

Findings of an engagement survey of Canal and River Trust waterway users

*Report for the Commission of the
Trust*

June 2025

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1. Introduction and executive summary

Introduction

- 1.1 The purpose of the Commission's [*Future framework for boat licensing review*](#) is “to consider options for potential changes to the Trust’s approach to boat licensing, to identify and evaluation alternative models for how to regulate the use of the canal network for boating that reflects the changes to its use over the past 30 years and the likely range of future uses.”
- 1.2 The Commission determined that among its engagement processes with key stakeholders it would commission an online survey in order to allow as many people as possible to have an input to its review. Keen to ensure that it was able to approach issues from an objective and neutral perspective and to hear how respondents would propose resolving them, and with a view to offering stakeholders confidence that it was not looking to predetermine issues and solutions, it decided to appoint an independent consultancy – Campbell Tickell Ltd (CT) – to manage this aspect of the review process. CT provided advice and guidance to the Commission about how to structure a survey that would offer data that could be translated into findings and insights.
- 1.3 The survey’s intended audience was boaters and other stakeholders likely to have a view on boat licensing, but it was open to anyone with an interest in participating. The public engagement survey was described by the Commission as offering a chance for respondents to share their experiences of the licensing framework and any changes they would like to see in the Trust’s approach to boat licensing.
- 1.4 The survey findings constitute one part of the evidence the Commission will consider and reflect on, prior to making recommendations to the Trust’s Board of Trustees in October 2025.
- 1.5 The survey was launched by the Commission on 3 March 2025 and ran until 9am on 22nd April 2025. In total, 4,678 responses were received from a cross-section of stakeholder groups. There are discernible prevailing trends in opinion from this set of responses. It is important to note, however, that the survey was not weighted, and therefore the results may not be representative of the broader population of waterway users. The survey was not designed as an holistic research exercise, but rather as part of a wider range of engagement exercises with users of the waterways. As such, the findings presented throughout this report should be considered indicative, and opening up further lines of enquiry, but not definitive.

Summary

- 1.6 Responses signal the importance and timeliness of the Commission's work. There is a strong level of support for the review's guiding principles of clarity, effectiveness, fairness and sustainability. There is a general level of concern across all types of respondent about the current licensing model and the Trust's approach to enforcement, which will be directly relevant to the Commission's review.
- 1.7 In addition, respondents have raised a wide range of other operational and strategic issues. While these may not be directly related to the Commission's core purpose, they provide important context for the review and may be helpful for the Trust to consider as part of its [Plan for better boating](#) and the development of its next [ten-year strategy](#).

Theme 1: Licensing model

- 1.8 Responses suggest there is an appetite for review of the licensing model. Many feel that the current model is unfair because it:
- does not reflect the diversity of waterway users
 - does not represent good value for money
 - is increasingly unaffordable for some licence-holders.
- 1.9 The impact of these issues can be acute. They are seen as posing a particular threat to continuous cruisers' way of life. More generally, they are thought to create divisions and tensions between different groups of licence-holders and between licence holders and other users.

Theme 2: Approach to enforcement

- 1.10 Linked to the concerns about the licensing model, many respondents expressed a lack of confidence in the Trust's approach to enforcement. There are two predominant, underlying reasons for this:
- a perception of the Trust as being overly focused on enforcement and aggressive in tone, with detrimental impacts on boaters' wellbeing
 - concerns about a perceived lack of enforcement action against unlicensed or incorrectly licensed boats and/or boats overstaying on moorings.
- 1.11 Issues relating to enforcement suggest that if the licences were better designed, compliance would be easier and enforcement less necessary.

Theme 3: 'Getting the basics right': operational issues

- 1.12 Many respondents raised operational issues which contribute to a sense that licences are not good value for money and that licence-holders do not get enough benefit in return for the licence fee.

1.13 Notably, there is considerable resonance between the survey responses and the three themes of the Trust's *Plan for better boating*:

- *Getting the basics right* – maintenance of the waterways and infrastructure was raised by an overwhelming majority of respondents
- *Boater facilities* – facilities and services were the second most important issue to survey respondents
- *Better communication and customer service* – the Trust's approach to communication and customer service was a significant theme among respondents.

1.14 However, respondents also raised other operational issues, such as the availability of moorings and the condition of towpaths.

Theme 4: Strategic considerations

1.15 There are several strategic considerations arising from the responses which it may be valuable for the Trust (rather than the Commission) to consider and engage on with stakeholders as part of the development of its ten-year strategy:

- How rising, unfulfilled demand for housing affects the Trust's purpose and strategy
- The role the Trust plays in relation to crime and anti-social behaviour on the waterways and towpaths
- How the Trust is positioned properly to fulfil its public functions
- How the Trust best demonstrates transparency in decision-making and public accountability for delivering outcomes
- How the Trust best secures its long-term financial sustainability
- The culture the Trust needs to foster and promote to command the confidence of licence-holders and other stakeholders.

1.16 The Commission's review of licensing and enforcement presents a significant opportunity to enhance public confidence in the organisation by addressing issues that are clearly of significant concern to many licence-holders. The issues are not straightforward and, necessarily, there will need to be choices and trade-offs. In that context, open and transparent engagement with stakeholders and the public in due course on the substance of proposals will be especially important. In parallel, it will be important for the Trust to consider how best to address those issues raised through this public engagement survey which fall outside the remit of the Commission.

2. Methodology

Survey design

- 2.1 A survey was designed to collect information about respondents' relationships with the waterways. This included questions about:
- Respondents' primary relationship with the waterways;
 - The parts of the network they most frequent;
 - Whether they hold a licence and, if so, which type;
 - (For those who hold a licence) How long the licence has been held;
 - The amount of time spent on the canals annually; and
 - (For those with a boat) Whether the boat constitutes their home.
- 2.2 Additionally, equality and diversity monitoring data was collected to understand better the representation of responses from across the boating community and other user groups.
- 2.3 The survey aimed to identify key issues experienced by users with the boat licensing framework and to determine the most appropriate solutions for each of these issues. Respondents were asked to identify up to five issues using open text questions, explaining why each was an issue and how it affected them.
- 2.4 They were then presented with a range of possible solutions, including:
- No change
 - Legislative change
 - Non-legislative change (e.g., Trust policy or guidance)
 - Enforcement approach
 - Trust communication and engagement
 - Wider cross-stakeholder communication
 - Pricing and other economic incentives
 - Types of licence
 - Mooring supply.
- 2.5 Respondents were also given opportunities to identify other solutions to the issues and add comments to explain their responses using open text questions. An additional comment box was provided at the end to allow respondents to highlight any issues not covered in the main body of their responses and to leave any additional comments.

- 2.6 Finally, respondents were asked to provide feedback on the Commission's terms of reference, and assess whether the guiding principles of fairness, clarity, sustainability and effectiveness are appropriate for evaluating the impact of any changes that result from the Commission's engagement. This was with a view to establishing an approach to measuring the success of any outcomes.

Distribution and access

- 2.7 The survey was hosted online using the Smart Survey platform, a widely used digital tool for creating and distributing questionnaires. Participants were able to access the survey via a unique digital link, which could be opened through any internet-enabled device, including computers, tablets and smartphones.
- 2.8 In designing the survey, particular attention was given to accessibility; it was developed in accordance with the Web Content Accessibility Guidelines (WCAG) 2.0. These internationally recognised standards aim to make web content more accessible to a wider range of people with disabilities, including those with visual, auditory, cognitive and motor impairments. As such, the survey was designed to be navigable with screen readers, keyboard-accessible, and compatible with assistive technologies, thereby promoting inclusivity.
- 2.9 Campbell Tickell played no role in the distribution of the survey and the promotion of its availability. This aspect was managed by the Canal & River Trust. The Trust informed Campbell Tickell that the survey was being shared through various communication channels, such as newsletters, stakeholder mailing lists, social media platforms and internal networks.

Analysis

- 2.10 The analysis was conducted in several phases. Initially, each of the issues identified in the open text responses was coded.
- 2.11 SmartSurvey's built-in categorisation tool was used to support the coding process. Each individual response was read and assigned to one or more relevant categories. Where multiple issues were mentioned within a single response, up to three categories were applied to reflect the range of themes discussed.
- 2.12 The coding was carried out iteratively. Categories were developed and refined throughout the data collection period, with new categories introduced as needed when responses did not align with existing ones. Categorisation was based on the overarching themes or issues being raised, allowing for a structured yet flexible approach to analysing qualitative input.

- 2.13 The categories assigned during this phase formed the basis of the emerging issues. These issues were then grouped thematically (and have determined the structure of this report).
- 2.14 The next step involved considering each individual issue one at a time and qualitatively analysing the open text comments left in the 'other solutions' and 'additional comments' boxes in relation to each issue, in combination with the selections made by respondents from the multiple-choice options of solutions to the issue. Solutions were then summarised for each issue.
- 2.15 This process culminated in a thematic summary of issues under each theme and the key emerging solutions as suggested by the survey responses.

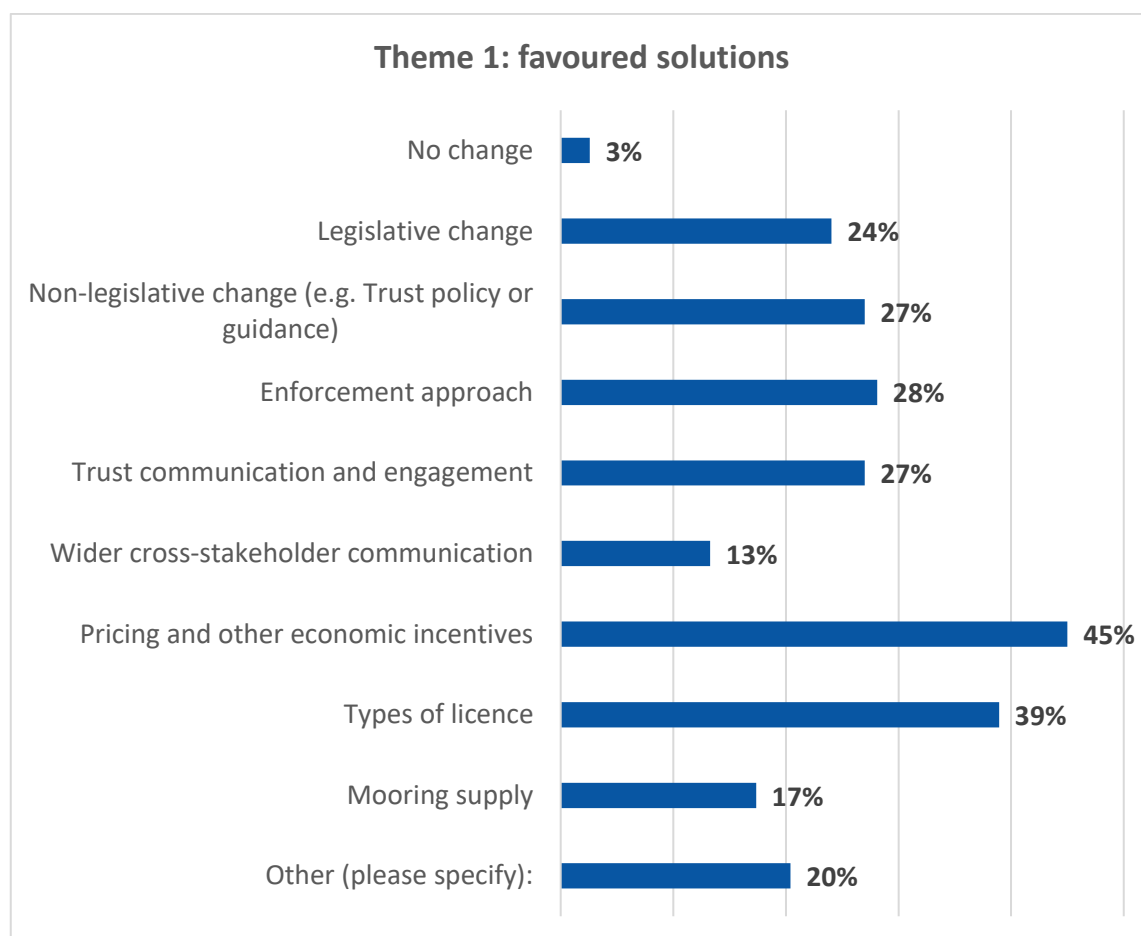
The frame of interpretation

- 2.16 While the survey provides valuable insights into stakeholder perspectives, the limitations of this approach should be borne in mind when interpreting the results.
- 2.17 First, the sample represents a proportion of the total stakeholder population. As such, the views captured may not fully reflect the diversity or distribution of opinions across all stakeholder groups.
- 2.18 Secondly, the analysis was not weighted to account for the actual population size of each stakeholder group. This means that the influence of each group on the overall findings is not proportional to their representation in the broader population.
- 2.19 Thirdly, while open text responses were systematically coded using SmartSurvey's built-in categorisation tool, the coding process is interpretative and iterative, relying on subjective judgment to assign categories and develop themes. Although care was taken to ensure consistency and coverage, and more than one person from Campbell Tickell was involved in the discernment of prevailing themes, there is always a risk that some nuances or less common perspectives will be oversimplified or overlooked.
- 2.20 Additionally, as categories were developed during the course of analysis, early responses may not have been considered in light of categories created later in the process.
- 2.21 Given these limitations, the survey results should be regarded as indicative rather than definitive. They offer a useful snapshot of stakeholder sentiment, but should not be taken as fully representative or conclusive evidence of broader trends or opinions.

