

Roy Graham Marketing Research

Angling Clubs Research Findings

Prepared for:
Canal & River Trust
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Summary & Conclusions

The Clubs and their Members

- We interviewed 203 Angling Clubs and Associations, over 90% of the clubs who lease Trust canals
- Most of these Angling Clubs have been in existence for some time, there is considerable heritage
- Most of the Trust contacts have been members of their club for 25 years or more, half are aged 65+
- A wide variation in sizes; a quarter have fewer than 50 members, a fifth have over 500
 - In total these Angling Clubs and Associations have around 60,000 members
- A fifth of these clubs *only* fish Trust canal/s – these are mostly small clubs
- Larger clubs do most of their fishing elsewhere, not on the Trust canals
- When clubs fish both canals and still waters, usually the still waters are more popular with members:
 - good access, easy parking
 - well stocked with more popular (and easy) fish
 - without the various drawbacks of canals
- Around a quarter of clubs would though be interested in taking on more Trust waters
- Around half of clubs report their membership levels are fairly static
- But among the remainder, for each expanding club there are two who are losing members, mainly due to:
 - the growth in commercial fisheries
 - a lack of interest in fishing among the young, resulting in an ageing membership
- 18% of clubs are growing – some said this is because they now provide members with more places to fish; well-stocked, quality waters

Summary & Conclusions

Attracting New Members

- Three-quarters of clubs have junior members, including almost all of the large clubs
- One-in-five have a junior section
- Most clubs are keen to attract new members, which they attempt through:
 - word of mouth
 - the club website – almost all larger clubs have a website, but few small clubs do
 - advertising or press editorial
 - local tackle shops
 - competitions
 - improving waters / restocking (these are larger clubs)
- Half of the clubs run open match events on Trust canals
- Almost two-fifths run events to attract new people into fishing
 - including half of the largest clubs, but their events are unlikely to be held on Trust canals
 - Only a quarter of the smallest clubs run events, but usually on canals (the only option for many)
- Some clubs face barriers in running events:
 - insufficient manpower
 - access / parking problems (on canal stretches)
 - insufficient interest in angling in their area

Summary & Conclusions

The Relationship Between Clubs and the Trust

- For most clubs the main point of contact with the Trust is the Fisheries and Angling Team
 - for others it is usually their local office, while a few (smaller) clubs do not have any point of contact
- Almost two-fifths told us they attend User Group Forums
- Overall half are 'favourable' to the Trust, only one-in-six 'unfavourable' (including some large clubs)
- A quarter think the Trust represents an improvement on BW, only one-in-ten would disagree
- John Ellis and the Fisheries and Angling Team have developed very good relationships with many clubs
 - Clubs praised the work of the F&AT, their expertise and the help they provide
 - A few commented that the department is stretched / under-resourced
- We heard of instances where the Trust has been proactive and responsive in terms of maintaining or policing their canal
- But we also heard criticism of other parts of the Trust, and the organisation generally in terms of:
 - being slow and unresponsive
 - focussing on other canal and towpath users at the expense of anglers
- Angling clubs can feel marginalised, even though they are the Trust's paying-customers

Summary & Conclusions

How the Trust Could Help Clubs & How Clubs Help the Trust

- The majority of clubs told us of ways in which the Trust could help their club and attract new members – most commonly they suggested:
 - that their stretch of the canal could be restocked with fish
 - improving access or parking (particularly larger clubs)
- Other issues that some also talked about included:
 - controlling cyclists – the Trust appear to be encouraging cyclists but speeding cyclists are a menace
 - more effective policing of illegal moorings / overstays
 - controlling various predators who steal fish – zander, cormorants, otters and people.
 - vegetation management (though we also heard a few complaints about excessive cutting back)
 - dog fouling is also an issue
- Just about every club is already involved to some degree in helping to maintain their canal
 - The majority *regularly* police their stretch to help prevent illegal fishing
 - The majority clear up litter
 - Most clear around fishing spaces or pegs
 - Just under half (admitted to) clearing vegetation from banks or overhead branches
 - A few clear aquatic weed, occasionally
- The vast majority carry out this maintenance as a matter of course without involving the Trust

Summary & Conclusions

Clubs and the Trust Working Together in the Future

- Just under 30 clubs told us they already volunteer and work closely with the Trust
 - A similar number are interested in volunteering (we are able to provide the names of these clubs)
 - Most others are cautious in stepping forward, but few rule out volunteering to work with the Trust
- Most clubs would certainly be interested in receiving assistance from the Trust
- Two-thirds of clubs would welcome help with:
 - improving access / parking
 - providing signage (*a topic that few thought to mention until we prompted*)
- Half would like Trust help with:
 - vegetation management
 - social media
- Most clubs with a website would appreciate the Trust helping to direct traffic to their site
- Some of the clubs with junior members would like Trust help with coaching or education
- There is enthusiasm and passion for Angling, a sport that most Trust contacts have been involved with for most of their lives – most were not just willing, but keen to answer our questions so that their views can be passed back to the Trust, and in this report we include many of their comments in full
- Clubs will now expect or hope that the Trust will provide them with an overview of the findings from this survey, including the actions that the Trust are planning in response

INTRODUCTION

Research Objectives

- C&RT wished :
 - to establish a ‘top five’ actions which will help C&RT to help clubs in growing their membership by developing more public/coaching events to widen the audience
 - to aid and encourage volunteering from clubs giving them more ownership in things like the maintenance of their waters – some do this already but C&RT just don’t know about it
- More specifically, C&RT wished to establish:
 - Who/how many clubs run open events to the public?
 - Who/how many run and develop juniors?
 - Have junior sections but no juniors?
 - What are the barriers to running open events/junior sections?
 - Club membership levels increasing/decreasing?
 - What can the Trust do to bring more people to their club?
 - Volunteering, who is already, do C&RT know about it?
 - Barriers to volunteering?

Research Outline

- C&RT provided us with a spreadsheet with contact details for 221 Angling Clubs who lease fishing rights on Trust canals – between them these clubs lease 381 stretches of Trust canal
- A further three Clubs who started leasing during the fieldwork period were added during the project, taking our universe to 224 clubs (a few were not eligible for the survey)
- We discovered that contact details for some clubs on the Trust database were either outdated or inaccurate – we requested updated details which the Trust provided continuously during the fieldwork period
- Interviewing took place over a month from 24th March to 25th April 2014
- In total we achieved 203 interviews – over 90% of eligible clubs took part in the survey
 - Among the 21 non-contacts there are some who are not angling clubs, and therefore not eligible for our survey
 - Only three individuals refused to take part on our survey
- Interviewers estimate that typically each interview was taking around 25 minutes, while the longest interviews took around 45 minutes
- Interviews were conducted by our small, long-established team of mature interviewers, all of whom worked on our previous projects for the Trust and previously British Waterways

Open-ended Questions on the Survey

- We asked a number of open-ended questions about the club's relationship with the Trust
- The nature of these interviews meant that these often became (as one interviewer put it) more of a conversation than a series of questions, and we briefed interviewers to capture relevant responses and comments even when these were not answering a specific question
- In this report we have summarised responses on open-ended questions into codeframes to show the common threads, and to allow us to put percentages on the responses
- This does lose much of the flavour of the detailed responses, our coder has therefore also selected examples of typical or particularly interesting responses verbatim
- Usually in research reports the many varied comments by respondents are heavily edited, and represented by a small number of quotes
- On this project we felt that it was important to show more of the detail – the report therefore includes numerous pages of quotes from respondents in their own words, which we believe will be of interest to the Trust – this is in addition to our summaries of responses at these questions
 - with the exception of the final question where we provided respondents the opportunity to speak directly to the Trust, where we show every comment in full

Non-Contacts & Reasons

| | TOTAL NON-CONTACTS | 21 |
|--|---------------------------|-----------|
| | | Number |
| No answer after 5+ attempts | | 8 |
| <i>1 poor experience of C&RT, 1 too busy, 1 kept putting phone on voice mail</i> Refused | | 3 |
| Business owner who was always too busy | | 1 |
| C&RT said remove from survey when we asked for contact details | | 3 |
| Not a club – group of friends | | 2 |
| A marina who rents just to stop fishing | | 1 |
| Commercial, selling only day tickets | | 1 |
| Owners of canalside houses who rent to keep privacy | | 1 |
| Club has closed | | 1 |

MAIN FINDINGS

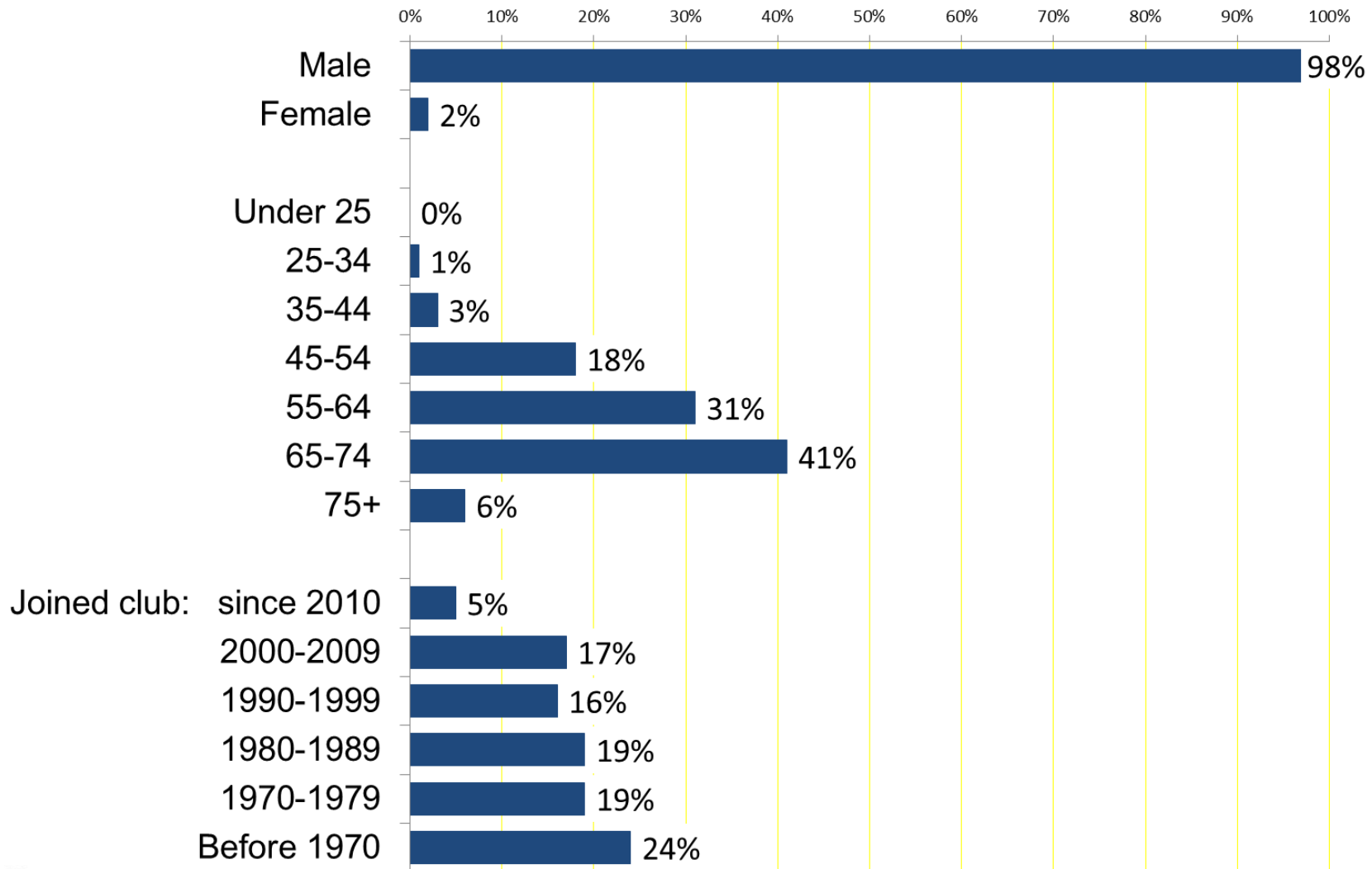
The Angling Clubs

Angling Clubs

- We completed interviews among 203 Angling Clubs who lease Trust canals
 - Two-thirds of these clubs lease just one stretch of Trust canal, while at the other extreme 17 of these clubs lease four or more stretches
- These Angling Clubs have been in existence for some time, there is considerable heritage
 - ~70% were active in the 1960s, we heard about clubs which go back 100 years or more
 - Just 17 clubs (8%) started up since the year 2000 – these are mostly smaller clubs
 - Most of the Trust contacts have been with their club for 25 years or more
 - Around half are 65+, very few are under-45
 - A quarter joined their club in the 1960s or earlier
- There is considerable variation in the size of the different angling clubs
 - A quarter of the clubs have 50 members or fewer
 - While around 30% have over 400 members (half of these are Associations)
- In total these clubs and Associations have around 60,000 members
- Overall 70% belong to the Angling Trust, including practically all larger clubs
 - Only half of the clubs with up to 100 members are in the Angling Trust
 - Eight of the smaller clubs used to belong to the Angling Trust but are no longer members
- Only 27 clubs are Clubmark-accredited (13 of these are the largest clubs with 400+ members)



