Canal & River Trust
Making life better by water

djs research

Boat licence consultation 2023

Summary report
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Background

The Canal & River Trust (“the Trust”) commissioned DJS Research to conduct a survey of boaters ahead of foreseen changes to the boat licence fee over the next 10 years.

The aim of this survey was to understand boater preferences between four proposed fee structure options that it has determined to be viable. It is understood that no boater wishes for fees to be increased and that this preference is often based on an option being ‘least worst’.

Please note, this document is intended to help guide the Trust’s decision making as it evaluates the current boat licence fee structure, but does not seek to make recommendations as to which option or options are ultimately most sustainable or reasonable.

In late 2022, prior to fieldwork taking place, DJS conducted two focus group sessions with a group of boaters representing the interests and views of the boating community.

These sessions were used to:

- Gauge reactions to, and refine, the list of possible fee structure options to be presented in the research.
- Refine the language used in the survey.
- Understand what contextual information would be valued by boaters in making their decision.

This final report is based on the 8,479 responses to the survey, received between 15th February and 6th April 2023.

Methodology

Invites were sent to c.33,000 individual boaters representing c.35,000 licenced boats. Invites were sent to boaters primarily by email. However, where a valid email address was not held by the Trust, boaters were invited by text message or post, instead.

All surveys were completed online, with the exception of a small number that, on request, were conducted over the phone with boaters by a representative of the Trust.

In all, 26% of boaters invited to the consultation completed the survey.

Group	Responses
All boaters	8,479
Continuous cruiser	1,908
Home mooring	6,412
Other mooring type	159

There are a number of outputs to accompany this research that are available to the Trust. These aim to give readers more depth and context to the results presented in this summary report, as well as access to the full results according to certain behavioural, attitudinal and demographic sub-samples.

These include:

- Survey data tables (Excel)
- An analysis of the strength of correlation between Q9 and Qs 11 & 13 (Word)
- A breakdown of boater option preferences by notable sub-sample, as well as direct boater choice comparisons between each combination of options (Excel)
- A breakdown of boater second preferences (Word)

Make-up of survey responses

Sample structure: demographics

Gender	Consultation responses
Man	68%
Woman	22%
Identify in another way	1%
Prefer not to say	9%

Age	Consultation responses
16-44	10%
45-64	39%
65+	36%
Prefer not to say	9%

Employment	Consultation responses
Employed FT	19%
Employed PT	7%
Self-employed	13%
Retired	47%
Out of work	4%
Prefer not to say	9%

Sample structure: Demographics

Household income	Consultation responses
Under £10,000	9%
£10,000 - £19,999	18%
£20,000 - £29,999	16%
£30,000 - £39,999	10%
£40,000 - £49,999	7%
£50,000 - £59,999	5%
£60,000 - £79,999	4%
£80,000 - £99,999	2%
£100,000 or more	3%
Prefer not to say	26%

Boating region	Consultation responses
North West	13%
Yorkshire and North East	7%
North Wales	1%
West Midlands	18%
East Midlands	17%
Wales and South West	8%
London and South East	15%
Boat widely across more than one region	17%
Prefer not to say	4%

Sample structure: consultation responses vs registered licences

In terms of mooring type, responses to the consultation were broadly in line with the wider boating population, with 76% of responses coming from those with a home mooring (versus 80% of registered licences) and 23% coming from continuous cruisers (versus 20% of registered licences).

Mooring type	Consultation responses	Registered licences
Continuous cruisers	23%	20%
Boats with home moorings	76%	80%
Other	2%	-

Please note, while individuals can hold more than one boat licence (many more in the case of boat hire businesses, for instance), only one survey was sent per individual boater. As such, this document reports the findings according to the number of individual boaters who responded, not the proportion of boats or licences those responses represent.

Relative acceptability of the four proposed fee structure changes

Four potential fee structure options were presented to boaters as part of the consultation

These options were presented as part of a pairwise choice experiment, in which participants viewed three batches of three options under consideration by the Trust in rotation.

For each rotation of options presented, two options (drawn from 'B', 'C', or 'D') were presented against the one option that most closely represented the current fee structure (i.e., status quo), option 'A'. The purpose of doing so was to allow participants to always have an option considered tenable by the Trust to represent a neutral response, in the absence of a viable 'none of the above' option.

Once all responses were gathered, a statistical analysis was run on the data set that allows us to assign a probability for each option that it would be the 'most preferred' (or least worst) option should all four options be presented to a given audience.

Options presented

	Description
Option 'A'	Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width. An increase would be applied evenly to all licences at a rate above annual inflation (CPI) each year for a period of ten years (from 2023 – 2032).
Option 'B'	Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width. An increase would be applied to all boats. However, a higher increase in licence fee would be applied to those boats without a home mooring who are required to continuously cruise, with those with a home mooring seeing a lower increase in licence fee.
Option 'C'	An increase would be applied to all boats. However, the current wide-beam surcharge would be replaced with an area-based charge (based on the width of the boat multiplied by its length). This would involve introducing a sliding scale of charges that reflect the footprint of the boat on the water. Boats with a larger overall area would pay proportionally more and those with a smaller overall area would pay proportionally less.
Option 'D'	Retaining the current licence fee structure based on the length of the boat but the current surcharge based on boat width would rise. An increase would be applied to all boats. However, boats with a larger width would receive a higher surcharge than they do currently and those with a smaller width would continue to receive no surcharge at all.

Under this model, preference is reported as a probability

A relative preference score is used to determine the expected proportion of respondents who would choose each of the four options if all were on offer and they had to choose just one.

The probabilities sum to 100%, as the model assumes that only these four options are available and each boater must choose one, and only one, of them.

Where a probability is over 50%, the model suggests that the majority of boaters prefer that option.

Please note, participation in the pairwise choice experiment does not imply participants' consent or acceptance of the wider notion of the Trust's fee rises. Their answers simply represent participants' view of the proposed options' acceptability relative to each other.

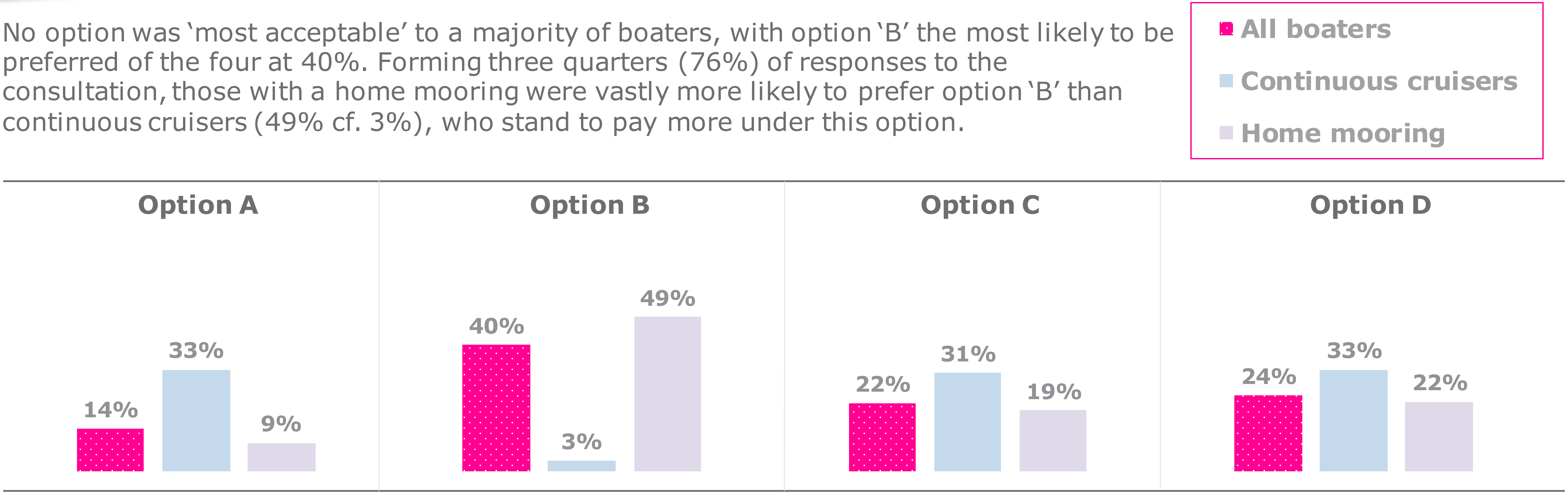
Options presented

	Description
Option 'A'	Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width. An increase would be applied evenly to all licences at a rate above annual inflation (CPI) each year for a period of ten years (from 2023 – 2032).
Option 'B'	Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width. An increase would be applied to all boats. However, a higher increase in licence fee would be applied to those boats without a home mooring who are required to continuously cruise, with those with a home mooring seeing a lower increase in licence fee.
Option 'C'	An increase would be applied to all boats. However, the current wide-beam surcharge would be replaced with an area-based charge (based on the width of the boat multiplied by its length). This would involve introducing a sliding scale of charges that reflect the footprint of the boat on the water. Boats with a larger overall area would pay proportionally more and those with a smaller overall area would pay proportionally less.
Option 'D'	Retaining the current licence fee structure based on the length of the boat but the current surcharge based on boat width would rise. An increase would be applied to all boats. However, boats with a larger width would receive a higher surcharge than they do currently and those with a smaller width would continue to receive no surcharge at all.

