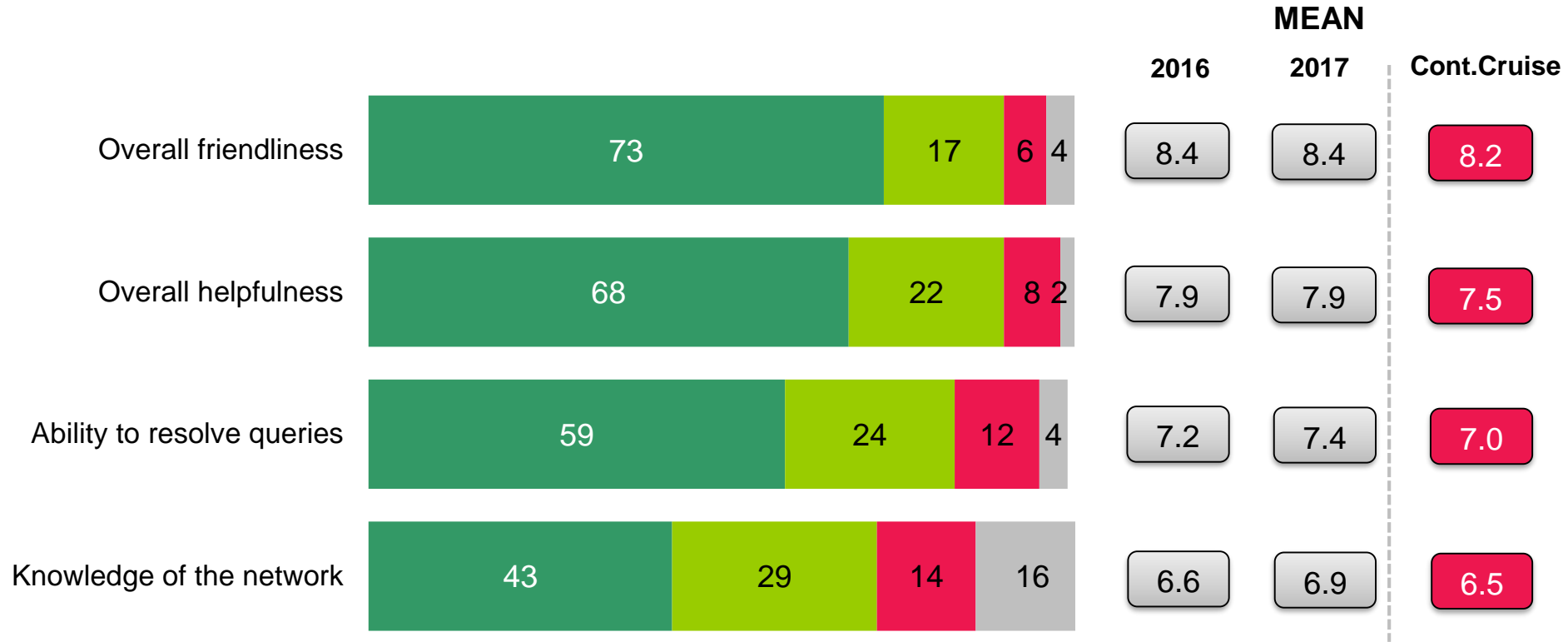
Q23: And for what reasons did you call this number?

Base: Boat owners 2017 n=1,160; all who called in the past year n=582

# Ratings of customer service team for friendliness/helpfulness high and improving for ability to resolve queries and network knowledge

%

## Ratings for the Canal & River Trust's telephone customer service team



■ Net: 8-10  
 ■ Net: 5-7  
 ■ Net: 1-4  
 ■ No opinion

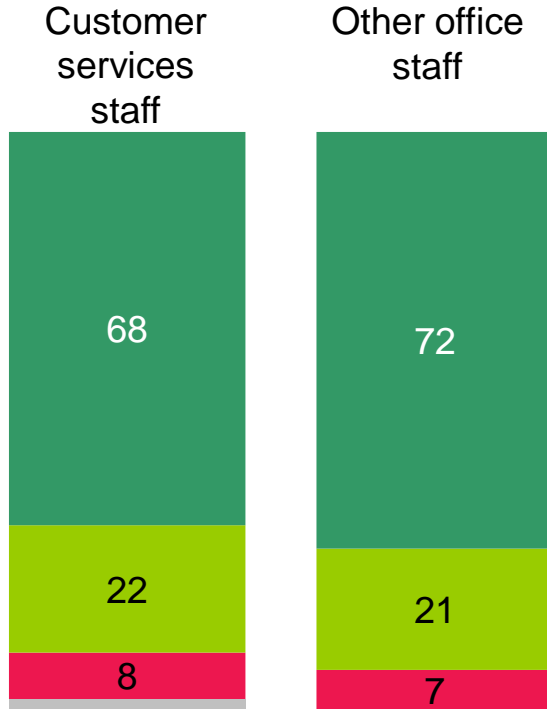
Q23: When calling the Trust's 0303 040 4040 number for customer services how do you rate...?  
 Base: All who called in the past year n=582; leisure n=228; residential n=382