Profile of Respondents



Angling Clubs

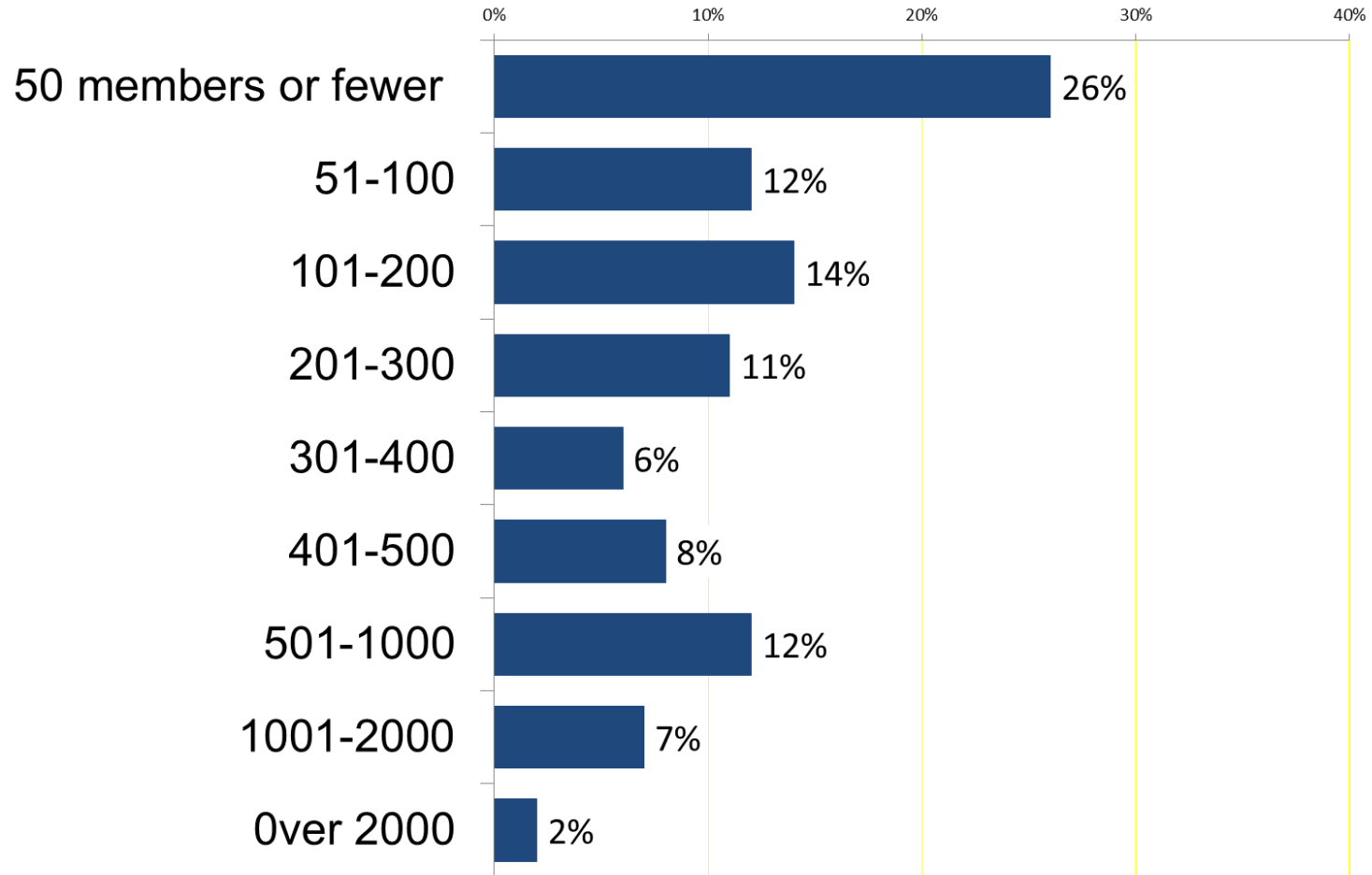
| | | |
|---|-----------|-------|
| | Base: all | (203) |
| Just one Trust canal lease (on C&RT database) | 66% | |
| 2 leases | 17% | |
| 3 leases | 9% | |
| 4 or more leases | 8% | |

| | Club founded | <i>I</i> <i>joined</i> |
|---------------------|-----------------|---------------------------|
| Base: all | (203) | (203) |
| 2010 or more recent | 3% | 5% |
| 2000-2009 | 5% | 17% |
| 1990-1999 | 6% | 16% |
| 1980-1989 | 8% | 19% |
| 1970-1979 | 8% | 19% |
| Before 1970 | 69% | 24% |

Q24a Can I ask when your angling club was founded?
 Q24b And when did you personally join the club?



Membership



Q1a First can you tell me about your club – how many members do you have?
Q1b And is the number of members growing or declining?

Angling Trust & Clubmark

| | | |
|-----------------------------|-----------|-------|
| | Base: all | (203) |
| Member of the Angling Trust | | 70% |
| Not now, but used to belong | | 6% |
| Not | | 23% |
| DK / NA | | 1% |

| | | |
|-----------------------------|-----------|-------|
| | Base: all | (203) |
| Clubmark accredited | | 13% |
| Not now, but used to belong | | * |
| Not Clubmark accredited | | 80% |
| DK / NA | | 6% |

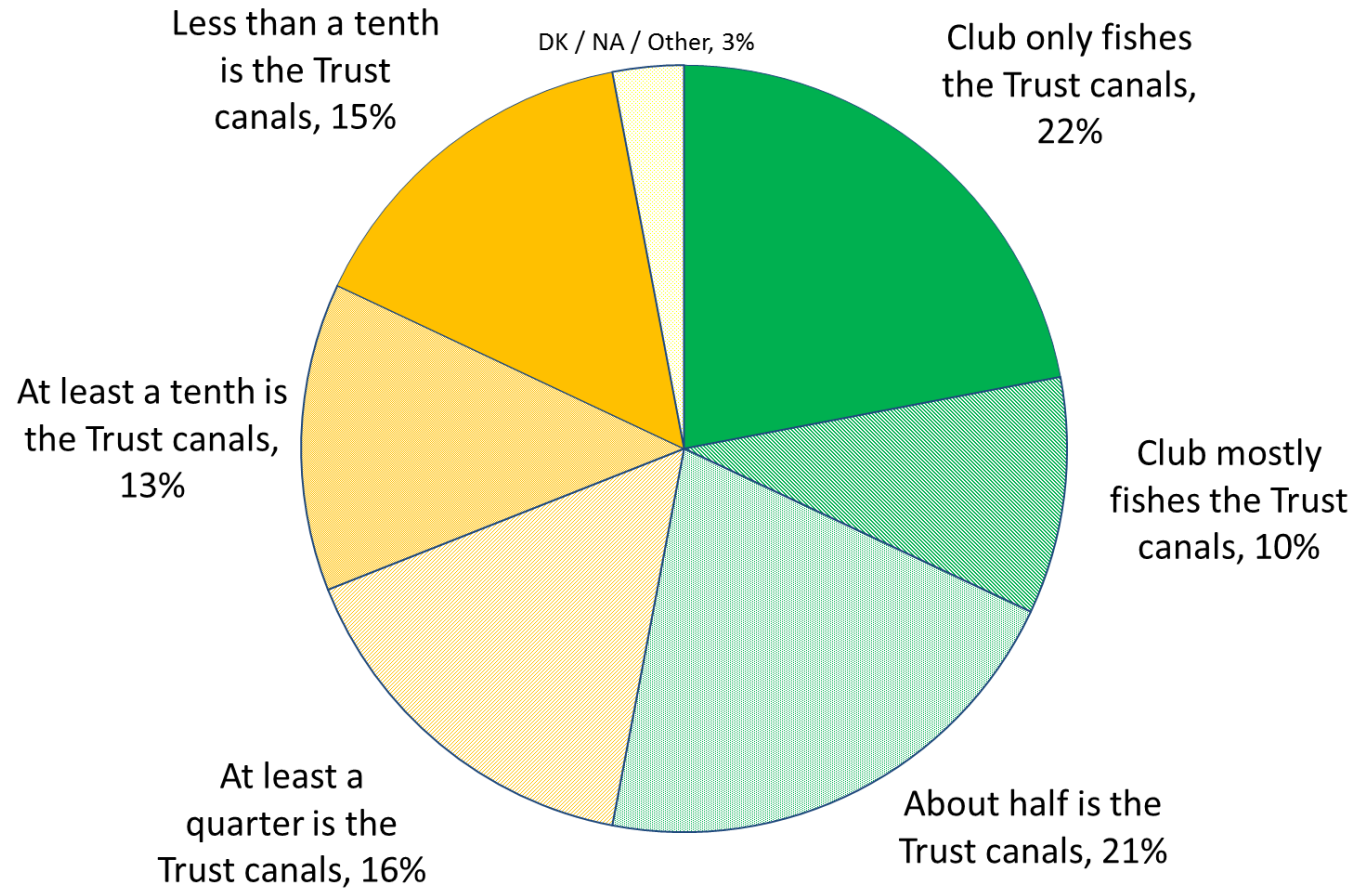


Q9 Is your club a member of the Angling Trust?
Q10 Are you Clubmark accredited?

Trust Canals vs Other Waters

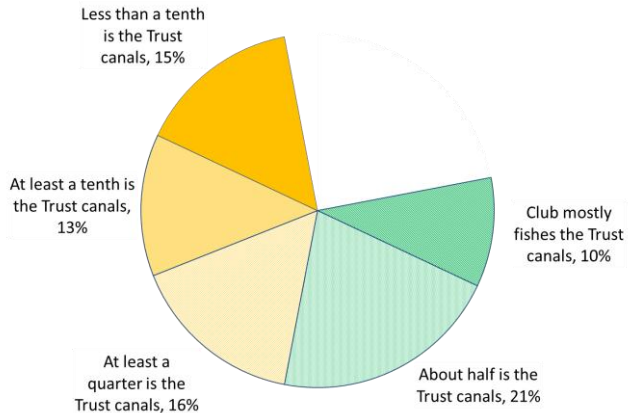
- We only interviewed clubs who lease at least one stretch of canal from the Trust
- 22% of these clubs *only* fish the Trust canal/s – these are predominantly the small clubs
 - Half of the smallest clubs (<100 members) *only* fish on the Trust canal
- The largest clubs (400+) do most of their fishing elsewhere
 - Almost three-quarters of the largest clubs mostly fish non-Trust waters
 - Indeed a third of the largest clubs said that less than 10% of their waters are Trust canals
- Those clubs who have the options of fishing both Trust canals and other waters usually find the non-Trust waters are more popular with their members, particularly still waters
 - Only 24 clubs (16%) who have other waters told us their members prefer to fish the canal
- Still waters are the most popular
- The main advantages of still waters and rivers are:
 - good access, easy parking
 - well stocked with more popular (and easy) fish
 - without the various drawbacks of canals (which includes cyclists and dogs)
- However just over a quarter of clubs said they'd be interested in taking on more Trust waters
 - A third of clubs with 100+ members, but only 14 of the 78 smaller clubs
 - And most others still say they *might* be interested, only a third of clubs are uninterested

Fishing Trust vs Non-Trust Waters



Q11a Does your club also manage other angling venues that are not owned by the Trust?
IF YES Roughly what proportion of your waters are canals? PROMPT AS NECESSARY

Popularity Trust Canals vs Non-Trust Waters



| | | |
|---|-------|-----|
| Base: fish both Trust / non-Trust | (153) | |
| Trust canals are more popular | 16% | |
| All equal | 15% | |
| Non Trust still waters are more popular | 58% | 71% |
| Non Trust rivers are more popular | 28% | |
| Non Trust canals are more popular | 1% | |
| Other Trust waters are more popular | 1% | |
| DK / NA / Other | 3% | |



Q11b Which waters are more popular with your members, those operated by the Trust or the other club waters?
 Q11c Why is that?