3. Theme 1: Licensing model

Summary

- 3.1 Of the total survey respondents, 2,253 (48%) mentioned issues pertaining to the fairness of the licensing framework.
- 3.2 The drivers for this sense of unfairness appear to focus on affordability and value for money of licences, and the arrangements for different users of the waterways. There was an overall sense that the licensing model lacks the nuance necessary to accommodate all user types. Continuous cruisers and users of wide beam boats aired particular frustrations. The process of obtaining or renewing a licence is seen as unnecessarily cumbersome.



- 3.3 Among those who identified the fairness of the framework as an issue, just under half (45%) considered pricing and other economic incentives to provide a possible solution. A revision to the types of licence available was the next most popular solution at 39%.

Issues

Licensing options

- 3.4 Of the respondents who identified the fairness of the licensing framework as an issue, 669 (33%) identified licensing options as a key issue.
- 3.5 The issues relating to licensing options are multifaceted. A principal issue is the perceived disparity in costs between users with a home mooring licence and those without. Continuous cruisers, who do not have a fixed home mooring, report facing higher licence fees; many of them consider these higher fees unfair on the basis of what they see as their central role in looking after, or stewarding, the waterways.
- 3.6 There are also, however, expressions of concern about the fairness of charging boaters who rarely use the waterways the same fees as those who use them extensively.
- 3.7 Boaters with wide beam boats have reported that their subjection to a surcharge is not proportionate, given their limited access to the canal network.
- 3.8 Overall, the licensing system is criticised for not adequately reflecting the size and usage of boats. The overall concept of differential charging rates and surcharges for continuous cruisers and wide beam boats is seen as discriminatory and as exacerbating existing inequalities on the waterways.

Suggested solutions

- 3.9 More than half (55%) of respondents who identified the fairness of licensing options as a key issue proposed pricing and other economic incentives as a possible solution, as well as offering a different range of licensing options. The next most popular solution (29% of people who responded on this issue) was non-legislative change, such as improved Trust policy or guidance.
- 3.10 Of those who responded on the fairness of licensing options, 12% offered other solutions to the issue. Suggestions included the introduction of a pay-as-you-go system using technology, and carving out new licence categories: for example, for boats that 'over-winter' in different marinas, boaters who are retirees, or boats that stay local.
- 3.11 Some respondents believe that a sliding scale or different types of licences for residents in marinas or fixed moorings could be beneficial.
- 3.12 For wide beam boats, suggestions included implementing a licence that only allows wide beam boats on parts of the network suited for them. Others propose scrapping surcharges and basing prices on a boat's footprint.
- 3.13 Other ideas included reducing licence fees by half or returning to a flat rate for the licence fee, with some suggesting that all boaters should pay the same licence fee regardless of their mooring status.

Affordability

- 3.14 Of survey respondents who discussed issues with the licence model, 545 (27%) identified affordability as a problem.
- 3.15 Issues relating to affordability revolve around the increasing costs associated with boating licences, which have become a significant concern for many boaters. Over the past few years, the cost of licences has reportedly risen sharply, often above the rate of inflation. This has made boating unaffordable for some individuals, particularly those on low incomes or fixed budgets. As a result, many boaters are considering selling their boats or leaving the waterways altogether.
- 3.16 Many respondents expressed the view that price increases are unjustified, particularly in light of what they perceive as a decline in services and maintenance provided by the Trust.

Suggested solutions

- 3.17 Of respondents who identified affordability as an issue, two-thirds (66%) felt that pricing and other economic incentives would be an appropriate solution, and more than a third (39%) favoured revisions to the types of licence that are available.
- 3.18 Of the respondents on affordability, 17% identified other possible solutions to the issue. Suggestions include lowering fees, ensuring any increases are in line with inflation, and implementing a variable "postcode" type licence system whereby fees depend on the location of the boat.

Issues facing continuous cruisers

- 3.19 Of the respondents who identified the licence model as an issue, 494 (24%) identified specific issues facing continuous cruisers as a result of the current licensing framework. Specific concerns for continuous cruisers related to affordability resulting from increases in costs for this type of licence. Additional charges for those without a home mooring has led to a perception of discrimination against continuous cruisers.
- 3.20 In practical terms, the licence requirement for a continuous cruiser to move every 14 days, regardless of weather or personal circumstances, as well as the distance that must be travelled, was said to lead to stress and uncertainty for the itinerant boating population. For instance, it was highlighted that the continuous cruising licence does not make reasonable allowances for families living on boats, particularly those with children who need to travel to school. The continuous cruising licence was therefore seen as limiting boaters' access to statutory services, such as healthcare and education, as well as to employment.
- 3.21 Respondents also highlighted ongoing confusion around the rules for continuous cruising, particularly regarding how far and how often boaters are required to move.

This lack of clarity makes it difficult for many to comply confidently and adds to the uncertainty of their situation.

- 3.22 Comments from continuous cruisers suggest that they feel targeted by the Trust, with perceptions of aggressive enforcement and of bias against their way of life. This constant pressure, coupled with the fear of losing their homes, has made it challenging for continuous cruisers to maintain their lifestyle on the waterways. The precarity of their way of life was linked to concerns about the canal heritage and a perceived gentrification of the canal network.
- 3.23 There were also concerns that the distinction between types of licence causes friction between continuous cruisers and moorers.

Suggested solutions

- 3.24 A third of respondents who identified issues for continuous cruisers that result from the current licensing framework proposed improved Trust communication and engagement as a solution. The next most frequently cited solution was non-legislative change, such as changes to Trust policy and guidance (30%).
- 3.25 Just over a third (34%) of respondents on the issues for continuous cruisers identified other solutions. These included:
- extending the time period for towpath mooring from 14 days to one month, with some suggesting doing this only in winter months;
 - accommodating continuous cruisers with a new type of licence that takes into account their challenges and circumstances;
 - ensuring clearer rules and less ambiguity, with an overall focus on creating a more inclusive and equitable environment for continuous cruisers.
- 3.26 More broadly, a strong sentiment was of the need for greater support for boat dwellers—particularly continuous cruisers—recognising their vital role in maintaining and preserving the canals. Improved communication and engagement with the liveaboard community was given strong emphasis, alongside broader collaboration with stakeholders, for example working more closely with local authorities, outreach services, businesses and nearby residents to fully understand and address the impacts of licensing changes on those who live aboard continuously. These suggestions are largely in response to the challenges and uncertainties faced by continuous cruisers navigating the current system.

Licensing process

- 3.27 Of the survey respondents who discussed the licence model, 76 (4%) expressed direct concerns about the process involved in obtaining a licence. Boaters reported finding

the licensing process bureaucratic and inflexible. The process is viewed as overly complex, unclear and not reflective of boaters' diverse needs, contributing to a sense of division and dissatisfaction within the community.

- 3.28 Respondents find the requirement to submit mooring proof repeatedly—often misaligned with actual renewal periods—cumbersome and stressful, sometimes resulting in enforcement threats. Licences have also reportedly been restricted without explanation or recourse, leaving boaters feeling powerless, even when they have supporting evidence.
- 3.29 The system's online-only approach to secure maximum discounts disadvantages those who are less tech-savvy or who do not have ready access to the internet. This is particularly important among members of the liveaboard community who often live off grid and therefore find internet access problematic.
- 3.30 Limited licence duration options and the issuance of six-month licences by default were viewed as contributing to uncertainty and hindering long-term planning.

Suggested solutions

- 3.31 To address the challenges faced by boaters, several potential solutions were proposed by respondents:
 - Streamline the requirement to repeatedly submit mooring proof by aligning submissions with licence renewal periods, thereby reducing the unnecessary administrative burden;
 - Simplify the overall licensing process to better reflect the diverse needs of the boating community, which would also help to reduce confusion and dissatisfaction. Introducing a clear and accessible appeal mechanism would ensure that boaters have a fair opportunity to challenge licence restrictions and provide supporting evidence, promoting greater transparency and accountability;
 - Improve accessibility, especially for those less confident with technology; and offer alternative methods (such as phone or in-person support) of help to secure discounts and manage licence tasks;
 - Offer more flexible licence duration options—such as annual or multi-year licences—which would provide greater stability and enable boaters to plan more effectively.

Other users

- 3.32 Of the survey respondents who raised issues with the licensing model, 210 (10%) identified issues with other users that result from the licensing framework and which contribute to a sense of injustice. Access to and investment in towpaths is perceived to

be more biased towards cyclists and walkers who are able to use this facility for free, rather than boaters who pay for their licence. Likewise, boaters highlighted the misuse of boater facilities by the general public.

- 3.33 Other issues relating to other users were also highlighted, including concerns about the safety of allowing speeding cyclists, electric scooters, and motorbikes on towpaths. Issues around fishing from official mooring sites were also mentioned, along with reports of aggression from joggers and towpath users.
- 3.34 Almost two thirds (63%) of those who identified issues with other users of the canal suggested an enforcement approach as a solution, and 40% also proposed legislative change.

Suggested solutions

- 3.35 Almost a quarter (24%) of respondents on this issue identified other solutions. These included:
- reintroducing permits for cyclists, which could be checked by lock keepers, ensuring that only authorised cyclists use the towpaths;
 - requiring all users, including cyclists and anglers, to contribute financially to the maintenance of the towpaths, either through permits or voluntary contributions;
 - improving safety by introducing clear cycling speed limits, and more stringent control over fishermen to prevent them from blocking the towpaths;
 - installing physical speed-calming measures, such as bumps and chicanes, to slow down cyclists and make the towpaths safer for all users; and
 - promoting respect and understanding among different user groups through education and proper signage.

Accessibility

- 3.36 Of the survey respondents who discussed the licence model, 49 (2%) identified issues regarding accessibility of the licensing framework in their responses. Respondents highlighted that boaters with disabilities, specifically those with learning disabilities, find the current system challenging. They report that there is often no help available to them and find that the payment process can be confusing.
- 3.37 There are also accessibility issues relating to a lack of both accessible moorings and facilities for disabled individuals, with many areas not equipped to accommodate their needs. This includes the closing of essential facilities, which disproportionately affects them.

Suggested solutions

- 3.38 Of those who identified accessibility as an issue with the current licensing framework, 47% were of the view that non-legislative change, such as updates to Trust policy and guidance, would be helpful, and 45% favoured improved Trust communication and engagement.
- 3.39 Of respondents on accessibility, 18% identified other solutions, such as:
- making the guidelines clearer and more consistent with accessibility guidelines;
 - adopting a disability-informed approach in Trust communications;
 - introducing licence discounts for older people and disabled people; and
 - introducing a type of licence specifically for continuous cruisers with disabilities and long-term health issues.
- 3.40 Suggestions relating to accessibility more broadly included:
- increased investment in adapted infrastructure, such as moorings and waterside facilities;
 - ensuring that repairs and maintenance better consider the needs of disabled boaters and how approaches and locks can accommodate disabled people; and
 - undertaking work to canal edges to make them safer for disabled people.

Congestion

- 3.41 The issue of congestion – which appears in substance to relate to the licensing framework – was mentioned by 210 (5%) respondents. Respondents highlighted overcrowding of the waterways, particularly in popular areas. This was felt to be exacerbated by the perceived proliferation of wide beam boats, the perceived limitless issuing of licences to new boaters by the Trust, and the increase in the number of hire boats on the canals. Coupled with issues of overstaying, the increase in the number of boats was seen as further contributing to a lack of available mooring space for boaters.