Overall, ‘B’ is the ‘most acceptable’ option of the four. However, this is driven almost exclusively by a larger population of boaters with a home mooring

Probability of finding each route ‘most acceptable’

No option was ‘most acceptable’ to a majority of boaters, with option ‘B’ the most likely to be preferred of the four at 40%. Forming three quarters (76%) of responses to the consultation, those with a home mooring were vastly more likely to prefer option ‘B’ than continuous cruisers (49% cf. 3%), who stand to pay more under this option.

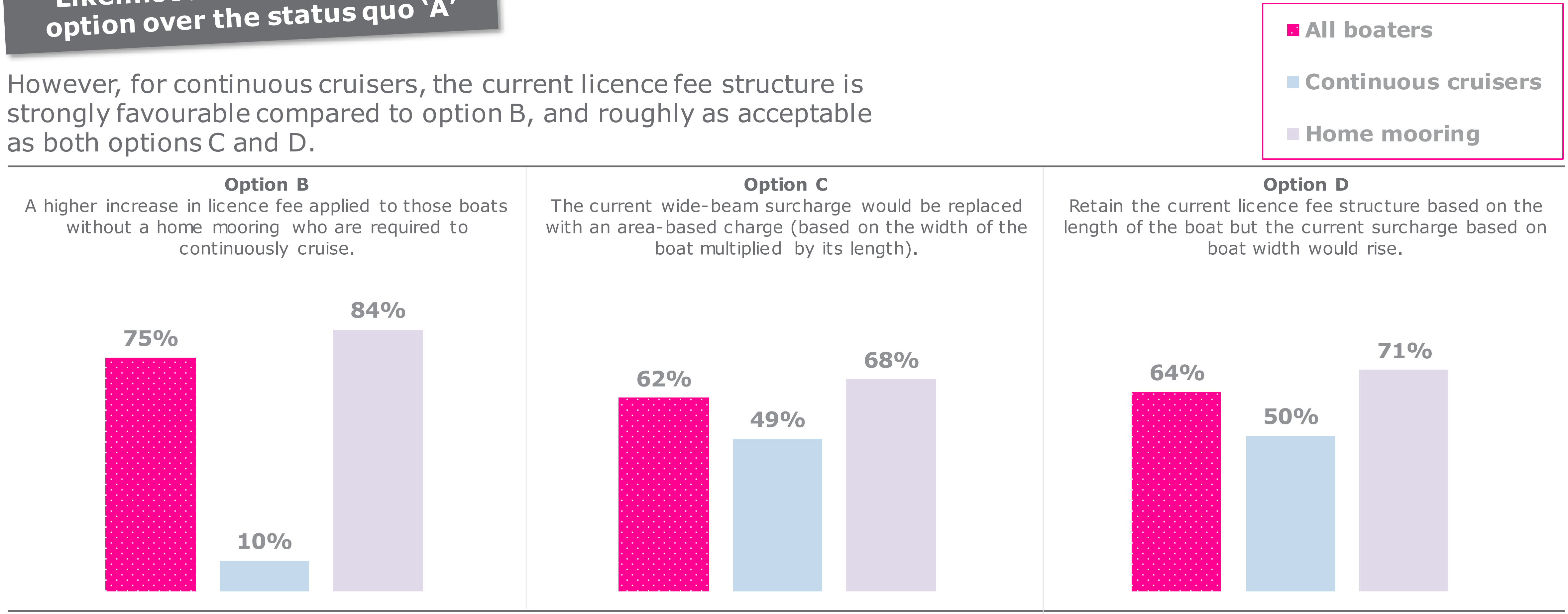


Base: All respondents. Q9. We’d like you to choose which of the 3 options shown below would be the most acceptable to you. n=8,479

Those with a home mooring strongly favoured each option over retaining the status quo

Likelihood of selecting each option over the status quo 'A'

However, for continuous cruisers, the current licence fee structure is strongly favourable compared to option B, and roughly as acceptable as both options C and D.



Base: All respondents. Q9. We'd like you to choose which of the 3 options shown below would be the most acceptable to you. n=8,479

Option ‘B’ performed best among leisure boaters with a home mooring and least well among liveaboard continuous cruisers

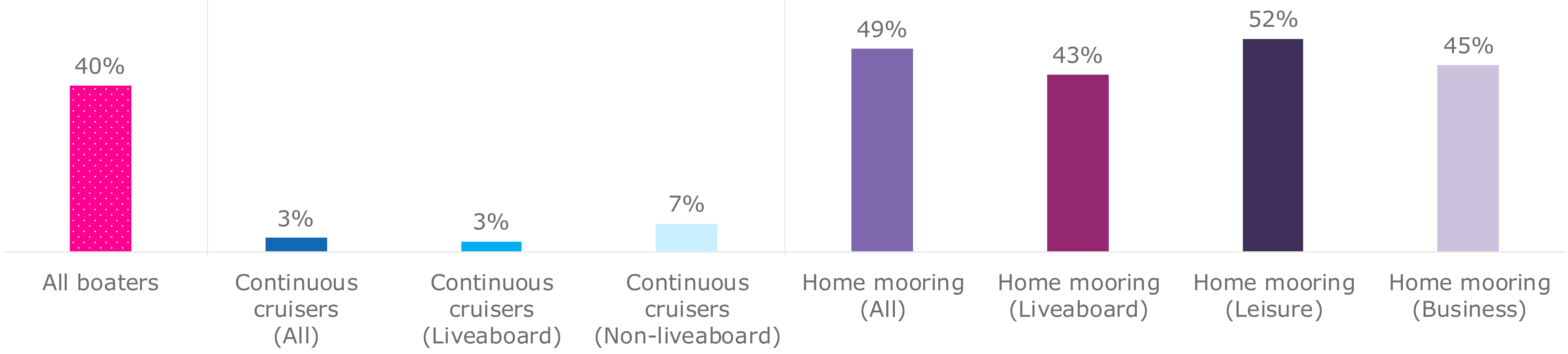
Likelihood of selecting option ‘B’ as most preferred

Option ‘B’

Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width.

An increase would be applied to all boats. However, **a higher increase in licence fee would be applied to those boats without a home mooring who are required to continuously cruise**, with those with a home mooring seeing a lower increase in licence fee.

The probability of continuous cruisers preferring this option, which would see them paying proportionally more, was just 3%.

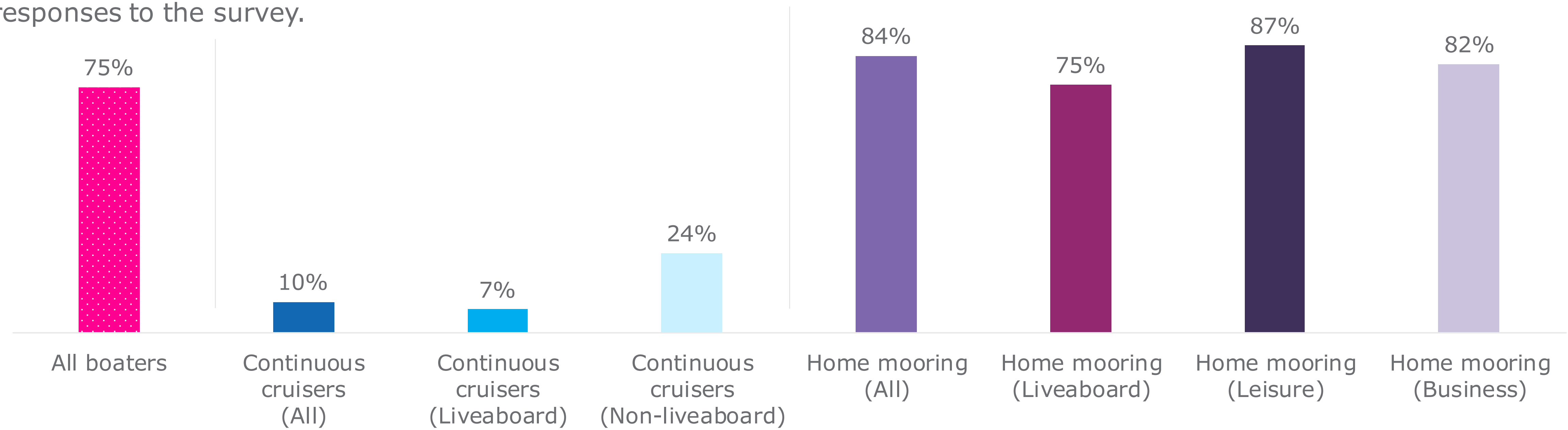


Base: All respondents. Q9. We’d like you to choose which of the 3 options shown below would be the most acceptable to you. n=8,479

Nine-in-ten continuous cruisers would rather the Trust stick to the status quo over switching to option B

Likelihood of selecting option 'B' over the status quo 'A'

However, around a quarter of CCs who are *not* liveaboard boaters do find option B more acceptable than the current structure. These boaters make up 3% of responses to the survey.