# Whilst ratings for 0303 number remain similar, ratings for the Trust's office staff have improved in 2017

%

## Ratings telephone customer services staff vs. other office staff (tel/f2f)

### Overall helpfulness



2017 MEAN:

7.9

8.1

2016 MEAN:

7.9

7.9

### Overall friendliness



8.4

8.4

8.4

8.1



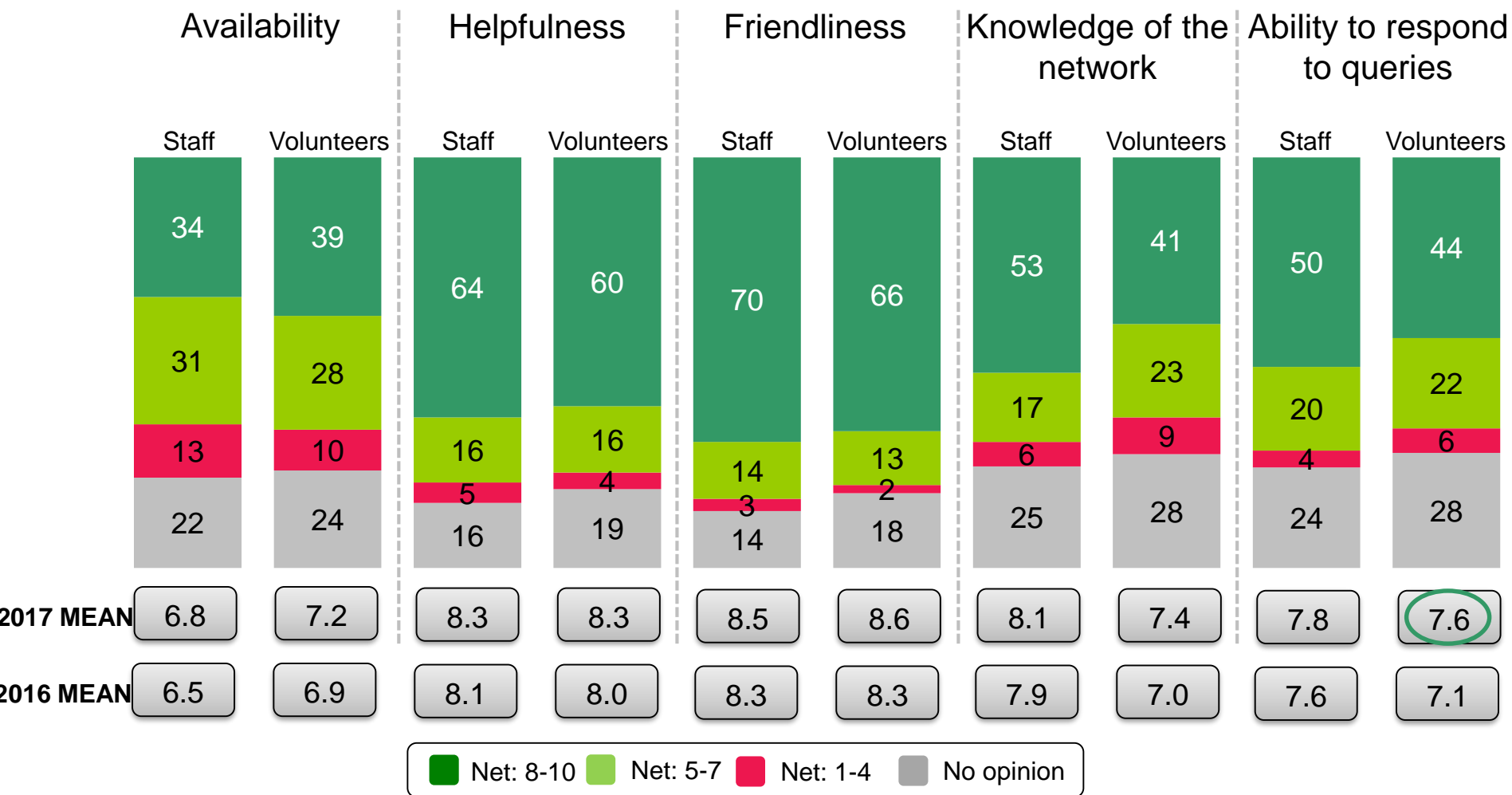
Q24: When calling the Trust's 0303 040 4040 number for customer services how do you rate...?

Q25: And overall, how do you rate...?

Base: Boat owners 2017 n=1,160; all who called in the past year n=582; all rating office telephone staff (582)

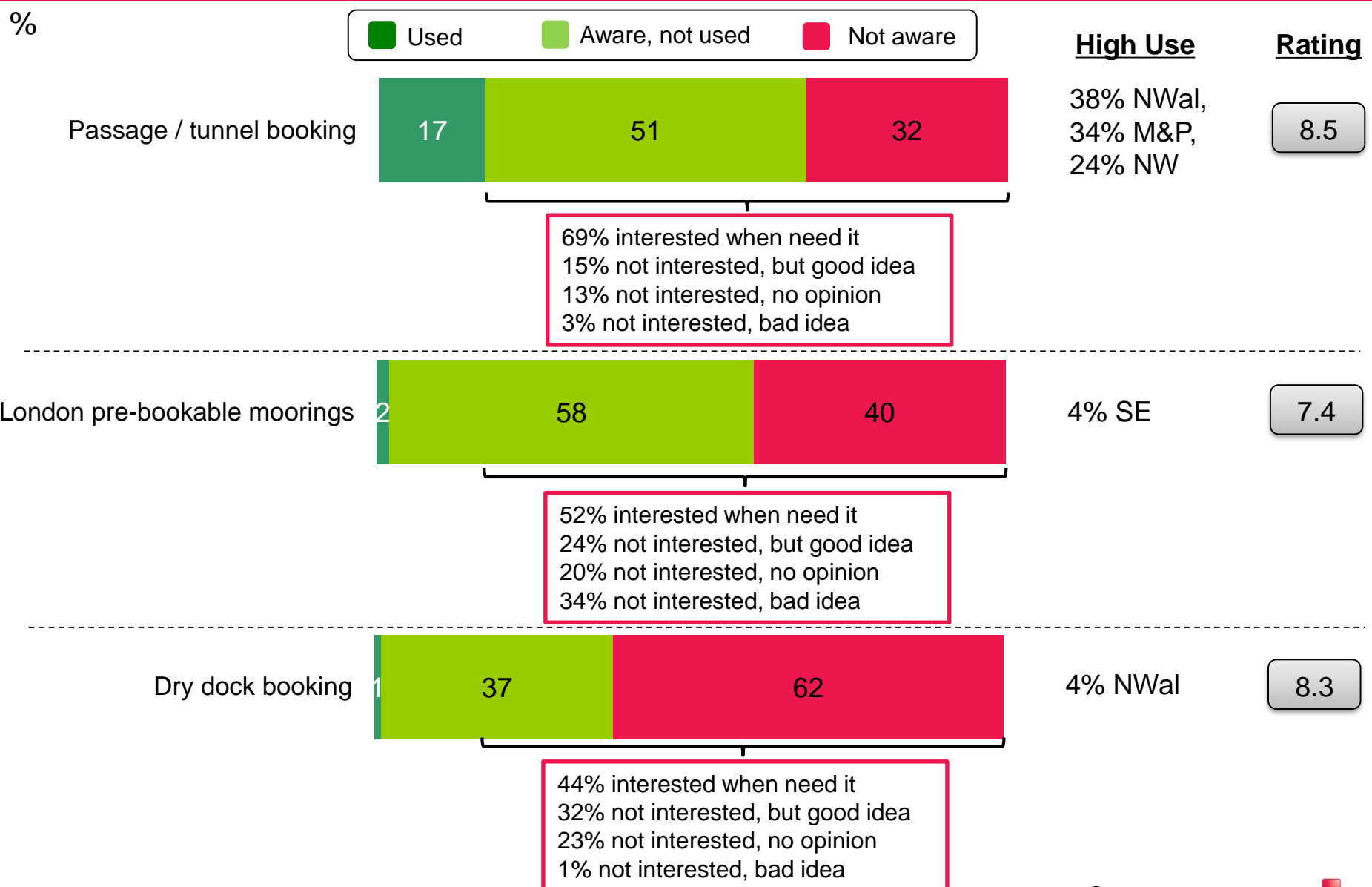
# Volunteers rated well for their availability but CRT staff have the edge when it comes to network knowledge. Volunteer ability to respond to queries improved in 2017

