

Boat Owners' Views 2019: Reputation survey

July 2019

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Summary

The findings show a decline in boater satisfaction, perception of overall upkeep of the waterways and boaters likely to advocate for the Trust.

The KPI of overall satisfaction has dropped to 61% (from 70% in 2018).

Analysis of the free text comments suggests these issues which may explain the drop in boater satisfaction;

- Implementation of the boat licence review findings, including reduction of the prompt payment discount (from 10% to 5% from April 19) and introduction of the wide beam surcharge (satisfaction amongst wide beam boaters is well below other boater groups).
- The perception that the Trust is moving away from boating towards wellbeing. Frequent comments refer to the repositioning of the Trust and indicate that many boaters don't understand the reason why the Trust has repositioned it's focus.
- Concern that the Trust is not investing in planned maintenance Unplanned stoppages and failed assets are referenced by many as an indication that the Trust is not carrying out day to day and pro-active maintenance. Many people also point to the cost of re-branding in 2018 and comment that they feel the money involved would have been better spent on maintaining the network.

The overall sample size and response group is broadly similar to last year so we do not believe that the drop in satisfaction is related to this.

1. Method:

An online survey, based on the reputational aspects of the previous BOV survey was the primary method of data collection.

The survey was distributed to random sample of approximately a third of all licence holders.

Those for who the Trust her held an email address were sent a link to the online survey through a personal email. The emails included a unique URL for each respondents

Boaters for whom the Trusts doesn't hold an email address were sent a link to the survey either through a:

- Text message including link to online survey, if the Trust held a mobile number
- Letter including link to online survey but with paper version of the survey

2. Dates:

Online survey ran from 10th April to 1st May, 2019

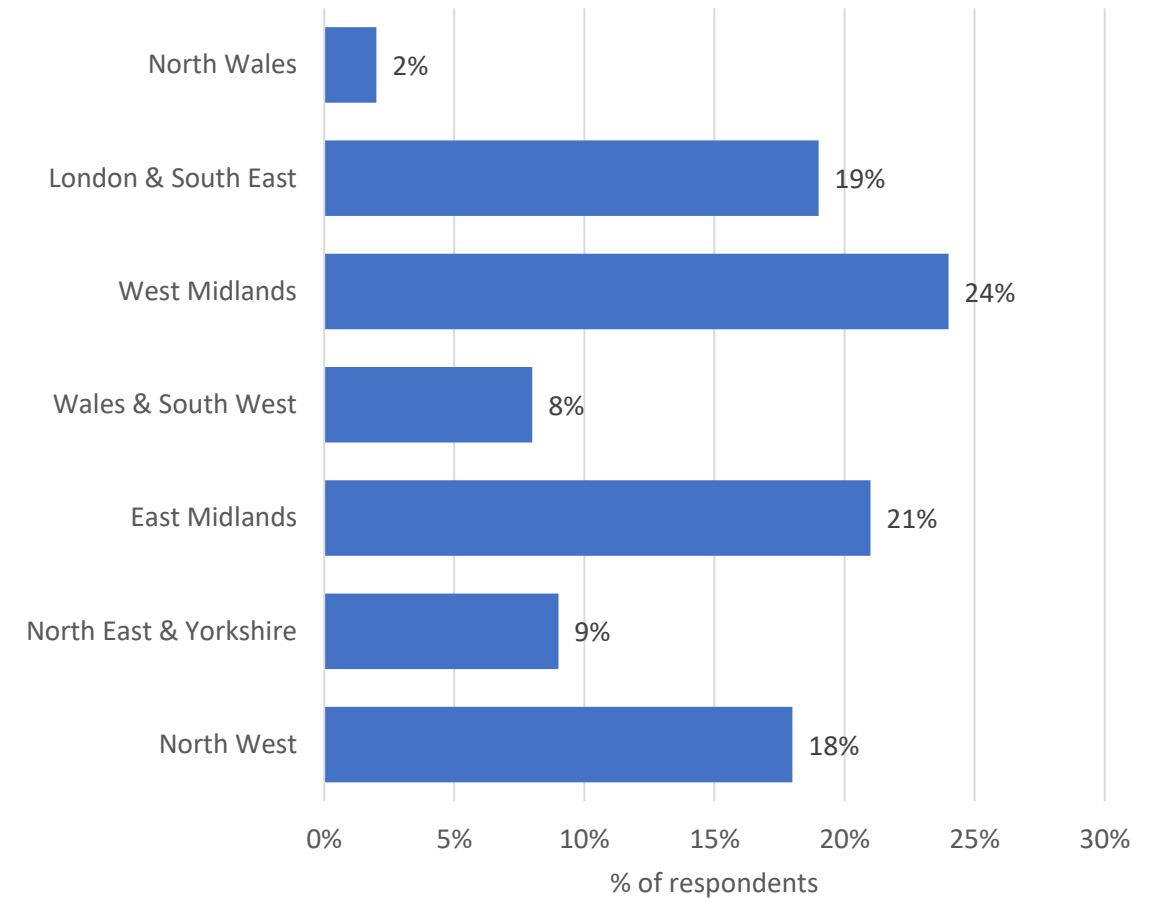
3.

Channel	Sample size	Response	Response rate
Core online survey sent by email	8,872	1,163	13%
Text message	MS to add	8	
Letter – online version	MS to add	2	
Letter – paper version	MS to add	20	
Total		1193	

Sample characteristics

- Respondents were asked where they had done most of the boating in the past year. The regional spread is shown in the chart. Due to boundary changes there is no easy comparison to previous years.

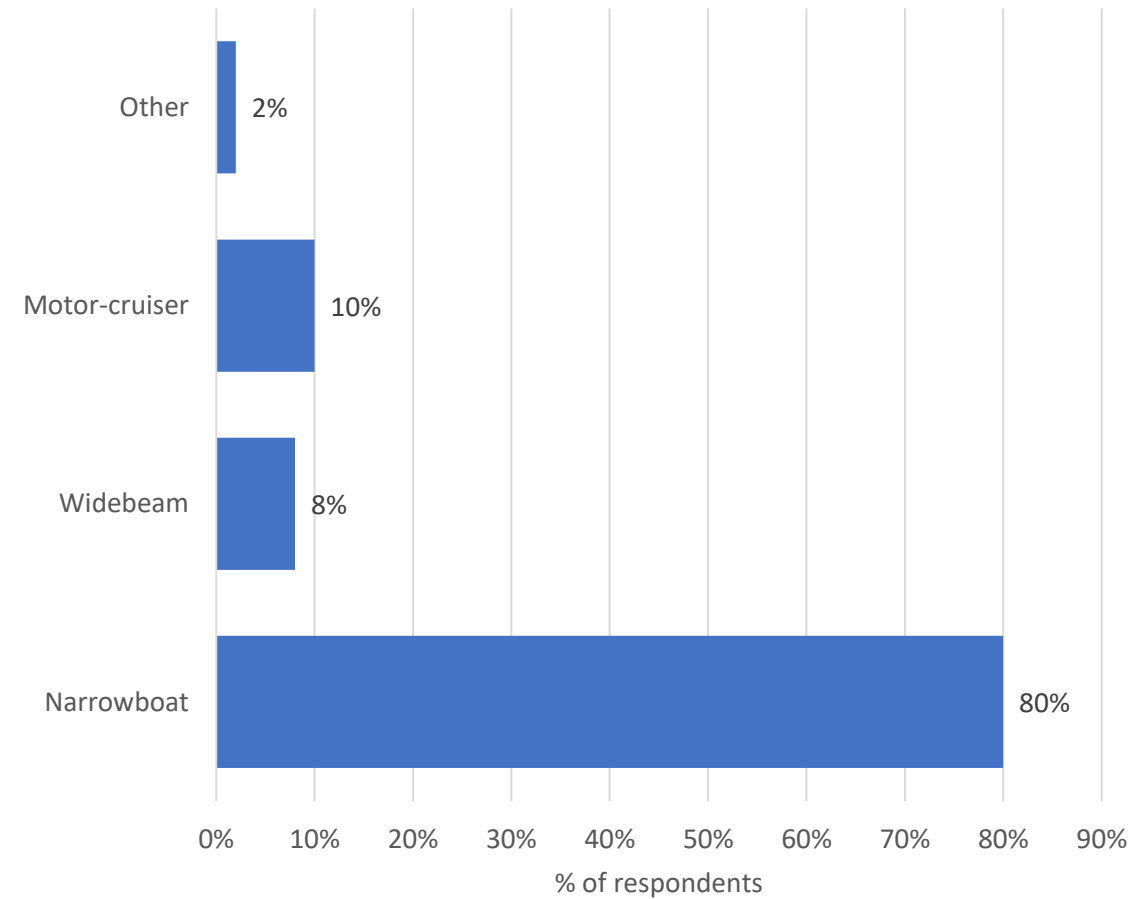
Q15 Please enter the region in which you did most of your boating in the past 12 months



Type of boat

- The overwhelming proportion of respondents owned a narrowboat. The split is similar to 2018 when 79% owned a narrowboat and 6% a widebeam.

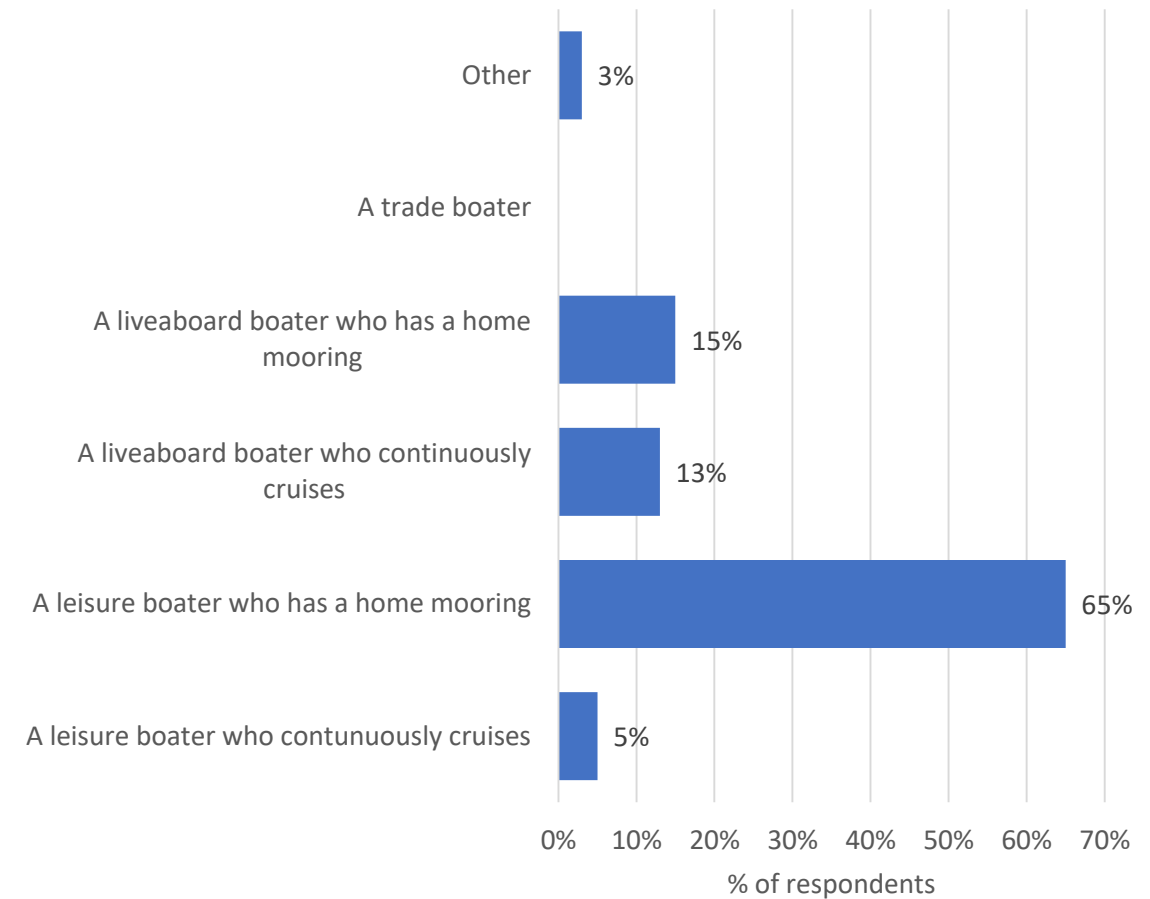
Q16 Is your main boat a...



Type of boater

- Although structured in a slightly different way to previous years in order to provide greater clarity similar results were attained when asking about type of boater.
- 28% of the sample said they lived on their boat, either on a mooring or as a continuous cruiser. This is fairly similar to 2018 when 23% said they lived on the boat permanently and a further 12% said they did so temporarily.
- Note – Business Boats are not included in this survey, so boaters that self-identify as trade boaters are not formally registered as business boats.