Suggested solutions

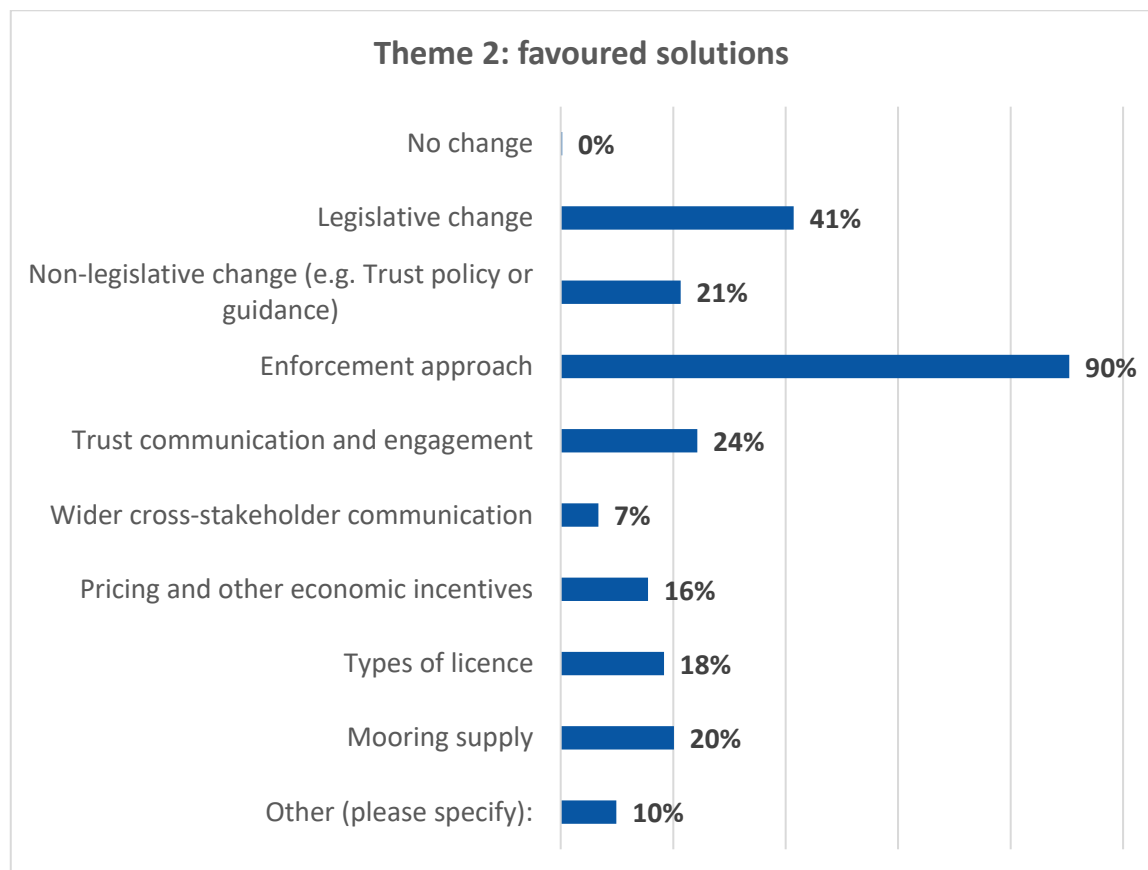
- 3.42 More than half (53%) of the 210 who discussed congestion felt a better enforcement approach would be an appropriate solution, while the next most popular solution related to the types of available licence at 40%.
- 3.43 Of the 210, 22% suggested other solutions, including:
- improving and requiring education for hirers;
 - limiting hire boat traffic;

- disincentivising wide beam purchases by increasing their licence fees or limiting the waterways they can use to rivers only;
- capping the number of licences that can be issued at any one time; and
- setting financial disincentives to deter new prospective boaters from taking up residence on the canal because it is cheaper.

4. Theme 2: Approach to enforcement

Summary

- 4.1 Issues around the day-to-day enforcement of the licence framework were mentioned 1,421 times in total (30% of all survey respondents).
- 4.2 The preoccupations of respondents focus on the cultural tone of the Trust's approach to enforcement and on the Trust's perceived unwillingness to take enforcement action against non-compliant boaters. This relates in particular to overstaying and unlicensed boats, but respondents also expressed more general frustration at boater etiquette and safety.
- 4.3 Issues relating to enforcement raise broader questions about whether the need for enforcement itself reflects deeper problems with the types of licences.



- 4.4 Among those who identified the operational enforcement of licences as an issue, 90% felt that improvements to the enforcement approach would be a relevant solution. The next most popular proposed solution was legislative change, at 41%.

Issues

Overstaying

- 4.5 Of the respondents who identified enforcement of licences as an issue with the current framework, 665 (47%) specifically discussed overstaying as a key enforcement issue relating to licences. Respondents had observed continuous cruisers occupying moorings for extended periods, exceeding the permitted time limits. This behaviour was seen to lead to a lack of available mooring spaces for other boaters, particularly in popular and urban areas, with the exacerbating factor of insufficient enforcement of mooring regulations by the Trust.
- 4.6 There is considerable frustration for those boaters who see themselves as adhering to the rules and paying their fees, and yet struggling to find mooring spaces because (in their view) the system is being abused by those who do not comply.

Suggested solutions

- 4.7 Of the 665 respondents who discussed overstaying, a large majority (93%) favoured an improved enforcement approach, with the next most popular approach being non-legislative change (38%).
- 4.8 Eight per cent of respondents identified other solutions to the issue, including
- issuing fines, akin to fines for motorists, with on-the-spot enforcement;
 - establishing clearer signage to indicate where restricted moorings start and finish;
 - limiting the number of times boats can return to the same place within a calendar year;
 - providing much clearer information about continuous cruising licences, and the frequency and distance that must be moved;
 - making better use of technology, such as an app to report overstayers or digital tracking of boat movements;
 - increasing the number of permanent and short-stay moorings in popular areas; and
 - greater powers for the Trust to fine and remove boats that overstay.

Unlicensed boats

- 4.9 Of the respondents who identified licence enforcement issues in their responses, 475 (33%) discussed unlicensed boats as a specific issue. Responses highlighted frequent instances of boats that are unlicensed and evading fees. It was felt that this was contributing to overcrowding on the canals, particularly in popular mooring spots.

- 4.10 Additionally, respondents suggested that many unlicensed boats are in poor condition, lacking proper maintenance and safety checks, and potentially posing hazards to other waterway users.
- 4.11 The feelings elicited by this issue bear similarities with those prompted by overstayers – frustrations with the lack of enforcement and penalties, and a sense of unfairness and frustration among those who adhere to the regulations, as they see others benefiting from the waterways without contributing to their upkeep. Boaters who pay their licence fees feel they are bearing the financial burden of other non-compliant boaters. The perceived proliferation of unlicensed boats undermines the integrity of the licensing system in their eyes, and the sustainability of the waterways.

Suggested solutions

- 4.12 Of the 475 respondents who discussed unlicensed boats as an issue, a large majority (93%) saw improvements to enforcement as a remedy, with legislative change the next most popular solution (48%).
- 4.13 Of those who responded on the issue of unlicensed boats, 9% identified other solutions to the problem of overstaying. These included:
- making the display of a valid licence and registration number compulsory so that enforcement and reporting of unlicensed boats is easier; and
 - more frequent checks along the towpath by enforcement officers, including at weekends.
- 4.14 The legislative framework was frequently viewed as inadequate, lacking the necessary powers to deal with intentional abuse of the licensing system. Legislative change was seen as a route for upholding licence compliance, allowing for more effective enforcement and removal of offending boats. More prompt and firmer action against non-payers, such as fines and swift removal of unlicensed boats from the waterways in cases where boat owners fail to comply, was widely favoured.

General enforcement

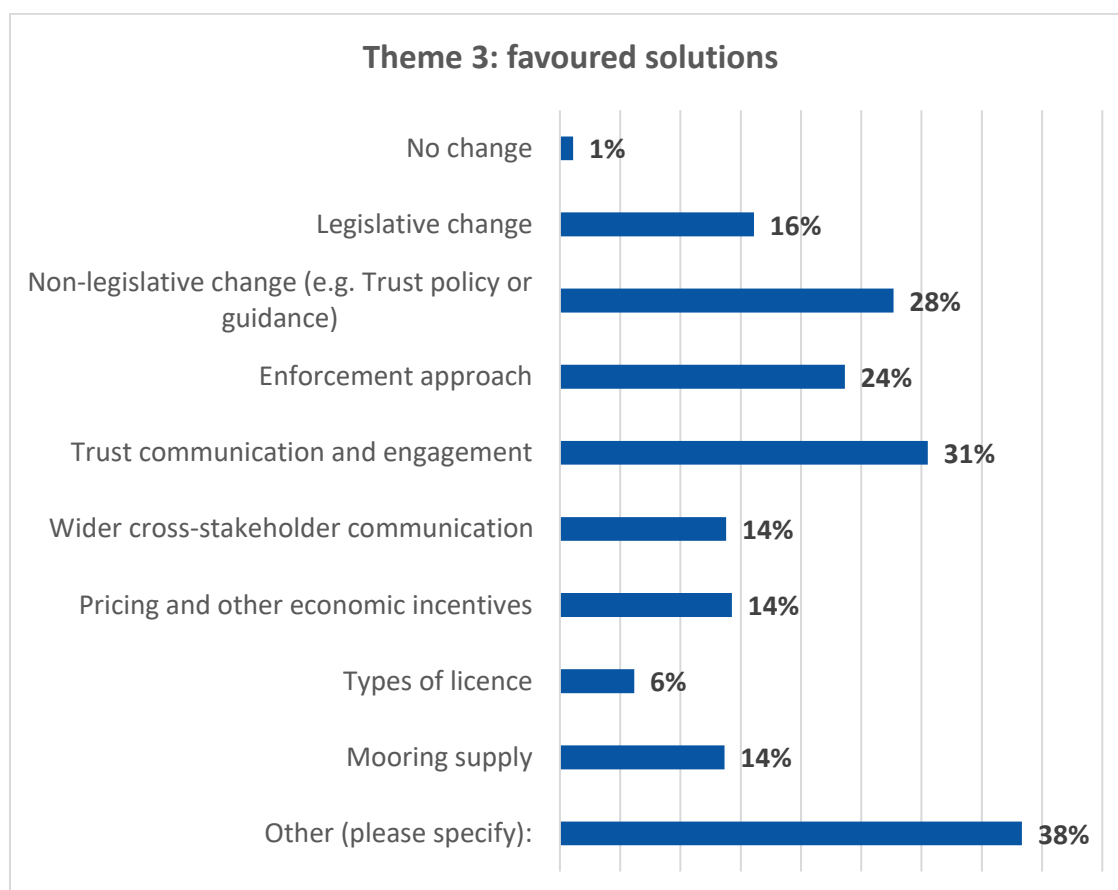
- 4.15 Of the 1,421 respondents who identified licence enforcement issues with the current licensing framework, 281 (20%) made observations about general enforcement, not specifically relating to overstaying or unlicensed boats. Specific issues related primarily to boating etiquette and safety, including boats mooring in prohibited areas such as lock landings, the misuse of locks by narrow boaters who sometimes break wires and force gates, and ‘bridge hopping’.
- 4.16 Overall there was a sense among respondents that the Trust fails to enforce its own rules consistently, leading to a disparity between those who follow regulations and those who do not, and a sense of ‘chaos’ on the waterways.

Suggested solutions

- 4.17 Of the 281 respondents who identified general enforcement issues, 80% felt that improved enforcement by the Trust would be effective, while the second most popular solution was legislative change at 39%. Sixteen per cent identified other solutions.
- 4.18 Some respondents added a comment to explain their response, and in these comments highlighted the need for consistency and fairness to be prioritised when considering improvements to enforcement.

5. Theme 3: ‘Getting the basics right’

- 5.1 Of the total survey respondents, 3,939 (84%) shared frustrations about the day-to-day operational management of the waterways, making this the most significant issue for the majority of survey respondents.
- 5.2 These issues are not directly relevant to the Commission’s review of the licensing framework, although they provide important context for the work. The Trust may wish to consider the extent to which the issues are already being addressed through its *Plan for better boating* and how best to provide a transparent response to the concerns raised by survey respondents.
- 5.3 The issues around maintenance and the provision of facilities are manifold, but attitudinal perceptions of the Trust also surface across these responses – seen as reactive – and specific concerns also emerge relating to mooring spaces and the condition of towpaths.