% **Ratings for Canal & River Trust staff vs. volunteers out and about on waterways**



Q26: Thinking about Canal & River Trust staff you see out and about on the waterways, how do you rate them for...?  
 Q27: And now thinking about Canal & River Trust volunteers you may see on the waterways, how do you rate them for...?  
 Base: Boat owners 2017 n=1,160

# Awareness, usage and interest in online booking services available through the Trust



Q14a: Which of these statements best describes each of these online booking services which are available through the Canal & River Trust?

Q15. And which of these describes your interest in using each of these online booking services?

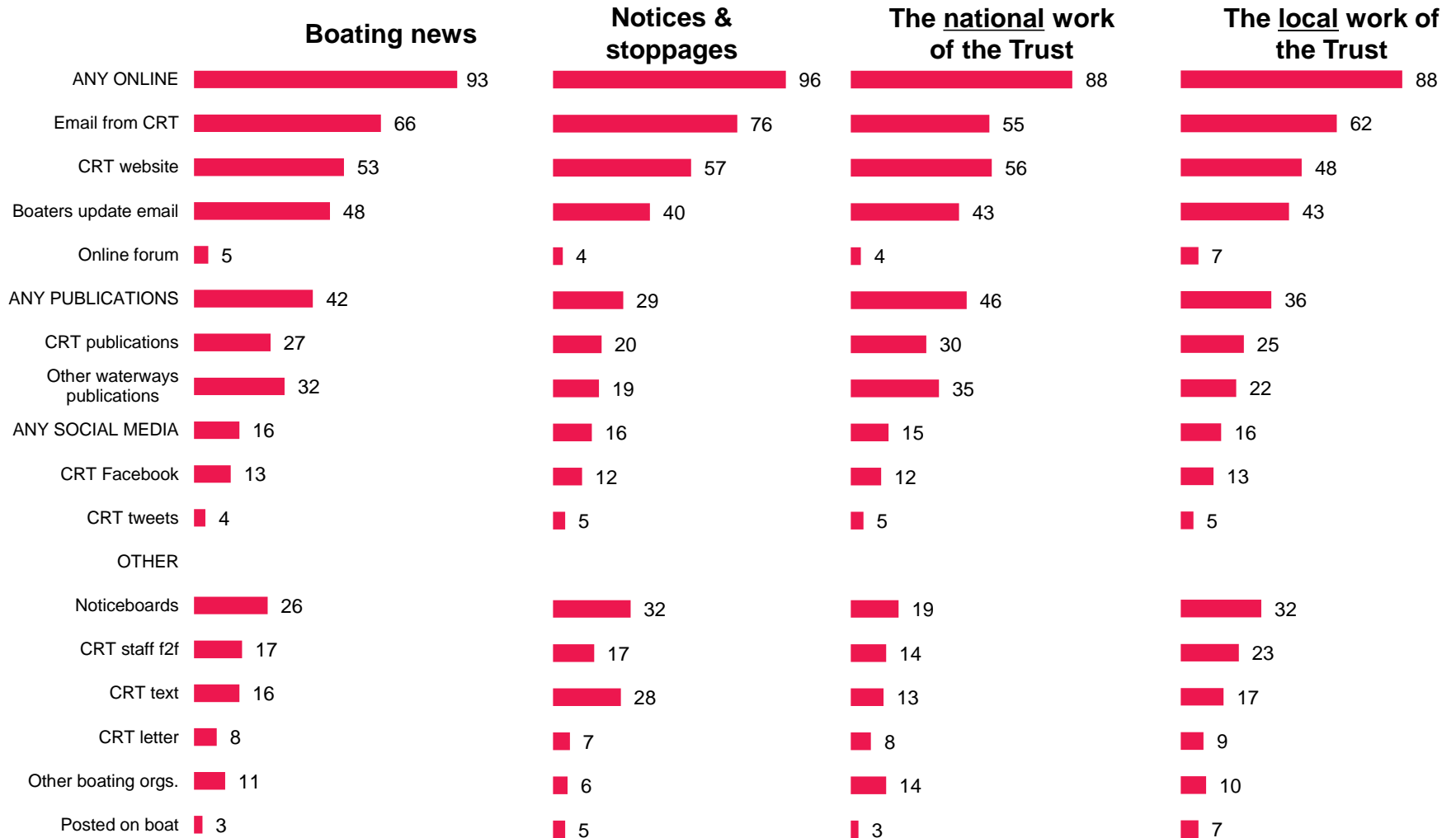


Communications

# Most are happy to receive information and updates online

%

## Preferred sources for types of information



Q29, 30, 31: For each topic area listed tick which would be your preferred sources of information.  
Base: Boat owners 2017 n=1,160



Canal & River Trust



# Almost 90% of boaters have visited the Trust's website in the past 12 months, with ratings for ease of finding what they were looking for also improving in 2017

%

## Success of Canal & River Trust website

Use of website (%)