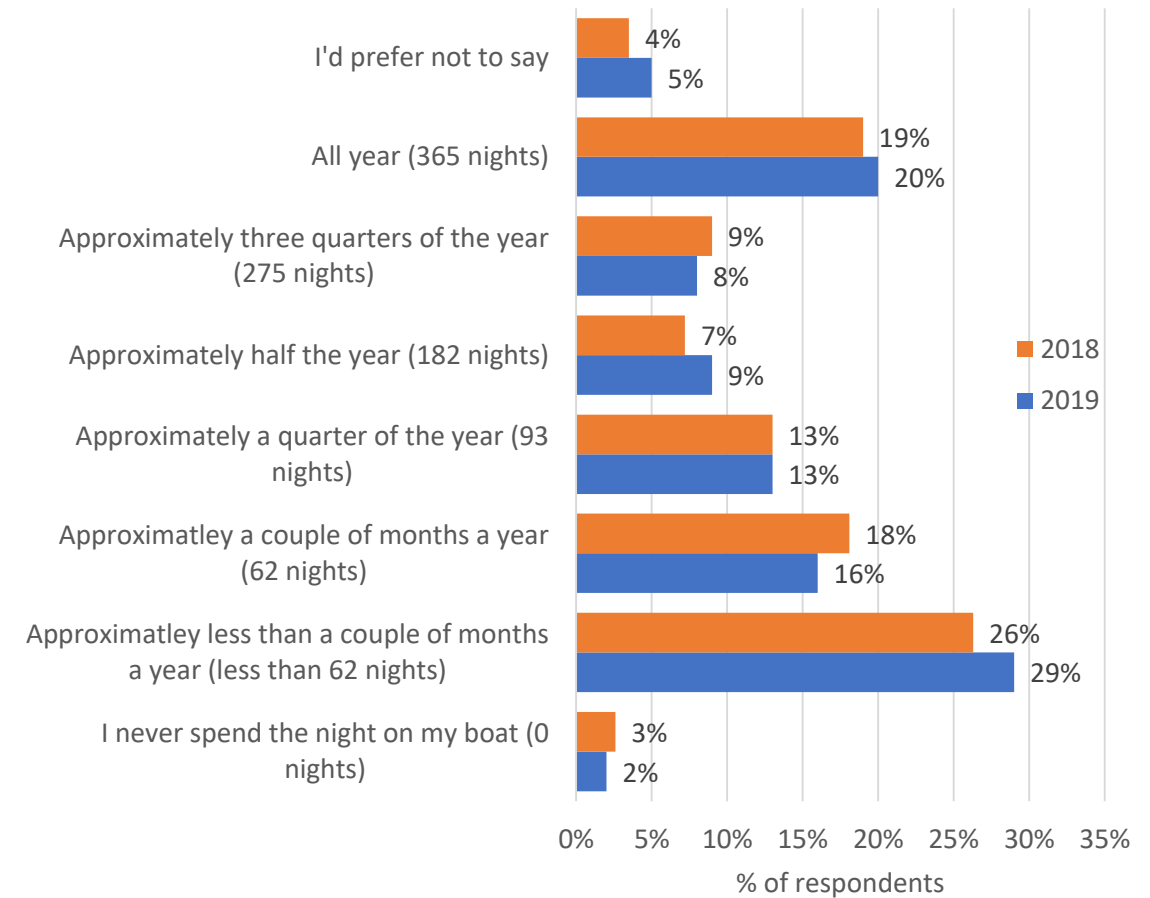
Q18 Please select (from the list below) the one which best describes you



Nights spent on the boat

- There is little change on 2018 when respondents were asked about the number of nights spent on the boat. Whilst 37% spent more than half the year on their boat 45% spent only a couple of months or less on their boat.

Q17 How many nights a year do you usually spend on your boat?

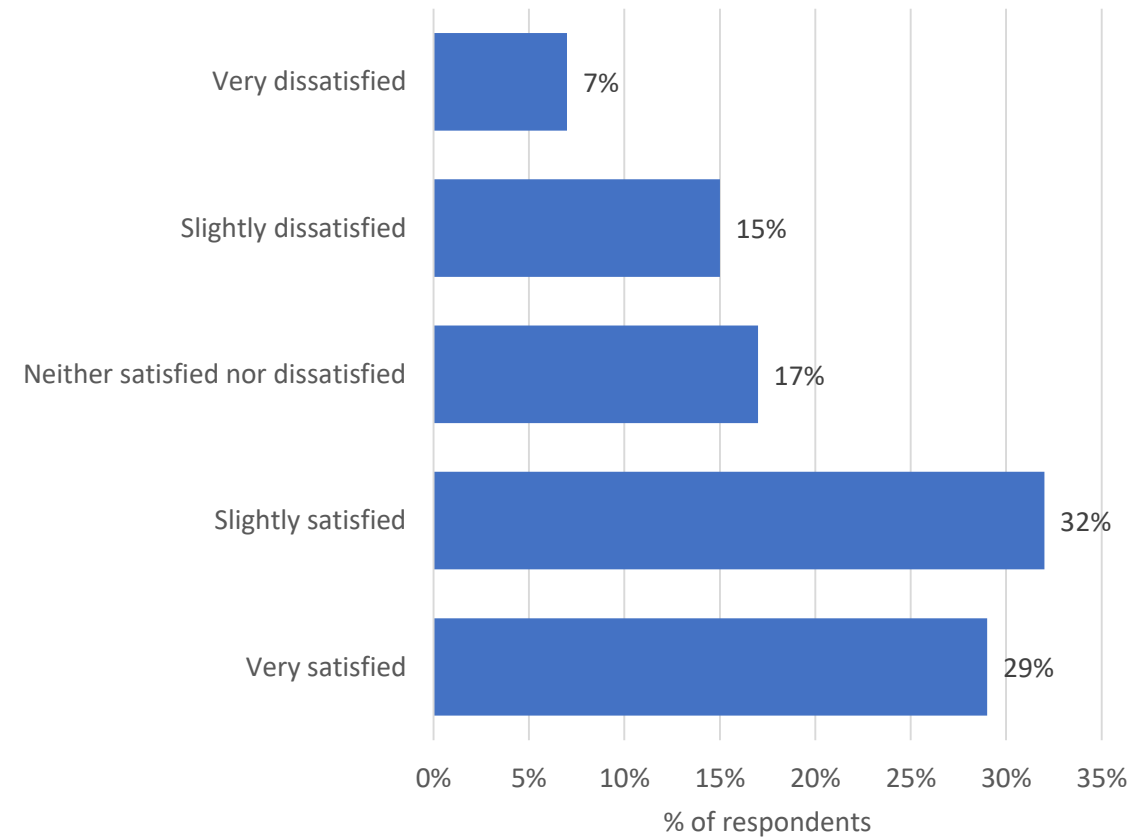


KPIs

- Overall satisfaction has drop from a high point in 2017. In 2019, only 61% of respondents agreed they were satisfied with their experience compared to 76% in 2017.
- Satisfaction appears to be greatest in the West Midlands and East Midlands, and perhaps notable amongst continuous cruisers too.
- Those with a narrowboat are much satisfied than either those with widebeams or motor cruisers.

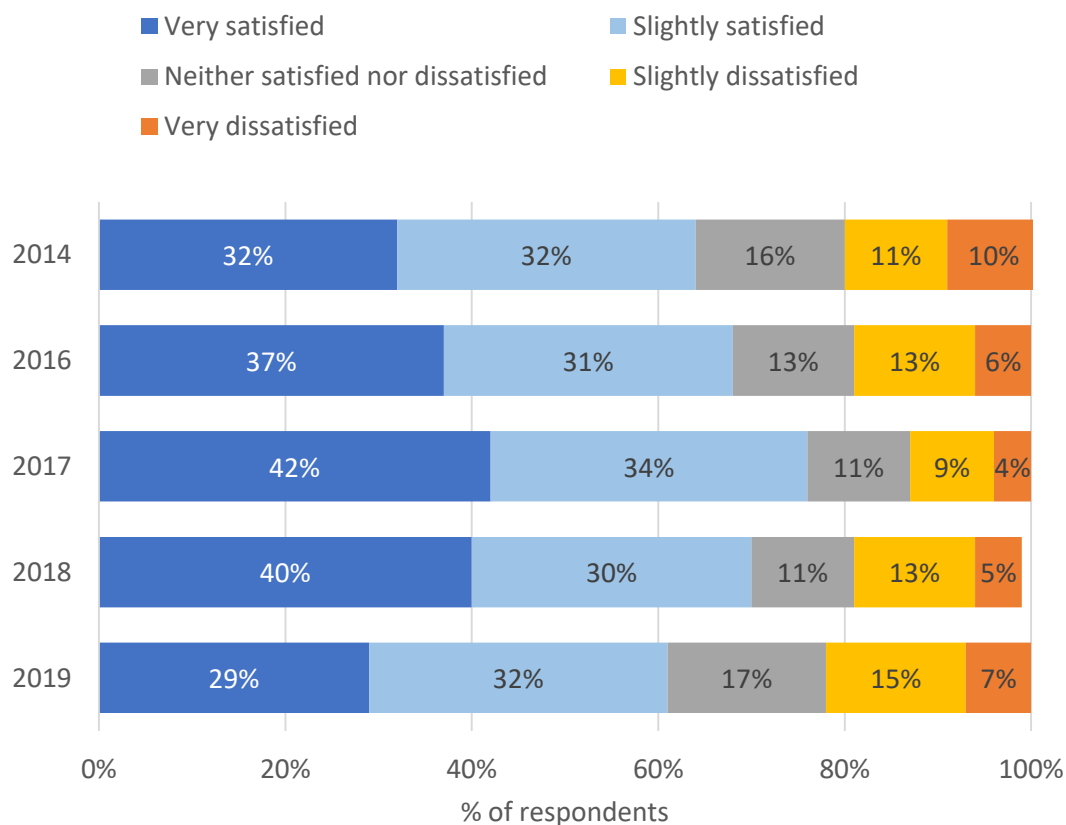
Overall satisfaction

Q13 Thinking about your boating on the Canal & River Trust's canals and rivers over the past year, overall, how satisfied were you with your experience?