- 5.4 Among those who identified frustrations about the day-to-day operations of the waterways as an issue, the most popular types of solution offered were: improvements to the Trust’s approach to communication and engagement; non-legislative change; and changes in the approach to enforcement.

- 5.5 Other comments stressed the importance of canal infrastructure repairs and proactive maintenance schedules as a first priority for the Trust, while other proposed solutions included offering more flexible mooring options and implementing education programmes for hire boaters. Comments also highlight the need for clearer accountability of the Trust as well as improved coordination with local councils and businesses to improve management of the waterways.

Issues

Maintenance and facilities

- 5.6 Of the respondents who raised the subject of operational management of the waterways by the Trust, 2,860 (69%) felt that maintenance of the network and boater facilities was a key issue. Maintenance was the most frequently mentioned issue across *all* survey responses, with 61% of all respondents sharing frustrations in this area.
- 5.7 Issues relating to network maintenance include the poor condition of locks, major stoppages and unplanned closures, and a lack of dredging and overgrown vegetation on towpaths and canal banks, making mooring and navigation difficult. Many reported that poor lock maintenance has resulted in fluctuating water levels and problems with water supply. Some highlighted geographic imbalances in canal maintenance, with northern canals disproportionately affected by a lack of investment and infrastructure management.
- 5.8 Responses suggest that there has been an overall decline in the usability and safety of the waterways in recent years, with some pinpointing the Covid-19 pandemic as a turning point. Boaters are frustrated by what they perceive as a *reactive* rather than a proactive approach to maintenance, with issues addressed only after they have become significant problems.
- 5.9 Some suggest the Trust is not sufficiently creative in its approach to the issue, and has tended to outsource maintenance work to expensive contractors, rather than hiring staff or incentivising volunteers to carry out basic works. Some people reported they had offered to volunteer with the Trust to help with maintenance issues, but had been refused.
- 5.10 Issues relating to a lack of facilities, or poor maintenance of facilities, include a significant shortage of working water taps and accessible waste disposal points, the shutting down of sanitary facilities, such as showers and toilets, and a lack of pump-out facilities. Respondents also highlighted the lack of recycling points and the removal of litter and dog waste bins, which has led to increased littering and health hazards.

Suggested solutions

- 5.11 Of the 2,860 who identified maintenance as a core issue, 30% favour changes to Trust communication and engagement as a solution. The second most popular solution is non-legislative change to Trust policy and guidance at 28%.
- 5.12 Nearly half (45%) of the 2,860 respondents suggested other solutions to the issue of maintenance, including:
- prioritising canal infrastructure repairs over other activities;
 - implementing regular maintenance schedules with a focus on proactive rather than reactive maintenance;
 - rediverting maintenance resources to the most neglected canals;
 - incentivising volunteer labour to help carry out basic maintenance work by offering licence fee reductions for boaters; and
 - making sure accurate information is available about where maintenance is happening on the network and the impact on navigation.
- 5.13 There is a strong sense among respondents that maintenance of the canals and Trust-owned moorings is a core responsibility for the Trust, should always be the organisation's top priority, and that income generated from licences should be used primarily for that purpose. Senior staff salaries and signage were cited by some respondents as examples of expenditure which should be of a lower priority.

Moorings

- 5.14 Of the respondents who identified operational management as a core issue, 545 (13%) specifically discussed mooring. The lack of available mooring spaces was highlighted, especially in popular urban areas. This issue particularly affects residential moorings, and leaves many boaters struggling to find permanent spots to live.
- 5.15 Boaters also expressed frustration at the costs of moorings, and shared that the increase in paid mooring spots and the removal of free moorings have made it challenging for boaters to find affordable places to stop. The high cost of mooring fees, which often rise above inflation, adds to the financial strain on boaters.
- 5.16 In addition, respondents observed that poor maintenance of mooring facilities, such as a lack of rings and bollards, makes it difficult for boaters to secure their vessels safely.

Suggested solutions

- 5.17 Of the 545 who identified mooring issues, 60% felt that mooring supply would be a suitable solution. The next most popular solution is an improved enforcement approach to reduce pressure on moorings by overstayers.

- 5.18 Other possible solutions to mooring issues were surfaced by some 16% of the 545 respondents, with calls for more common-sense policies and fairer access. Suggestions include:
- creating additional moorings, especially in popular areas;
 - reinstating previously free spots by removing unnecessary charges and no-mooring zones;
 - abolishing access charges and incorporating them into licence fees to ensure fairness;
 - creating zones where people who can't afford a home mooring can store their boats for free;
 - providing more flexible mooring options, including roaming winter moorings and more opportunities to book short-term stays;
 - allowing [or encouraging] private landowners to develop moorings.
- 5.19 Underpinning all views about maintenance of the network is a desire to protect the boating lifestyle and ensure that policies serve the needs of both continuous cruisers and residential boaters fairly.

Towpaths

- 5.20 Of the respondents who identified day-to-day operational management of the canals as an issue, 189 (5%) discussed the towpaths. Issues specifically related to the quality of the paths, which are said to be often muddy and eroded, with large gaps. Combined with the lack of lighting, the poor condition of the towpath makes it difficult for boaters to moor their vessels and unsafe for pedestrians and cyclists.
- 5.21 Many respondents expressed frustration at clutter and rubbish left by boaters, as well as fly-tipping and dog mess contributing to an unsightly and hazardous environment and reducing the available space for other users.

Suggested solutions

- 5.22 Of the 189 respondents who discussed towpaths, more than a third (36%) favoured an enforcement approach as a solution. The next most popular solution (25%) was non-legislative change to Trust guidance and policy.
- 5.23 Other solutions suggested from among 39% (of the 189) included:
- consistent and proactive maintenance, including repairs, resurfacing and drainage improvements;
 - better investment, including more bins, dog waste facilities, lighting at locks, and improved signage; and

- liaison with local councils and landowners to coordinate upkeep and drainage, and to reinstate essential amenities like waste bins and recycling points.

5.24 A sundry number of other suggestions were:

- using alternative surfacing, like cobbles over tarmac, for heritage alignment and cyclist control;
- making better use of volunteers for towpath care; and
- clearer rules on towpath usage, especially in busy areas.

Communication

5.25 Of the respondents who discussed day-to-day operational issues, 165 (4%) shared concerns about Trust communications.

5.26 These boaters report that:

- the Trust fails to communicate effectively, leading to confusion and frustration;
- there is a lack of clarity regarding licensing scales, continuous cruising rules, and movement requirements, which makes it difficult for boaters to understand what is expected of them;
- the Trust often shifts the goalposts for their expectations regarding cruising patterns, making boaters feel harassed and uncertain about their compliance;
- stoppage notices are frequently inaccurate or not updated promptly, causing inconvenience and disruption to navigation plans;
- those who answer the phones and deal with the end user on behalf of the Trust lack proper education and understanding of the waterways, making communication and the resolution of issues difficult;
- communication and meaningful engagement with business licence holders is lacking; and
- the Trust's communication techniques can be aggressive and accusatory, which creates a hostile environment for boaters.

Suggested solutions

5.27 Three quarters (75%) of the 165 respondents who discussed communication issues favoured improved Trust communication and engagement as a solution. The next most popular solution (cited by a third) was non-legislative change such as amendments to Trust policy and guidance.

- 5.28 Of the respondents that discussed communication, 21% proposed other solutions. There were strong calls to reinstate direct, person-to-person communication and to ensure payment guidelines are clear, fair and consistent. Other suggestions included:
- improving access to accurate, up-to-date information—particularly through enhancements to the Trust’s website;
 - simplifying communication methods;
 - demonstrating clearer accountability from management;
 - adopting a more respectful, approachable tone in emails to help rebuild trust between the Trust and boaters;
 - improving staff training and better equipping volunteers to enhance engagement; and
 - better coordination and dialogue between the Trust and canal-based businesses to create a more cooperative environment.
- 5.29 There is a general view among these respondents that the Trust needs to adopt a more user-focused outlook, prioritising the needs of boaters and other canal users. Overall, the emphasis is on fostering a transparent, inclusive and responsive communication system that serves the boating community.

Hire boats

- 5.30 Of the 4,149 respondents who identified day-to-day operational issues in their responses, 35 (1%) discussed issues relating to hire boats. These include a high number of hire boats contributing to congestion and overcrowding, and a lack of proper training for boat users, resulting in damage to locks and other boats. Respondents also noted that hire boat users, especially day boats, often behave in an anti-social manner and treat the canals with disrespect.

Suggested solutions

- 5.31 Of these 35 respondents, two-thirds of them favoured an enforcement approach as a solution. Half of them wanted legislative change.
- 5.32 Around a quarter suggested other solutions, including:
- holding hire companies to account for being firmer about safety and courtesy and for limiting the number of occupants;
 - introducing online boating proficiency tests for hirers ahead of them being allowed to rent a boat;
 - giving the Trust the power to fine hire companies against whom complaints are made; and

- establishing a reporting system for informing the Trust or other relevant authority of any issues.

Derelict boats

- 5.33 Of the 4,149 respondents who identified day-to-day operational issues in their responses, 145 (3%) discussed the presence of derelict boats on the canals. Responses focused on the poor condition of boats, some of which are sinking, and the navigational and safety challenges posed to other users as a result. Respondents raised environmental concerns resulting from the presence of derelict boats, such as leaking fluids into the canal and attracting vermin. They reported that derelict boats look unsightly and detract from the user experience.
- 5.34 There is also a perceived lack of swift action on the Trust's part to remove these boats. Of the 145 who identified derelict boats as an issue, 83% favoured an enforcement approach as a solution. The next most popular solution was legislative change, at 45%.

Suggested solutions

- 5.35 Of the 145 respondents, 14% identified other solutions, including:
- placing visible markers on derelict boats;
 - implementing 'MOT-style' inspections of boats;
 - removing boats without a safety certificate;
 - a scrappage scheme to help owners economically dispose of end-of-life boats; and
 - providing financial support to owners to improve their vessels and maintain a good state of repair.

6. Strategic issues

- 6.1 Respondents raised a number of other issues of a more strategic nature. As with the operational management issues, these are important context for the Commission's work but do not relate directly to the licensing framework. The Trust may wish to consider these issues and engage with stakeholders on them as part of the development of its new ten-year strategy.

Perceptions of the Trust

- 6.2 Respondents expressed concerns about the Trust's governance, culture, accountability and transparency, and its understanding of the core stakeholder community. Comments suggest a strained relationship between the Trust and boaters, particularly continuous cruisers, as a result of the Trust's communication style, which is perceived as heavy handed and accusatory. There is also a feeling that the organisation does not advocate sufficiently for boaters' needs. The portrait that these comments conjure is of an organisation that may lack understanding of the boating community's needs and priorities. Some respondents suggested that this was a result of the removal of specific boating officers allocated to nominated canals or regions and their replacement with a centralised bureaucracy that makes it difficult for boaters to raise issues directly.
- 6.3 Issues around accountability and transparency are prominent in respondents' feedback. Boaters suggested that it is difficult for them to lodge formal complaints against Trust employees and some of them believe that the organisation in effect shields staff from accountability. In their view, this leads to continued poor service and unchecked issues. Respondents expressed concern at the lack of an independent ombudsman, observing that this is a standard accountability mechanism across other public bodies (though we note that the Trust is an independent charity). While Campbell Tickell (CT) is aware of the existence of a Trust complaints mechanism, the frequency of responses citing difficulties with this system suggests it may require review and/or improvements in the complaints handling culture within the Trust.
- 6.4 Furthermore, while CT can see apparently extensive engagement mechanisms detailed on the Trust's website, respondents report an absence of avenues for customer representation and engagement, particularly for itinerant boat dwellers. This indicates that the current engagement mechanisms may not be fit for purpose, or that work is required to ensure that such avenues are clear to all of the Trust's stakeholders.
- 6.5 Similarly, respondents reflected on the lack of elected, accountable representatives within the Trust. This leads many to feel that the Trust makes decisions that affect its key stakeholders without their input. There is also a view that the Trust does not have sufficient oversight from a governing body or an independent regulator (again, we note as CT that these are matters of perception rather than fact).