Popularity Trust Canals vs Non-Trust Waters

Base: fish both Trust / non-Trust (153)

Trust canals are more popular 16%

All equal 15%

Non Trust still waters are more popular 58%

Non Trust rivers are more popular 28%

Non Trust canals are more popular 1%

Other Trust waters are more popular 1%

DK / NA / Other 3%

71%

Why Trust canals more popular

Base: Trust canals more popular (24)
number

| | |
|--|---|
| Depends / different people want different things | 6 |
| Well stocked lots / easy to catch fish | 5 |
| Good access / parking | 2 |
| That's all / the most water we have | 2 |
| Different waters for different seasons | 2 |
| Other reasons | 7 |



Q11b Which waters are more popular with your members,
those operated by the Trust or the other club waters?
Q11c Why is that?

Popularity Trust Canals vs Non-Trust Waters

Base: fish both Trust / non-Trust (153)

Trust canals are more popular 16%

All equal 15%

Non Trust still waters are more popular 58%

Non Trust rivers are more popular 28%

Non Trust canals are more popular 1%

Other Trust waters are more popular 1%

DK / NA / Other 3%

71%

Why non-Trust still waters more popular

Base: non-Trust still waters more popular (88)

Good access / parking 35%

Well stocked lots / easy to catch fish 25%

They have the fish people want like big carp / pike 19%

Canals aren't popular anymore 11%

No cyclists there 10%

Easy fishing 9%

Commercial ponds popular / the way people get into fishing now 7%

Attractive surroundings / atmosphere 7%

No dogs there 7%

Depends / different people want different things 6%

Good facilities there 4%

No boats there 4%

Different waters for different seasons 3%

Other reasons 8%



Q11b Which waters are more popular with your members, those operated by the Trust or the other club waters?

Q11c Why is that?

Popularity Trust Canals vs Non-Trust Waters

Base: fish both Trust / non-Trust (153)

Trust canals are more popular 16%

All equal 15%

Non Trust still waters are more popular 58%

Non Trust rivers are more popular 28%

Non Trust canals are more popular 1%

Other Trust waters are more popular 1%

DK / NA / Other 3%

71%

Why non-Trust rivers more popular

Base: non-Trust rivers more popular (43)
number

Good access / parking 16

Well stocked lots / easy to catch fish 12

Canals aren't popular anymore 5

Attractive surroundings / atmosphere 5

Depends / different people want different things 5

No cyclists there 5

They have the fish people want like big carp / pike 3

No boats there 3

No dogs there 2

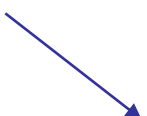
Other reasons 5



Q11b Which waters are more popular with your members, those operated by the Trust or the other club waters?

Q11c Why is that?

Interest in Further Licenses

| | | |
|---|----------------------------|---|
| | Base: all | (203) |
| Interested in licensing more Trust waterway stretches | | 27% |
| Possibly, it depends | | 41% |
| Not interested | | 32% |
| | |  |
| | Base: not interested | (64) |
| | Already have enough water | 52% |
| | Can't afford anymore | 20% |
| | Canals are not popular now | 8% |
| | Club is struggling | 6% |
| | We are a new club | 3% |
| | Only want pools now | 3% |
| | Other reasons | 5% |
| | DK / NA | 5% |

Q23a Would your club be interested in licensing more waterway stretches from the Trust if these were available?

IF 'NO'

Q23b Why would you not be interested?

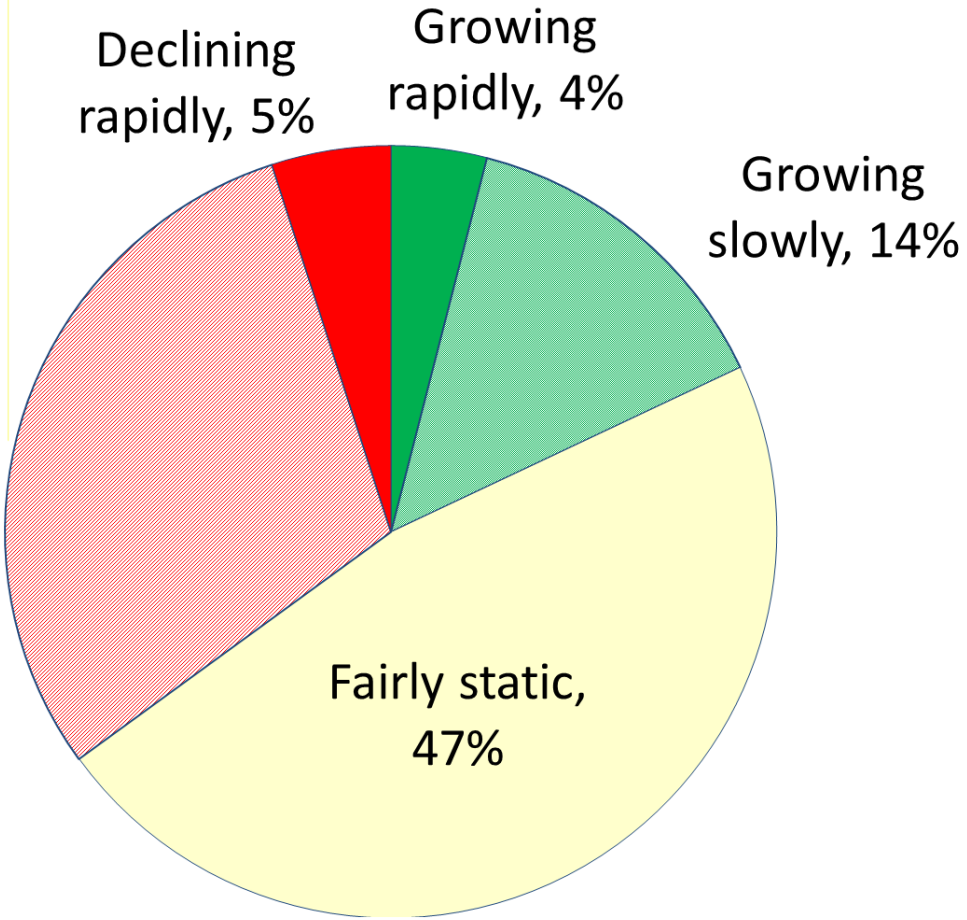
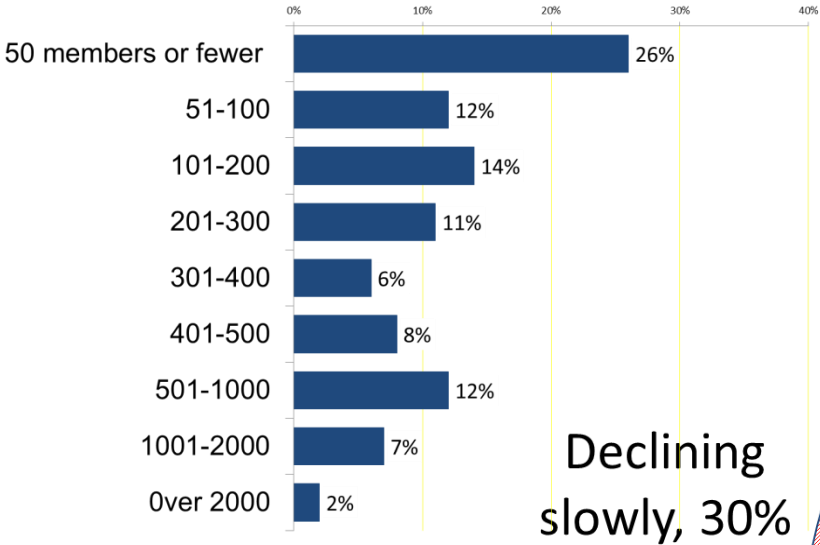


Club Membership

Membership Trends

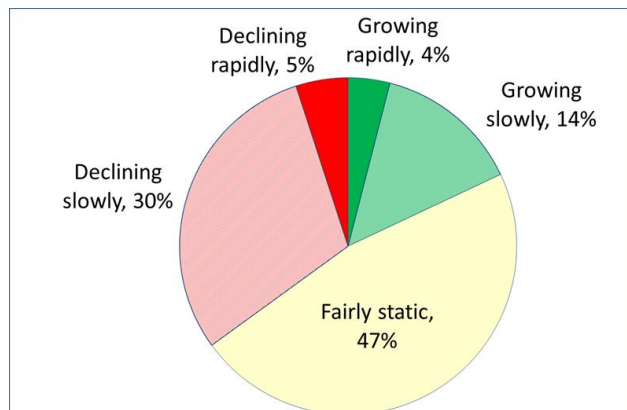
- Overall membership levels are declining
 - Around half of these clubs told us that their membership levels are fairly static
 - But among the remainder, for each club who are increasing their membership there are two who are losing members (and this is true for clubs both large and small)
- 35% reported a declining membership, which they put down mainly to:
 - the growth in commercial fisheries, which offer a number of advantages over canal fishing
 - a lack of interest in fishing among the young, resulting in an ageing membership
- 18% of clubs are growing – these 37 clubs talked about:
 - providing more places to fish / more stretches of water
 - providing quality stretches that are well stocked with fish
 - managing their club better
 - a few mentioned keeping fees low
 - but only a couple talked specifically about efforts to attract younger members

Membership Trends



Q1a First can you tell me about your club – how many members do you have?
 Q1b And is the number of members growing or declining?

Reasons 18% of Clubs Growing



Base: growing (37)
No.

| | |
|--|----|
| Have more water / pegs / platforms | 12 |
| Improved the club / managing it better | 10 |
| Good fishing / have restocked | 8 |
| Keep membership fees low / give good value | 5 |
| Cost / lack of money / recession | 2 |
| Good access / parking | 2 |
| Providing facilities for disabled anglers | 2 |
| Attracting some youngsters / coaching / visiting schools | 2 |
| Other reasons | 12 |

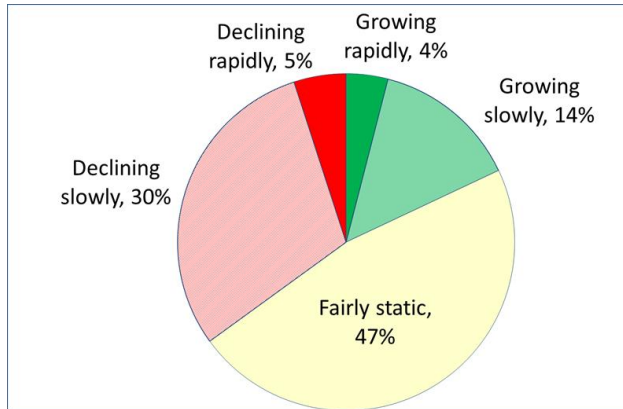


IF GROWING / DECLINING ASK

Q1c What are the main reasons for that growth / decline (*as appropriate*)?

PROBE Any other reasons?

Reasons 35% of Clubs in Decline



| Reason | Percentage |
|--|------------|
| Base: declining | (71) |
| Growth / popularity of commercial | 31% |
| No youngsters coming into fishing | 27% |
| Ageing membership | 18% |
| Cost / lack of money / recession | 15% |
| Canal fishing is losing popularity | 13% |
| Poor fishing | 4% |
| Poor access / parking | 3% |
| Fishing generally is losing popularity | 3% |
| Always fluctuates | 3% |
| Other reasons | 27% |



IF GROWING / DECLINING ASK

Q1c What are the main reasons for that growth / decline (*as appropriate*)?

PROBE Any other reasons?