Option 'B'

Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width.

An increase would be applied to all boats. However, **a higher increase in licence fee would be applied to those boats without a home mooring who are required to continuously cruise**, with those with a home mooring seeing a lower increase in licence fee.

Base: All respondents. Q9. We'd like you to choose which of the 3 options shown below would be the most acceptable to you. n=8,479

Money conscious boaters with a disability are less accepting of ‘B’

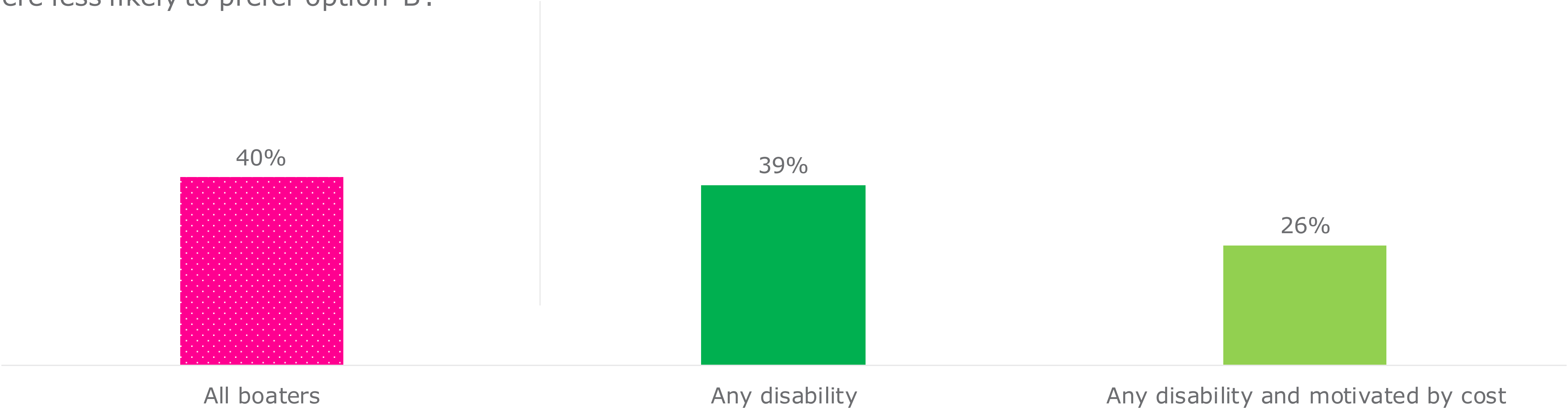
Likelihood of selecting option ‘B’ as most preferred

While, in general, boaters who identify as having a disability share the same preferences as the wider boating population, boaters with a disability and who were motivated to begin/remain boating as an affordable lifestyle choice were less likely to prefer option ‘B’.

Option ‘B’

Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width.

An increase would be applied to all boats. However, **a higher increase in licence fee would be applied to those boats without a home mooring who are required to continuously cruise**, with those with a home mooring seeing a lower increase in licence fee.



Base: All respondents. Q9. We’d like you to choose which of the 3 options shown below would be the most acceptable to you. n=8,479

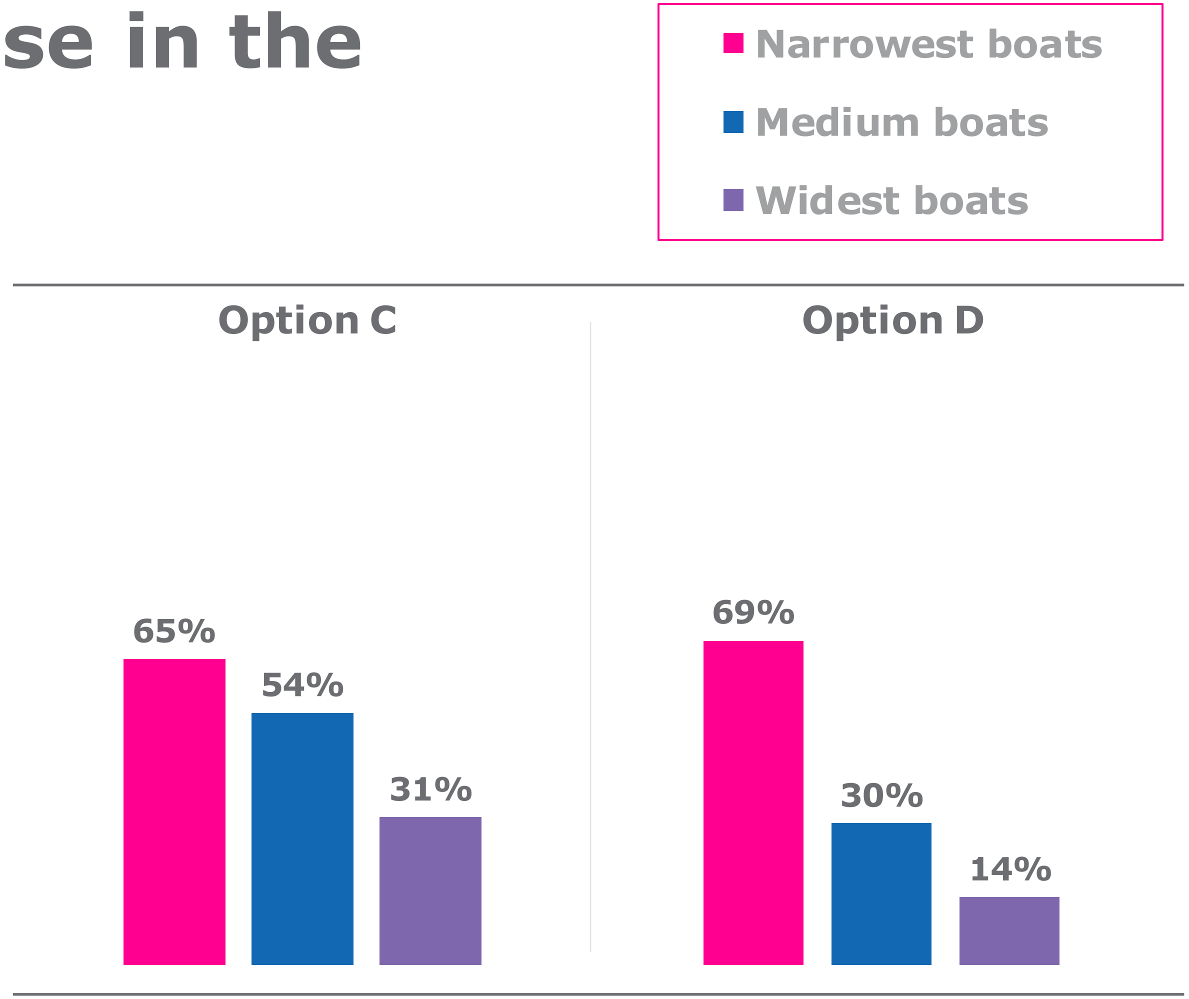
Owners of the largest boats are unlikely to support a move to an area-based surcharge (‘C’) or an increase in the current surcharge (‘D’)

Likelihood of preferring options ‘C’ or ‘D’ to the status quo ‘A’

Those with boats that are currently subject to the wider boat surcharge were unlikely to prefer option D, which would see the current surcharge increased to the current surcharge bands.