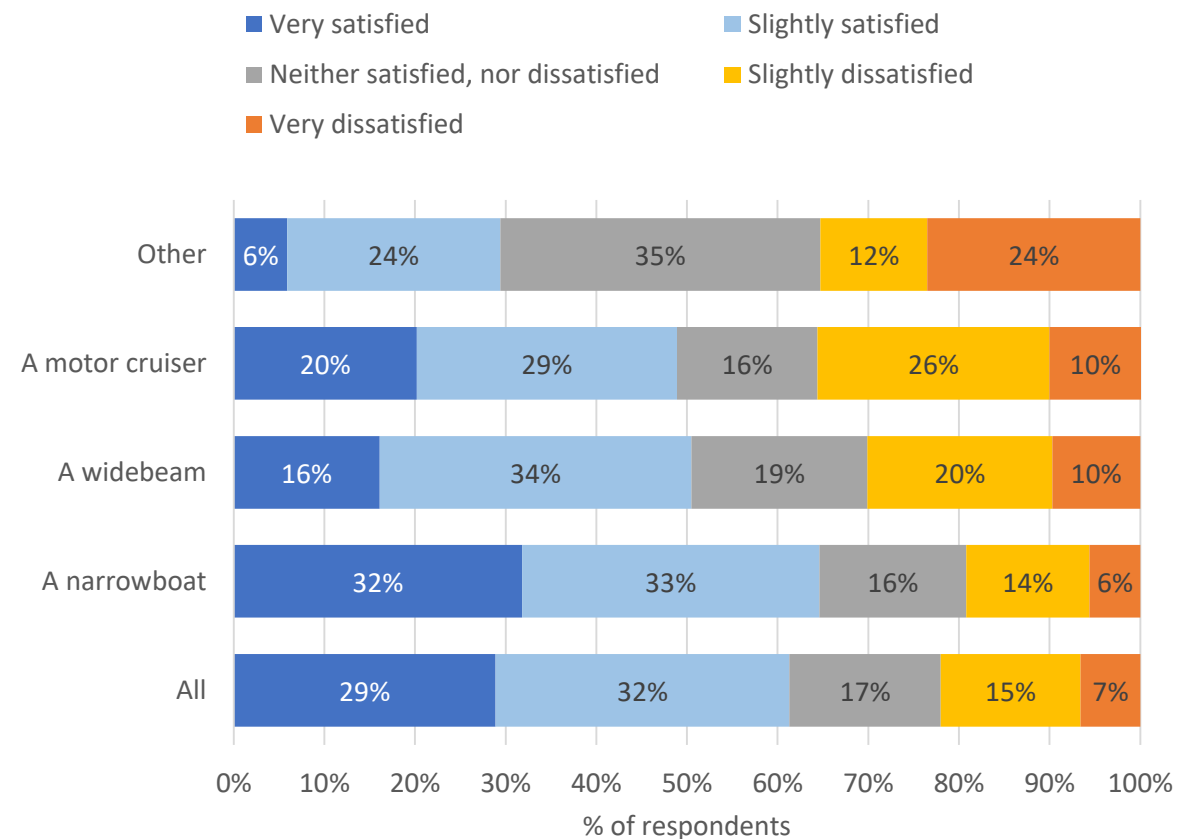


Overall satisfaction

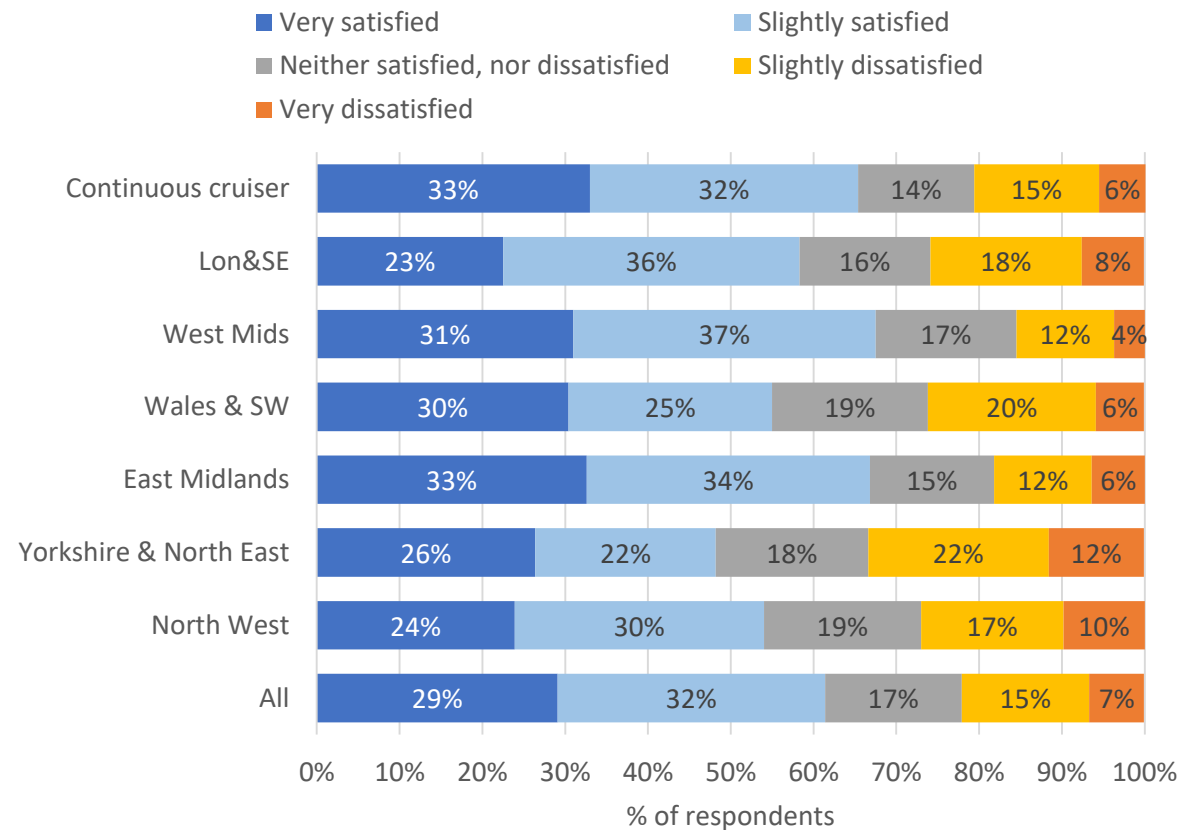
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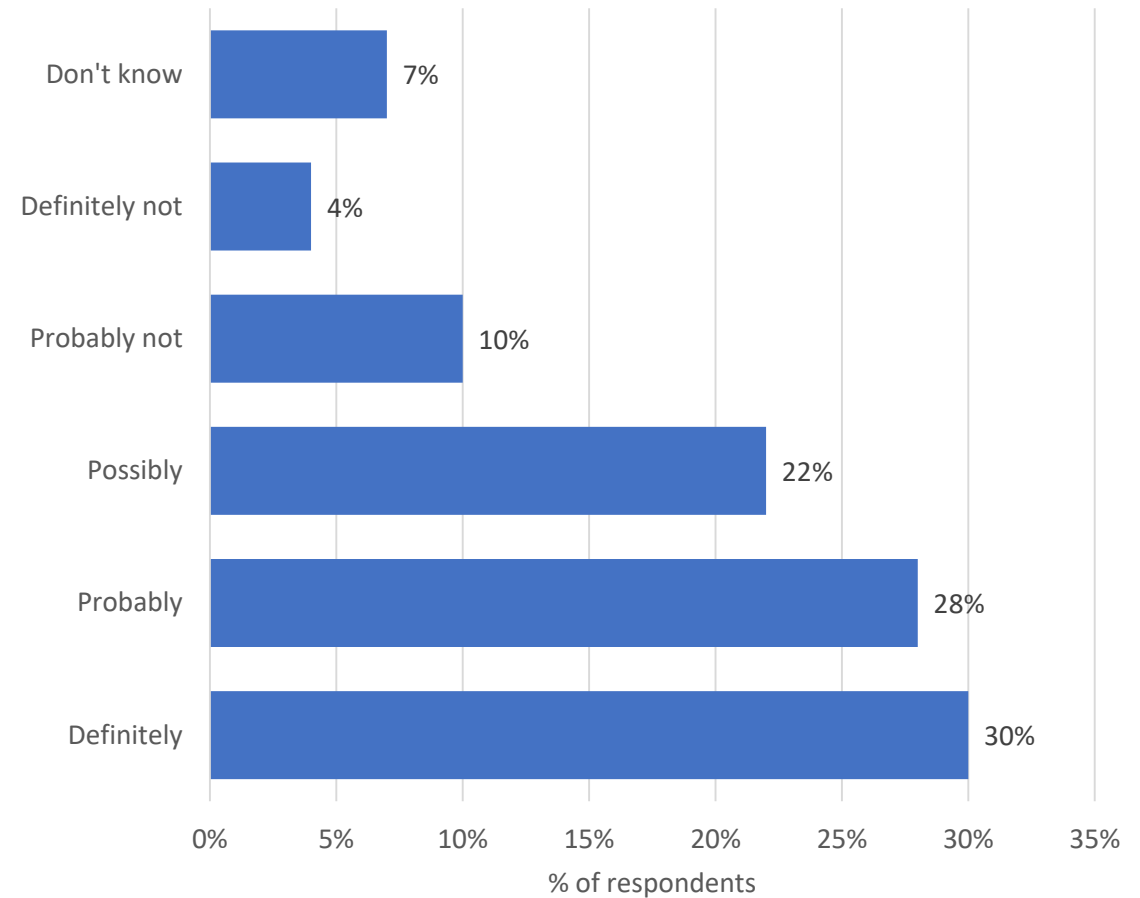
Q13 Thinking about your boating on the Canal & River Trust's canals and rivers over the past year, overall, how satisfied were you with your experience?



- After remaining relatively constant over the past few years scores for propensity to recommend have also declined in 2019 with only 58% saying they would definitely or probably recommend the waterways in their area to other boaters compared to a high of 78% in 2017.
- There is little variation between regions, most notable is the lower scores in London & SE and also Yorkshire & NE.
- Those with narrowboats are much more likely to recommend the local waterways to other boaters than either those with widebeams or motor cruisers.

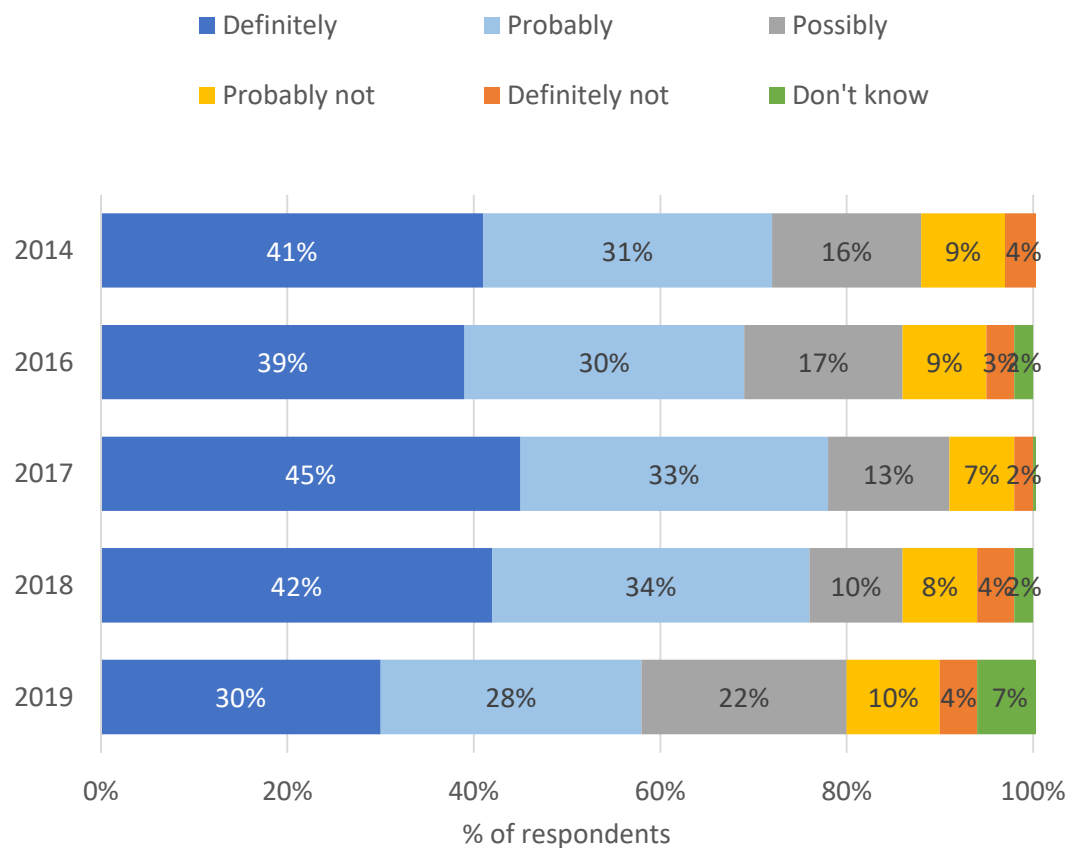
Propensity to recommend

Q14 How likely are you to recommend the Canal & River Trust waterway to other boaters?

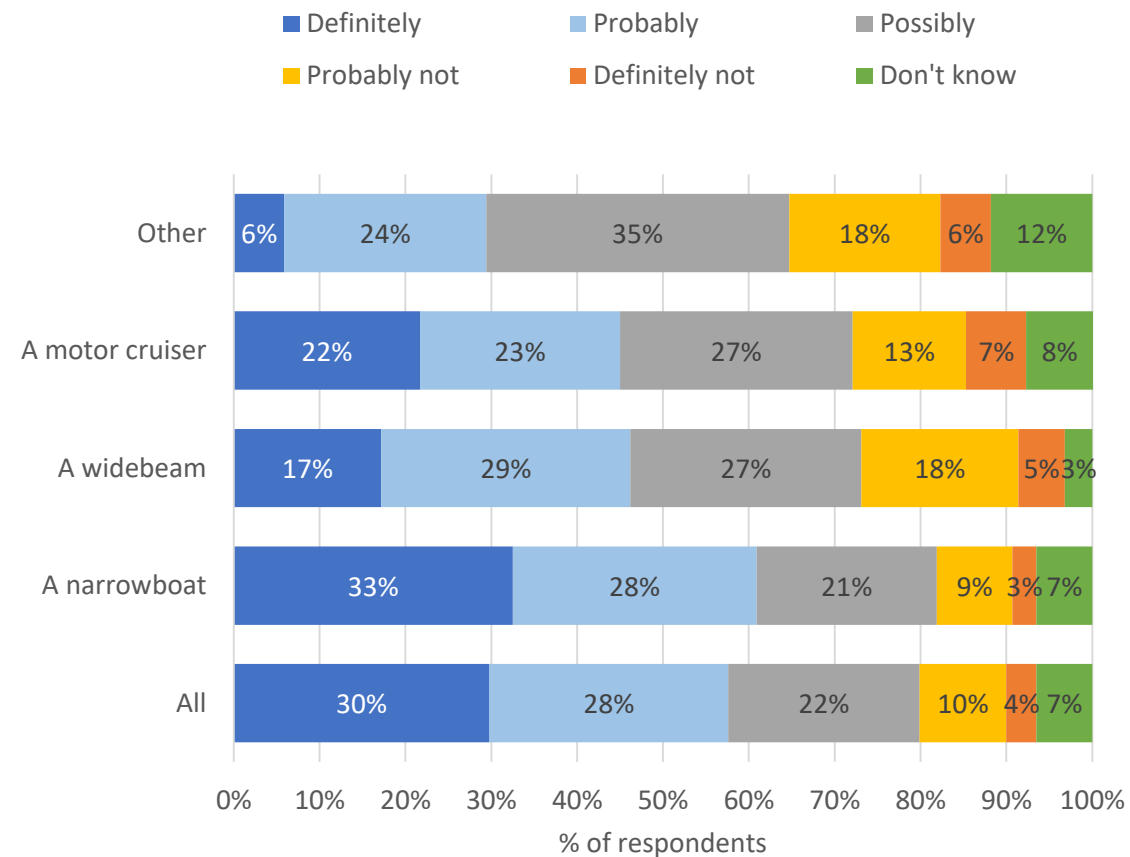


Propensity to recommend

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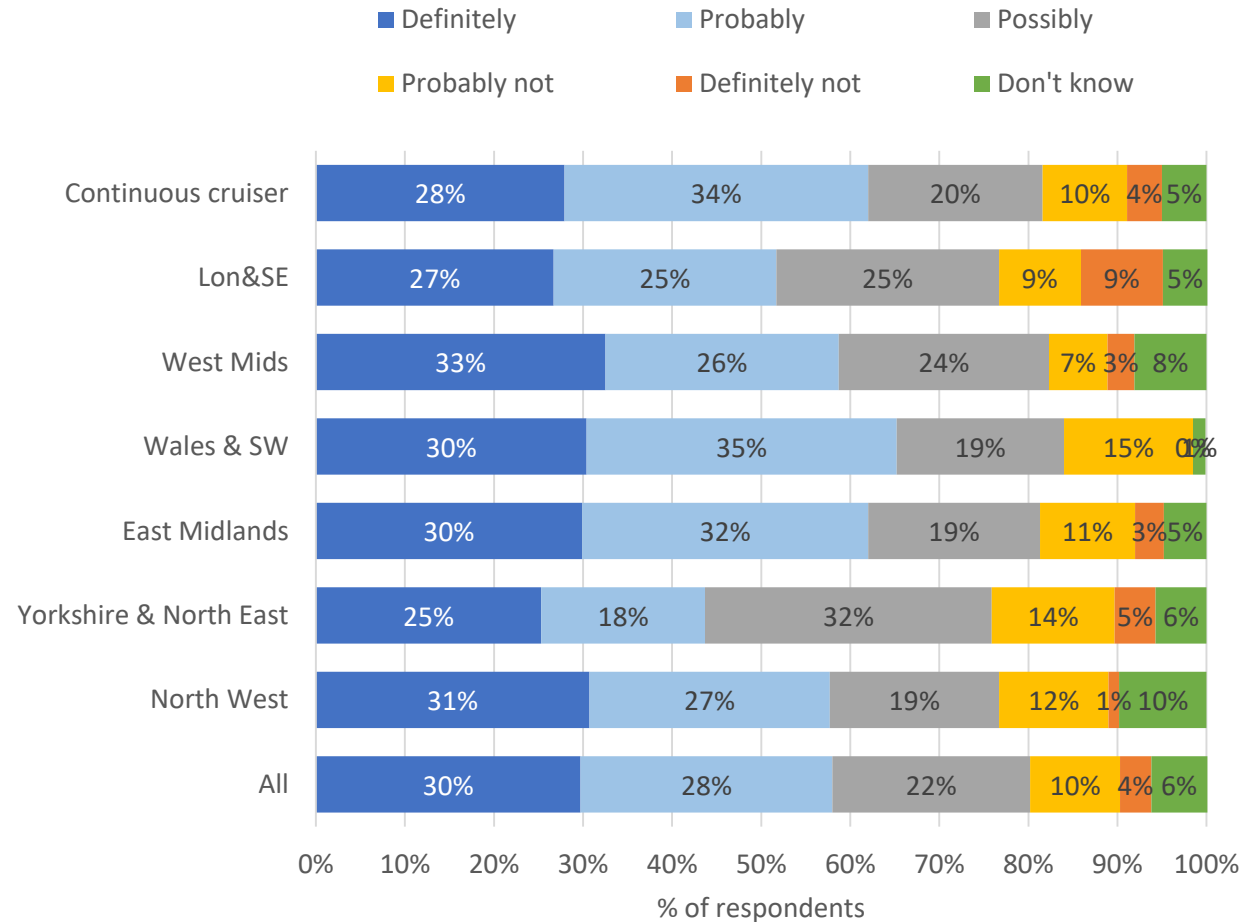