Attracting Members

- Three-quarters of clubs are keen to attract new members
 - 84% of clubs who already have over 100 members want to grow their membership further
 - However a third of the smaller clubs think their current levels are about right (or in two instances would actually prefer to reduce the number of members)
- Three-quarters talked about some way in which they try to attract new members
 - some of these simply told us they attract new members by word-of-mouth (these are mostly the smaller clubs)
- Specific ways of attracting members include:
 - the club website – almost all larger clubs have a website, although few small clubs do
 - advertising or press editorial – local and national publications, in local shops etc.
 - through local tackle shops
 - running competitions
 - improving their waters / restocking (these are the larger clubs)
- A few mentioned that they try to recruit juniors, including through local schools

Club Websites

| | | | | |
|------------------|-------|---|-------------------|-----------|
| Base: all | (203) | | | |
| Have own website | 57% | → | Clubs with... | |
| Do not | 43% | | up to 100 members | 23/78=29% |
| | | | 101-400 members | 39/64=61% |
| | | | Over 400 members | 53/59=90% |



Q8a Does your club have your own website?

Attracting New Members

| | | |
|------------------------------|-----------|-------|
| | Base: all | (203) |
| Keen to attract new members | 77% | |
| Current level is about right | 22% | |
| Already have too many | 1% | |

| | | |
|--|------------|-------|
| | Base: all | (203) |
| Mention any activity | 76% | |
| Website | 27% | |
| Word of mouth | 24% | |
| Fliers / ads / books in local tackle shops | 15% | |
| Competitions / matches | 11% | |
| Articles / ads / match results in local papers | 9% | |
| Posters / ads in local shops / pubs | 9% | |
| Trying to interest youngsters / schools | 8% | |
| Articles / ads in angling publication | 7% | |
| Adding / improving waters | 5% | |
| Restocked / good fishing | 5% | |
| Facebook | 4% | |
| Other / non specified advertising | 4% | |
| Keeping membership fee low | 4% | |
| Improving the club / managing it better | 2% | |
| Taster sessions | 2% | |
| Attractive locations to fish in | 1% | |
| Articles / ads in national papers | 1% | |
| Other ways | 9% | |
| Don't do anything as have a limit / waiting list | 13% | |
| Do nothing | 6% | |
| DK / NA | 5% | |



Q2 Is your club keen to attract more new members?
 Q3 What are the main ways your club attempts to attract new members?
 PROBE What else does your club do?

Junior Members

- Overall three-quarters of clubs have junior members
 - Including almost all the largest clubs, but just under half of clubs with <100 members
- The number of junior members of course varies according to the size of the club
 - Around half of the largest clubs (400+) with junior members have over 50 juniors
 - Small clubs (<100) with junior members are unlikely to have more than 10 juniors
- Overall a fifth of these clubs run a junior section – 43 clubs in total
 - These are clubs with over 100 members, only 4 of the smaller clubs have a junior section
- Most told us that running their junior section is straightforward
 - Some have problems getting sufficient helpers or coaches
 - But few complained about red tape or bureaucracy
- Half of the clubs have junior members but no junior section
 - Mostly because there is insufficiently widespread interest to make a junior section viable
 - Some talked about insufficient helpers, or concerns about bureaucracy / red tape

Junior Members

Base: all (203)

Have junior members 73%

Dedicated junior section 21%

Purely allow juniors to fish 52%

Do not have junior members 27%



Base: have junior members (148)

10 or fewer 28%

11-20 22%

21-30 8%

31-40 4%

41-50 8%

51 and over 23%

DK / NA 6%



Q4a Does your club have any junior members (aged up to 16)?

Q4b About how many junior members are there (aged up to 16)? WRITE IN

Q4c Does your club have a dedicated junior section with regular junior activity, or do you purely allow juniors to fish?

One-in-Five Have Junior Sections

Base: all (203)

Have junior members 73%

Dedicated junior section **21%**

Purely allow juniors to fish 52%

Do not have junior members 27%

Base: run junior section (43)
number

Straightforward 30

Some difficulties 13

Difficulties...

Lack of helpers / manpower 6

Lack of coaches 4

Lack of interest from youngsters 4

CRB checks 2

Bureaucracy / red tape 1

Parents don't co-operate / bring them 1

Bikes on the towpaths 1



IF HAVE JUNIOR SECTION

Q4d Does the club experience any difficulties or problems running a junior section, or is it totally straightforward?

Q4e What difficulties or problems do you experience?

Half Have Juniors But No Junior Section

| | | | | |
|-----------------------------------|-----------|-------------------------|-------|----------------------------------|
| | | Base: no junior section | (105) | |
| | Base: all | (203) | | Not interested |
| | | | | 43% |
| Have junior members | | 73% | | Some barrier |
| | | | | 57% |
| Dedicated junior section | | 21% | | |
| Purely allow juniors to fish | | 52% | | Base: face barriers |
| | | | | (60) |
| Do not have junior members | | 27% | | Lack of interest from youngsters |
| | | | | 58% |
| | | | | Lack of helpers / manpower |
| | | | | 18% |
| | | | | Bureaucracy / red tape |
| | | | | 12% |
| | | | | CRB checks |
| | | | | 8% |
| | | | | Are setting one up shortly |
| | | | | 8% |
| | | | | Lack of coaches |
| | | | | 3% |
| | | | | Other barriers |
| | | | | 5% |

‘To run junior events you need 1 adult to 2 children plus First Aiders, Police checks etc. We are not able to meet all those requirements ‘
 ‘Now a day by open waters is not as safe as it once was – towpaths can be unsafe with bikes / strangers etc. One of our members was electrocuted by getting tangled up with overhead cables’

IF DO NOT HAVE JUNIOR SECTION

Q5a Is that because your club is just not interested in running a junior section,
 or is there something that prevents or discourages you?

Q5b What are the difficulties or problems that you’d face in setting up a junior section?



Events

- Half of the clubs run open match events on Trust canals
- 37% run events to attract new people into fishing
 - Half of the largest clubs (400+) run events, but these are unlikely to be held on Trust canals
 - Only a quarter of the smallest clubs (<100) run events, but these clubs have fewer waters, their events are likely to take place on Trust canals (for half of the small clubs that's their only option)
- 63% do not run any events, most are simply not interested
- But 49 clubs (i.e. about a quarter of all clubs) do not run events because of some barrier, most commonly:
 - insufficient people to run events
 - access / parking problems (on canal stretches)
 - a perception that there is little interest in angling in their area
 - cost

Events

Base: all (203)

Run open match events on Trust canals 48%

Base: all (203)

Run events to attract new people into fishing 37%



Base: run events (76)

| | |
|----------------------------|-----|
| Only on Trust canal | 26% |
| Mostly on Trust canal | 13% |
| About half | 13% |
| Mostly not on Trust canals | 18% |
| None on Trust canals | 29% |



Q6 Does your club run any open match events on the Trust canals?
Q7a Does your club run any events to attract new people into fishing?
IF RUN EVENTS
Q7b What proportion take place on the Trust canals?

Reasons Why Do Not Run Events

| | | | | |
|---|-----------|-------|--|--------|
| | Base: all | (203) | | |
| Run events to attract new people into fishing | 37% | | Base: some barrier | (49) |
| Do not run events | 63% | | | number |
| | | | | |
| | | | Lack of helpers / manpower | 16 |
| | | | Poor access / parking | 7 |
| Base: do not run events | (127) | | Lack of interest in angling nowadays | 6 |
| Not interested | 61% | | Costs involved / club can't afford it | 5 |
| Some barrier | 39% | → | Lack of time | 3 |
| | | | Members are too old | 3 |
| | | | CRB checks | 3 |
| | | | Insurance problems | 2 |
| | | | It's youngsters that we want to attract into angling | 2 |
| | | | Lack of fish | 2 |
| | | | Pollution | 2 |
| | | | Other barriers | 8 |
| | | | DK / NA | 3 |

IF DO NOT RUN EVENTS

- Q7b Is that because your club is not interested in running events, or is there something that prevents or discourages you?
- Q7c What are the difficulties or problems in running events?



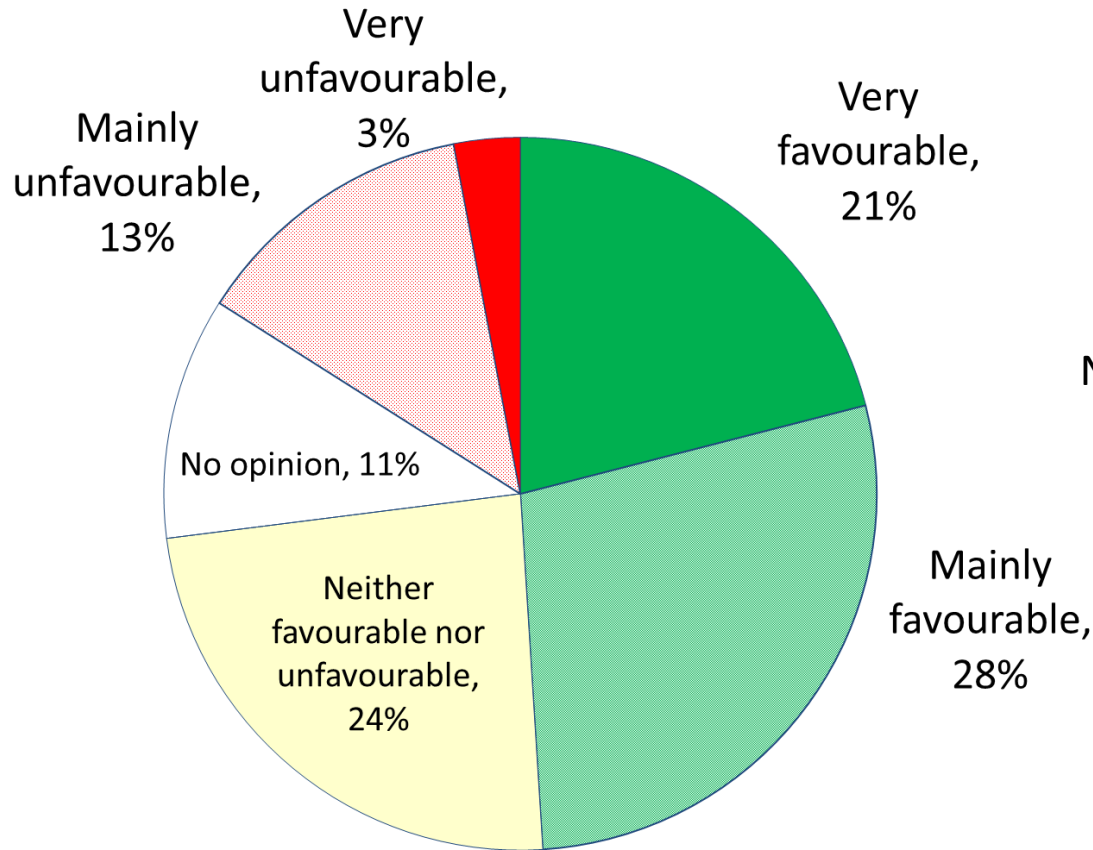
The Canal & River Trust



Canal & River Trust

- For three-fifths of clubs (of all sizes) the main point of contact is the Fisheries and Angling Team
 - for a fifth it is their local office, while a few do not have any point of contact with the Trust
 - 37% of clubs told us they attend User Group Forums
- We included a standard C&RT question asking clubs to rate the Trust
- On balance views are positive – half are favourable to the Trust, only 16% are unfavourable
 - Medium size clubs (100-400) appear most favourable to the Trust
 - While almost 30% of largest clubs (or those who mainly fish non-Trust waters) are negative
 - Interviewers reported some clubs wanted to make a distinction between their positive experience of John Ellis and the Fisheries and Angling Team, and the C&RT as an organisation
 - We notice that those whose first point of contact is the F&AT are more likely to be favourable to the Trust (60%) than are other clubs whose main contact is their local office (17/42=40%) or the other clubs, most of which have no point of contact (7/36 approx. 20%)
- A quarter think the Trust represents an improvement on BW, while only one-in-ten preferred BW
- *Although this was a closed question, the nature of these interviews meant that some elaborated on their response, our interviewers captured additional comments which we show in this report*

Rating the C&RT



Base: all (203)

| | |
|----------------------------------|-----|
| The Trust far better than BW | 9% |
| The Trust slightly better | 15% |
| No difference / exactly the same | 54% |
| BW was slightly better | 5% |
| BW was much better | 4% |
| No dealings with them | 6% |
| Early days | 2% |
| No opinion | 3% |

'Promotes the canal – now has charitable status and encourages participation'

Q12a Generally, how favourable or unfavourable is your overall opinion or impression of the Canal & River Trust?