However, a majority of those in both the smallest width band, unaffected by the current surcharge, and the middle surcharge band were more likely to prefer the introduction of an area-based surcharge to the current system.

For those currently paying the highest surcharge, 86% would prefer to retain the current structure rather than increase the current surcharge. However, 31% would accept a move to an area-based system.



Base: All respondents. Q9. We’d like you to choose which of the 3 options shown below would be the most acceptable to you. n=8,479

Reasons for choosing ‘most acceptable’ option

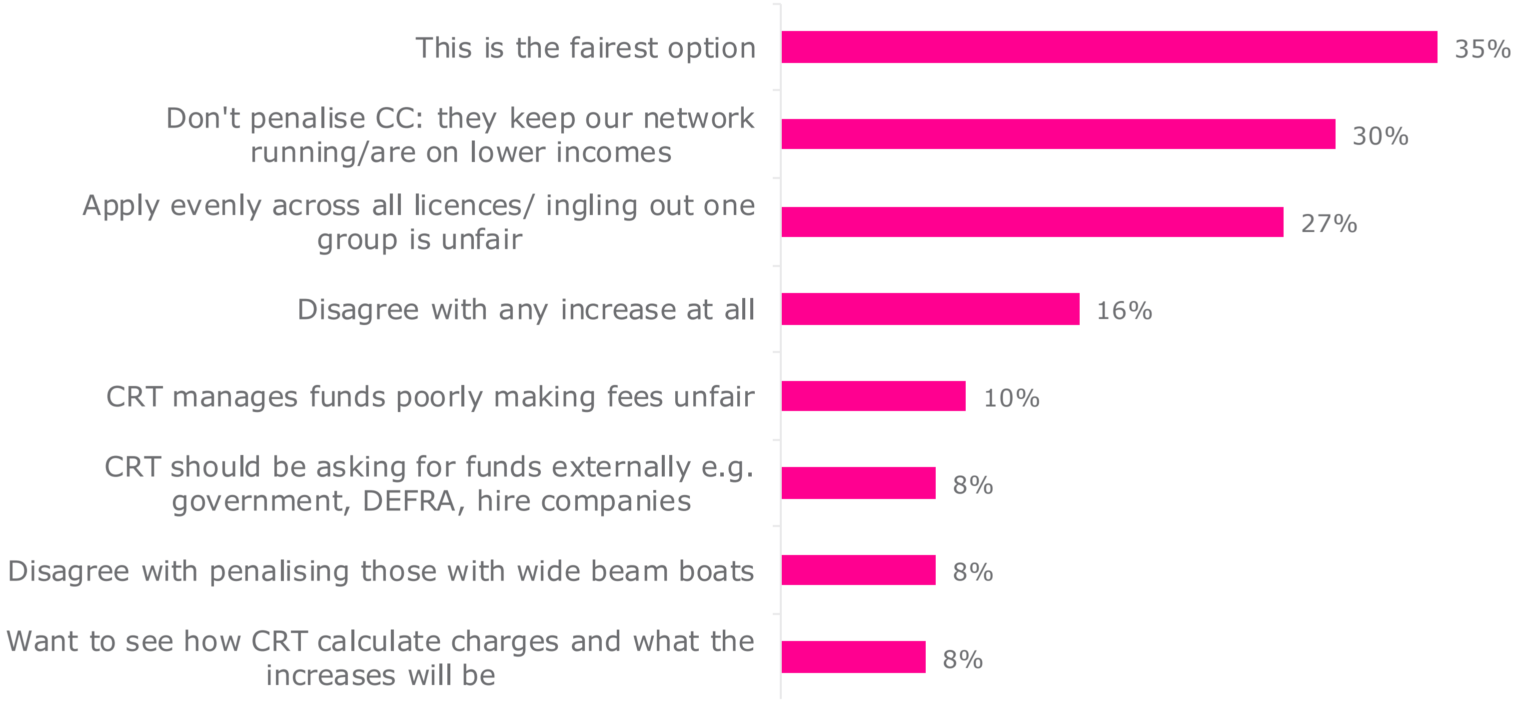
A third of those preferring the status quo option 'A' do so to avoid penalising continuous cruisers, felt to be culturally necessary and more financially vulnerable

Most common reasons for preferring option 'A'

Option 'A'

Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width.

An increase would be applied evenly to all licences at a rate above annual inflation (CPI) each year for a period of ten years (from 2023 – 2032).



Other common reasons for wanting to keep the current structure in place related to the fairness of applying increases evenly, as well as disagreeing with the notion that any increase should be levied on boaters at all. In some cases, boaters pointed to better fund management and/or external revenue generation by the Trust as the solution.

Base: Respondents who preferred option 'A' at Q9 (182 randomly selected for coding Q10a). In your own words, why did you choose this option over the alternatives? Responses over 5% only.

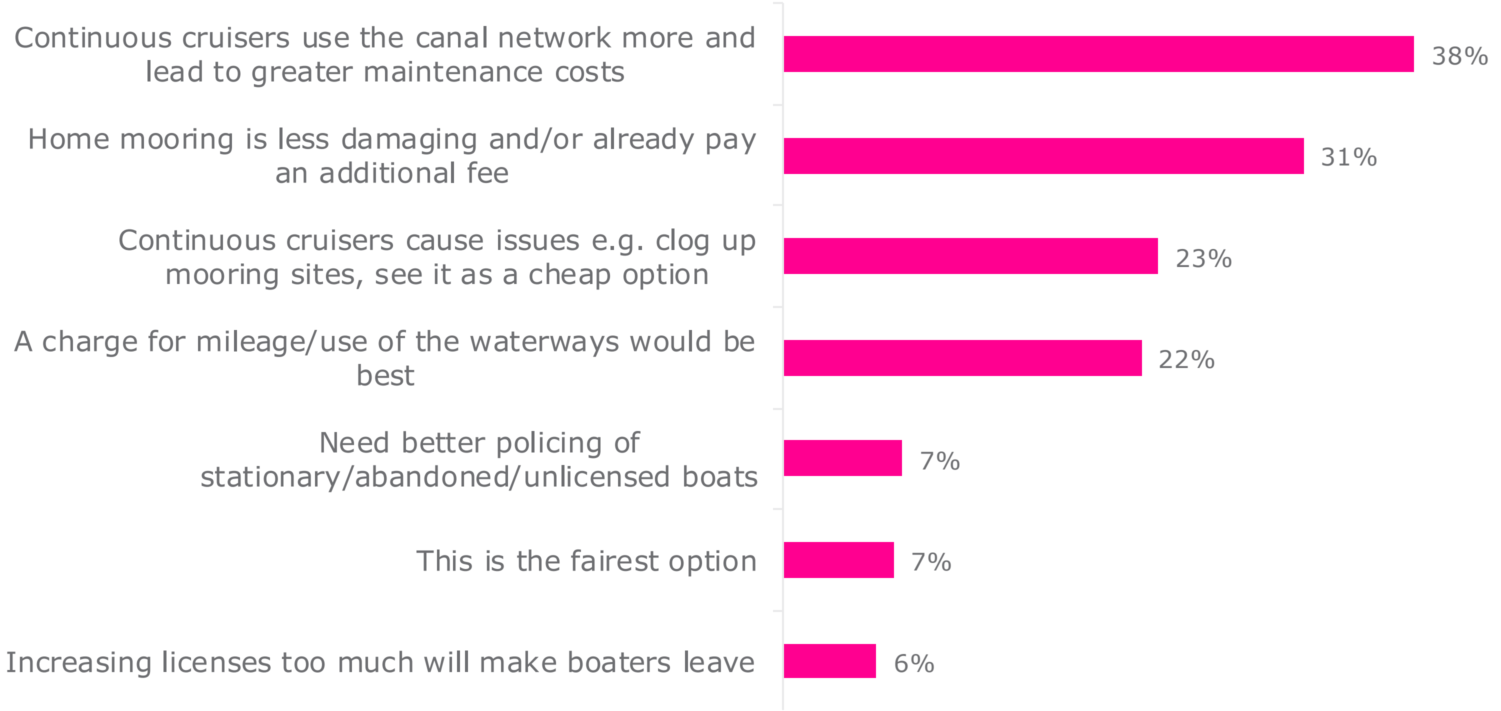
For those who selected option ‘B’ as their preferred of the four, the most common reasons related to the additional use of the waterways by CCs, and the cost this incurs to the Trust

Most common reasons for preferring option ‘B’

Option ‘B’

Retaining the current licence fee structure based on the length of the boat and the current surcharge based on boat width.