- 6.6 Respondents suggest greater transparency regarding the Trust's governance, policies, and use of public funds is necessary to improve public trust and ensure accountability.
- 6.7 Some respondents also raised questions about whether the Trust's corporate structure as a registered charity and company limited by guarantee is an appropriate vehicle for discharging public functions. Some questioned whether this was a material improvement on the predecessor body, British Waterways.

Management of funding and investment

- 6.8 Many respondents believe that the Trust's funding environment is challenging because of long-term underinvestment in the waterways and insufficient government funding. They acknowledge that these issues are a root cause of many of the concerns across the network highlighted elsewhere in the report.
- 6.9 Nevertheless, some strong views were expressed about the Trust's financial management. These include perceptions that the Trust:
- wastes funds on unnecessary projects and external contractors while neglecting core maintenance work;
 - spends too much on management, including senior staff salaries, and not enough on front line colleagues; and
 - is not transparent and accountable for the way it uses funds generated from licence fees.
- 6.10 Specific uses of the licence fee which respondents have raised concerns about include:
- upgrading towpaths for the benefit of cyclists and other users who are not themselves subject to a licence fee; and
 - making good damage caused by contractors and water companies which are subsequently not held to account for the damage.

The housing crisis

- 6.11 Many respondents have raised questions and concerns relating to the housing crisis. These issues are relatively polarised between:
- people who believe it is not appropriate for the waterways to be used as a cheaper alternative to traditional housing; and
 - those who believe the Trust should be doing more to support the increasing number of people living on the waterways.

- 6.12 The increase in residential use of the waterways appears to have contributed to many of the issues around overstaying, congestion and general boater etiquette highlighted through this report. It also gives rise to a number of strategic questions including:
- how the Trust balances the interests of residential and leisure boaters
 - what the Trust's additional responsibilities to residential boaters are or should be
 - how the Trust works in partnership with local authorities and other agencies on the specific issues facing residential boaters.
- 6.13 It is clear that the Trust's charitable objects are in no way related to providing housing to people in need and yet the consequences of the housing crisis pull the Trust into a difficult and thorny space more akin to a social housing landlord than an organisation looking to manage inland waterways for public benefit.

Security, crime and Anti-Social Behaviour (ASB)

- 6.14 Throughout the responses, boaters and other users highlight issues around security, crime and anti-social behaviour (ASB) on the canal network. For instance, boaters have faced burglaries, with some experiencing break-ins while they were away. Vandalism and interference with boats, such as undoing mooring lines, are also common concerns. Safety along towpaths is a significant issue, particularly due to the lack of lighting at night around mooring spots and popular towpaths, which poses a risk, especially for single women living on boats. Some boaters also reported bullying, theft, targeting to cause damage, and hate crimes by other boaters, Metropolitan police officers, and council staff. This raises questions about:
- the Trust's role in ensuring the safety of its user group on the network;
 - where the jurisdiction for canal-related crime lies; and
 - what powers the Trust needs to enforce proper and legal behaviour and use of the canals.

Environment

- 6.15 The canal network is a valuable open space, rich in wildlife and native flora, and is widely regarded as having the potential to serve as a holistic green space for all users. However, several respondents expressed concern that current practices—and the perceived lack of enforcement around environmentally responsible behaviour—are undermining this potential. For instance, respondents expressed concern about air pollution and bad smells caused by engines left running for heating, particularly during colder months. Smoke from chimneys and boat/motor fumes contribute to the pollution problem. Additionally, there is a significant amount of debris and rubbish in

the canals, including plastic bags, bottles, tyres, trolleys, and clothing. There are also mentions of environmental noise and smoke, pollution response time, and the impact of pollution on wildlife.

- 6.16 Some respondents were frustrated by the lack of environmental incentives and policy from the Trust to encourage more sustainable and green boating practices. Without stronger protections and accountability, the canal's ecological value and its role as a shared natural space risk being compromised.

7. Other issues

7.1 Many of the comments in this section are similar to the issues respondents have raised elsewhere in the consultation. The main issues raised as additional comments relate to:

- Maintenance
- Facilities & services
- Fairness of licensing options
- Overstaying
- Unlicensed boats.

7.2 There is a reasonable amount of positivity in the additional comments, especially around frontline Trust employees, and volunteers (both what they already do and their willingness to do more).

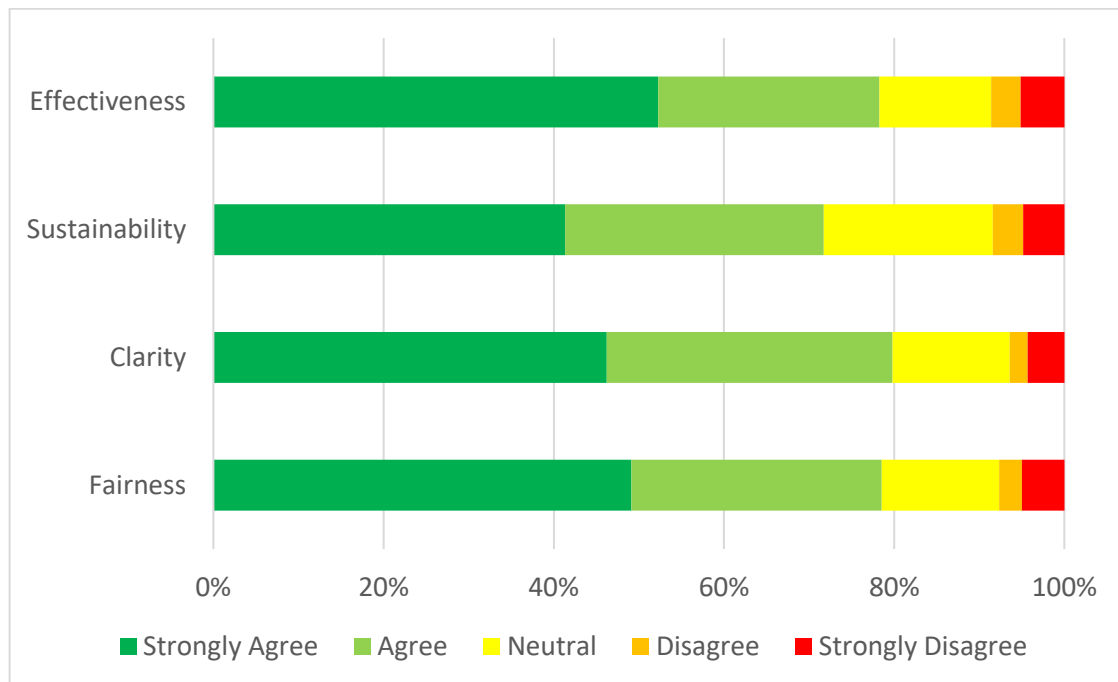
7.3 However, the additional comments overall suggest that confidence in the Trust is low. In part, this relates to the main issues identified above. However, there are some underlying concerns which are worthy of attention:

- Culture of the Trust:
 - Seen as focusing too much on enforcement and not enough on engagement with stakeholders;
 - Views on enforcement are polarised, with some feeling it is heavy handed and others feeling it is too lax;
 - Inadequate transparency in decision-making and public accountability for performance.
- Corporate structure
 - Whether the charity structure and legal framework provide the tools that are needed for the Trust to do its job;
 - Whether the current structure is better than its predecessor, British Waterways.
- Funding
 - The lack of government investment leading to underfunding and over-reliance on licence holders.

7.4 These issues resonate with respondents' comments elsewhere in the survey.

8. Measuring success

Guiding principles



8.1 The overwhelming majority of respondents supported the principles, with some variation:

- **Clarity** received the highest level of support with 88% agreement (58% strongly agree, 30% agree)
- **Effectiveness** received the strongest support with 85% agreement (61% strongly agree, 24% agree)
- 14% of respondents were neutral about **Fairness**, although it nevertheless received a high level of support with 83% agreement (49% strongly agree; 34% agree)
- 22% of respondents were neutral about **Sustainability** and it also had the lowest strong support (39% strongly agree), although overall agreement was still 75%.

Outcomes

8.2 The following themes related to the principles emerged from the open text responses:

- **Fairness – enforcement:**
 - Better enforcement of licensing rules, mooring time limits, and removal of unlicensed boats

- Concerns around continuous cruisers misusing the system or not contributing fairly
- Suggestions to charge continuous cruisers and wide-beam boats more to reflect their higher usage
- **Clarity – communication**
 - Better communication around policy changes
 - Questions around the Trust’s transparency and openness
 - Improved two-way communication (online chat, phone lines, apps)
- **Fairness – cost distribution**
 - Disagreement with flat-rate licensing and a view that cost should reflect boat size, location and usage
 - A desire for other users who also benefit from the waterways to contribute to costs
- **Effectiveness – maintenance, facilities and operations**
 - Better upkeep and more mooring spots
 - Improvements to availability and accessibility of facilities for boaters
 - Concerns about perceived organisational inefficiencies and use of resources
- **Sustainability – future proofing**
 - Strategic long-term maintenance planning
 - Government investment
 - Legislative change

8.3 There were also mixed views on social concerns about housing pressures. Some see continuous cruising as abused by those seeking cheap living. Others counsel against licensing or enforcement changes that could affect vulnerable groups.

APPENDIX 1 - DIFFERENT USER GROUPS

Analysis of the following user groups has been undertaken to look at the responses from different user groups to see whether there are any strong variances with the overall findings:

- **Boating organisations**
- **Businesses with a commercial interest**
- **Community organisations**
- **Local residents or businesses**
- **Other users**
- **Trust colleagues or volunteers**
- **Trust supporters**

The findings are set out in this appendix. There are no significant differences to draw to the Commission's attention.

Boating organisations

Fifty-three respondents indicated that they are Boating organisations, of which 50 are also boaters.

The most popular waterways they use are:

- Grand Union Canal: 23% (12)
- Trent & Mersey Canal: 23% (12)
- River Lee Navigation: 21% (11)
- Leeds & Liverpool Canal: 19% (10)
- Regent's Canal: 17% (9)
- Shropshire Union Canal: 17% (9)
- Limehouse Cut: 15% (8)
- River Trent Navigation: 15% (8)

Other waterways mentioned were the Thames, the Bridgewater Canal, the Nene, the Cam, the Fens, the Middle Levels, and the Droitwich Canals.

Of the 50 respondents who are also boaters, 92% (46) are Leisure Licence holders with a Home Mooring and 2% (1) are Leisure Licence holders without a Home Mooring.

All 50 respondents have had licences for more than a year and 80% (40) have held their licence for more than five years. For 12% (6), the boat is their primary residence.

19% (10) had no issues to raise, 13% (7) had one issue to raise, and 68% (36) had two or more issues to raise.

The main topics raised as the respondents' primary issue are:

- Maintenance
- Fairness of licensing options
- Overstaying
- Unlicensed boats

The most popular remedies for addressing the respondents' primary issue are:

- Enforcement approach: 51% (21)
- Types of licence: 29% (12)
- Trust communication and engagement: 27% (11)
- Legislative change: 27% (11)
- Pricing and other economic incentives: 22% (9)

22% (9) specified other remedies, although these are effectively different ways of expressing the categories used in the survey, in particular: Non-Legislative change (maintenance being a key theme here); Enforcement approach; Types of licence.

Businesses with a commercial interest

Eighty-two respondents indicated that they are Businesses with a commercial interest, of which:

- 58 are Boaters
- 2 are Local residents or businesses
- 1 is a Towpath user

The most popular waterways in use by them are:

- Grand Union Canal: 37% (30)
- Oxford Canal: 26% (21)
- Trent & Mersey Canal: 23% (19)
- Shropshire Union Canal: 22% (18)
- Coventry Canal: 20% (16)
- Whole Trust Network: 20% (16)
- Llangollen Canal: 17% (14)
- Regent's Canal: 16% (13)

Other waterways mentioned are the Thames; the Bridgewater Canal; the River Avon; the Avon Navigation; the Nene; the Great Ouse; Bristol Harbour.

Of the 58 respondents who are boaters, 48% (28) are Leisure Licence holders with a Home Mooring; 16% (9) are Leisure Licence holders without a Home Mooring. 33%

(19) hold other licences, most of which are specified as Trade licence, Business licence, Commercial licence, or Roving trader.

98% (56) have had their licences for more than a year; 77% (44) have had their licences for more than five years. For 56%, the boat is their primary residence.

17% (14) had no issues to raise and 20% (16) raised one issue; 63% (52) raised more than one issue.