Since Oct 2015

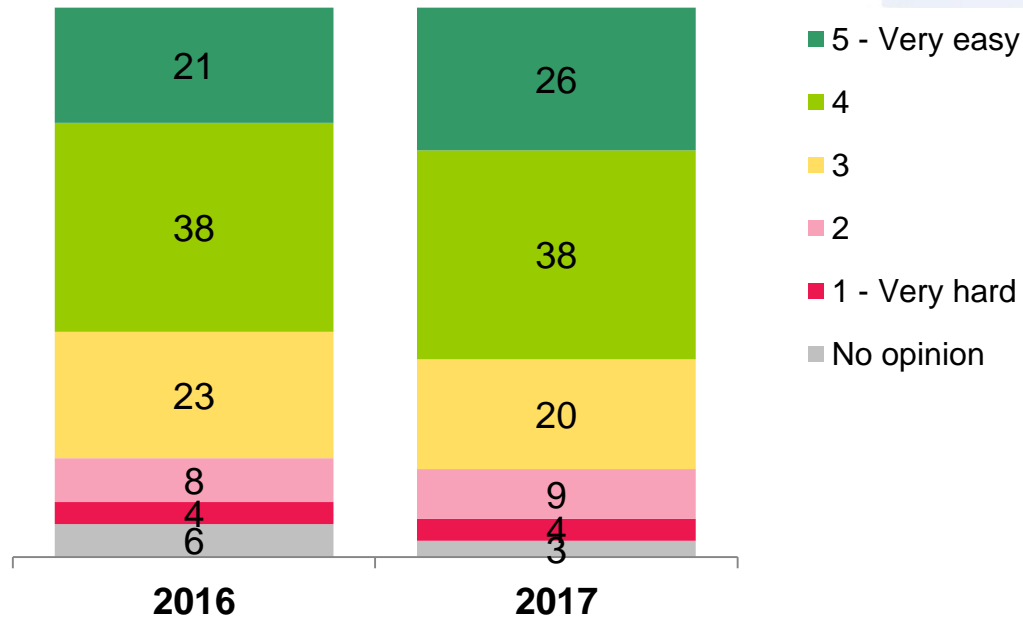
70

Past 12 months

89



Ease of finding what looked for



- 5 - Very easy
- 4
- 3
- 2
- 1 - Very hard
- No opinion

Q32: Have you visited the Canal & River Trust website in the past 12 months?

Q32a: How easy was it to find what you were looking for?

Base: Boat owners 2017 n=1,160; all who visited website n=1037



Canal & River Trust



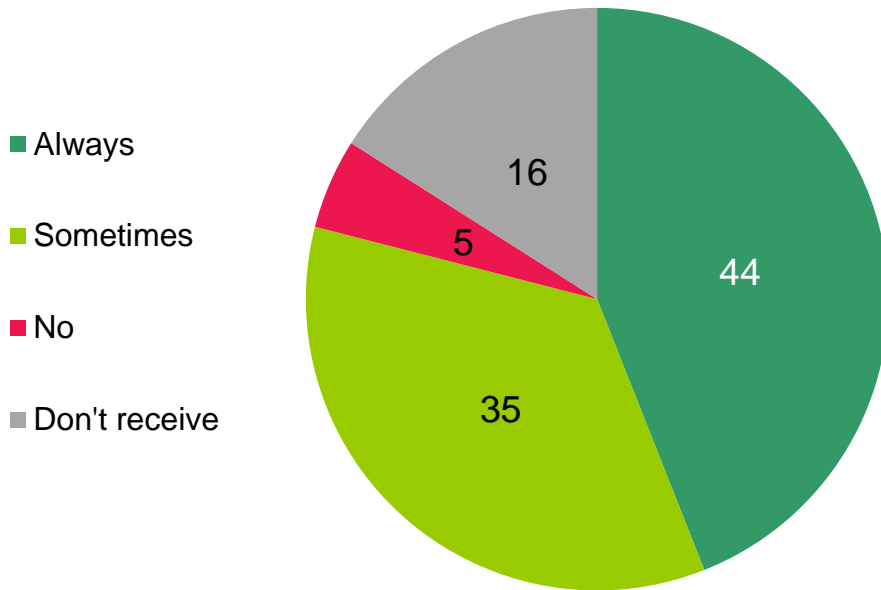


# Boaters Update is read by 80% of boaters and is at least fairly useful for over two-thirds of all boaters

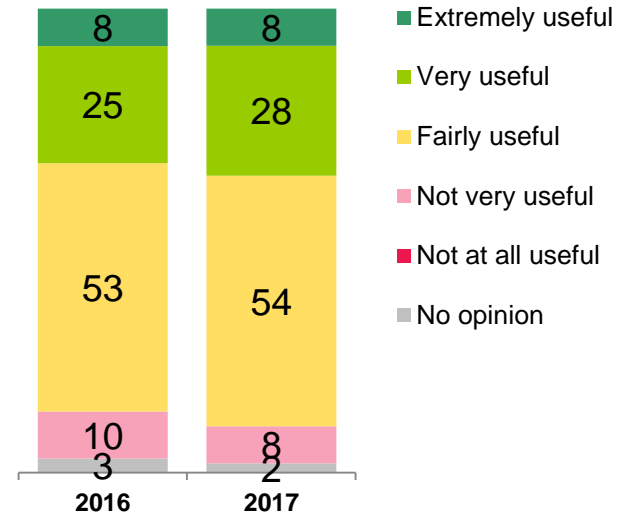
%

## Boater's Update summary

Read newsletter



Usefulness of newsletter  
(among readers)



N.B. 80% always / sometimes read in 2016

Q38: Do you read the Boater's Update newsletter sent by email from the Canal & River Trust?  
 Q38a: How useful do you generally find the information included in the Boater's Update?  
 Base: Boat owners 2017 n=1,160; all who read the newsletter n=917