An increase would be applied to all boats. However, **a higher increase in licence fee would be applied to those boats without a home mooring who are required to continuously cruise**, with those with a home mooring seeing a lower increase in licence fee.



Just under a quarter (23%) of those preferring this option referred to the problematic behaviour of some continuous cruisers, who, they feel, see it as a cheaper route into boating without the intention of fully cruising.

Base: Respondents who preferred option ‘B’ at Q9 (194 randomly selected for coding Q10a). In your own words, why did you choose this option over the alternatives? Responses over 5% only.

While those preferring option 'C' were often unspecific in their feedback, a third (35%) noted the impact wider boats have on the system, causing more damage and clogging moorings

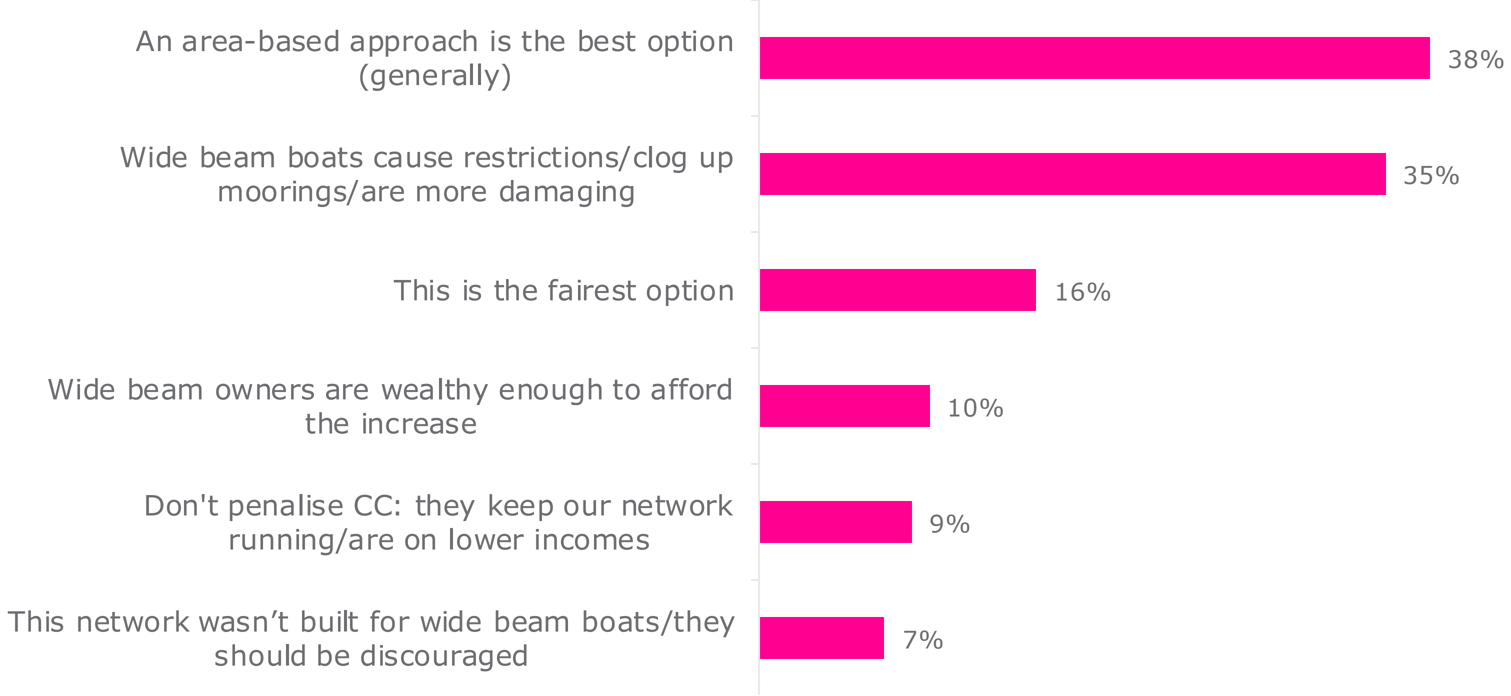
Most common reasons for preferring option 'C'

Option 'C'

An increase would be applied to all boats.

However, **the current wide-beam surcharge would be replaced with an area-based charge** (based on the width of the boat multiplied by its length).

This would involve introducing a sliding scale of charges that reflect the footprint of the boat on the water. **Boats with a larger overall area would pay proportionally more** and those with a smaller overall area would pay proportionally less.



A minority (10%) noted a perception that those with larger boats tend to be more affluent and, therefore, better placed to absorb the fee increase.

Base: Respondents who preferred option 'C' at Q9 (199 randomly selected for coding Q10a). In your own words, why did you choose this option over the alternatives? Responses over 5% only.

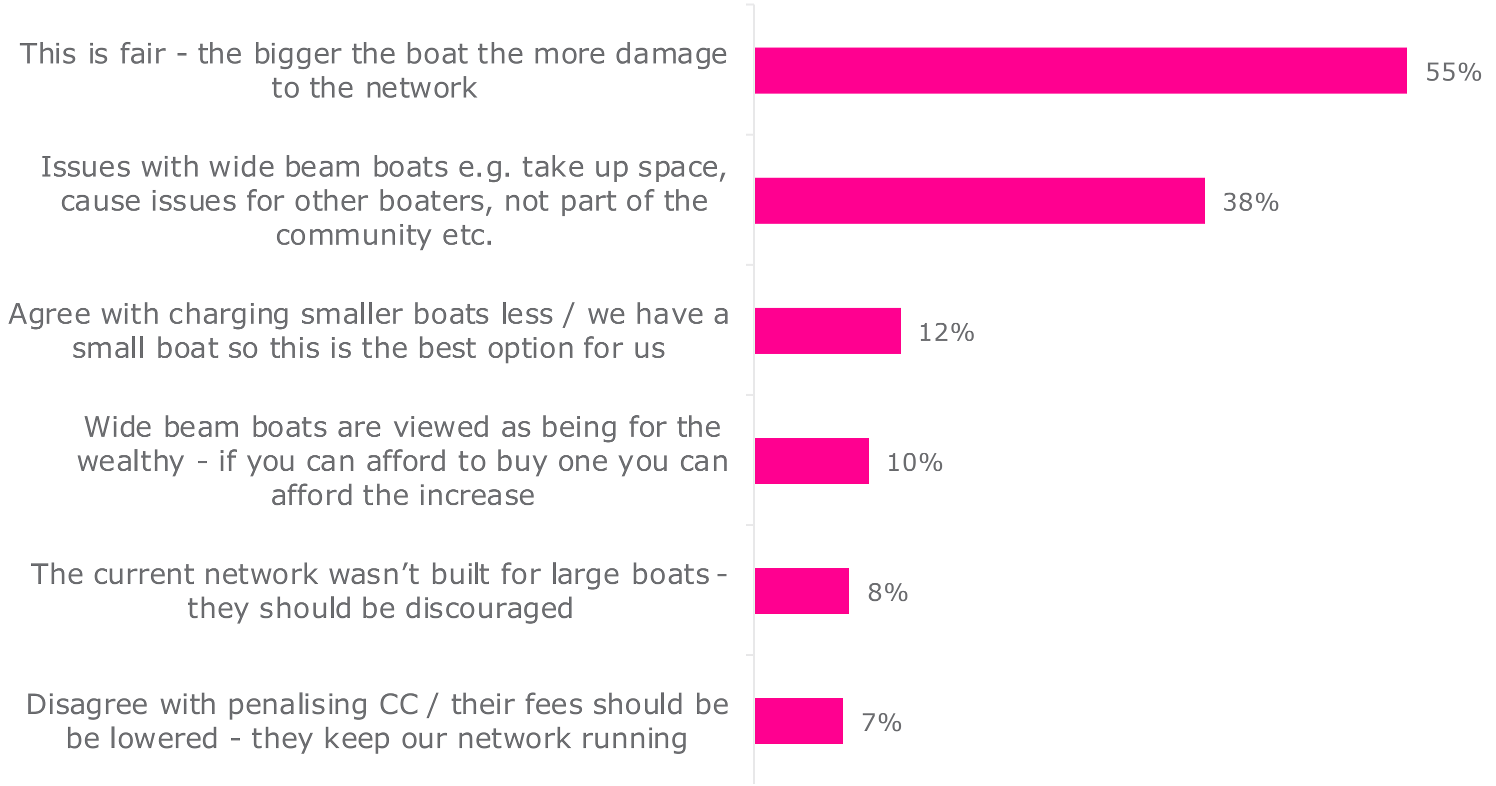
Those preferring option 'D' most commonly referenced the damage wider boats do to the canal system

Most common reasons for preferring option 'D'

Option 'D'

Retaining the current licence fee structure based on the length of the boat but **the current surcharge based on boat width would rise**.