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Propensity to recommend

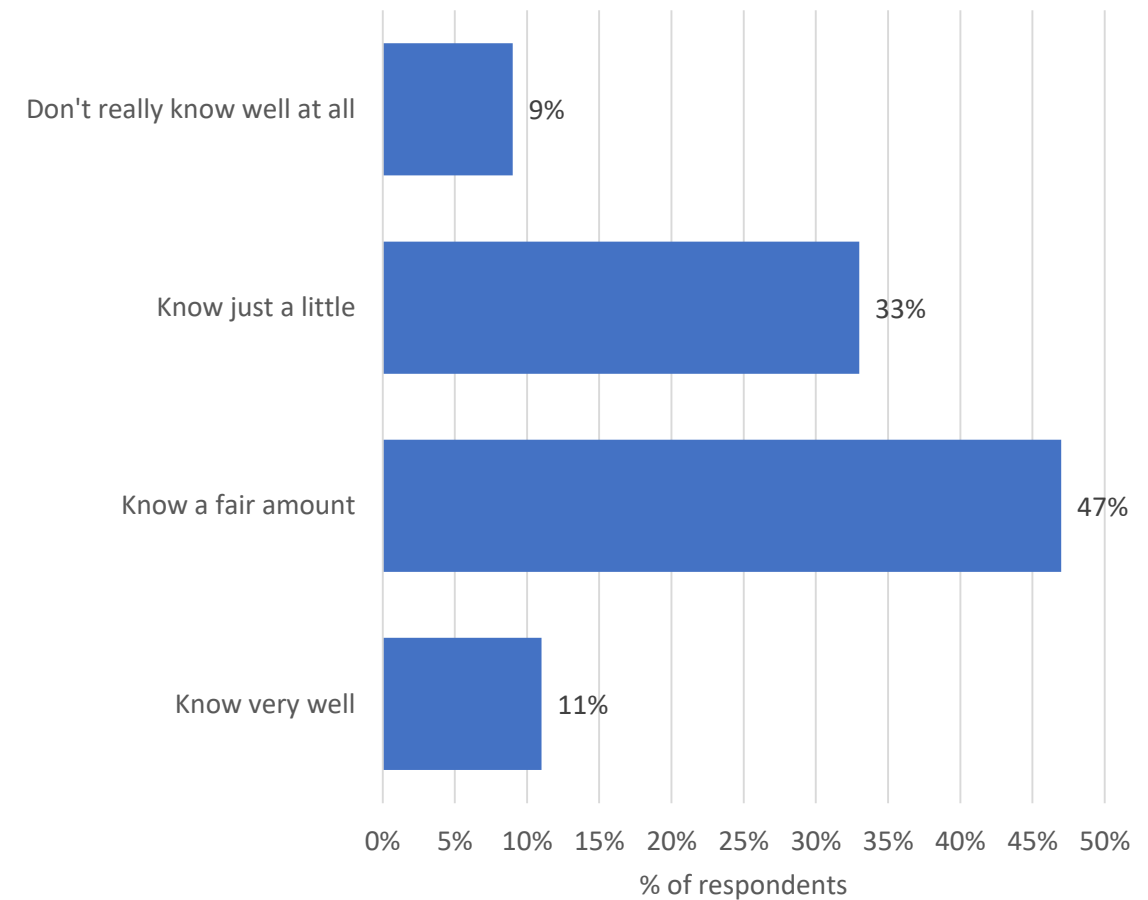
Q14 How likely are you to recommend the Canal & River Trust waterway to other boaters?



Familiarity

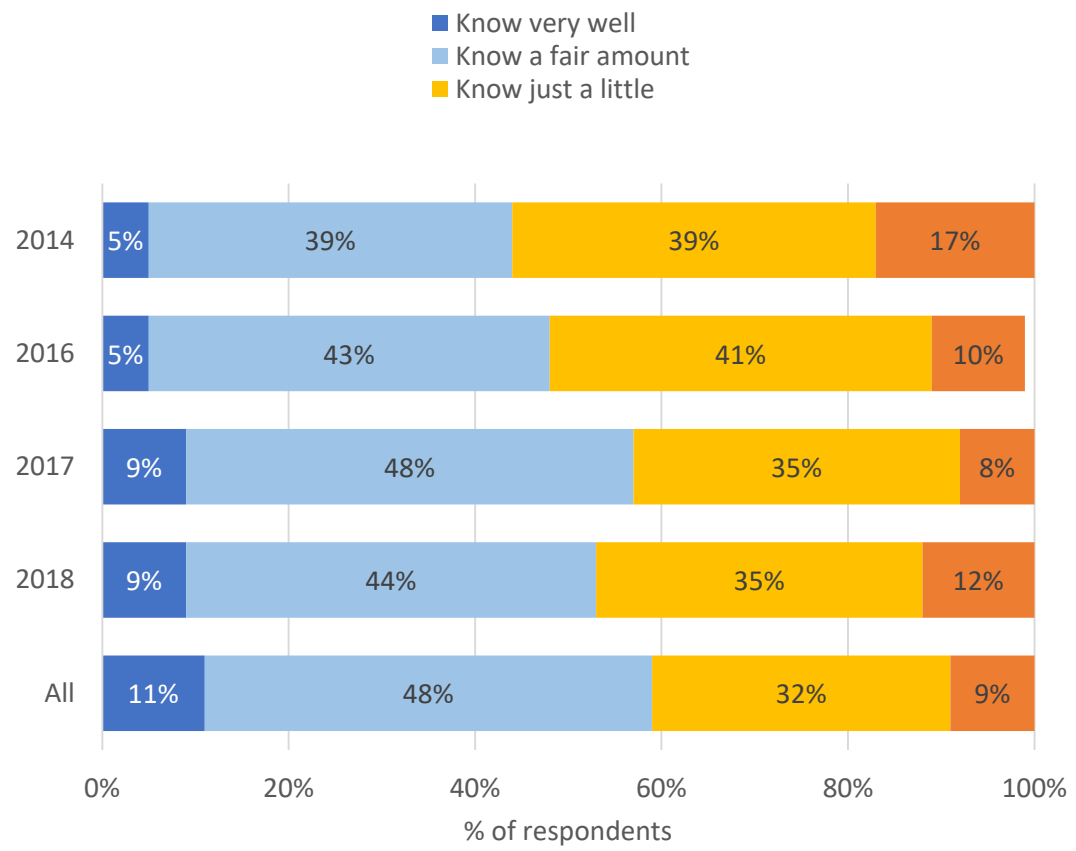
- Familiarity with the Trust continues to slowly increase – 59% of respondents said they know either a fair amount or a lot about the Trust.
- There is little variation between most regions, one point to note is the apparent lack of knowledge about the Trust in the East Midlands and Wales & SW. Continuous cruisers also show slightly less familiarity with the Trust than other boaters.

Q3 Firstly, how well do you feel you know the Canal & River Trust as an organization i.e. not its waterways?

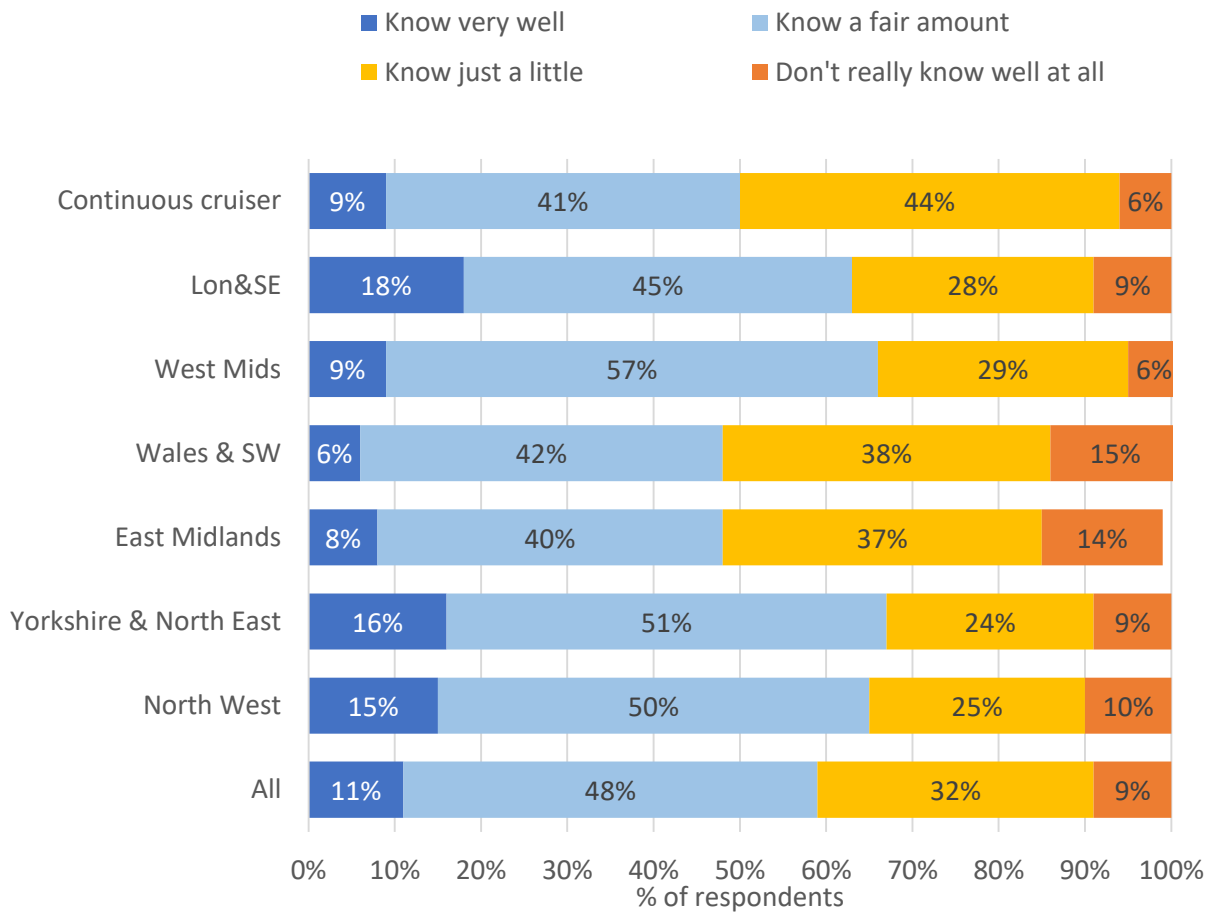


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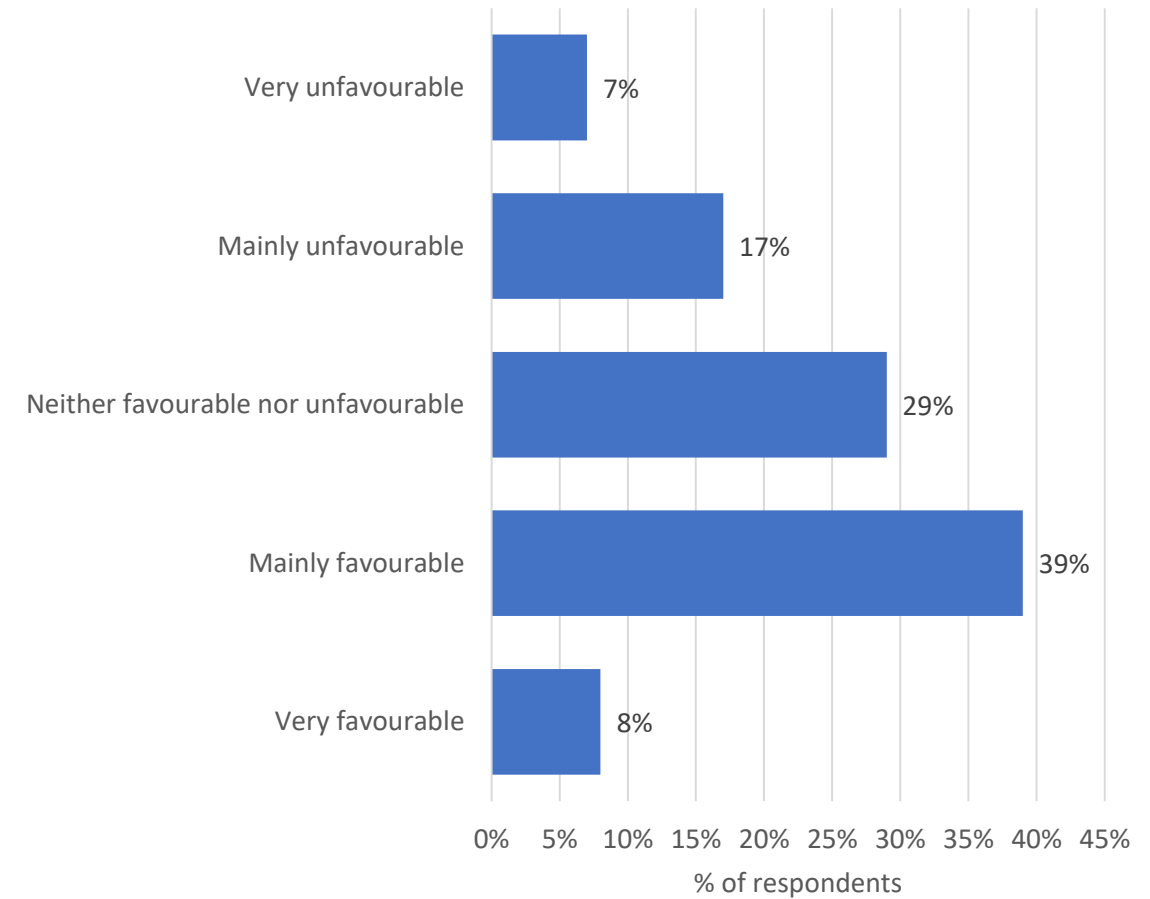


Base: All respondents (2019 = 1,193)

- The overall impression of the Trust has declined – 47% of respondents said their impression was favourable or very favourable compared to a high of 59% in 2017.
- London & SE stands out with lower favourable scores compared to other regions.