Q12b And how does the Trust compare with your previous experience of British Waterways?



Trust Contact

| | | |
|--------------|----------------------------|-------|
| | Base: all | (203) |
| | Fisheries and angling team | 62% |
| | Local waterway office | 21% |
| | User group forum | 2% |
| <i>Other</i> | | |
| | 'Head Office' | 1% |
| | Finance Department | * |
| | No one | 6% |
| | DK / NA | 9% |



Q13 Who is typically your first point of contact at the Trust?

User Group Forums

Base: all (203)

Club attends Trust user group forums 37%
Do not 61%

Base: do not attend UGF (123)

Not told about them (anymore) 26%
Too far to go / not local enough 20%
No time to go 16%
Attended / been told they're all about boats and little on angling / not relevant 13%
Intend to go soon 5%
Lack of interest 4%
No need 4%
Get information through the grapevine 3%
Ageing membership / too old to go 2%
Other reasons 4%
DK / NA 11%

'We have been to one or two and found that they are all about boats– bringing up angling issues and get shot down – should involve angling more – no one seems interested'

'It's a case of sitting there for 2 hours and the last item is angling issues and given 2 minutes. Waste of time – better to have one a year that's devoted to angling only'



Q22a Does your club attend Trust user group forums?
IF 'NO'
Q22b Why not?

Service from the Trust

- We asked several open ended questions about the Trust, starting with a general question about the service the club receives
- We heard a mix of positive and negative comments
 - On balance there are more clubs who started by praising the Trust than criticised
 - Most have strong opinions, although some smaller clubs have little contact with the Trust
- John Ellis and the Fisheries and Angling Team have clearly developed very good relationships with many clubs
 - Clubs praised the work of the Team, their expertise and the help they provide
 - Though a few commented that the department is stretched / under-resourced
- We heard of instances where the Trust has been proactive and responsive in terms of maintaining or policing their canal
- But we also heard criticism of other parts of the Trust, and the organisation generally in terms of:
 - being slow and unresponsive
 - focussing on other canal and towpath users at the expense of anglers
- Angling clubs can feel marginalised by the Trust, even though they are paying-customers

Level of Service from Trust (Unprompted)

Base: all (203)

| | | | | |
|--|---|-----|-----------------------|-----|
| | Positive comments about John Ellis and team | 19% | | |
| | | | Very good | 14% |
| | | | Helpful | 12% |
| | Poor / not good | 16% | Responsive | 10% |
| | Slow to respond / feedback | 8% | Fine / quite good | 10% |
| Difficult to get right person / passed around | | 6% | Good communication | 6% |
| Ignore / do nothing for anglers | | 5% | Carry out maintenance | 2% |
| Lack of information | | 5% | Informative | 2% |
| Don't enforce boat overstays / illegal moorings etc. | | 2% | Efficient | 1% |
| Do little maintenance | | 2% | Easy to deal with | 1% |
| Need to restock | | 1% | | |
| | No real experience / just pay the rent | 14% | | |
| | Early days / wait and see | 2% | | |
| | Other comments | 7% | | |
| | DK / NA | 4% | | |



Q14 How do you feel about the level of service your club receives from the Trust?

How the Trust Benefits the Club

| | | |
|---|------------|-------|
| | Base: all | (203) |
| Anything mentioned | 39% | |
| Are helpful | 8% | |
| Carry out maintenance | 7% | |
| Have a good relationship with us | 4% | |
| Are Responsive | 3% | |
| Don't overcharge / a fair rent | 3% | |
| Have restocked / given us fish | 3% | |
| Send out information / communicate | 3% | |
| Promoted us / put us in the press | 3% | |
| Work for everyone that uses the canals | 1% | |
| Sense of being part of a large organisation | 1% | |
| Hold forums / can have your say | 1% | |
| Other benefits | 11% | |
| DK / NA | 9% | |
| Nothing | 52% | |



Q15 What are the main things that the Trust **do currently** that really benefits your club, and helps you to attract new members?

How Trust Could Help Angling Clubs

How Trust Could Help the Clubs

- The majority could think of ways in which the Trust could help their club and attract new members
- Two fifths mentioned that their stretch of the canal needs to be restocked with fish
- A third would like the Trust to improve access or parking
 - The smallest clubs (<100) were more likely to talk about restocking than access
 - The largest clubs (400+) were more likely to talk about problems with access than fish stocks
- The most common other specific requests include:
 - controlling cyclists – the Trust appear to be encouraging cyclists but speeding cyclists are a menace, and unlike anglers they do not even pay to use the towpaths
 - more effective policing of illegal moorings / overstays
 - controlling various predators who steal fish – zander, cormorants, otters, people
 - vegetation management (but we also heard a few complaints about excessive cutting back)
 - dog fouling was also mentioned by a few – we later asked about clearing up ‘litter or dog mess’, but it is the dogs that are more of a problem
- As noted earlier, respondents had a lot to say, and their conversations with our interviewers did not necessarily divide into neat topics in response to our questions – the same themes emerge at various questions

How Trust Could Help the Clubs

Base: all (203)

Any requests 86%

| | | | |
|--|--|---|-----|
| | | Would like some fish / be restocked | 39% |
| | | Improve access / parking | 31% |
| | Do something about boats / illegal moorings / overstays etc. | | 12% |
| | | Cut back vegetation | 8% |
| | | Take action on cyclists | 8% |
| | Take action on predators (cormorants, otters etc.) | | 7% |
| | | Promote / help angling / listen to what we need | 6% |
| | Improve the towpaths | 2% | |
| | Be less severe when cutting back vegetation | 2% | |
| | Solve / help us with our problems | 2% | |
| | Do more dredging | 2% | |
| | Improve the habitat along canals | 2% | |
| | Remove weed | 2% | |
| | Provide more facilities | 1% | |
| | Offer better insurance rates | 1% | |
| | Provide toilets on canals | 1% | |
| | Other requests | 11% | |
| | DK / NA | 1% | |
| | Nothing | 12% | |
| | | Take action on dog fouling | 5% |
| | | Communicate / provide contacts etc. | 5% |
| | | Help with signage | 4% |
| | | Do something about illegal fishing / poaching | 4% |
| | | Take action on zander | 4% |
| | | Encourage / help fishing for the disabled | 3% |
| | | Patrol more | 3% |
| | | Install pegs / platforms | 3% |
| | | Do something to stop bank erosion | 3% |
| | | More information / newsletters etc. | 3% |



Q16a Thinking of the waterway/s that you license from the Trust. In terms of **fish stocks and facilities** what (else) **could, or should**, the Trust do that would really help your club and attract new members?

Q16b Other than fish stocks and facilities, what else **could, or should**, the Trust do generally that would help your club, and attract new members?

Other Concerns for the Trust

Base: all (203)

| | |
|---|------------|
| Any criticism / request | 56% |
| Take action about cyclists | 10% |
| Improve communication | 9% |
| Take action on boats / illegal moorings / overstays etc. | 8% |
| Less severe cutting back of vegetation | 5% |
| Promote / help angling / listen to what we need | 5% |
| Provide better access / parking | 4% |
| Patrol more | 4% |
| Take action on dog fouling | 3% |
| Respond / take action quicker | 2% |
| Take action on illegal fishing / poaching | 2% |
| Be strict with enforcement / code of conduct | 2% |
| Do more maintenance | 2% |
| Take action on predators (zander, cormorants, otters etc.) | 1% |
| Do more dredging | 1% |
| Help with signage | 1% |
| Let us do more things ourselves (cutting back vegetation etc.) | 1% |
| Do something about bank erosion | 1% |
| Others | 8% |
| DK / NA | 1% |
| Nothing | 43% |

Q17 Is there anything that the Trust does currently which **makes things difficult** for your club, and which might make it harder for you to attract new members?

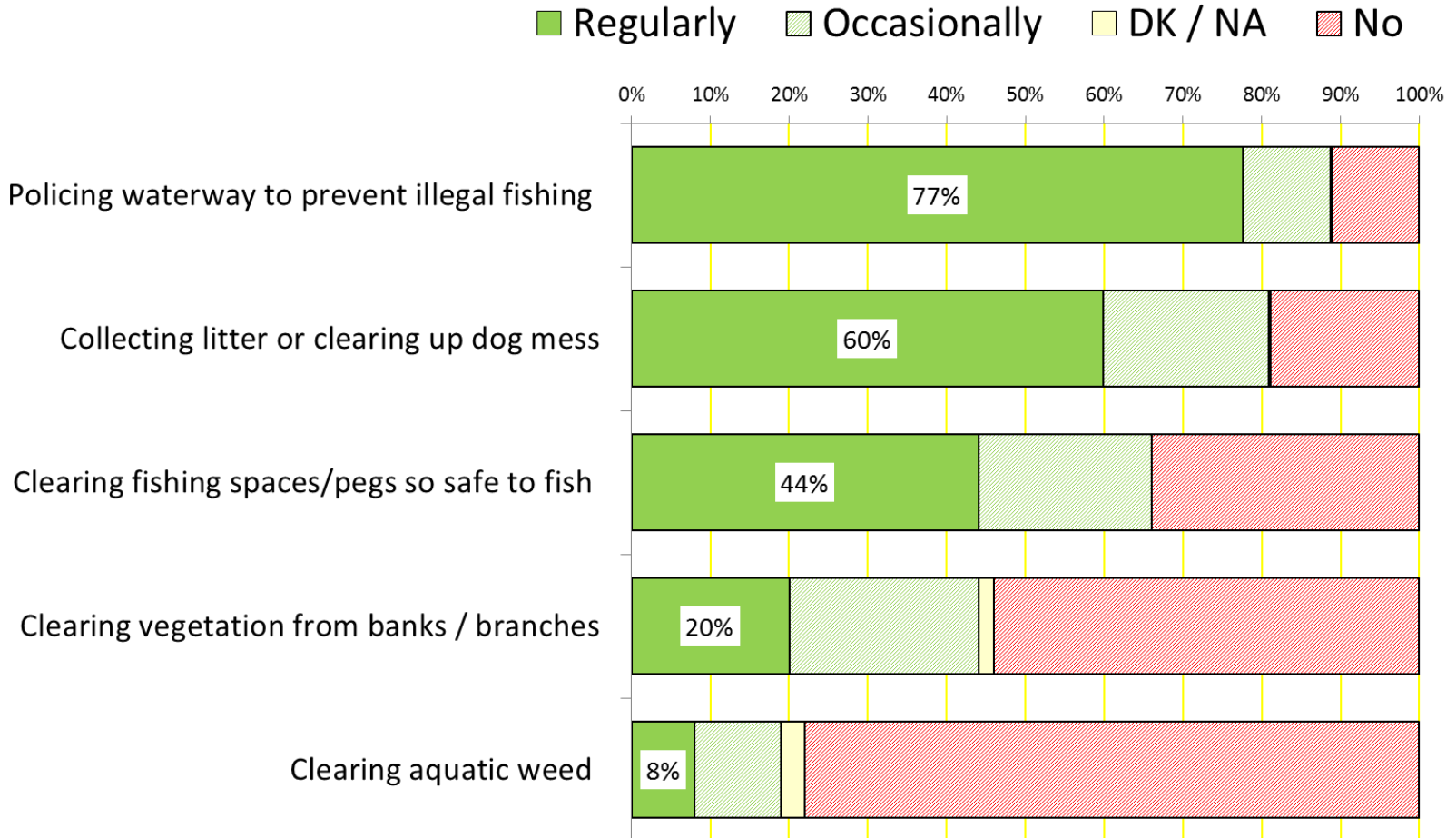


Canal Maintenance & Working with the Trust

Canal Maintenance by Club

- Having asked unprompted question to ascertain what is important to the clubs in their own words, we then prompted with more specific questions
- Practically every club is already involved to some degree in helping to maintain their canal
 - The majority *regularly* police their stretch to help prevent illegal fishing (over 80% of clubs with 100+ members, and two-thirds of smaller clubs)
 - The majority clear up litter (or dog mess) – *we should have split this question; they pick up litter, but dog mess is more of a problem which we suspect fewer are prepared to tackle*
 - Two-thirds clear around fishing spaces or pegs
 - But just under half (admitted to) clearing vegetation from banks or overhead branches
 - Around a quarter of clubs with 100+ members told us they clear aquatic weed (occasionally)
- The vast majority carry out maintenance as a matter of course without involving the Trust
 - Around a fifth of those who told us they clear vegetation or overhanging branches said they consult with the Trust
 - Only around one-in-ten consult with the Trust to police unlicensed fishing

Clubs Maintaining Trust Waterways



Q18a To what extent does your club help to maintain the waterways that you license from the Trust.
Does your club get involved in ...