An increase would be applied to all boats. However, boats with a larger width would receive a higher surcharge than they do currently and those with a smaller width would continue to receive no surcharge at all.

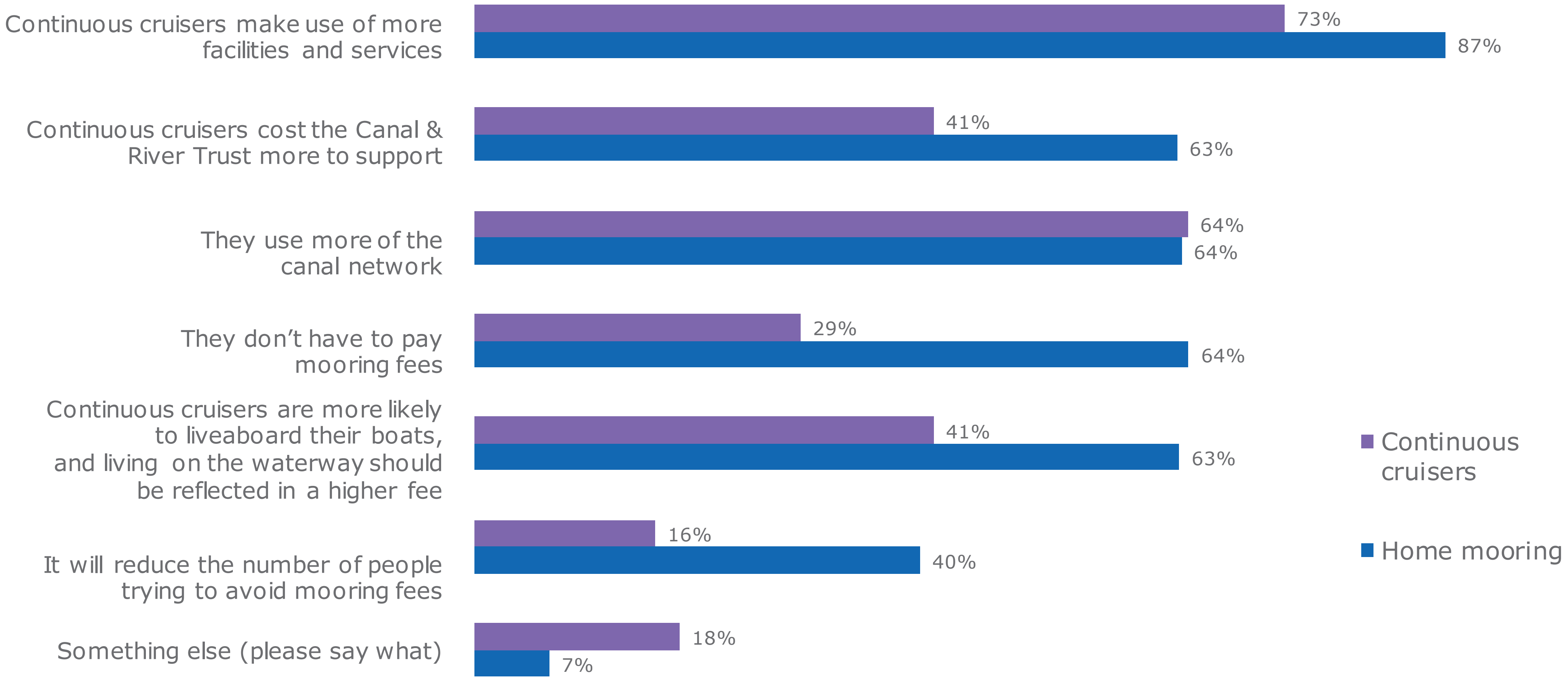


Two in five (38%) boaters who preferred this option did so because they felt that boaters with wide beam boats were more likely to cause logistical issues, such as taking up space on the waterway and/or felt less a part of the boating community.

Base: Respondents who preferred option 'D' at Q9 (187 randomly selected for coding Q10a). In your own words, why did you choose this option over the alternatives? Responses over 5% only.

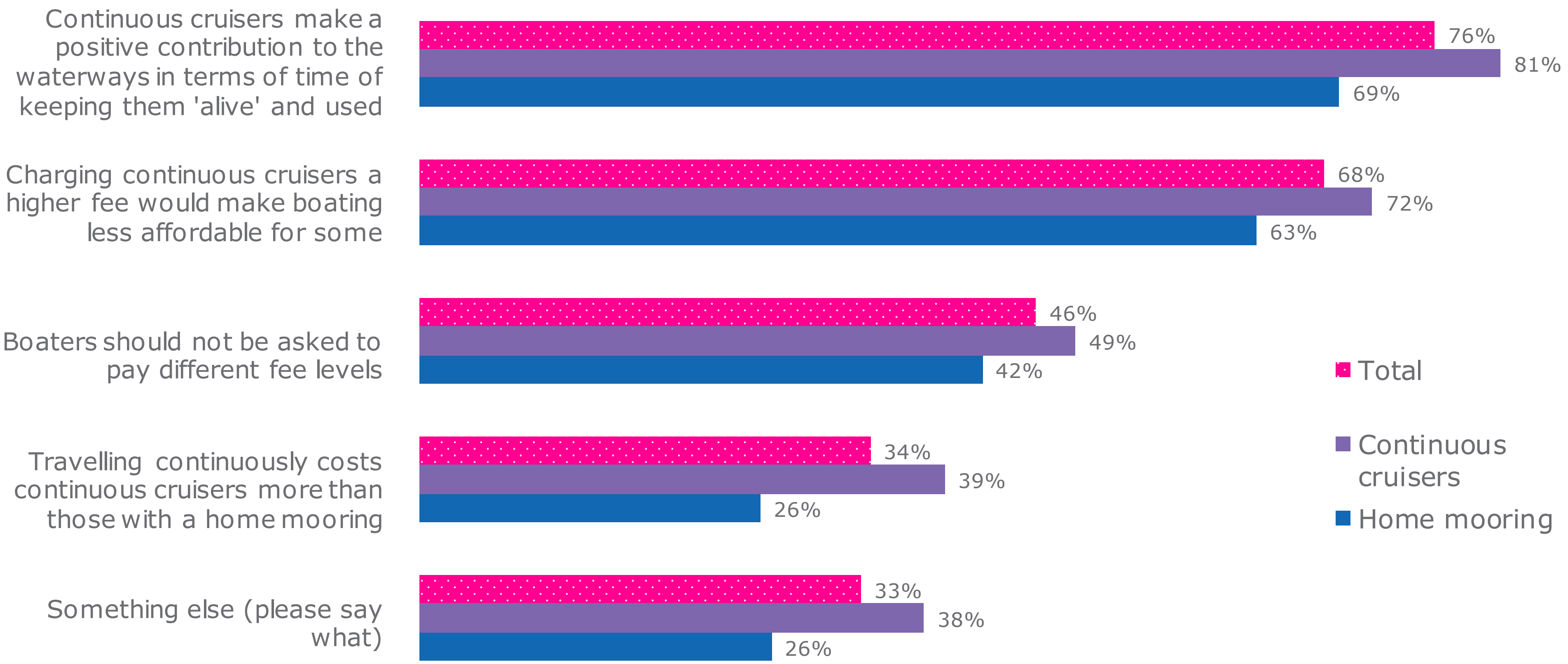
Reasonableness of the proposed change to licence fee by mooring status (option 'B')

Their more regular and continuous use of the waterway network and its facilities were cited as the key reasons an increase was deemed reasonable for continuous cruisers



Base: Respondents who feel higher CC charge is reasonable = 4,734. Q12B. Why do you feel that this approach is reasonable? Continuous cruisers = 92, Home mooring = 4,566. Chart excludes don't know as these were >2%. A 'total' audience is not displayed as the 'home mooring' component of the audience is too large to give appreciably different results to the separated 'home mooring' figures.