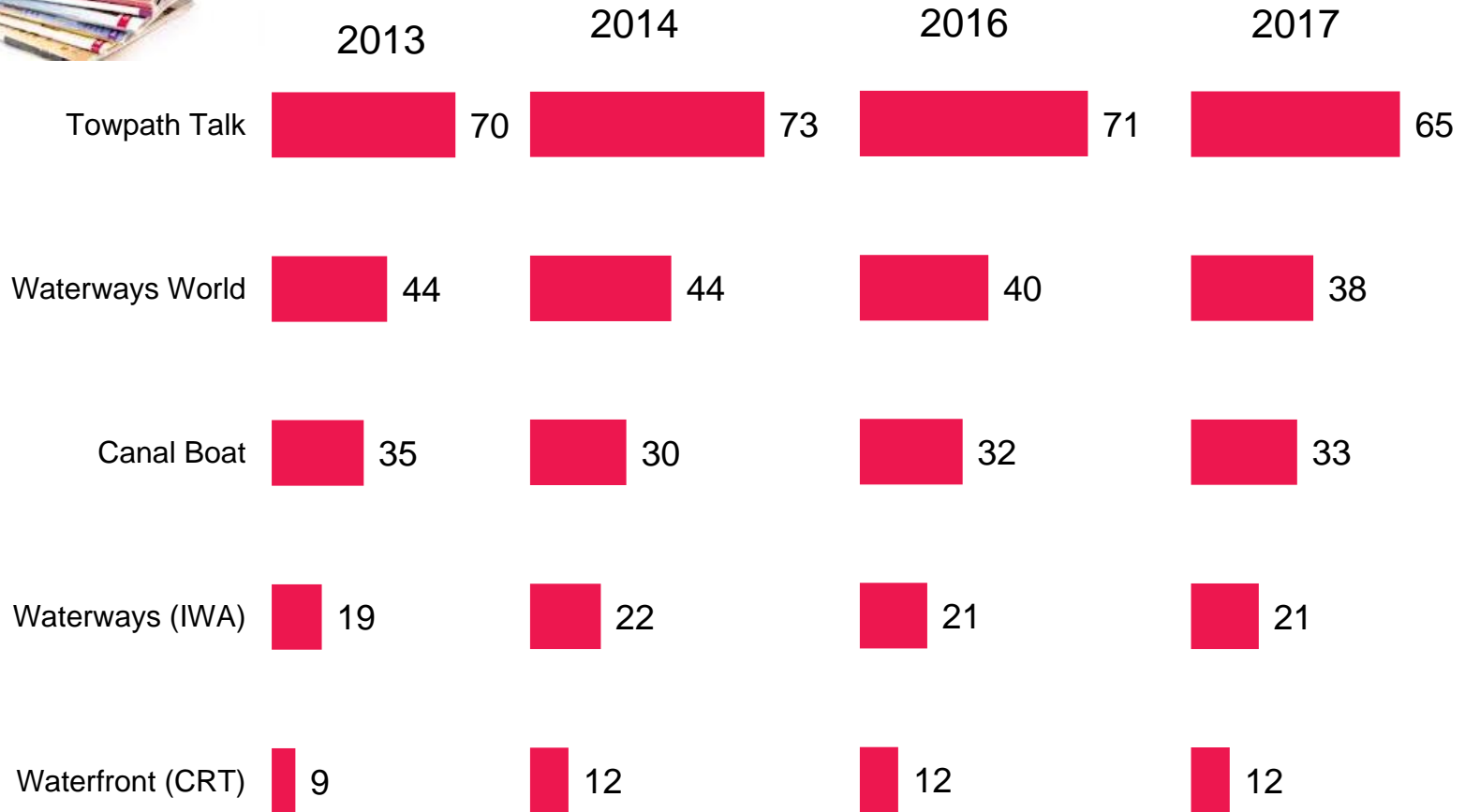


# Perhaps a slight fall in the proportion of boaters reading Towpath Talk and Waterways World in 2017

%



## Waterway publications read



Q35: Which, if any, of the following waterway (paper) publications do you read?  
Base: Boat owners 2017 n=1,160



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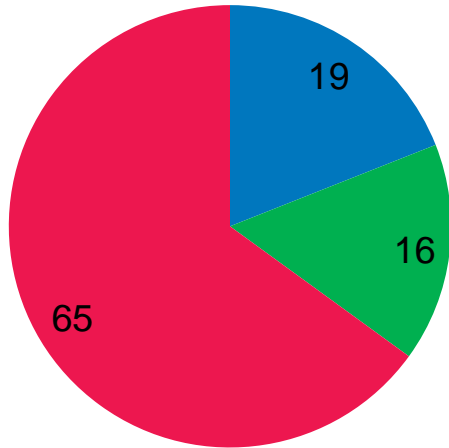


# A third of boaters read online forums or news on boating websites, with the most popular being Canal World Forum

%

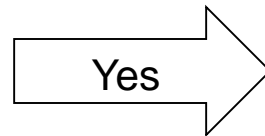
## Online internet forums follow

Participation in any online forum/read news on websites

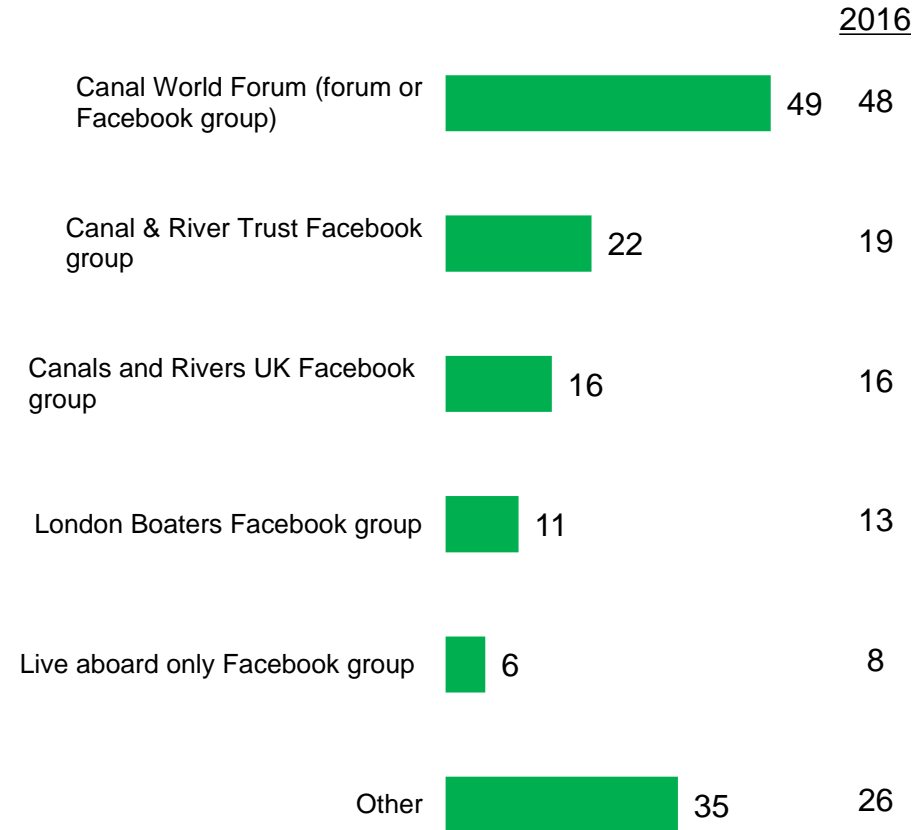


■ Yes - read only ■ Yes - read and comment ■ No

N.B. 38% read in 2016



## Forums / news websites



Q36: Do you participate in any online forums or read news on websites dedicated to waterways? If yes, please specify which.