Clubs Maintaining the Waterways – Data

Base: all (203)

| | Maintaining Trust waterways | | | | With Trust? |
|---|-----------------------------|--------------|-----|---------|-------------|
| | Regularly | Occasionally | No | DK / NA | Yes |
| Collecting litter or clearing up dog mess | 60% | 21% | 19% | * | 5% |
| Clearing fishing spaces/pegs so that it is safe for members and day permit holders to fish | 44% | 22% | 34% | 0% | 6% |
| Clearing vegetation from banks or overhanging branches | 20% | 24% | 54% | 2% | 9% |
| Clearing aquatic weed | 8% | 11% | 78% | 3% | 2% |
| Policing the waterway to help prevent illegal fishing | 77% | 11% | 11% | * | 8% |

Q18a To what extent does your club help to maintain the waterways that you license from the Trust.
Does your club get involved in ... READ OUT IN TURN, PROMPT AS NECESSARY
FOR EACH THAT THEY ARE INVOLVED WITH ASK

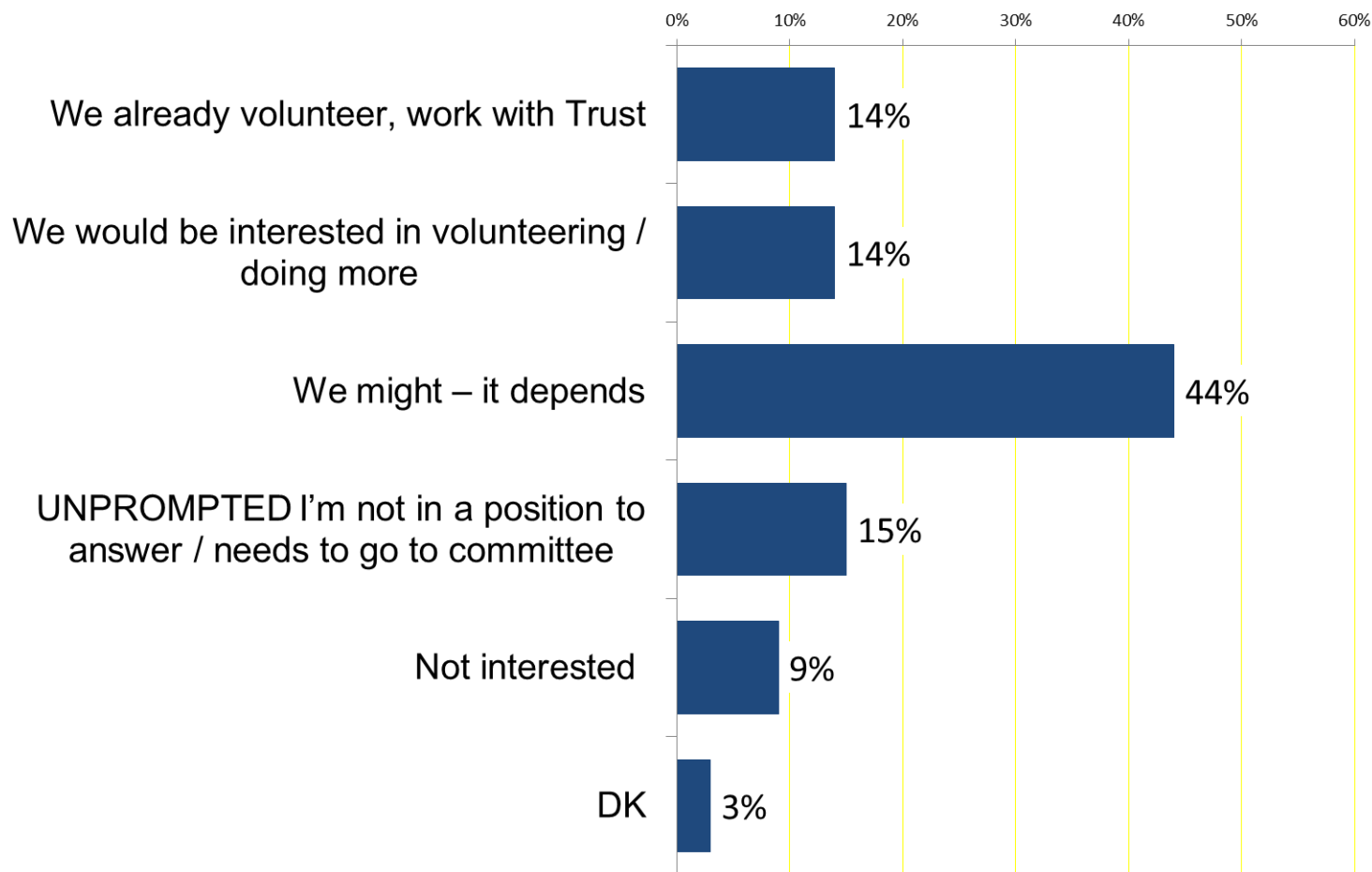
Q18b And does that involve consultation or discussion with the Trust, or is that just something your club does as a matter of course without involving the Trust at all?



Interest in Working with the Trust

- Although only 29 of these 203 clubs told us they already volunteer and work closely with the Trust, only 19 said they would *not* be prepared to volunteer (mostly small clubs)
 - Predictably most were cautious about committing themselves – they *might* be prepared to volunteer depending on what it involves (or they'd need to go through the committee)
- 28 stated that they *are* interested in doing more (we can identify most of these – they are a mix of different sizes of clubs)
- While there might be caution in offering to provide help, the majority are prepared to accept help from the Trust; three-fifths of clubs (all sizes) would *definitely* be interested in the Trust assisting them in growing their membership
 - Just 11 clubs do not want help, four others think the Trust has nothing to offer
- We prompted with seven ways in which the Trust might assist clubs
- Two-thirds of clubs would welcome Trust help in
 - improving access / parking
 - providing signage (something few mentioned until we prompted)
- Half would like Trust help with vegetation management
- Half would like Trust help with social media
- Most of the clubs who have a website would welcome Trust help in directing traffic to their site
- Two-fifths of the clubs with junior members would like Trust help with coaching or education

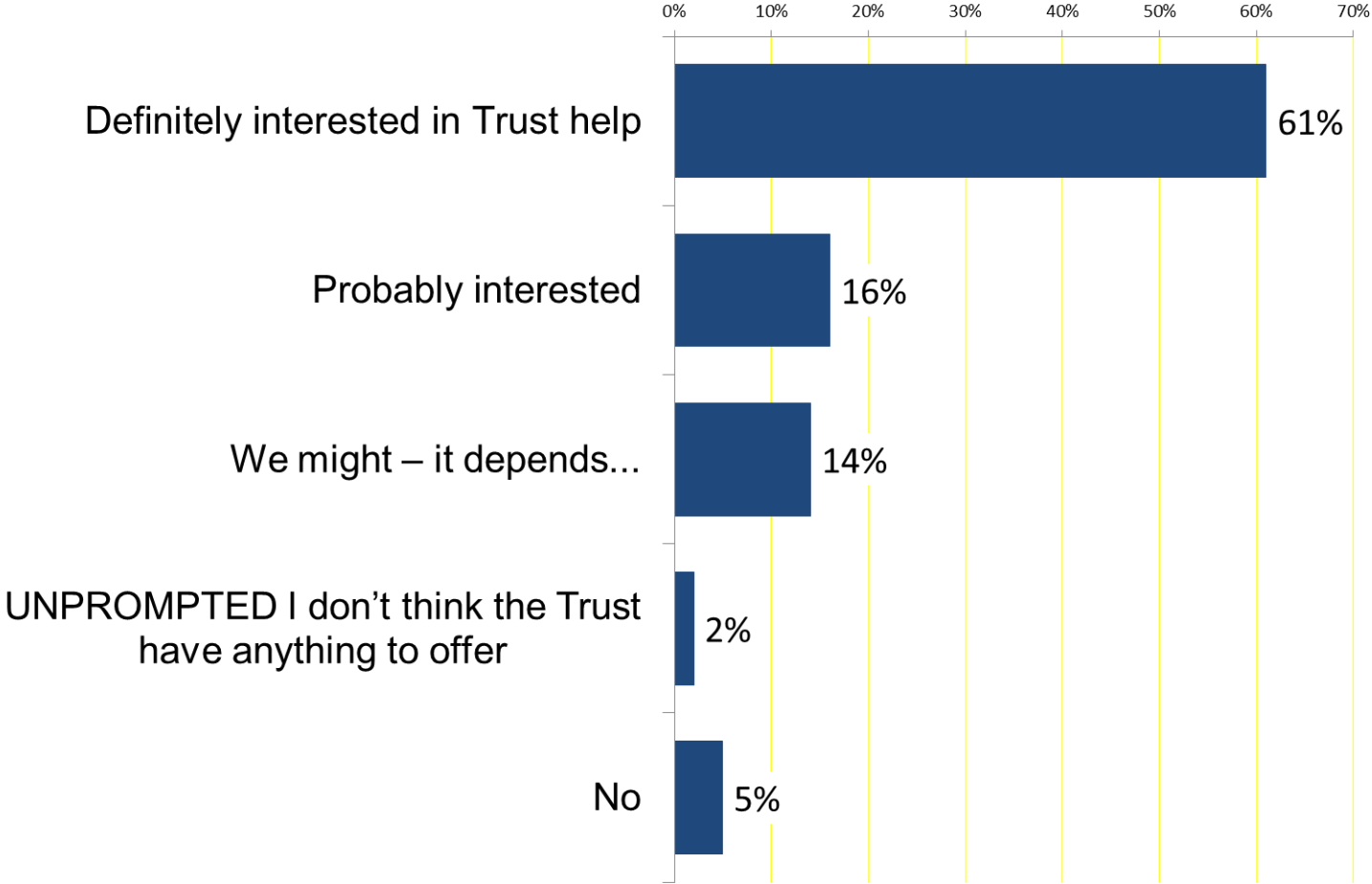
Interest in Volunteering



Q19 Might your club be interested in volunteering to work more closely with the Trust?