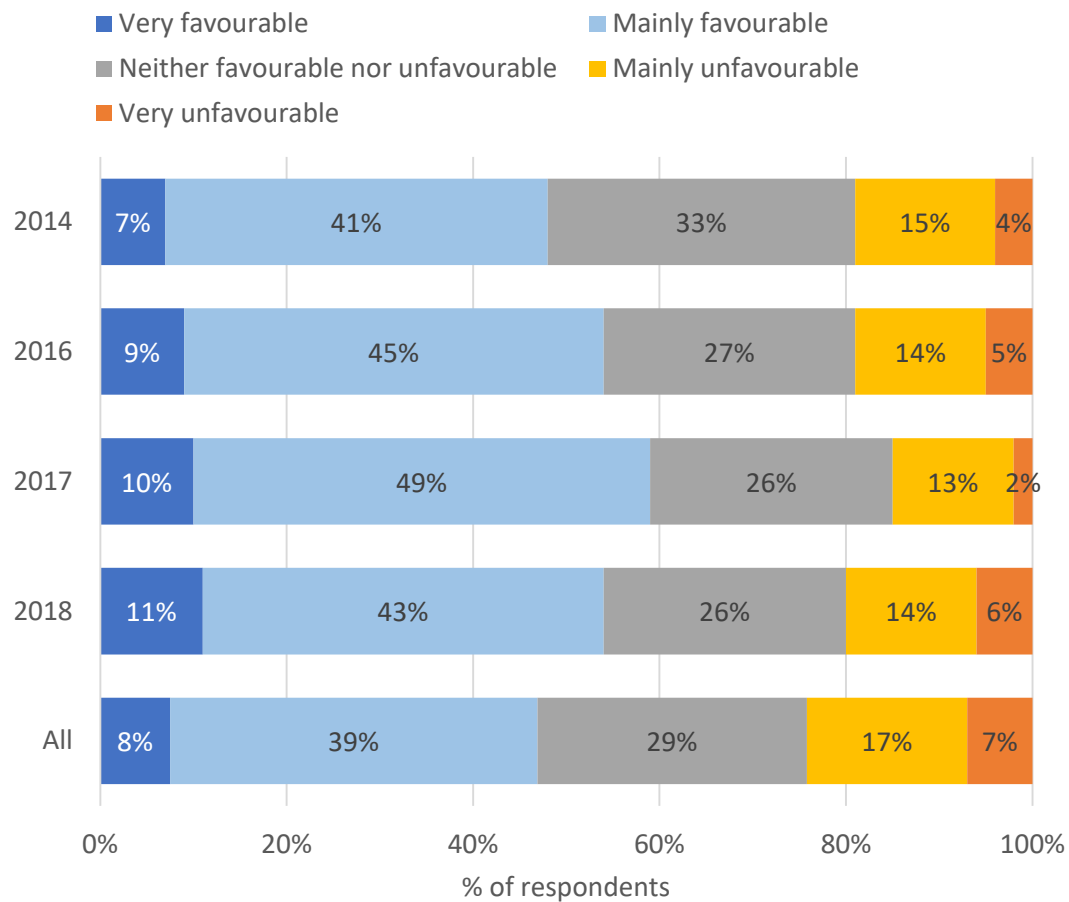
Favourability

Q4 How favourable or unfavourable is your overall opinion or impression of the Canal & River Trust?

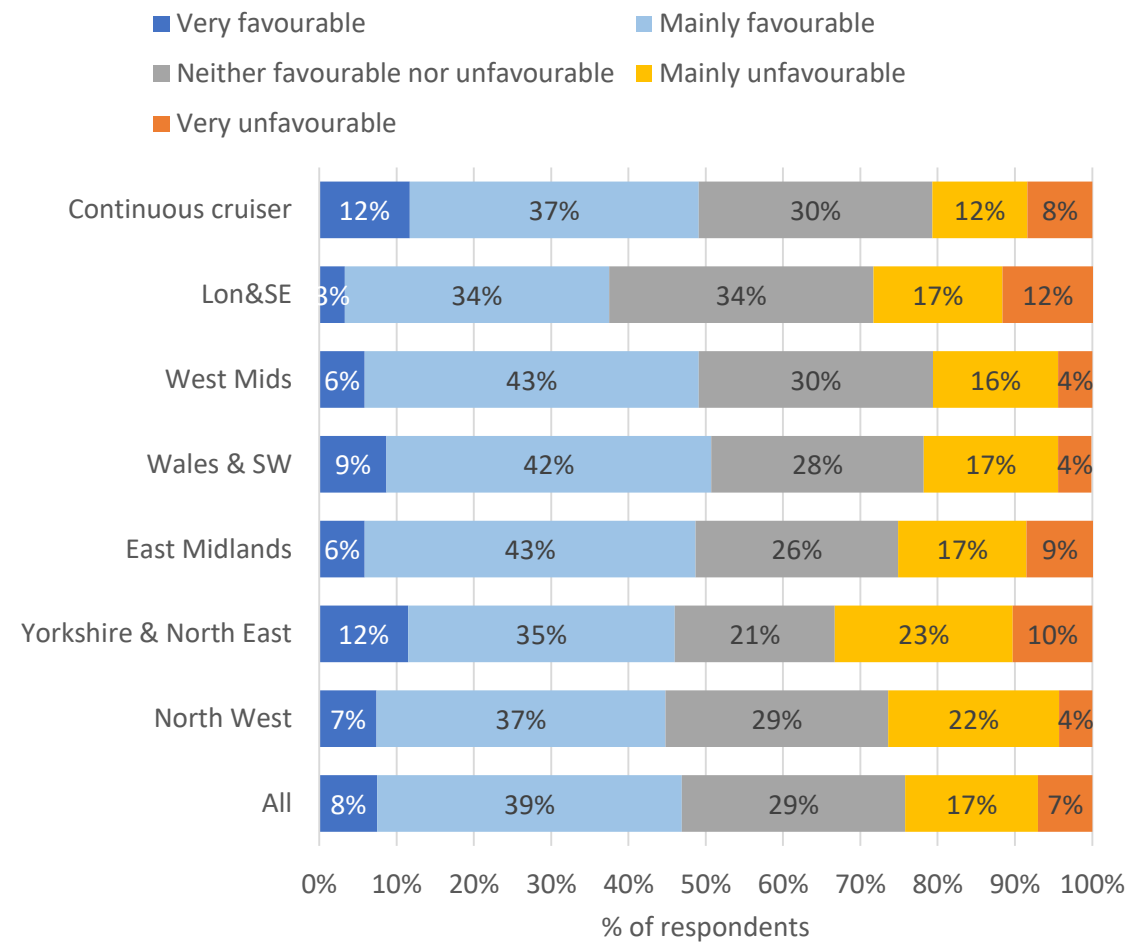


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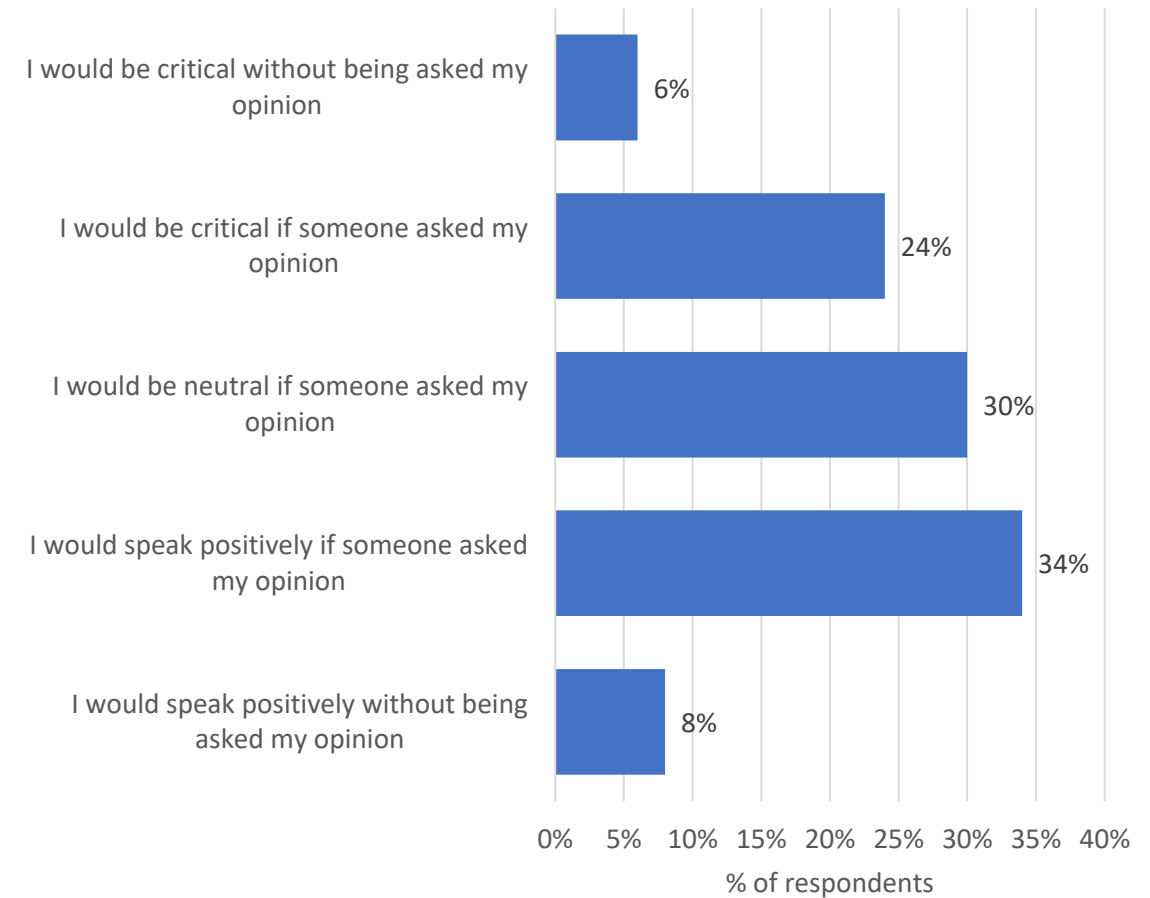
Q4 How favourable or unfavourable is your overall opinion or impression of the Canal & River Trust?



Advocacy – the Trust

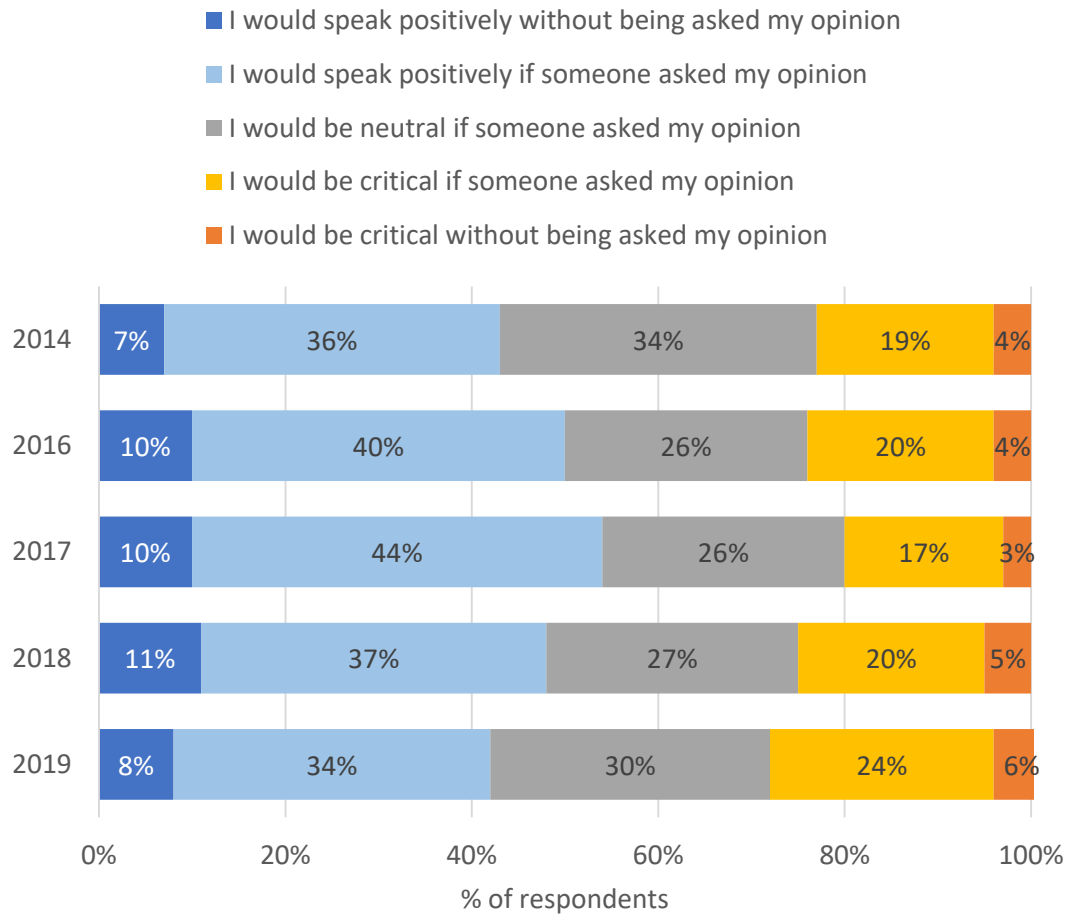
- Just under half (47%) said they would speak positively about the Trust in 2019 compared to 54% in 2017.
- Respondents from London & SE and Wales & SW were the least likely to be advocates for the Trust. Again, continuous cruisers show little variation from those with home moorings.
- Whilst there is little difference between those with narrowboats and motor-cruisers, those with widebeams appear much less likely to be advocates.

Q5 To what extent would you speak positively or critically about the Canal & River Trust?