The positive contribution of this group to the waterways and fear an increase would make boating less affordable for some were the top reasons why a fee increase was deemed unreasonable for continuous cruisers

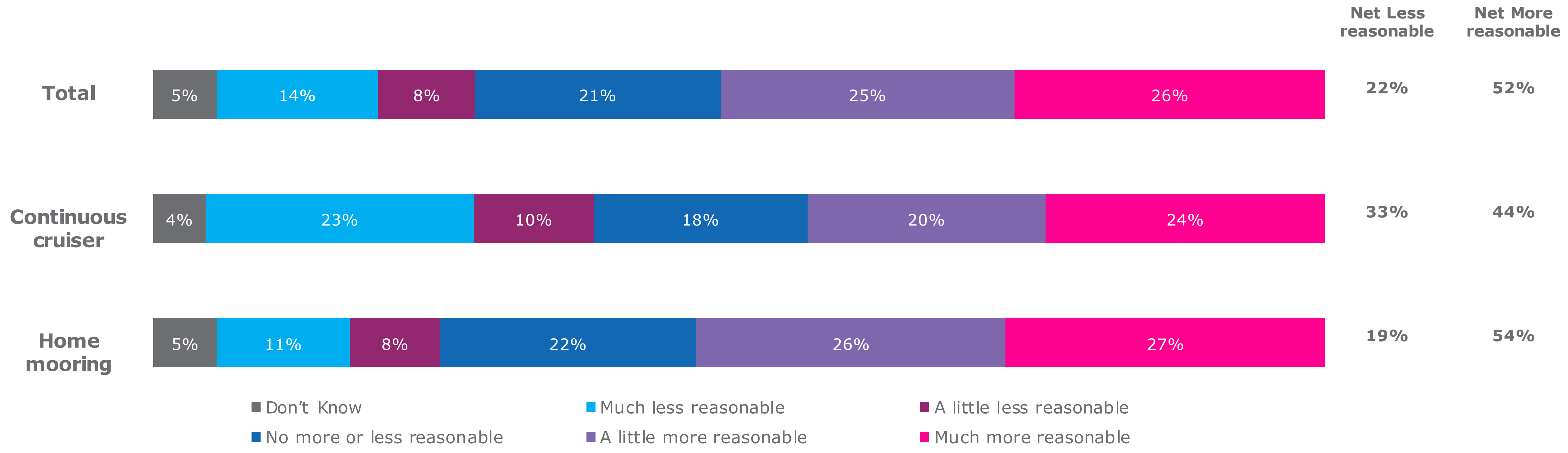


Base: Respondents who feel higher CC charge is unreasonable = 2,999. Q12A. Why do you feel that this approach is unreasonable? Continuous cruisers = 1,738, Home mooring = 1,218. Chart excludes don't know as these were >2%.

Reasonableness of the proposed change to licence fee by boat area (option ‘C’)

Just over half of the boating community believe an area-based fee structure would be more reasonable than the current one

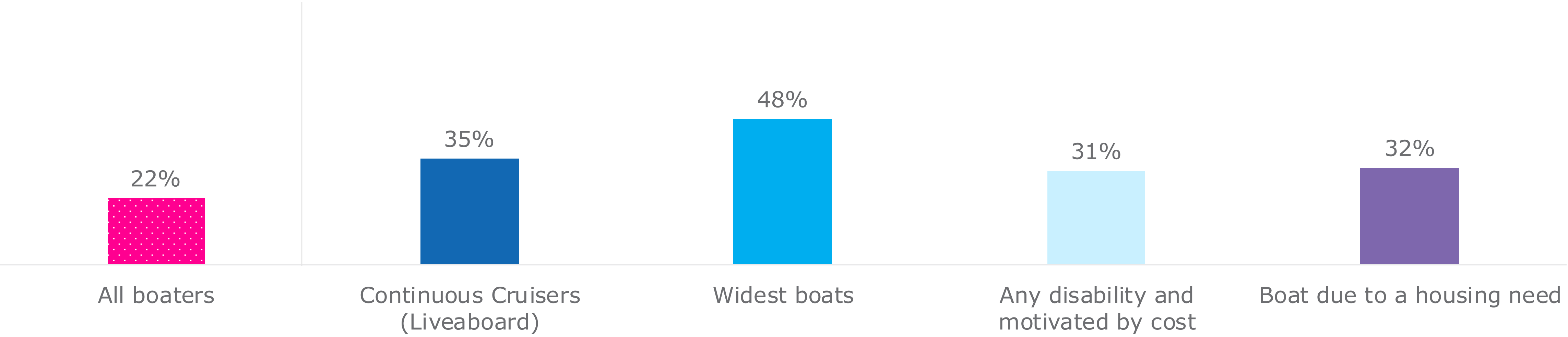
52% of the total boating community feel that implementing an area-based surcharge would be more reasonable than the current approach.



Base: All respondents. Q13. To what extent do you believe this change would be more or less reasonable than the current license fee structure? n=8,479, continuous cruisers = 1,980, boater with a mooring = 6,412.

Those most negative about introducing an area-based surcharge were wide beam boaters, disabled boaters who boat to save money, and those who boat for a housing need

Audiences most likely to believe that this approach is <u>less</u> reasonable than the status quo

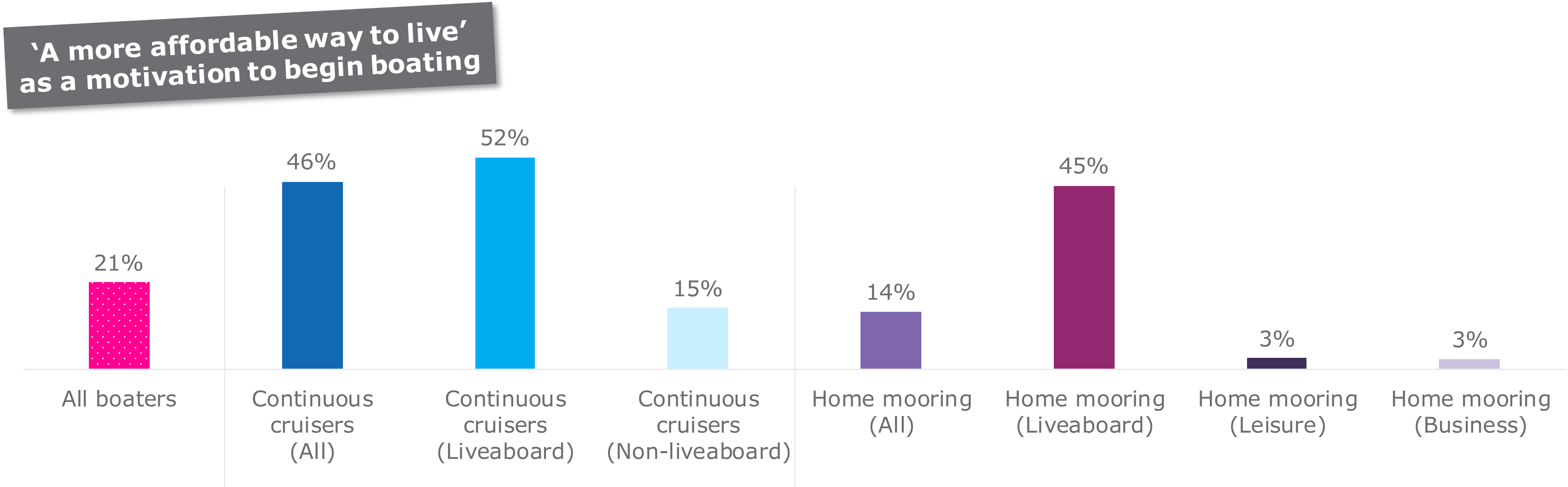


In particular, 37% of those with a wide beam boat said that this change would be 'much less reasonable' than the status quo.

Base: All respondents. Q13. To what extent do you believe this change would be more or less reasonable than the current license fee structure?