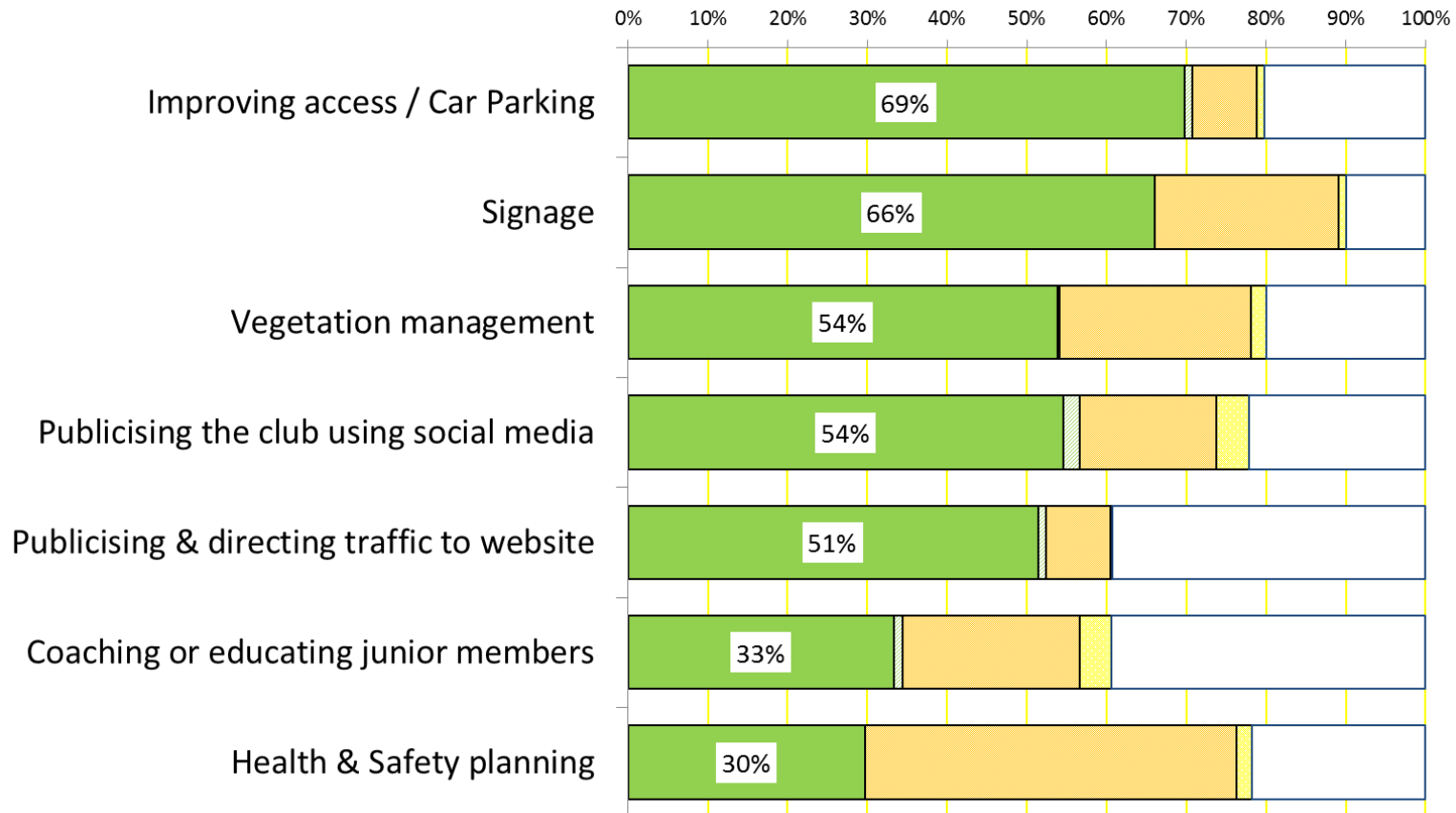
Interest in Trust Help to Increase Membership



Q20 The Trust are keen to work with Angling Clubs, and help clubs maintain or increase membership. If there was some way that the Trust could help your club, would that be of interest?

Areas in Which Trust Might Help

■ Trust could help
 ■ Need help, not Trust
 ■ Relevant, do not need help
 ■ DK / NA
 ■ Not relevant



Q21a I'd like to read out areas in which the Trust might be able to offer resources to Angling Clubs.
 For each I'd like you to tell me whether this is an area where your club might benefit from assistance,
 and whether you think the Trust would be an appropriate organisation to assist you . Firstly...



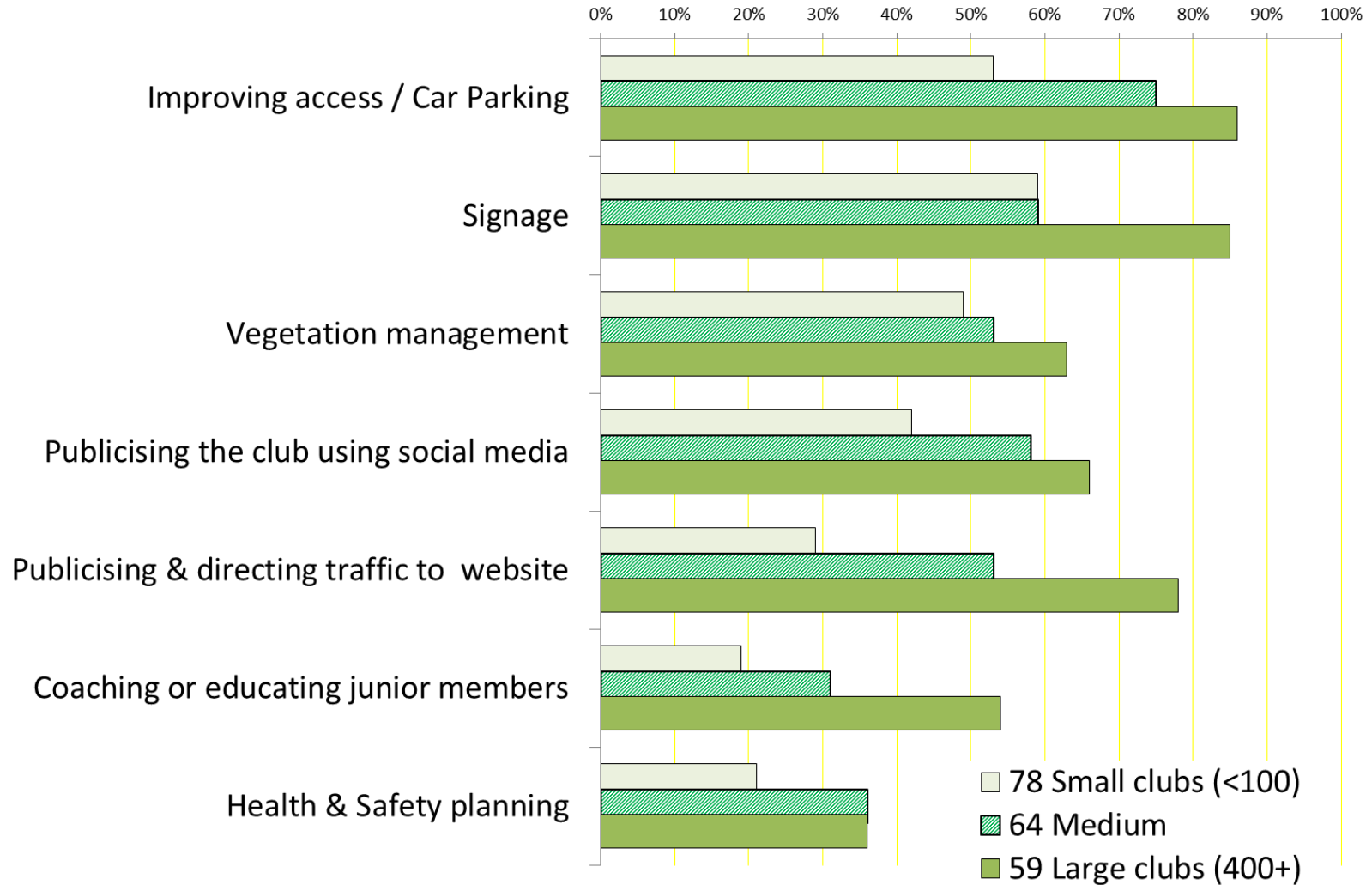
Areas in Which Trust Might Help – Data

| Base: all (203) | | We might benefit from Trust assistance | Need help, but not from the Trust | Relevant to us, but do not need help | Not relevant to us | <i>DK / NA</i> |
|-----------------|---|---|--|---|---------------------------|----------------|
| | Health & Safety planning | 30% | 0% | 47% | 22% | 2% |
| | Publicising the club using social media | 54% | 2% | 17% | 22% | 4% |
| | Publicising & directing traffic to club website | 51% | 1% | 8% | 39% | * |
| | Coaching or educating junior members | 33% | 1% | 22% | 39% | 4% |
| | Signage | 66% | 0% | 23% | 10% | 1% |
| | Improving access / Car Parking | 69% | 1% | 8% | 20% | 1% |
| | Vegetation management | 54% | * | 24% | 20% | 2% |

Q21a I'd like to read out areas in which the Trust might be able to offer resources to Angling Clubs. For each I'd like you to tell me whether this is an area where your club might benefit from assistance, and whether you think the Trust would be an appropriate organisation to assist you . Firstly...



'We Might Benefit from Trust Assistance'



Other Requests to Trust

Base: all (203)

Any (other) requests 46%

| | | | |
|--|----|-------------------------------------|-----|
| Improve access / parking | 9% | | |
| Take action on boats / illegal mooring / overstays | 6% | | |
| Take action on cyclists | 4% | Maintain trees / vegetation | 1% |
| Take action on illegal fishing / poaching | 4% | Solve / help us with our problems | 1% |
| Help with signage | 3% | Take action on weed | 1% |
| Take action on dog fouling | 3% | Less severe cutting back vegetation | 1% |
| Encourage / help disabled fishing | 3% | Have more meetings / contact | 1% |
| Promote / help angling / listen to what we need | 3% | Maintain the towpaths | 1% |
| Restocking / give us some fish | 2% | Work on bank erosion | 1% |
| Communicate / tell us what's happening | 2% | Reduce the rent | 1% |
| | | Install pegs / platforms | 1% |
| | | Other requests | 11% |
| | | DK / NA | 3% |
| | | Nothing (else) | 51% |



APPENDIX

Questionnaire

RGMR

Roy Graham Marketing Research
 7 St Margaret's Villas, Bradford-on-Avon
 Wiltshire BA15 1DU 01225 862787
 roy.graham@btinternet.com



Job No 143 (1-3)
 Card 1 (4)

Serial/URN «Club_URN» (5-7)
 Number of Trust leases «Number_of_stretches» (8)
 «Location» (9)

«Name_of_Club»
 «First_Name» «Last_Name»
 «Phone_home» / «Mobile»
 «Website»
 «Part») «Canal» / «Branch»

| | | |
|----------------------|----------------------|---------|
| Interviewer initials | Interview date | Mar/Apr |
| <input type="text"/> | <input type="text"/> | 2014 |

| | |
|---|------|
| NON CONTACT REASONS | |
| Too few / too many digits in phone number – not a phone number | 1 |
| Phone disconnected / no ringing tone / number unobtainable | 2 |
| A working phone number, but incorrect / person not known | 3 |
| Not answered / answerphone / voicemail 5+ attempts at different times | 4 |
| Named person repeatedly unavailable / away etc. (5+ attempts) | 5 |
| Refused | 0 |
| Other reason (write in) | (10) |

Ask to speak to named contact
 At least 5+ attempts at different days / times including evening / weekend
 This interview is being conducted in accordance with the rules & guidelines of the Market Research Society
 Respondents are able to remain anonymous if they wish – at the end of the survey we ask permission to attribute
 If respondent asks to contact us provide them with Roy's details(above left)
 If they ask to contact the Trust about this survey:
 general enquiries Becca Dent 0113 281 6811 technical angling enquiries John Ellis 07711 796344
 It is OK if they prefer to nominate another individual from the Club who is more able to answer the questions:
 note their name, role in the club, and phone number below

INTRODUCTION AND RECRUITMENT

Good morning / afternoon / evening. My name is from RGMR, an independent market research company.
 I am conducting a survey on behalf of the Canal & River Trust among Angling Clubs.
 This interview takes around 10 minutes (adjust estimate if interviews are taking longer or less time)
 I would like to ask you some questions about your club, and your opinions about the Trust.
 At the end of the survey I will be checking whether or not you are happy for us to attribute the comments you made
 to your club when we report back to the Trust.