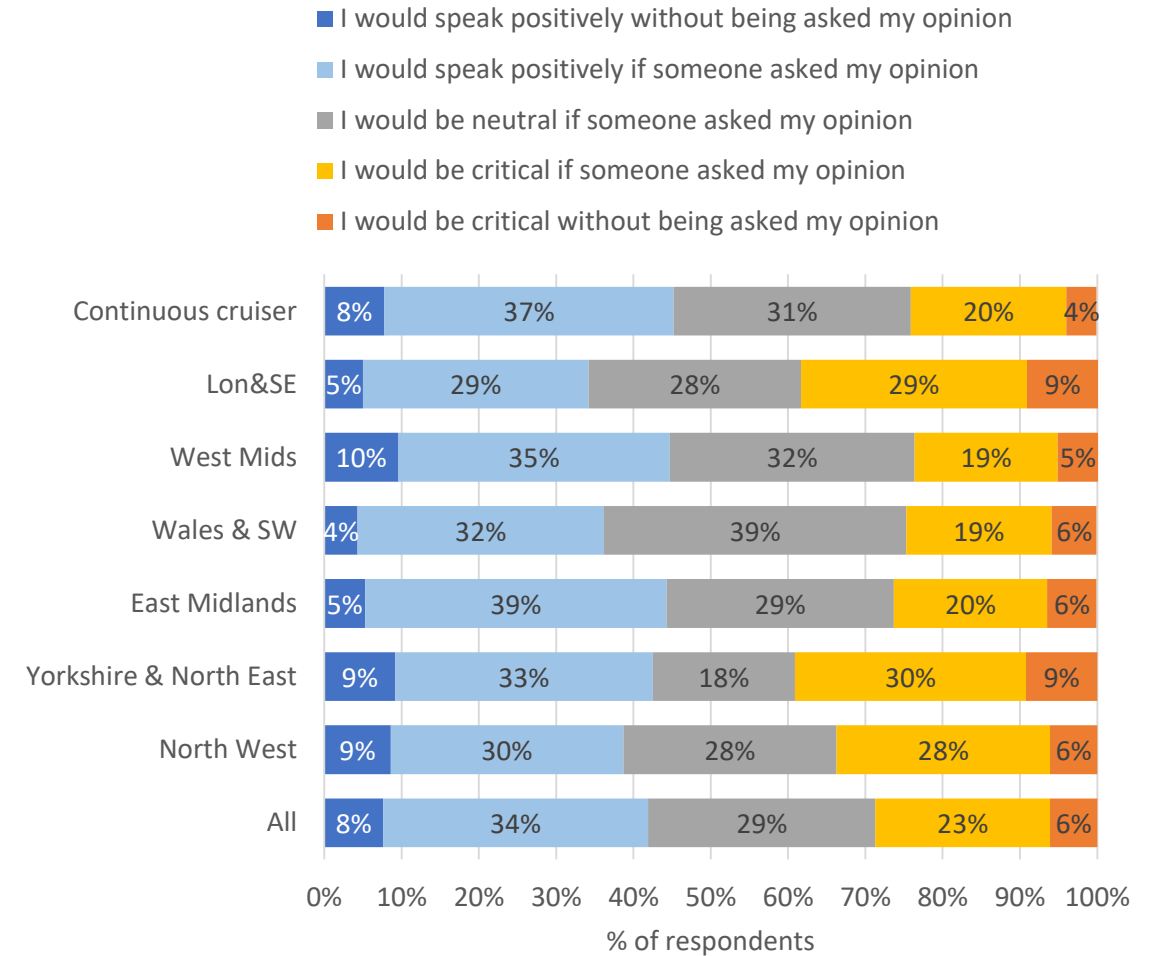


Advocacy – the Trust

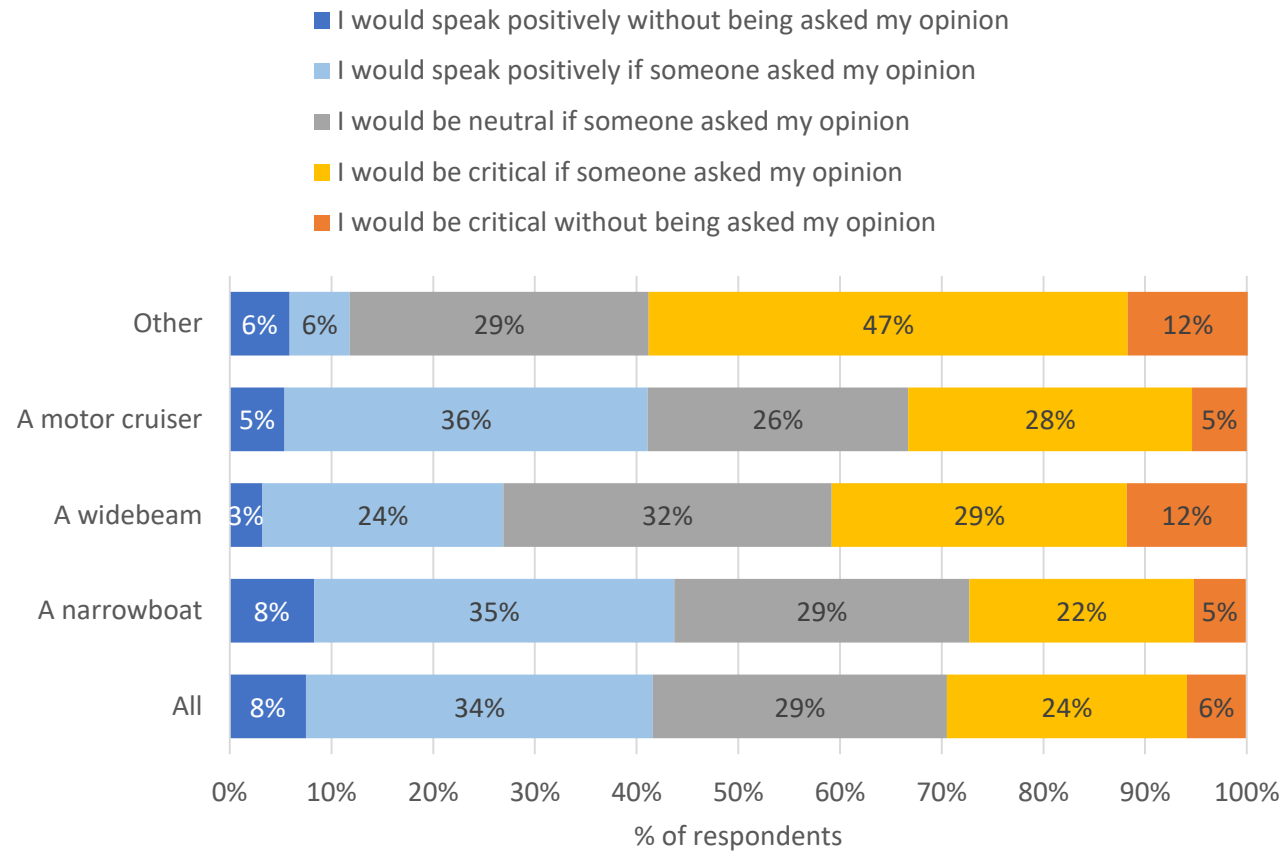
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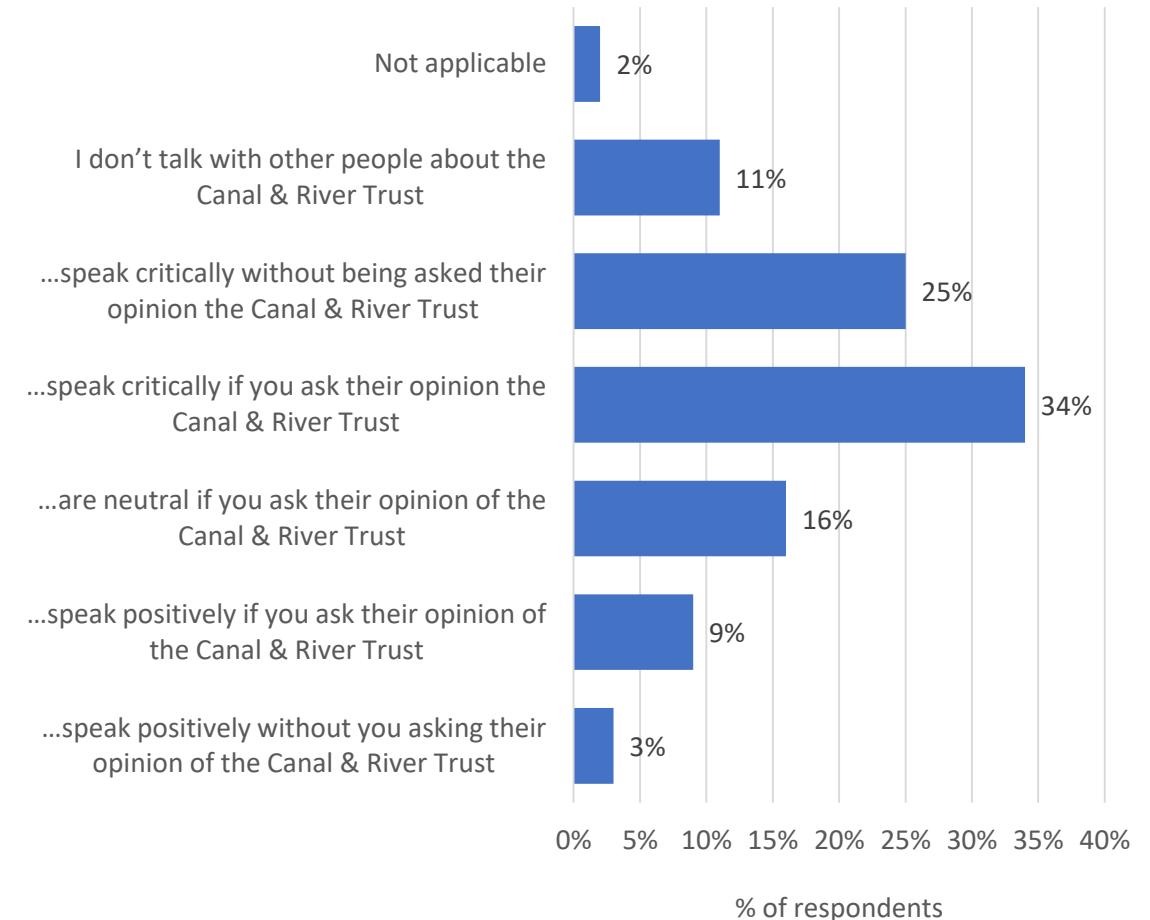
Q5 To what extent would you speak positively or critically about the Canal & River Trust?



- When asked about the conversations they have with other boaters it is clear that the overwhelming tone is negative with 59% saying they hear other people being critical of the Trust and only 12% saying they hear people being positive.

Advocacy – conversation

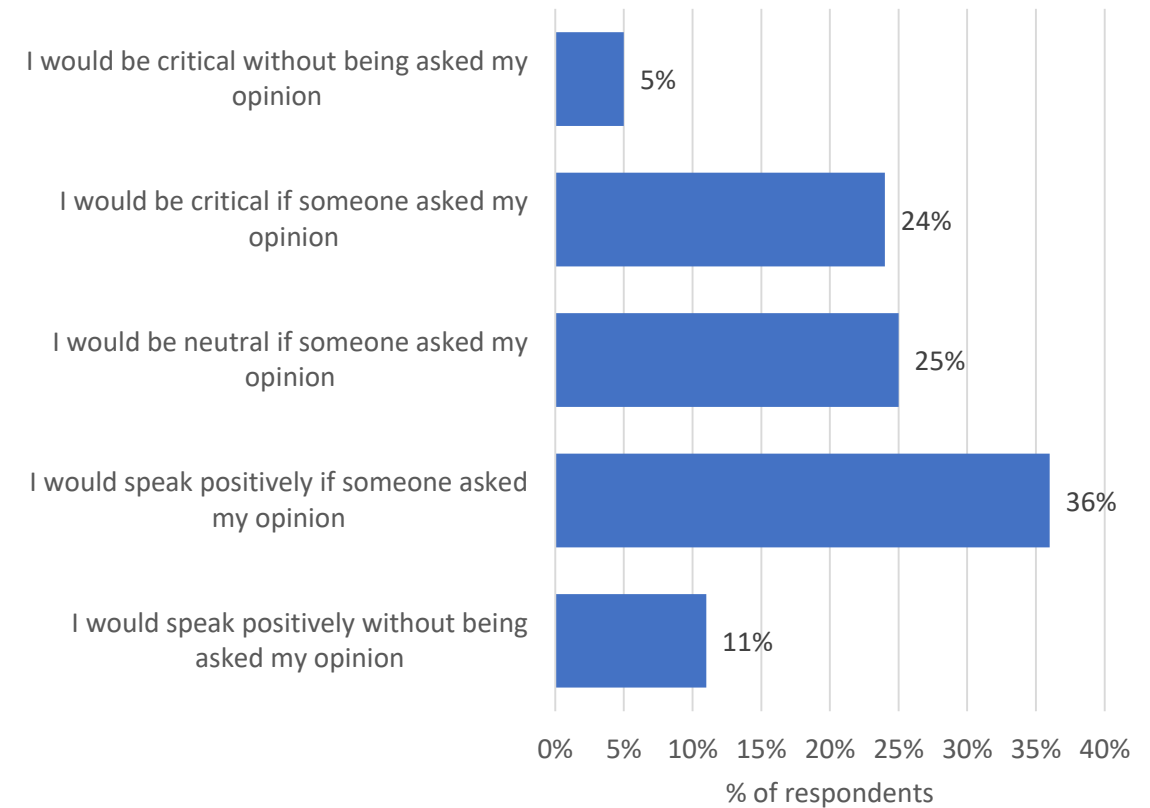
Q6 Thinking about occasions when you may talk with other people about the Canal & River Trust, do people mainly...



Advocacy – the waterways

- The tone changes when asking respondents about their advocacy for the waterways themselves – 47% say they would be advocates for the waterways and only 29% say they would be critical.

Q7 To what extent would you speak positively or critically about the waterways the Canal & River Trust look after?