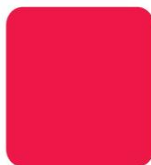
Base: Boat owners 2016 n=1,024; all who participate in any online forums or read news on websites dedicated to waterways n=407



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# Boater demographics and behaviour



# Boater profile: demographics

%

		2017	2016	2014	2013	2011	2009	2008	2007	2006
<b>Age:</b>										
	16 – 34	3	5	2	4	3	2	5	3	2
	35 – 54	22	21	22	26	28	29	37	32	33
	55+	73	74	76	71	69	69	58	65	63
<b>Gender:</b>										
	Male	76	78	80	82	81	79	80	83	85
	Female	20	22	20	18	19	21	20	17	14
<b>Boat main residence*:</b>										
	Yes	22	26	21	21	15	17	18	11	13
	No	78	74	79	80	85	81	80	89	87
<b>Children in household</b>										
	Yes	7	6	8	14					
	No	93	94	92	86					
<b>Grandchildren</b>										
	Yes	46	44							
	No	54	56							
<b>Take (grand)children boating</b>										
	Yes	36	35							
<b>Employment:</b>										
	Retired	50								
	Full time	34								
	Part time	8								
	Not working	4								
	Other/prefer not to say	4								

\*Note: question wording change in 2011

Q38, Q37, Q31, Q39, Q40, Q41

Base: Boat owners 2016 all responded



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# Minority groups summary

%

ETHNICITY	2017
White (British)	92
White (Irish)	1
White (other)	2
Non-white	1
Prefer not to say	4

TRAVELLER	2017
ANY	4
Bargee	3
New (Age) Traveller	1
Fairground/circus	<0.5
Prefer not to say	3
None of these	93

DISABILITY	2017
ANY	19
- a lot	4
- a little	5
TYPE OF DISABILITY	
Mobility	6
Manual dexterity	4
Progressive condition	3
Hearing	2
Sight	1
Personal, self care	1
Other	6
Prefer not to say	2



# Summary of wellbeing measures

%

## Satisfaction



## Leisure

8.1

## Permanent

8.1

## Worthwhile



8.3

8.2

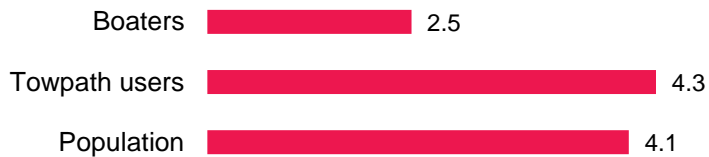
## Happy



8.0

8.0

## Anxious



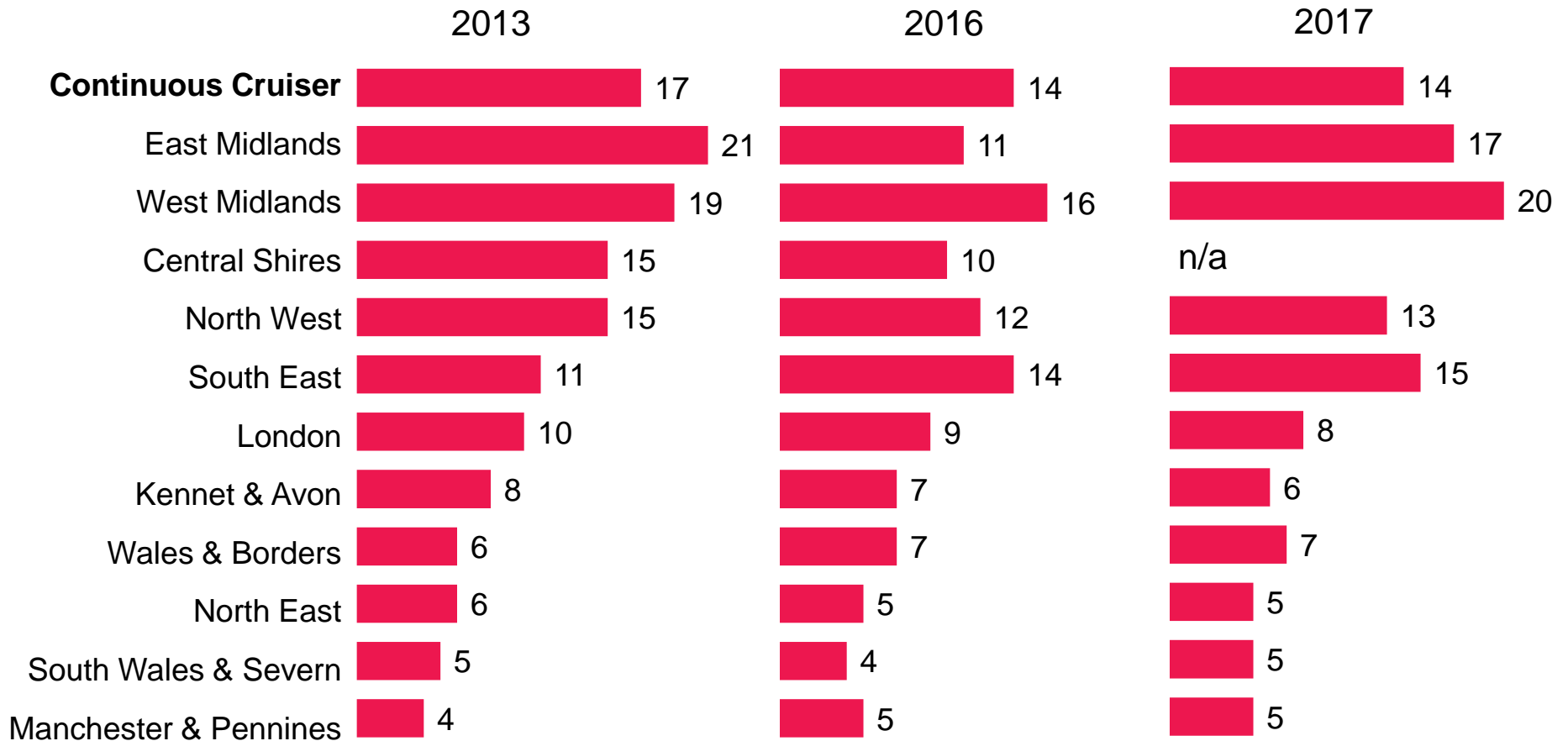
2.4

2.7



# Boater profile: region where undertook most boating

%



Q3: Please enter the region in which you did most of your boating in the past 12 months.  
Base: Boat owners 2016 n=1,024