The main topics raised as the respondents' first issue are:

- Maintenance
- Fairness of licensing options
- Price
- Overstaying
- Unlicensed boats

The most popular remedies for the respondents' first issue are:

- Other: 32% (22) – see further analysis below.
- Legislative change: 31% (21)
- Enforcement approach: 31% (21)
- Pricing and other economic incentives: 31% (21)
- Non-legislative change (e.g. Trust policy or guidance): 22% (15)

Some of the other remedies specified by respondents are effectively different ways of expressing the categories used in the survey, in particular: Enforcement; Trust communication and engagement; No change; and Types of licence. Three other themes emerged (which could broadly fit under the category of Non-legislative change) relating to improvements in: maintenance; Trust management, governance, and oversight; partnership working with other organisations.

Community organisations

Fourteen respondents indicated that they are Community organisations, of which 12 are boaters.

The most popular waterways they use are:

- Grand Union Canal: 43% (6)
- Shropshire Union Canal: 21% (3)

No other waterways were mentioned.

Of the 12 respondents who are boaters, 83% (10) are Leisure Licence holders with a Home Mooring.

All respondents (11) have had licences for more than a year and 73% (8) have held their licence for more than five years. For 42% (5), the boat is their primary residence.

Fourteen per cent (2) had no issues to raise, 29% (4) had one issue to raise, and 57% (8) had two or more issues to raise.

The main topics raised as the respondents' primary issue were:

- Price
- Overstaying

The most popular remedies for addressing the respondents' primary issue are:

- Enforcement approach: 42% (5)
- Trust communication and engagement: 42% (5)
- Types of licence: 42% (5)
- Wider cross-stakeholder communication: 33% (4)
- Pricing and other economic incentives: 33% (4)

Local residents or businesses

Sixty-two respondents indicated they are Local residents or businesses, of which:

- 41 are Boaters
- 13 are Towpath users
- 2 are Businesses with a commercial interest
- 1 are Other users

The most popular waterways they use are:

- Grand Union Canal: 23% (14)
- Kennet & Avon Canal: 23% (14)
- Oxford Canal: 23% (14)
- Coventry Canal: 13% (8)
- Trent & Mersey Canal: 13% (8)
- Staffordshire & Worcestershire Canal: 11% (7)

Other waterways mentioned are: the Thames, Grand Western, Cotswold Canals, Lichfield & Hatherton Canal Restoration Project.

Of the 41 respondents who are boaters, 83% (34) are Leisure Licence Holders with a Home Mooring; 10% (4) are Leisure Licence holders without a Home Mooring.

92% (36) have held their Licence for more than one year; 74% (29) have held their Licence for more than five years. For 22% (9), the boat is their primary residence.

19% (12) had no issues to raise and 24% (15) raised one issue. 57% (35) raised more than one issue.

The main topics raised as the respondents' primary issue are:

- Fairness of licensing options
- Maintenance
- Overstaying

The most popular remedies for addressing the respondents' primary issue are:

- Legislative change: 38% (19)
- Enforcement approach: 38% (19)
- Types of licence: 36% (18)
- Other: 30% (13)

Most of the other remedies specified by respondents are effectively different ways of expressing the categories used in the survey, in particular: Pricing and other economic incentives; Non-legislative change (suggestions being around maintenance, organisational changes to the Trust, support for boaters, reducing number of continuous cruiser licences); and Enforcement approach.

Other users

Fifty-two respondents indicated they are Other users, of which:

- 41 are Boaters
- 4 are Towpath users
- 2 are Trust colleagues or volunteers
- 1 is a Local resident or business
- 1 is Trust supporter (friend or donor)

The most popular waterways they use are:

- Grand Union Canal: 44% (23)
- Llangollen Canal: 23% (12)
- Trent & Mersey Canal: 23% (12)
- Shropshire Union Canal: 19% (10)
- Oxford Canal: 17% (9)

Other waterways mentioned are: the Thames; the Avon; the Wye; the Teme; the Colne; the Great Western Canal; the Bude Canal; the Cotswold Canals.

Of the 41 respondents who are boaters, 71% (29) are Leisure Licence Holders with a Home Mooring; 20% (8) are Leisure Licence holders without a Home Mooring.

95% (37) have held their Licence for more than one year; 64% (25) have held their Licence for more than five years. For 32% (13) the boat is their primary residence.

27% (14) had no issues to raise and 21% (11) raised one issue. 52% (27) raised more than one issue.

The main topics raised as the respondents' primary issue are:

- Maintenance
- Overstaying
- Price
- Trust Customer Service/Governance

The most popular remedies for addressing the respondents' primary issue are:

- Enforcement approach: 51% (19)
- Pricing and other economic incentives: 32% (12)
- Non-legislative change: 30% (11)

22% (8) specified other remedies, although these are effectively different ways of expressing the types of remedy proposed in the survey.

Trust colleagues or volunteers

One hundred and one respondents indicated that they are Trust colleagues or volunteers, of which:

- 75 are Boaters
- 7 are Towpath users
- 2 are Other users
- 2 are Trust supporters (friends and donors)

The most popular waterways in use by them are:

- Grand Union Canal: 31% (31)
- Trent & Mersey Canal: 25% (25)
- Oxford Canal: 19% (19)
- Shropshire Union Canal: 15% (15)
- Coventry Canal: 14% (14)
- Staffordshire & Worcestershire Canal: 14% (14)
- Leeds & Liverpool Canal: 12% (12)
- Worcester & Birmingham Canal: 11% (11)

Other waterways mentioned are the Droitwich Canal; the Thames; the River Avon; the River Avon (Warwickshire); the Avon Navigation; the Nene; the Trent; the Chesterfield Canal; the Middle Levels; the Great Ouse; the Colne; the Bridgewater Canal.

Of the 75 respondents who are boaters, 71% (53) are Leisure Licence holders with a Home Mooring; 19% (14) are Leisure Licence holders without a Home Mooring.

92% (66) have had their licences for more than a year; 65% (47) have had their licences for more than five years. For 21% (16), the boat is their primary residence.

18% (18) had no issues to raise and 20% (20) raised one issue; 62% (63) raised more than one issue.

The main topics raised as the respondents' primary issue are:

- Maintenance
- Overstaying
- Fairness of licensing
- Overstaying
- Price

The most popular remedies for the respondents' primary issue are:

- Enforcement approach: 49% (40)
- Pricing and other economic incentives: 34% (28)
- Legislative change: 29% (24)
- Trust communication and engagement: 28% (23)
- Non-legislative change (e.g. Trust policy or guidance): 26% (21)
- Other: 24% (20)

Most of the other remedies specified by respondents are effectively different ways of expressing the categories used in the survey, in particular: Non-legislative change (themes being around maintenance and more effective use of Trust resources); Enforcement approach; Wider cross-stakeholder communication; Types of licence.

Trust supporters

Sixty-five respondents indicated that they are Trust supporters (donors and friends), of which:

- 56 are boaters
- 3 are Towpath users
- 2 are Trust colleagues or volunteers
- 4 are Other users

The most popular waterways in use by them are:

- Grand Union Canal: 45% (29)
- Oxford Canal: 31% (20)
- Trent & Mersey Canal: 27% (17)

- Leicester Line (Grand Union Canal): 22% (14)
- Shropshire Union Canal: 22% (14)
- Kennet & Avon Canal: 20% (13)
- Leeds & Liverpool Canal: 20% (13)
- Staffordshire & Worcestershire Canal: 20% (13)

Other waterways mentioned were the Thames, Ouse, River Nene, River Avon, and Bridgewater.

70% (39) are Leisure Licence holders with a Home Mooring; 20% (11) are Leisure Licence holders without a Home Mooring.

90% (47) have had their licences for more than a year; 63% have had their licences for more than five years.

For 28% (15), the boat is their primary residence.

31% (20) had no issues to raise and 20% (13) raised one issue; 49% (32) raised more than one issue.

The main topics raised as the respondents' primary issue are:

- Maintenance
- Overstaying
- Price
- Fairness of Licensing options

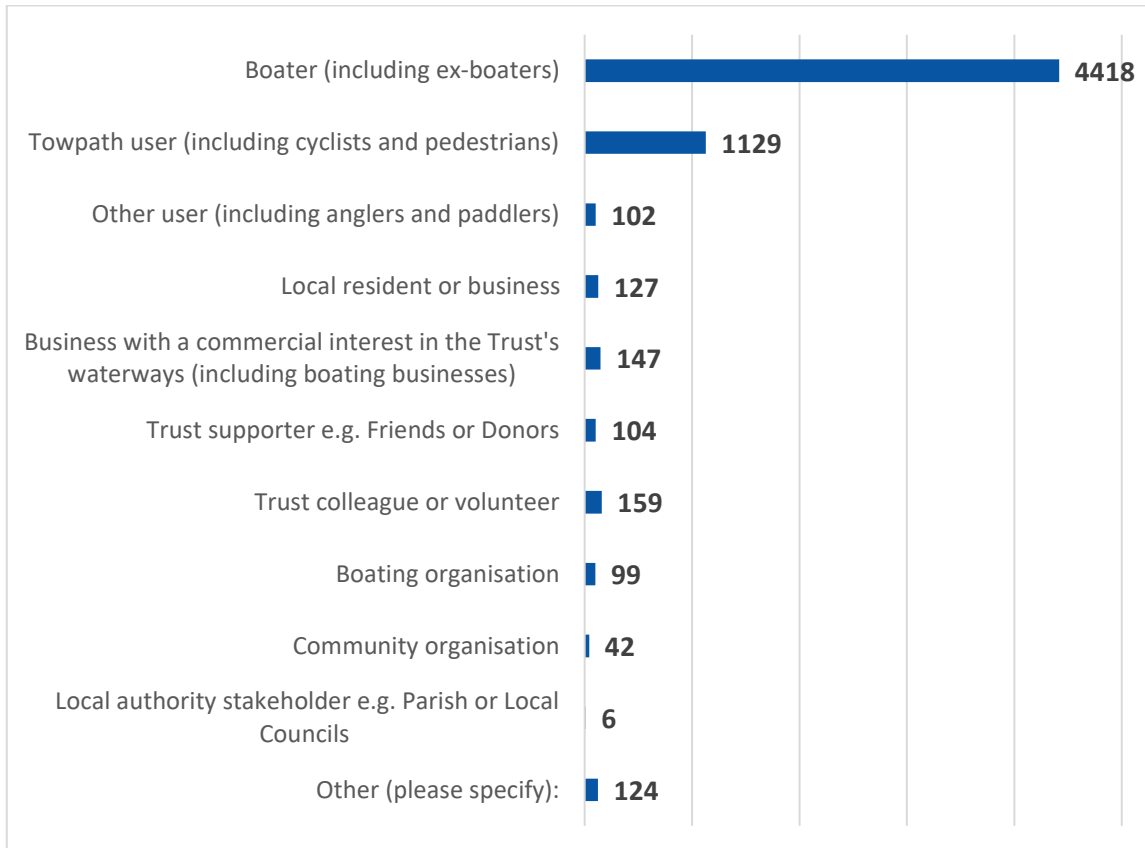
The most popular remedies for the respondents' primary issue are:

- Enforcement approach: 49% (22)
- Legislative change: 31% (14)
- Trust communication and engagement: 27% (12)
- Pricing and other economic incentives: 27% (12)
- Other: 22% (10)

Most of the other remedies specified by respondents are effectively different ways of expressing the categories used in the survey, in particular: Non-legislative change (themes being around maintenance and more effective use of Trust resources); Wider cross-stakeholder communication (with suggestions to improve government relations and government funding).