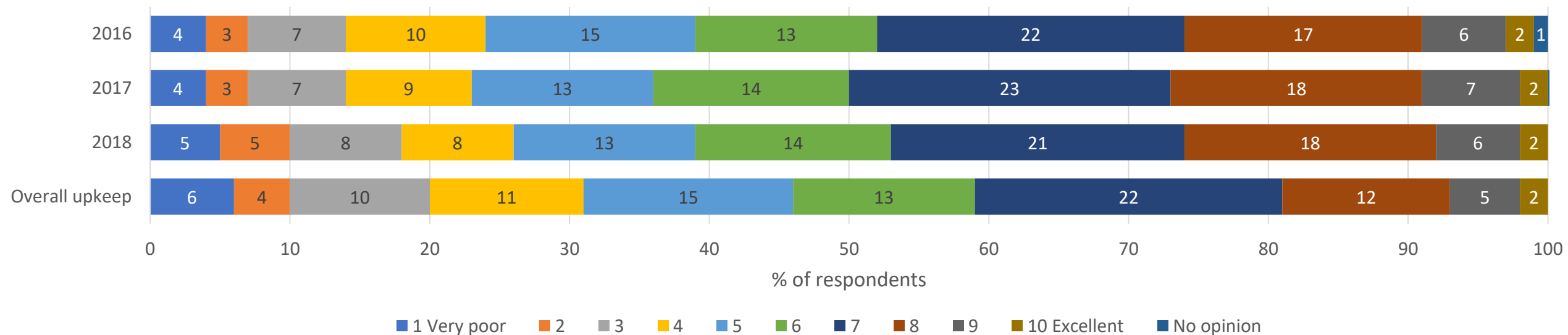


Overall upkeep

Overall upkeep

- A more operational measure, included in the survey for consistency, is perceptions of overall upkeep. This has been measured on a 10-point scale for the past four years (before then it was measured on a 5-point scale so not comparable).
- Like the reputational measures reported in the earlier slides, perceptions of overall upkeep have seen a decline. In 2019 only 19% gave a score of 8 or more out of 10, compared to 2017 when this stood at 27%. Conversely, in 2017 only 23% gave a score of 4 or less but this has increased to 31% in 2019. Has there been a real decline in the standard of upkeep?

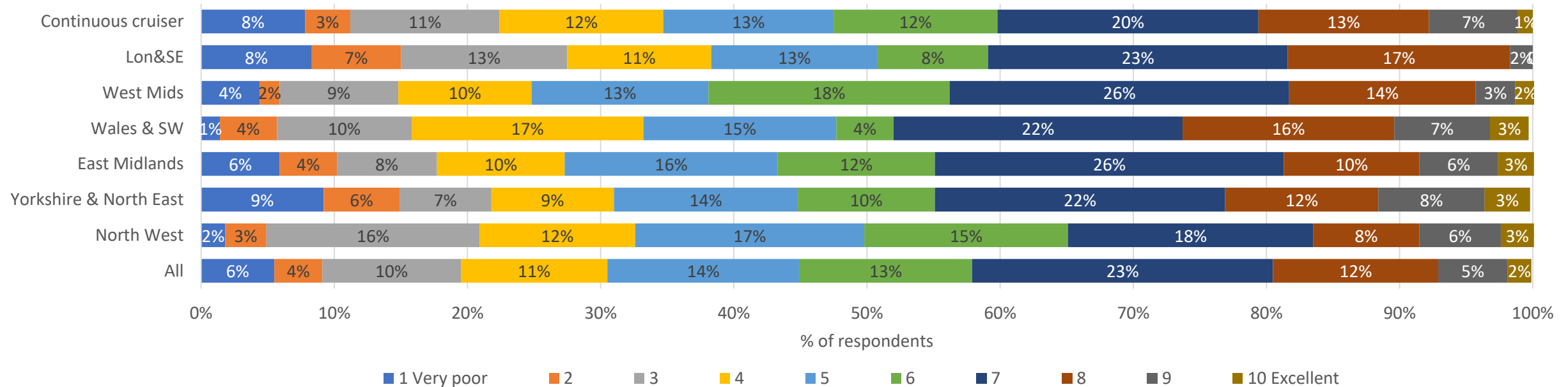
Q12 Please indicate, using the scale provided, how you rate the overall upkeep of the Canal & River Trust's waterways



Overall Upkeep

- Wales & SW and Yorkshire & NE receive the greatest proportion of scores of 8 or more out of 10. Yorkshire & NE also receive a fairly high proportion of poor scores too (1 or 2 out of 10) suggesting perhaps upkeep is not consistent across the region. London & SE also receive a higher proportion of poor scores compared to other regions – 28% give a score of 3 or less out of 10 compared to the overall score of 20%.

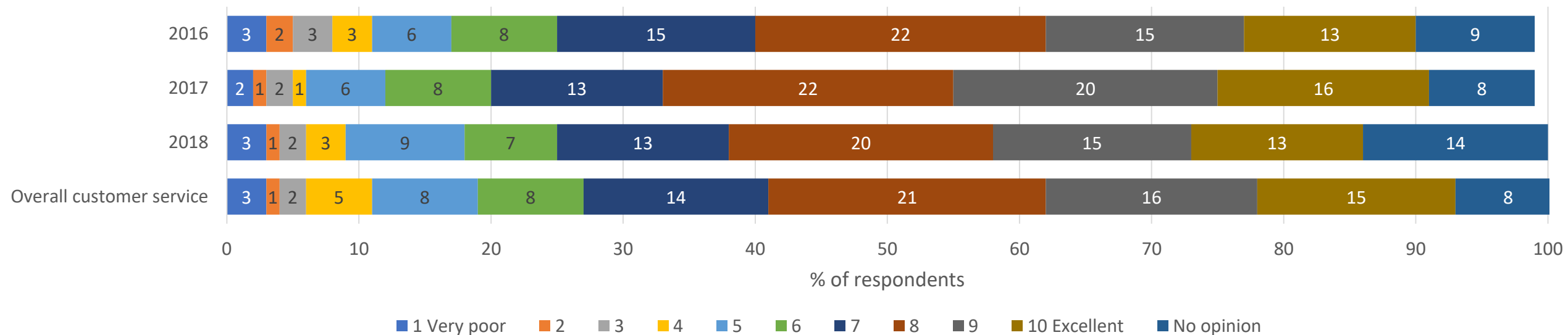
Q12 Please indicate, using the scale provided, how you rate the overall upkeep of the Canal & River Trust's waterways?



Customer service

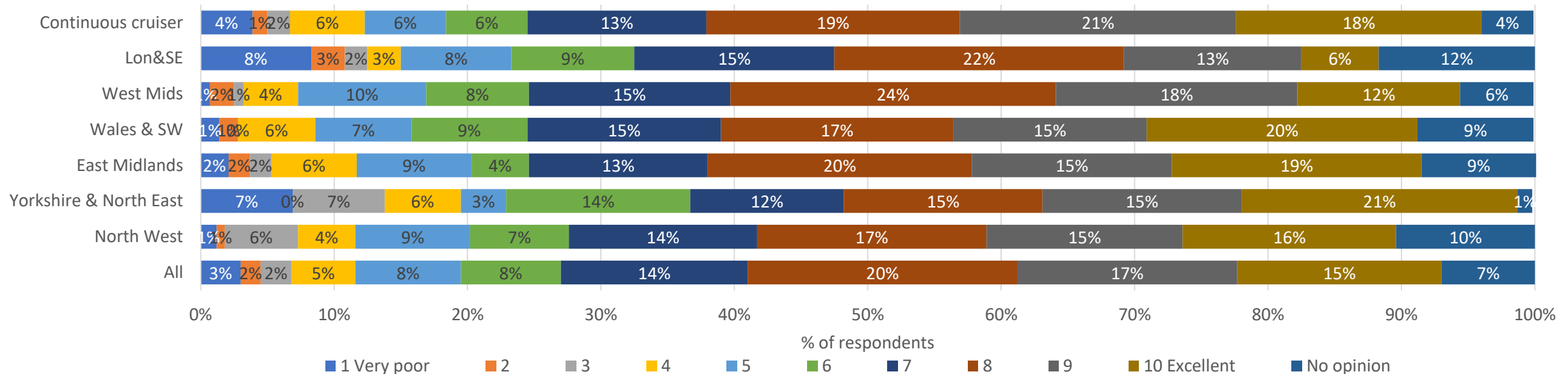
- Respondents were asked to rate overall customer service as well as specific aspects of their interactions with Trust staff and volunteers.
- Overall, perceptions of customer service are fairly positive with 52% of respondents giving a score of 8 or more out of 10, and only 11% giving a score of 4 or less out of 10.
- Perceptions of overall customer service have declined, although not to the same extent as other measures. 2017 again emerges as the high point, with 58% giving score of 8 or more out of 10.

Q10 Overall, as a boater, how would you rate the customer service you have received from the Canal & River Trust?



- Similar to upkeep scores, the two regions that stand out with lower scores for overall customer service are London & SE and Yorkshire & NE with 16% and 20% respectively giving a score of 4 or less out of 10.

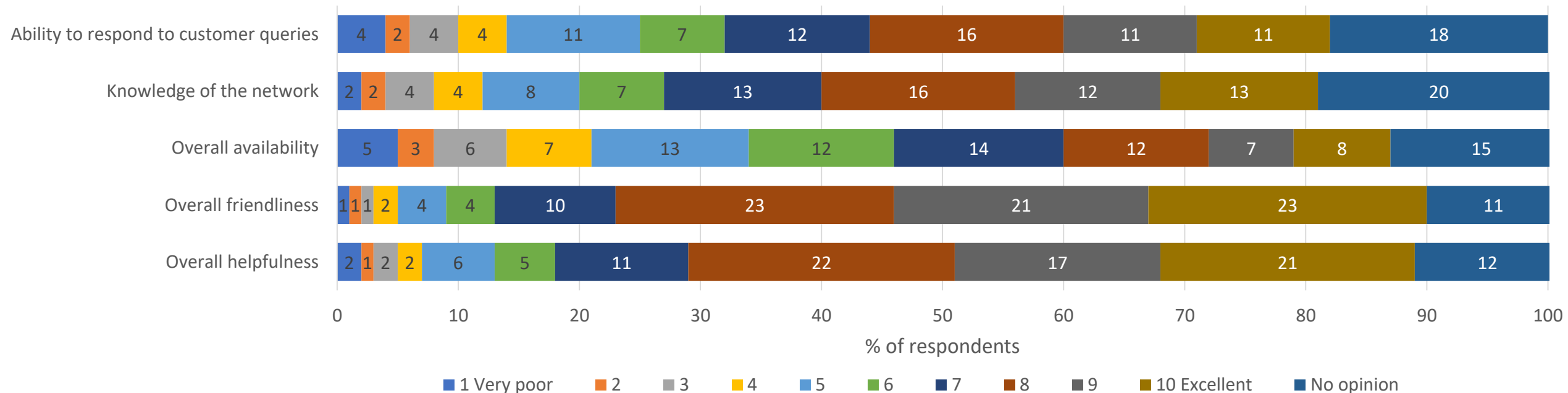
Q10 Overall, as a boater, how would you rate the customer service you have received from the Canal & River Trust?



Canal & River Trust Staff

- When looking at specific elements of customer service the most notable finding from the chart below is the score given for availability of staff. Only 27% of respondents give this measure 8 or more out 10 compared 38% for ability to respond to queries, 41% for knowledge of the network, 60% for helpfulness and 67% for friendliness. It is clear that when boaters interact with staff they are generally pleased with the service they receive, their issue is simply lack of people.

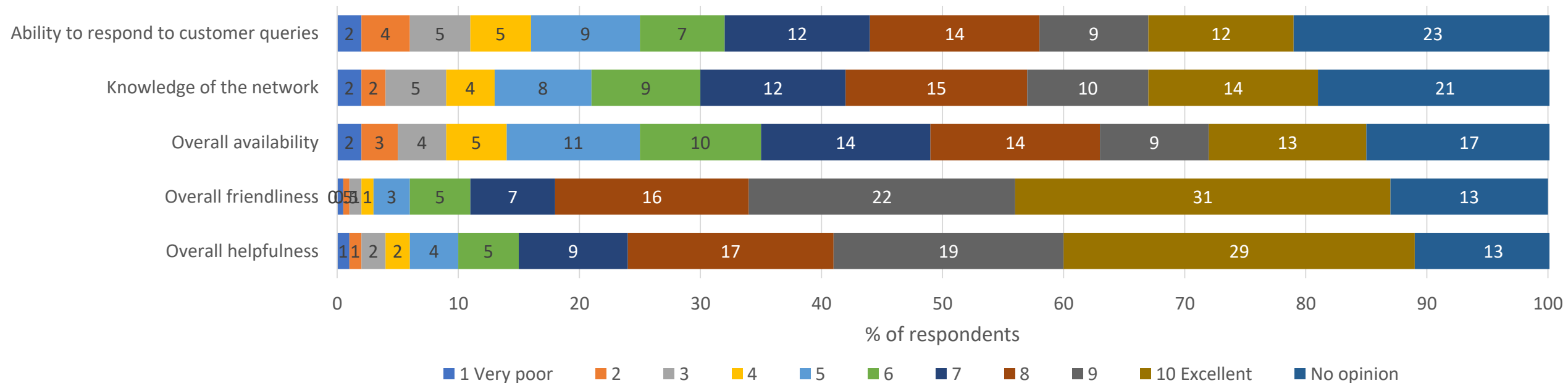
Q8 Thinking about the Canal & River Trust staff you see out and about on the waterways, how do you rate them for...



Canal & River Trust Volunteers

- A different picture emerges when looking at the interaction with volunteers. Friendliness and helpfulness score well with about two thirds scoring 8 or more out of 10. Conversely, availability, knowledge of the network and ability to respond to queries score less well with just over a third giving a score of 8 or more out of 10, but around 15% giving a score of 4 or less out of 10.

Q9 Thinking about the Canal & River Trust volunteers you see out and about on the waterways, how do you rate them for...