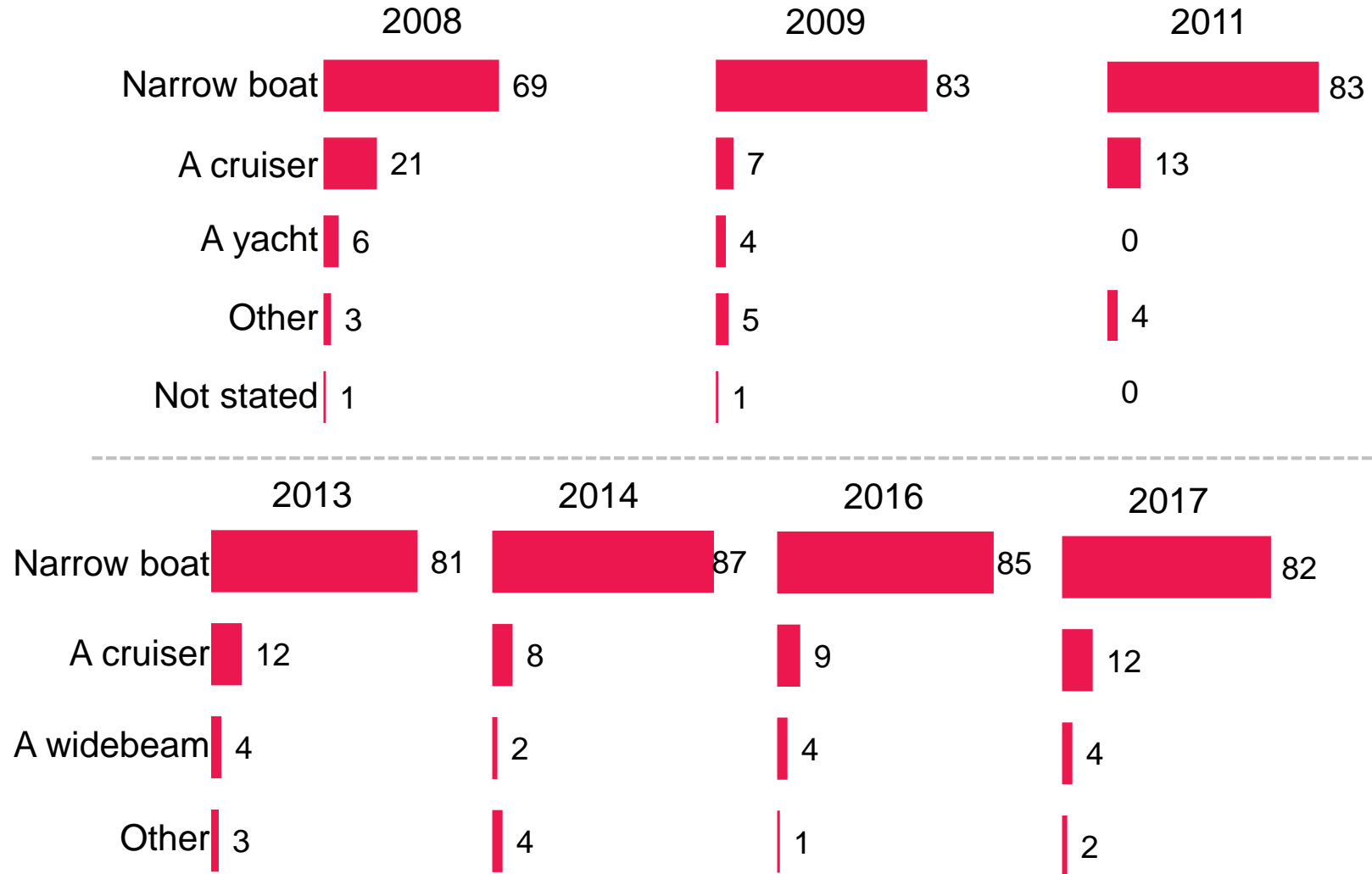
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# Boater profile: type of boat

%



Note: From 2013 based on 'boats'; 2012 and earlier based on 'people'.  
 Q39: Is you (main) boat...?  
 Base: Boat owners 2017 n=1,160