APPENDIX 2 - DEMOGRAPHIC SPREAD OF RESPONSES

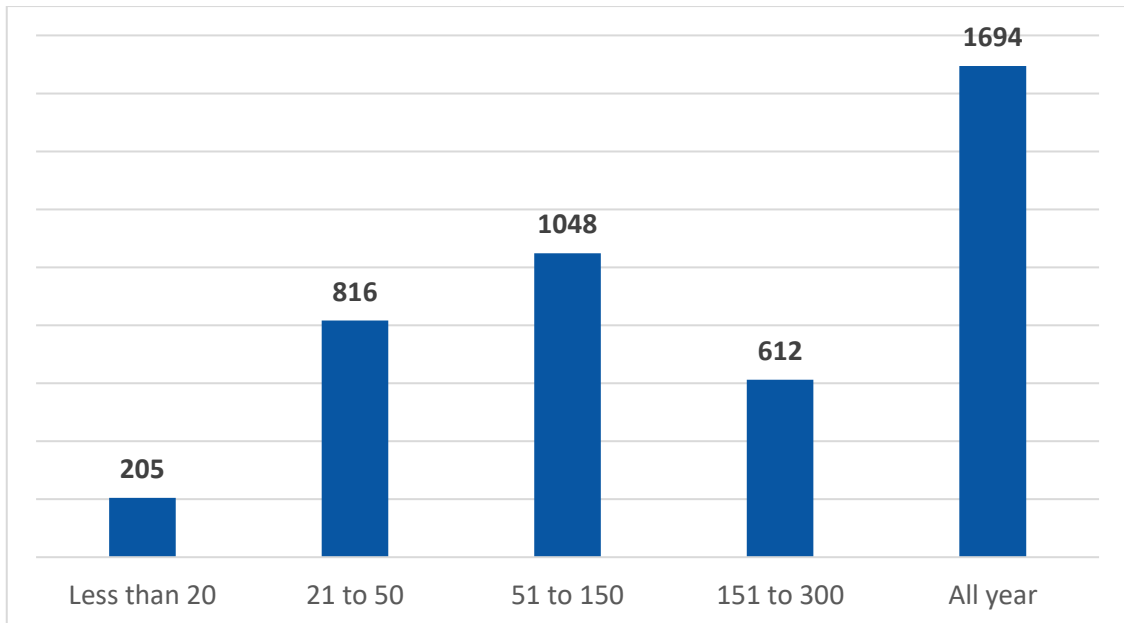
Primary relationship to the Trust waterways



Boaters comprise 4,418 (94%) of respondents, making up a large majority. This is followed by towpath users, including cyclists and pedestrians, who comprise 1,129 of the 4,678 responses (24%).

The next largest user type after this is Businesses with a commercial interest in the waterways, which comprise 147 (3%) of responses.

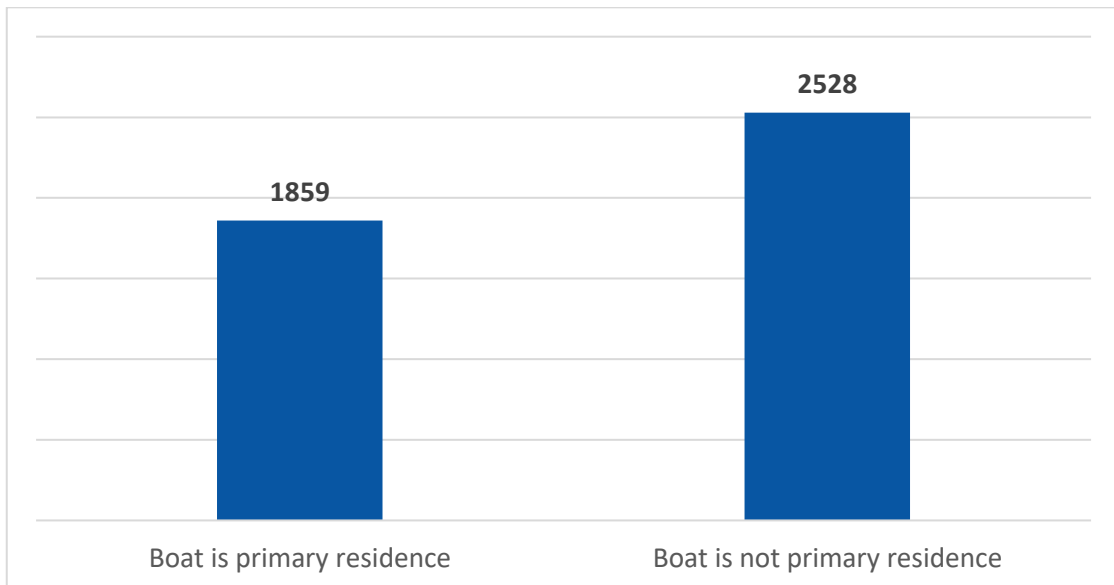
Duration of use of the waterways



Of the respondents who are boaters, 1,694 (38% of boaters) spend the entire duration of the year on their boats.

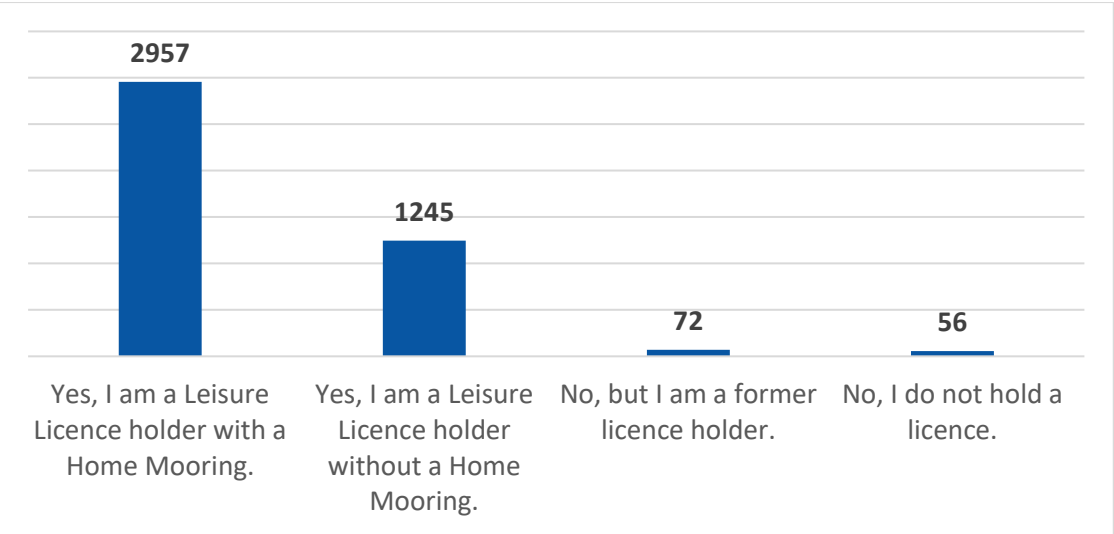
In total, 2,069 boaters (47% of boaters) spend less than half a year on their boats.

Residential status



Of the boaters who responded to the survey, 1,859 (42%) indicated that their boat was their primary residence, while 2,528 (57%) indicated that they did not live on their boat.

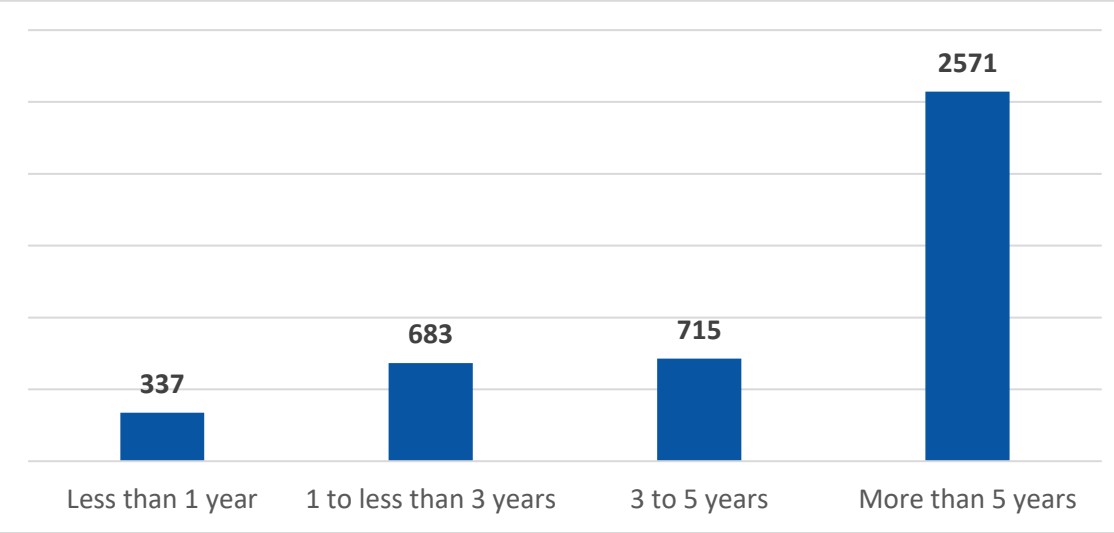
Licence status



2,957 (63%) of respondents are leisure licence holders with a home mooring, and a further 1,245 (27%) are leisure licence holders without a home mooring.

A total of 75 respondents indicated they had other types of licences to the options given in the survey. These included those with a roving traders licence (42), syndicate licence holders where the boat is shared among users (11), boaters who only use short-term temporary licences (7), and non-Trust licensees (5).

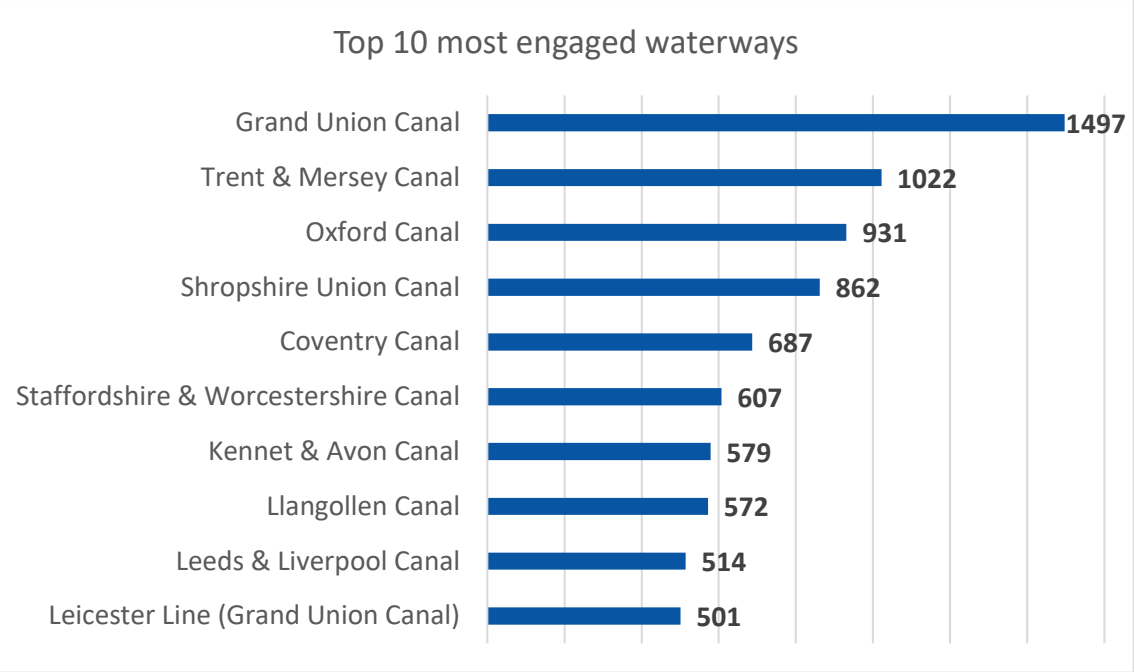
Length of licence term



2,571 respondents (55%) indicated that they had held a licence for more than five years.

The results show a strong skew towards those who have held their licence for longer periods of time compared with those who are new to the licence framework.