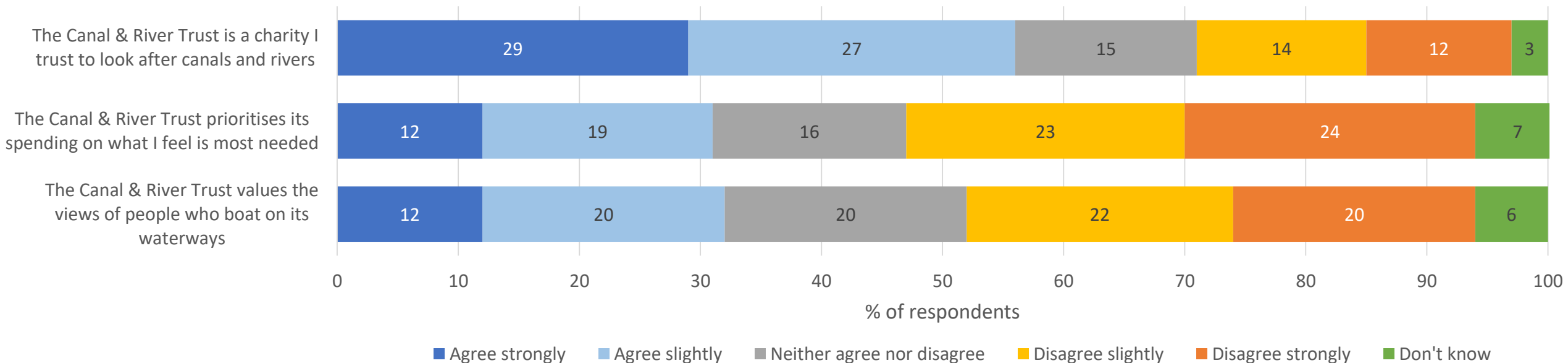


Perceptions of the Trust

Perceptions of the Trust

- Respondents were presented with three statements about the characteristics of the Trust and asked the extent to which they agree or disagree. The first of these statements has been amended slightly this year to reflect changes to the WEM.
- Whilst over half of respondents (56%) agreed that the Canal & Trust is a charity they trust to look after the waterways less than a third believed the Trust prioritises its spending on the areas where they believe it is most needed (31%) or that the Trust values the views of boaters (32%).

Q7 Here are some things that other boaters have said about the Canal & River Trust. To what extent do you agree or disagree with each statement?



Perceptions of the Trust

- **The Canal & River Trust is a charity that I trust to look after our canals and rivers (statement change)**
- There has been a steady decline over the last couple of years in agreement with statement that the Trust is trusted to look after the waterways. Although the statement has changed slightly this year it is unlikely that this has made a fundamental difference to the underlying trend. Just over half (56%) currently agree compared to 65% in 2017. This is matched by a subsequent increase in the disagreement scores, from 18% in 2017 to 26% in 2019 – suggesting a change rather than just a softening in attitudes.
- Trust in the trust appears to be greatest in East Midlands and West Midlands, and weakest in Yorkshire & NW and London & SE.
- Boaters with widebeams were less likely to trust the Trust than other boaters.

The Canal & River Trust is a charity that I trust to look after our canals and rivers (statement change)

	2019	2018	2017	2016	2014
Agree	56%	62%	65%	63%	58%
Neutral	15%	14%	16%	17%	21%
Disagree	26%	22%	18%	20%	21%

Perceptions of the Trust

The Canal & River Trust is a charity that I trust to look after our canals and rivers

	All	NW	Y&NE	EM	W&SW	WM	L&SE	CC
Agree	56%	56%	52%	60%	51%	60%	53%	53%
Neutral	15%	15%	10%	13%	28%	16%	15%	15%
Disagree	26%	26%	36%	24%	20%	21%	29%	31%

The Canal & River Trust is a charity that I trust to look after our canals and rivers

	All	Narrowboat	Wide-beam	Motor-cruiser	Other
Agree	56%	59%	38%	51%	24%
Neutral	15%	14%	26%	16%	12%
Disagree	26%	25%	34%	25%	59%

Perceptions of the Trust

- **The Canal & River Trust prioritises its spending on what I feel is most needed**
- There has been a similar decline in agreement that the Trust prioritises its spending in the areas where boaters believe it is most needed. Most notable is the increase in the disagreement scores – from 33% in 2017 and 37% in 2018 to 46% in 2019. Many of the comments given during the survey relate to this – either spending money on non-boating waterway users, unnecessary rebranding, not prioritising maintenance properly so it ends up costing more, not scheduling work properly e.g. grass cutting in the winter.
- Disagreement with the statement is greatest in Yorkshire & NE, with over half (54%) saying they disagree that the Trust prioritises its spending in the areas they believe most important, closely followed by the North West (49%) and London & SE (47%).
- It is also worth noting that continuous cruisers tend to be more likely to disagree with the statement than boaters with a home mooring. It is possible that their wider knowledge of the network influences these attitudes.
- Boaters with widebeams are most likely to disagree – 55% disagree with the statement and just 16% agree.

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

	2019	2018	2017	2016	2014
Agree	31%	38%	37%	40%	30%
Neutral	16%	18%	29%	25%	31%
Disagree	46%	37%	33%	34%	41%

Perceptions of the Trust

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

	All	NW	Y&NE	EM	W&SW	WM	L&SE	CC
Agree	31%	33%	26%	31%	33%	37%	27%	25%
Neutral	16%	10%	14%	18%	23%	17%	18%	15%
Disagree	46%	49%	54%	43%	38%	43%	47%	53%

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

	All	Narrowboat	Wide-beam	Motor-cruiser	Other
Agree	31%	33%	16%	31%	18%
Neutral	16%	15%	24%	18%	24%
Disagree	46%	47%	55%	37%	53%

Perceptions of the Trust

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

The Canal & River Trust values the views of the people who boat on its waterways					
	2019	2018	2017	2016	2015
Agree	32%	46%	24%	28%	28%
Neutral	20%	16%	25%	21%	22%
Disagree	43%	32%	24%	28%	28%

Perceptions of the Trust

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

	All	NW	Y&NE	EM	W&SW	WM	L&SE	CC
Agree	32%	33%	31%	33%	30%	35%	30%	26%
Neutral	20%	22%	20%	21%	28%	23%	18%	13%
Disagree	43%	41%	44%	39%	38%	38%	47%	54%

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

	All	Narrowboat	Wide-beam	Motor-cruiser	Other
Agree	32%	33%	18%	32%	12%
Neutral	20%	20%	23%	20%	24%
Disagree	42%	42%	54%	38%	59%

What do boaters think about the Trust?

- The survey begins asking boaters an open question about what they currently think about the Trust. This was positioned at the start of the survey, like in previous years, as it gives respondents an opportunity to voice any immediate issues that may otherwise distort their responses to later questions. Responses cover the organisation itself as well the operational management of the waterways and can help explain trends emerging through the quantitative sections of the questionnaire.
- Despite the general decline in performance across virtually all the quantitative questions the qualitative feedback does not seem to be any more negative or vociferous than in previous years. Nor does there seem to be any overwhelming theme emerging that can be identified as the primary reason for the decline. Perhaps if anything, there seems to be an underlying sense of frustration, not directly articulated but that permeates across a range of other issues including the rebranding, maintenance, and Trust management and is more a sense that 'nothing is changing' and this may have contributed to the decline. It is also worth noting that the sample composition is also fairly consistent with previous years suggesting this has not artificially distorted any trends.
- The main themes emerging that are likely to have contributed to a decline in overall perceptions, include:
 - Poor maintenance, reactive rather than proactive and Failure to account/prioritise of boater's needs
 - Lack of confidence in senior management
 - Lack of support for Trust's wellbeing vision
 - Lack of support for the rebrand
 - Issues relating to widebeams
- Not all comments are negative and the final slide highlights some of the positive identified by boaters.

- There were a number of elements around the maintenance theme that could have contributed to a decline in perceptions:
- Overall upkeep is perceived by some to have declined, with the waterways now in a worse state than people can remember
- Maintenance is perceived to be reactive, once problems occur, rather than proactive scheduled repair. Whilst many suggest the Trust handles major incidents very well there is a belief that maintenance should be improved to prevent major problems occurring
- Boaters are experiencing/hearing of problems too frequently suggesting to them that maintenance is inadequate
- Believed to be too great a reliance on contractors and inadequate input from Trust staff, who are perceived to be the experts and more passionate about the waterways than contractors
- Failure to take account of the needs of boaters with maintenance prioritised for the benefit of towpath users instead
- Whilst there does seem to be an acceptance amongst many respondents that funding is limited there is a common belief that the Trust is not prioritising maintenance properly and comments suggest this belief has been strengthened further by the re-brand and new logo
- Although there were minimal comments about licence fees being too high, there were many comments relating to the idea that the income the Trust receives from licences should be better invested in maintenance

Example quotes to illustrate the points around maintenance include:

“You’re letting the waterways fall into disrepair, probably intentionally. Never have I know so many breaches to the system. Instead of doing preventative maintenance you are reacting, very slowly, to mainly incidents which cost far more to repair than it takes to maintain. There is a complete breakdown of trust between CaRT and the boating community.”

“I feel there are challenges that are not being met. We cruise for probably 1 1/2 months per year. We have not had 1 trip in 4 years where we have not had problems with uncut verbiage overhanging or closing the navigations, too little water, closed sanitation facilities, underwater obstructions, fallen trees and breeches. Not to mention the state of some locks. Closer to home speeding boat traffic and a declining standard of maintenance on to path structures does make one wonder where the increased licence fees and mooring fees are going...”

“The C&RT clearly have a difficult job in managing a very old network with limited resources. I regret that C&RT staff with valuable local knowledge (“lengthsmen”) are apparently no longer employed or at least not sufficiently valued. This can mean that “stitch in time” remedies are not implemented and a situation can deteriorate to the point where a large and expensive contract is the only remedial solution.”

“At inauguration seemed to be doing well but now maintenance seems to have deteriorated. Major repairs are taking too long, are not finished on time and are unsatisfactory when passed as complete.”

“The days of reliable preventative maintenance seem to have disappeared with BW's demise whilst fees continue to rise.”

“While I think the canal and river trust do great work in keeping our waterways maintained. Recently, especially with the licence increases, more should be done to keep lock closure on schedule. As boater's who rely on being able to get from A to B I know I share the majority view when I say we’re fed up with the delays and being told the same excuses.”

Maintenance – Failure to prioritise boaters

“CRT give the impression that boaters and navigation are not their main focus. I understand that in order to put a strong case for government money they have to appeal to a broad church but the danger is boaters feel marginalised.”

“We recognise that the CRT has a very difficult job given the extent of the canal network, the demands of maintaining that network and the resources available to you. However, some of the prioritising of work seems, at best, questionable. In particular, we regularly see work to improve towpaths, presumably for cyclists, in stretches of canal that are silted up and/or where overgrown vegetation makes navigation difficult.”

- Many of the comments suggest that a segment of boaters have little confidence in senior management at the Trust.
- Maintenance of the waterways is often behind this and a perceived failure to manage resources and ensure the waterways are properly maintained.
- There is also a general perception that many senior management do not understand the waterways or boaters and therefore do not have the knowledge or expertise to manage properly.
- A minority believe the Trust lacks leadership and vision, although more likely, as voiced by a greater proportion, they simply don't believe in the vision the Trust has adopted.

“The trust has been taken over by people that don't appear to care about the significance of boaters in the trust. It feels like they are trying to cull the boating community by pushing up costs and where we were happy to contribute to the up keep of the waterways, we now really resent it.”

“The personnel that I have interacted with have been helpful and responsive. But, from the reports I have read and the general impression left is that the top management and anyone within the policy forming management have little or no experience on the canals and rivers.”

“The local and regional maintenance teams are clearly evident doing their job of keeping the network functioning - and doing it well. However, none I have spoken to are able to explain how the management consultant inspired wellbeing 'aims' and 'themes' are going to be implemented, how they relate to their job or what their senior management is doing implement them. There would appear to be a disconnect between the CRT senior management and the workforce, with the senior management unsure of how to implement the outcome of the rebranding and, in the vacuum, the workforce just getting on with what it has always done.”

- There were many comments relating to the rebrand and new logo. Some were positive, as noted in a later slide, but the majority were negative and related to three main themes:
 1. Inefficient - The money could have been better spent elsewhere. This includes the costs of developing the new brand and logo and the subsequent cost implications of rolling out the brand to new signage etc.
 2. Failure to resonate - Boaters don't believe in the brand vision based around wellbeing, they think there are other aspects of the waterways that are more important.
 3. Alienation – the new brand is perceived to relate to towpath users more than boaters leading to perceived alienation, and heightening the feelings of inefficiency and waste.

“The whole rebrand and mental health focus seems like the wrong focus and something done just to chase funding.”

“I do feel that the 're-branding process' was a complete waste of money that possibly could have been put to a lot better use. The old logo seemed to reflect the waterways. In my opinion, the new logo does not.”

“The new logo is awful. That money could have been better spent maintaining the waterways and clearing overgrown vegetation.”

“I am concerned that too much attention is paid to signage, and not enough on maintenance of the waterways. I have seen perfectly good BW signs ripped down to be replaced by CRT signs. I have no problem with renewing inappropriate, or dilapidated signs, but renewing to change the logo is not spending money wisely.”

Widebeams

- Although there was no clear consensus widebeam boats were mentioned a number of times.
- Those with a widebeam thought they were being treated unfairly; other boaters thought the Trust should do more to limit what they perceived to be the 'problem' of widebeams.

“Some problems they seem reluctant to tackle further alienating boaters. Broad beam boats on narrow canals is a minor problem at present it as the problem is not being resolved it will eventually become unsolvable like the London mooring problem. You would gain some respect if you did the sensible thing and ban wide beams from unsuitable stretches of canal before it becomes to late.”

Support for the Trust

- Not all the comments made by boaters were negative. The main areas received positive comments related to:
- The Trust is doing as good a job as possible with limited resources.
- The brand was taking the Trust in the right direction – attracting more people and thinking about the wider wellbeing benefits of the waterways.
- Customer service – whilst boaters were sceptical about senior management they continue to praise the staff and volunteers they see out on the waterways.

“A worthy organisation stretched to its limits by lack of funds, manpower and focus.”

“I think that exciting times are ahead for our waterways as the canal and river trust appear to be encouraging everyone to get involved. Giving more information on what they do and the fantastic things that can be explored on and around our waterways.”

“Whilst I don't like the new logo as much as the old logo (reminds me too much of the London underground and doesn't make me feel peaceful), I do like the rebranding to be a wellbeing charity with e rivers and canals for everyone to enjoy and benefit from.”