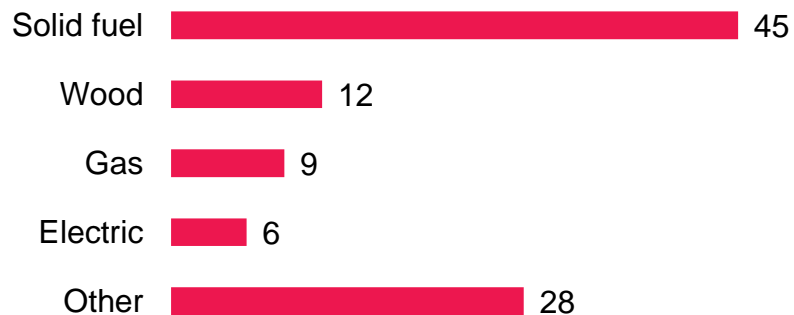
Canal & River Trust



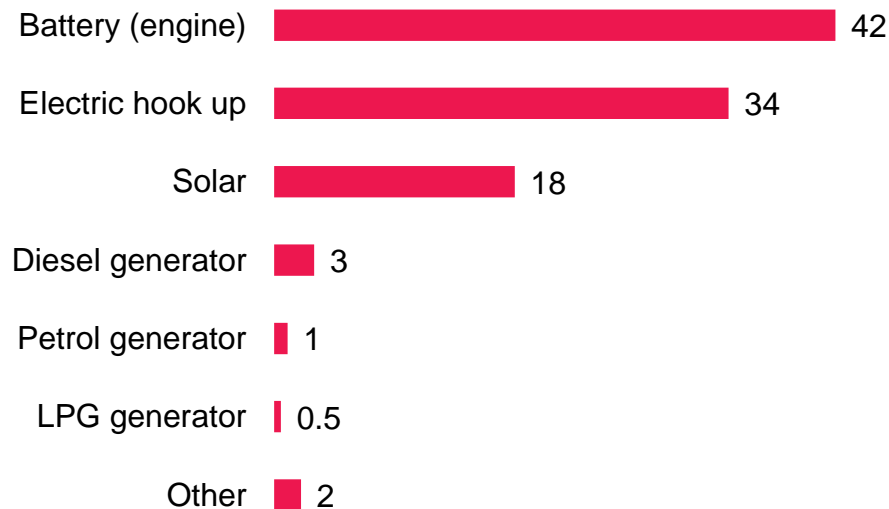
# Sources of heating / electricity

%

## Heating



## Electricity



	Leisure	Permanent home	Cont.Cruise
	35	68	63
	11	13	17
	14	1	4
	8	1	-
	32	17	16

	53	19	39
	29	40	1
	12	34	50
	3	3	5
	1	2	1
	<0.5	-	-
	2	1	3



# Residential Boaters – living on the boat

%

## Number of Bedrooms on Boat

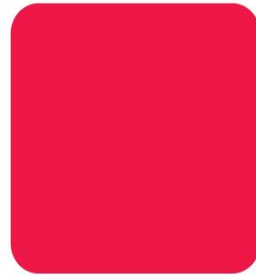
	Permanent	Other Residential	Cont.Cruise
One	47	55	53
Two	45	39	41
Three	7	4	6
Four or more	<0.5	1	-

## Age Profile (permanent home)

Under 16s	4
16-24	1
25-34	12
35-44	10
45-54	20
55-64	32
65-74	20
75 or over	<0.5

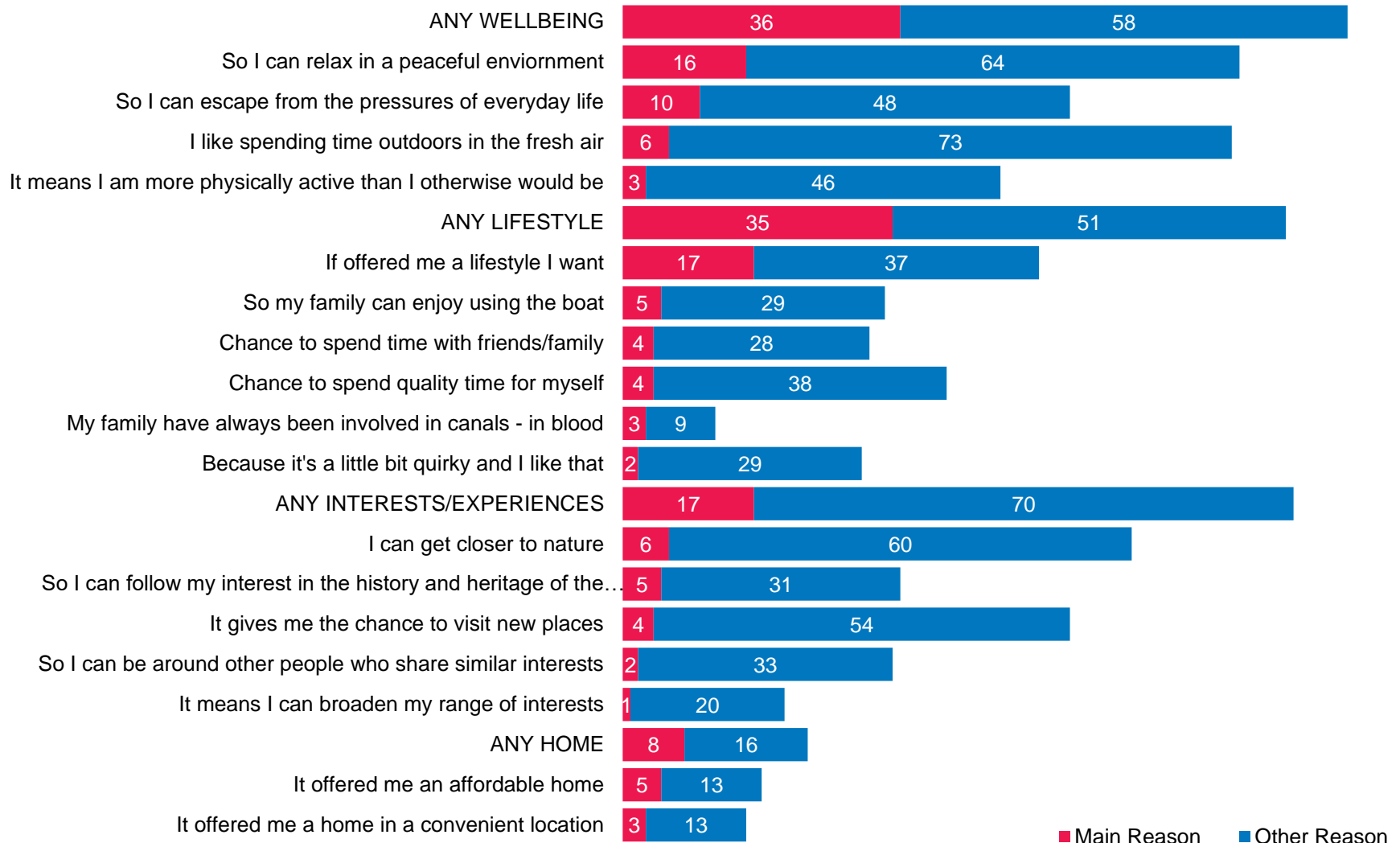
**(6% have any under 16s living on the boat)**

# Summary and implications



# Reasons why personally own a boat

%



■ Main Reason ■ Other Reason

Q34: Which, if any, from the following list provided the greatest influence on your decision to purchase your first boat?  
Base: Boat owners 2017 n=1,160

# For further information...

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Please contact us if you have any questions or comments regarding the contents of this report



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