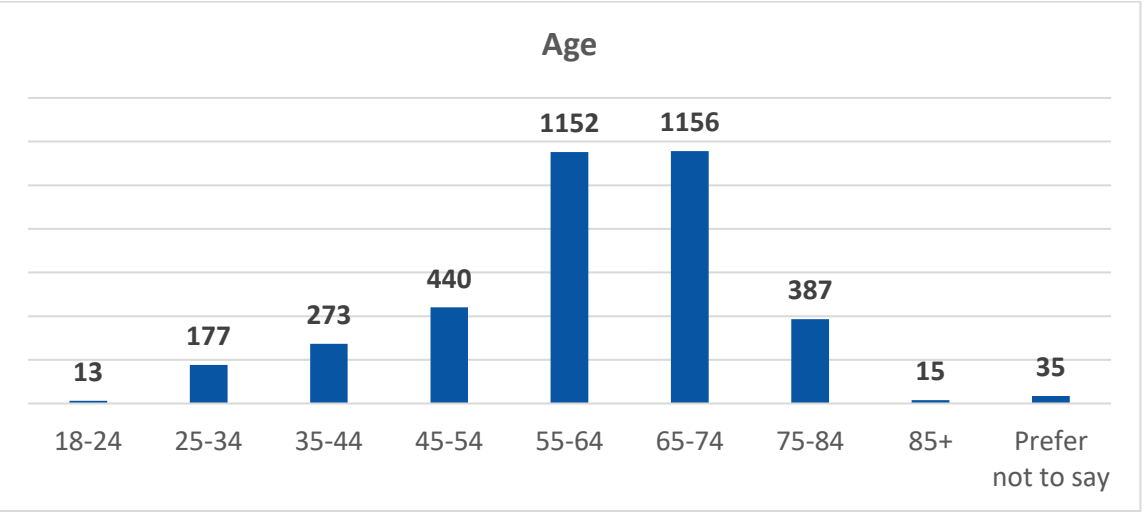
Geographic profile



1,497 (32%) respondents indicated that, of the Trust network, they are most engaged with the Grand Union Canal. This is followed by the Trent & Mersey (22%) and the Oxford Canal (20%). The agreed survey methodology allowed respondents to select more than one location. It is not possible, therefore, to breakdown responses by geographic profile.

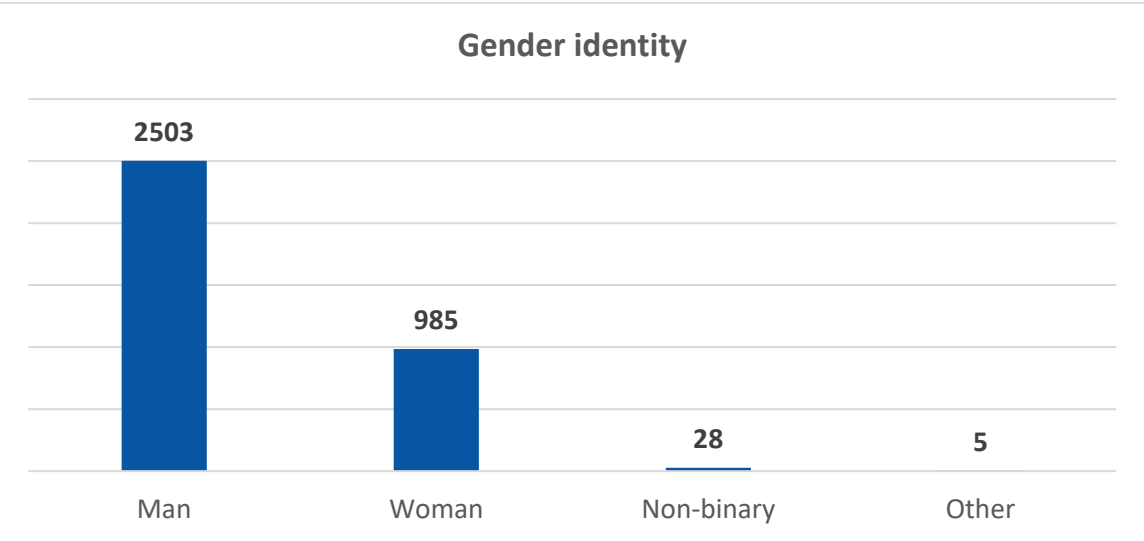
Demographic profile

3,639 (78%) respondents consented to completing the demographic section of the survey for diversity monitoring purposes.



There was a strong skew towards the higher age groups, with the largest age group of respondents who completed the questions being 65-74 (31.8%), followed by 55-64 (31.7%).

The estimated average age of respondents is just over 60 years old.

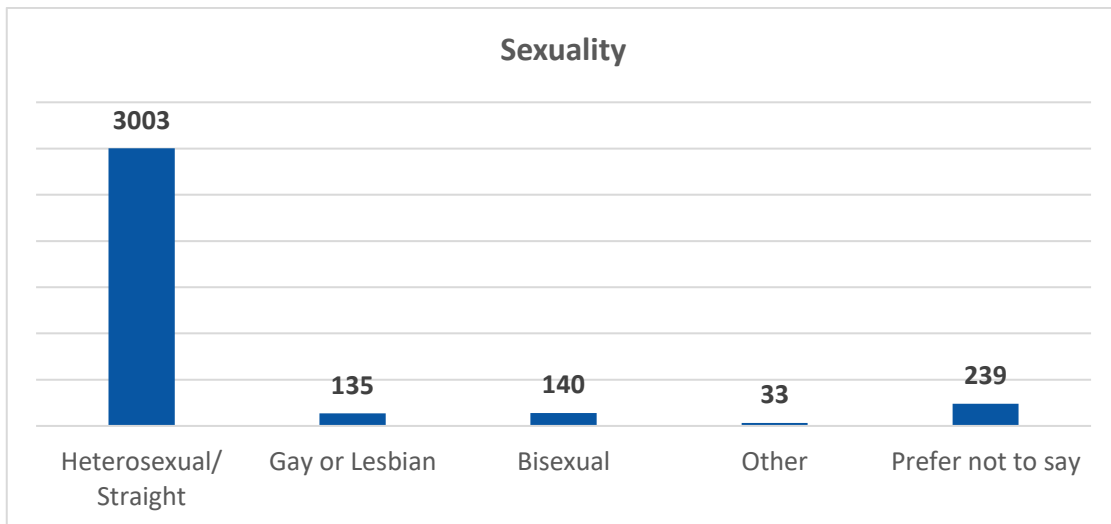


2,503 (69%) respondents are male, compared with 985 female respondents (27%). This is a significant underrepresentation of females to males in comparison with wider society (although the Trust may have data indicating how representative it is of, for example, the boating population).

Twenty-eight respondents indicated that they are non-binary (0.7%) while five preferred to self-describe (0.01%).

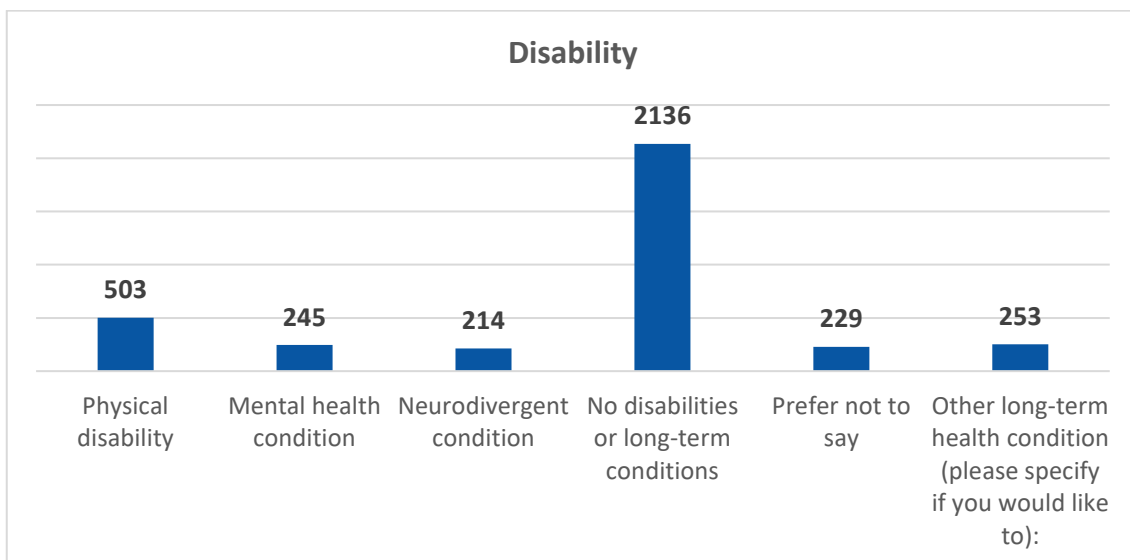
Sixty-seven respondents preferred not to say.

3,467 (95%) identified with the gender they are assigned at birth, compared with 41 (0.1%) who did not. 108 respondents preferred not to say.



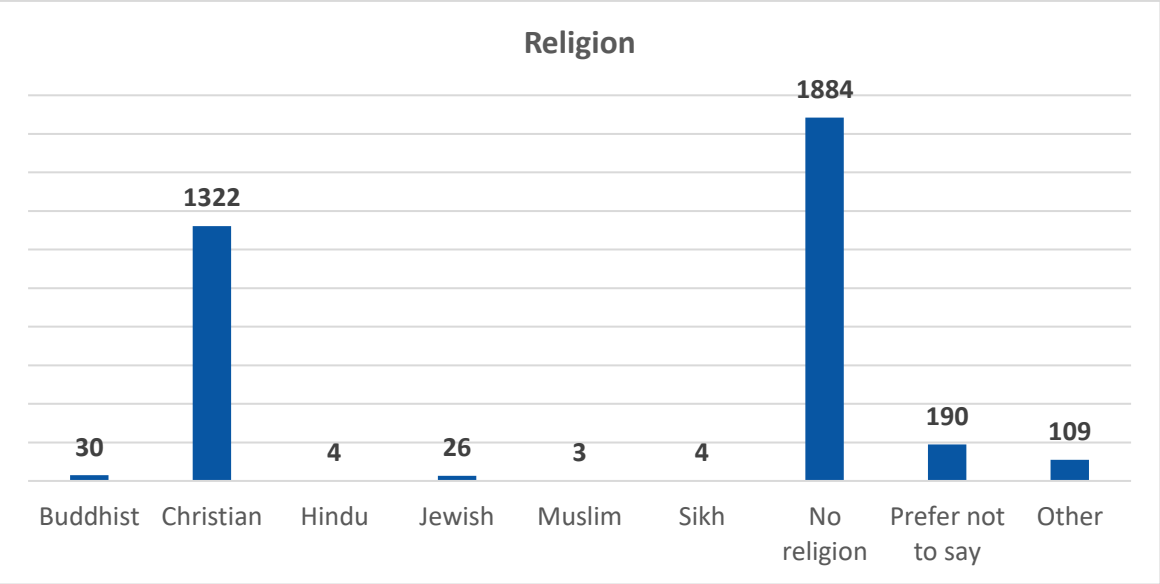
3,003 (83%) respondents identified as heterosexual, compared with 140 (3.8%) who identified as bisexual and 135 (3.7%) who identified as Gay or Lesbian.

33 respondents (0.9%) preferred to self-describe, while 239 (6.5%) preferred not to say.



The majority of respondents who answered the monitoring questions did not have a disability or long-term condition (59%).

Of those respondents who identified as having a disability or long-term condition, the largest group are those with a physical disability (14%), followed by those with a mental health condition (6.7%), and then those with neurodivergent conditions (5.8%), 253 (7%) respondents indicated that they had other long-term health conditions, while 229 preferred not to say.



The majority of respondents identified with having no religion (52%). Of those who identified with a religion, the largest group comprise Christians, with 1,322 respondents (36%).

A total of 67 (1.8%) respondents identified with the other named religions in the survey, with the largest sub-group comprising Buddhists with 30 respondents (0.8%) followed by Jewish people with 26 respondents (0.7%).

109 respondents identified with other religions not listed in the survey (2.9%), while 190 preferred not to say.

APPENDIX 3 - NUMERICAL SPREAD OF RESPONSES

	1	2	3	4	5	Total
Fairness of licensing options	1112	457	283	126	74	2253
Licensing options	352	177	76	39	25	669
Affordability	347	110	62	13	13	545
Issues facing continuous cruisers	268	101	77	38	19	494
Other users	65	49	54	29	13	210
Accessibility	27	7	9	3	3	49
Congestion	101	45	39	16	9	210
Licensing process	53	13	5	4	1	76
Management of licences	667	431	209	72	42	1421
Overstaying	301	237	98	22	7	665
Unlicensed boats	264	123	58	21	9	475
General enforcement	102	71	53	29	26	281
Getting the basics right	1698	1309	710	279	153	3939
Maintenance and facilities	1240	909	463	170	78	2860
Derelict boats	47	56	25	11	6	145
Hire boats	4	15	6	7	3	35
Communication	49	41	32	23	20	165
Moorings	197	190	97	38	23	545
Towpaths	60	53	48	14	14	189
Strategic issues	253	99	125	81	72	630
Responding to the housing crisis	13	6	1	0	0	20
Perceptions of the Trust	121	0	25	30	34	210
Decentralisation	2	0	0	0	0	2
Environment	32	12	22	12	8	86
Security, Crime and ASB	19	40	34	16	12	121
Funding and investment	66	41	43	23	18	191