Q1a First can you tell me about your club – how many members do you have? (11) (12)

Q1b And is the number of members growing or declining? PROMPT AS NECESSARY (1)

| | | |
|-------------------|---|------------|
| Growing rapidly | 1 | ASK Q1c |
| Growing slowly | 2 | |
| Fairly static | 3 | SKIP TO Q2 |
| Declining slowly | 4 | |
| Declining rapidly | 5 | ASK Q1c |

IF GROWING / DECLINING ASK
 Q1c What are the main reasons for that growth / decline (as appropriate)? PROBE Any other reasons?
 (14)
 (15)

ASK ALL
 Q2 Is your club keen to attract more new members? Keen to attract new members 1 (1)
 Current level is about right 2
 Already have too many 3

Q3 What are the main ways your club attempts to attract new members? PROBE What else does your club do?
 (17)
 (18)

Q4a Does your club have any junior members (aged up to 16)? Yes 1 ASK Q4b (19)
 No 2 GO TO Q5a ●

IF YES ASK
 Q4b About how many junior members are there (aged up to 16)? WRITE IN (2)

Q4c Does your club have a dedicated junior section with regular junior activity,
 or do you purely allow juniors to fish? Have a dedicated junior section 1 GO TO Q4d * (21)
 purely allow juniors to fish 2 GO TO Q5a ●

| | |
|---|---|
| <p>* IF HAVE JUNIOR SECTION *</p> <p>Q4d Does the club experience any difficulties or problems running a junior section, or is it totally straightforward? Straightforward 1 (22) Some difficulties 2 ASK DETAILS</p> <p>Q4e What difficulties or problems do you experience? (24) (25)</p> | <p>● IF DO NOT HAVE JUNIOR SECTION ●</p> <p>Q5a Is that because your club is just not interested in running a junior section, or is there something that prevents or discourages you? Not interested 1 (23) Some barrier 2 ASK DETAILS</p> <p>Q5b What are the difficulties or problems that you'd face in setting up a junior section? (24) (25)</p> |
|---|---|

(26) (27)



| | | | | |
|-----|---|-----|-----|------|
| Q6 | Does your club run any open match events on the Trust canals? | Yes | 1 | (28) |
| | | No | 2 | |
| Q7a | Does your club run any events to attract new people into fishing? | Yes | 1 * | (29) |
| | | No | 2 ● | |

| | | | |
|-------------------|---|--------------------------|--|
| * IF RUN EVENTS * | | ● IF DO NOT RUN EVENTS ● | |
| Q7b | What proportion take place on the Trust canals? | Q7b | Is that because your club is not interested in running events, or is there something that prevents or discourages you? |
| | Only on Trust canal | 1 | (30) |
| | Mostly on Trust canal | 2 | |
| | About half | 3 |) |
| | Mostly not on Trust canals | 4 | |
| | None on Trust canals | 5 | |
| | | Not interested | 1 (31) |
| | | Some barrier | 2 ASK DETAILS |
| | | Q7c | What are the difficulties or problems in running events? |
|  | ..... |  | (32) |
|  | ..... |  | (33) |

| | | | | | |
|-----|---------------------------------------|-----|---|------------|-----|
| Q8a | Does your club have your own website? | Yes | 1 | ASK Q8b | (3) |
| | | No | 2 | SKIP TO Q9 | |

IF HAVE WEBSITE

Q8b What is the website address? RECORD IF DIFFERENT TO ADDRESS SHOWN ON CONTACT PAGE

.....

| | | | | |
|----|---|----------------------------|---|------|
| Q9 | Is your club a member of the Angling Trust? | Yes | 1 | (35) |
| | | No – but we used to belong | 2 | |
| | | No | 3 | |

| | | | | |
|-----|------------------------------|------------------------|---|------|
| Q10 | Are you Clubmark accredited? | Yes | 1 | (36) |
| | | No – but we used to be | 2 | |
| | | No | 3 | |

| | | | | |
|------|--|---|--------------|------|
| Q11a | Does your club also manage other angling venues that are not owned by the Trust? | | | |
| | IF YES Roughly what proportion of your waters are canals? PROMPT AS NECESSARY | | | (37) |
| | Club only fishes the Trust canals | 1 | SKIP TO Q12a | |
| | Club mostly fishes the Trust canals | 2 | | |
| | About half is the Trust canals | 3 | | |
| | 25% or more is the Trust canals | 4 | ASK Q11b | |
| | 10% or more is the Trust canals | 5 | | |
| | Less than 10% is the Trust canals | 6 | | |

| | | | | |
|------|--|---|--------------|--|
| Q11b | Which waters are more popular with your members, those operated by the Trust or the other club waters? | | | |
| | PROMPT AS NECESSARY | | | |
| | Trust canals | 1 | (38) | |
| | Non Trust still waters | 2 | | |
| | Non Trust rivers | 3 | ASK Q11c | |
| | Non Trust canals | 4 | | |
| | All equal | 5 | SKIP TO Q12a | |

| | | | | |
|------|--------------|--|--|------|
| Q11c | Why is that? | | | |
|  | ..... |  |  | (39) |
|  | ..... |  |  | (40) |
|  | ..... |  |  | (41) |

| | | | | |
|------|---|-------------------------------------|---|------|
| Q12a | Generally, how favourable or unfavourable is your overall opinion or impression of the Canal & River Trust? | | | |
| | READ OUT 1-5 | Very favourable | 1 | (42) |
| | | Mainly favourable | 2 | |
| | | Neither favourable nor unfavourable | 3 | |
| | | Mainly unfavourable | 4 | |
| | | Very unfavourable | 5 | |
| | | No opinion | 6 | |

| | | | | |
|------|--|----------------------------------|---|------|
| Q12b | And how does the Trust compare with your previous experience of British Waterways? PROMPT AS NECESSARY | | | |
| | | The Trust far better | 1 | (43) |
| | | The Trust slightly better | 2 | |
| | | No difference / exactly the same | 3 | |
| | | BW was slightly better | 4 | |
| | | BW was much better | 5 | |

| | | | | |
|-----|--|----------------------------|---|------|
| Q13 | Who is typically your first point of contact at the Trust? | | | |
| | | User group forum | 1 | (44) |
| | | Fisheries and angling team | 2 | |
| | | Local waterway office | 3 | |
| | | Other (write in) | 4 | |

| | | | | |
|-----|---|--|--|------|
| Q14 | How do you feel about the level of service your club receives from the Trust? | | | |
|  | ..... |  |  | (45) |
|  | ..... |  |  | (46) |

| | | | | |
|-----|---|--|--|------|
| Q15 | What are the main things that the Trust do currently that really benefits your club, and helps you to attract new members? | | | |
|  | ..... |  |  | (47) |
|  | ..... |  |  | (48) |

| | | | | |
|------|--|--|--|------|
| Q16a | Thinking of the waterway/s that you license from the Trust. In terms of fish stocks and facilities what (else) could, or should , the Trust do that would really help your club and attract new members? | | | |
|  | ..... |  |  | (49) |
|  | ..... |  |  | (50) |

| | | | | |
|------|---|--|--|------|
| Q16b | Other than fish stocks and facilities, what else could, or should , the Trust do generally that would help your club, and attract new members? | | | |
|  | ..... |  |  | (51) |
|  | ..... |  |  | (52) |

| | | | | |
|-----|---|--|--|------|
| Q17 | Is there anything that the Trust does currently which makes things difficult for your club, and which might make it harder for you to attract new members? | | | |
|  | ..... |  |  | (53) |
|  | ..... |  |  | (54) |
|  | ..... |  |  | (55) |
|  | ..... |  |  | (56) |



Q18a To what extent does your club help to maintain the waterways that you license from the Trust.
Does your club get involved in ... READ OUT IN TURN, PROMPT AS NECESSARY

FOR EACH THAT THEY ARE INVOLVED WITH ASK

Q18b And does that involve consultation or discussion with the Trust,
or is that just something your club does as a matter of course without involving the Trust at all?

| | Q18a Maintaining Trust waterways | | | | Q18b With the Trust? | | |
|---|-------------------------------------|--------------|----|----|-------------------------|----|---------|
| | Regularly | Occasionally | No | DK | Yes | No | |
| Collecting litter or clearing up dog mess | 1 * | 2 * | 3 | X | 1 | 2 | (57-58) |
| Clearing fishing spaces/pegs so that it is safe for members and day permit holders to fish | 1 * | 2 * | 3 | X | 1 | 2 | (59-60) |
| Clearing vegetation from banks or overhanging branches | 1 * | 2 * | 3 | X | 1 | 2 | (61-62) |
| Clearing aquatic weed | 1 * | 2 * | 3 | X | 1 | 2 | (63-64) |
| Policing the waterway to help prevent illegal fishing | 1 * | 2 * | 3 | X | 1 | 2 | (65-66) |
| Is there anything else your club does? WRITE IN & CODE | 1 * | 2 * | 3 | X | 1 | 2 | (67-68) |

Q19 Might your club be interested in volunteering to work more closely with the Trust?

| | | |
|---|---|------|
| We already do volunteer and work closely with the Trust | 1 | (69) |
| We would be interested in volunteering / doing more | 2 | |
| We might – it depends | 3 | |
| DO NOT PROMPT! I'm not in a position to answer / needs to go to committee | 4 | |
| No | 0 | |
| DK | X | |

Q20 The Trust are keen to work with Angling Clubs, and help clubs maintain or increase membership.
If there was some way that the Trust could help your club, would that be of interest?

| | | |
|---|---|------|
| Definitely | 1 | (70) |
| Probably | 2 | |
| We might – it depends what the Trust have to offer | 3 | |
| DO NOT PROMPT! I don't think the Trust have anything to offer | 4 | |
| DO NOT PROMPT! I'm not in a position to answer / needs to go to committee | 5 | |
| No | 0 | |
| DK | X | |

Q21a I'd like to read out areas in which the Trust might be able to offer resources to Angling Clubs.
For each I'd like you to tell me whether this is an area where your club might benefit from assistance, and whether you think the Trust would be an appropriate organisation to assist you. Firstly...

| READ OUT IN TURN PROMPT AS NECESSARY | We might benefit from Trust assistance | Need help, but not from the Trust | Relevant to us, but do not need help | Not relevant to us | DK | |
|---|--|---|--|--------------------------|----|------|
| Health & Safety planning | 4 | 3 | 2 | 1 | X | (9) |
| Publicising the club using social media | 4 | 3 | 2 | 1 | X | (10) |
| Publicising & directing traffic to club's website | 4 | 3 | 2 | 1 | X | (11) |
| Coaching or educating junior members | 4 | 3 | 2 | 1 | X | (12) |
| Signage | 4 | 3 | 2 | 1 | X | (13) |
| Improving access / Car Parking | 4 | 3 | 2 | 1 | X | (14) |
| Vegetation management | 4 | 3 | 2 | 1 | X | (15) |

Q21b Is there anything else that you would like the Trust to help you with?
..... (16)
..... (17) (18)

Q22a Does your club attend Trust user group forums?

Yes 1 (1)
No 2 ASK Q22b

IF 'NO'
Q22b Why not?

ASK ALL
Q23a Would your club be interested in licensing more waterway stretches from the Trust if these were available?

Yes 1 (2)
Possibly, it depends 2
No 3 ASK Q23b

IF 'NO'
Q23b Why would you not be interested?

ASK ALL
Q24a Can I ask when your angling club was founded?

Q24b And when did you personally join the club?

| | Q24a The club | Q24b I joined | |
|-------------|------------------|------------------|---------|
| 2010 onward | 1 | 1 | (23-24) |
| 2000-2009 | 2 | 2 | |
| 1990-1999 | 3 | 3 | |
| 1980-1989 | 4 | 4 | |
| 1970-1979 | 5 | 5 | |
| Before 1970 | 6 | 6 | |

COMPLETE CLASSIFICATION: GENDER & AGE

| | Male | Female | |
|----------|------|--------|---|
| Under 25 | 1 | 25-34 | 2 |
| 35-44 | 3 | 45-54 | 4 |
| 55-64 | 5 | 65-74 | 6 |
| 75+ | 7 | | |

(25) (26)

Q25 Thank-you for giving me your time to answer those questions.
The Trust Fisheries and Angling Team are interested in reading comments made by each club.
Are you happy for us to identify your club when we report back on your responses and comments?
IF DO NOT WANT TO BE IDENTIFIED ASK
Is it just your comments on some specific questions that you would prefer to remain anonymous,
or do you not want any of your responses attributed? IF JUST SPECIFIC QUESTIONS RECORD BELOW

My comments and responses can (all) be attributed 1 (27)
Most comments can be attributed,
but comments on the questions specified below should **not** be attributed 2
.....
None of my responses should be attributed 0

Q26 Are there any other comments or requests that you would like us to pass back to the Trust on your behalf?

..... No X
.....

THANK & CLOSE

(28) (29) (30) (3)



Roy Graham Marketing Research



- RGMR established in 1991
- Specialises in UK quantitative research
- Roy responsible for and heavily involved with every stage of every project
- Interviewers booked directly
- Consumer / general public, trade & B2B projects
- Face-to-face (street, in-outlet / exit, in-home, workplace), telephone, postal, on-line
- Associated with independent qualitative researchers for qualitative projects
- Projects for Communities & Local Government (includes 7-year project with 35,000+ face-to-face interviews), Dover-Calais Ferries, ADT, AgeUK, RNIB, QinetiQ, Canal & River Trust, MPC (Dubai) and Spirit Pub Company
- Roy was previously Research Manager for Grand Met Brewing and Director of Innovation Limited, a marketing consultancy
- Roy is a certified (full) member of the Market Research Society (MRS) and a member of the Independent Consultants Group, RGMR is an MRS Company Partner