The affordability of boating in England & Wales

For liveaboard boaters, finding a more affordable way to live is often a motivation to taking up their lifestyle

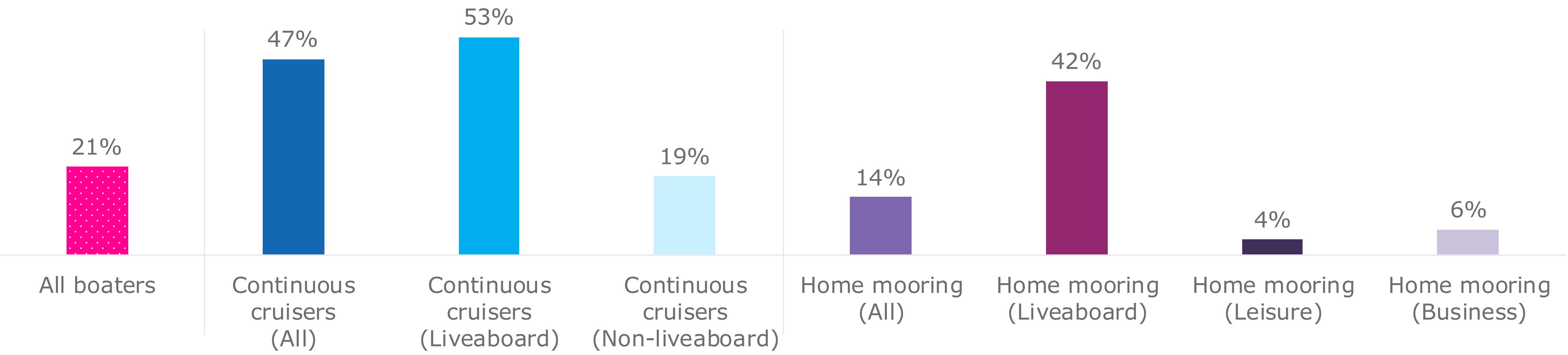


Approximately half of liveaboard boaters stated that reducing the cost of living was a motivation when they first started to boat, with liveaboard continuous cruisers even more likely than their home mooring counterparts to state this as a motivation.

Base: All respondents. Q6. What made you start using the inland waterways for boating? n=8,479

Similarly, 'a lower cost of life' remains a strong motivation for liveaboard boaters to continue boating

'It's a lower cost way of life' as a motivation to continue boating

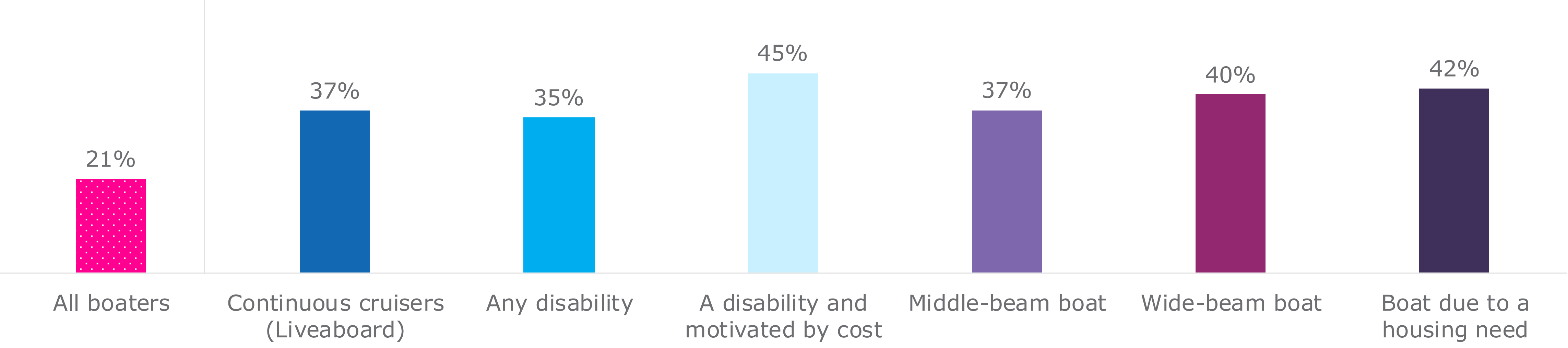


Liveaboard boaters are likely to be more sensitive to the cost of boating than their leisure or business counterparts.

Base: All respondents. Q6. What made you start using the inland waterways for boating? n=8,479

Concern about the future cost of boating is highest among continuous cruisers, those with a disability, those with a housing need, and with wider boats

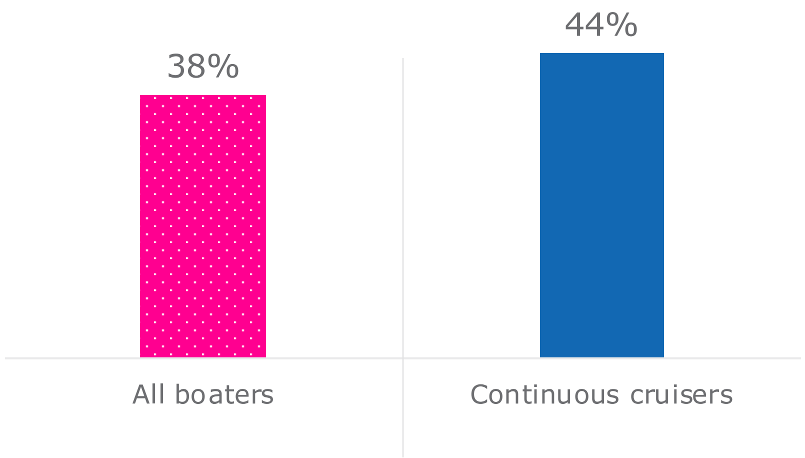
Audiences most worried that the cost of boating in the UK may make it unaffordable for me in the near future (% Strongly agree)



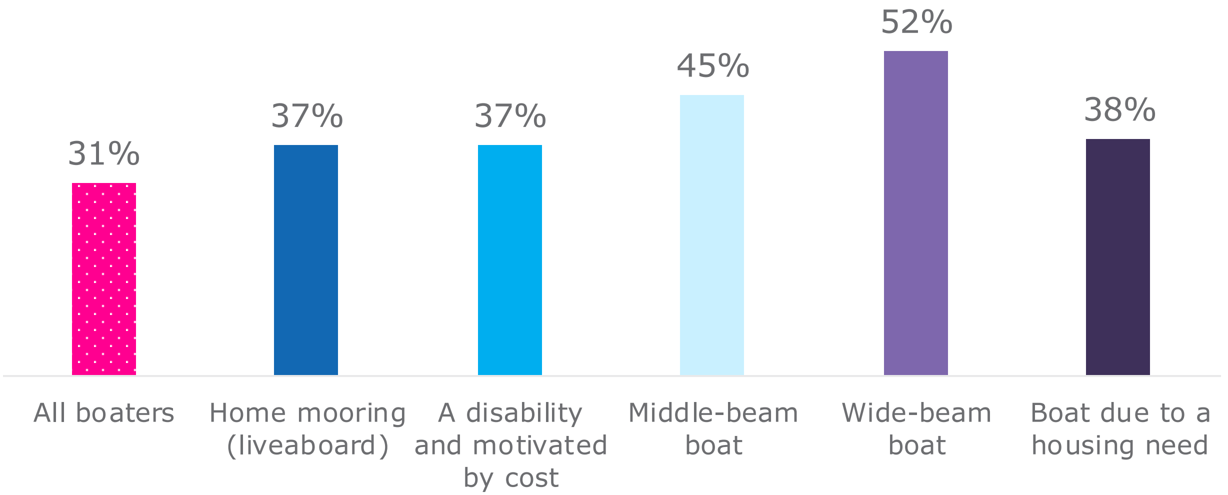
Base: All respondents. Q17. To what extent do agree or disagree with the following statement about the boat licensing fee?

Boaters currently receiving the highest surcharge were the most likely to disagree that the current licence fee represents good value for money

Audiences most likely to agree that the current licence fee represents good value for money (% Agree or strongly agree)



Audiences most likely to disagree that the current licence fee represents good value for money (% Disagree or strongly disagree)

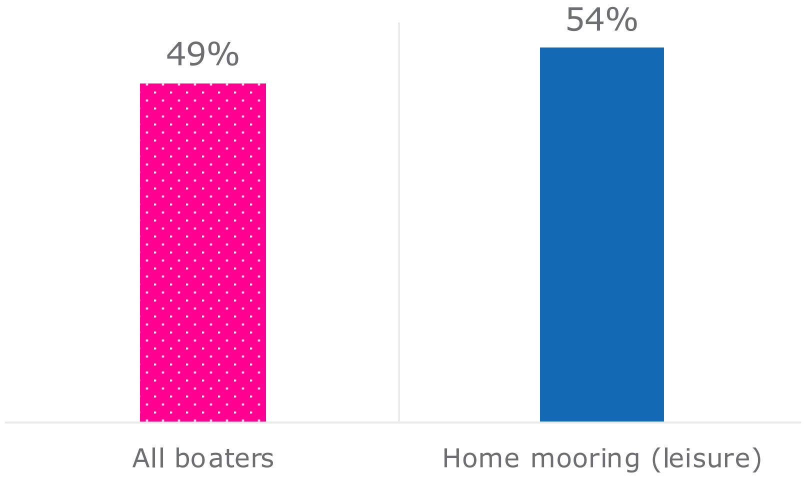


Continuous cruisers are the group most likely to agree that the current fee *does* represent good value for money.

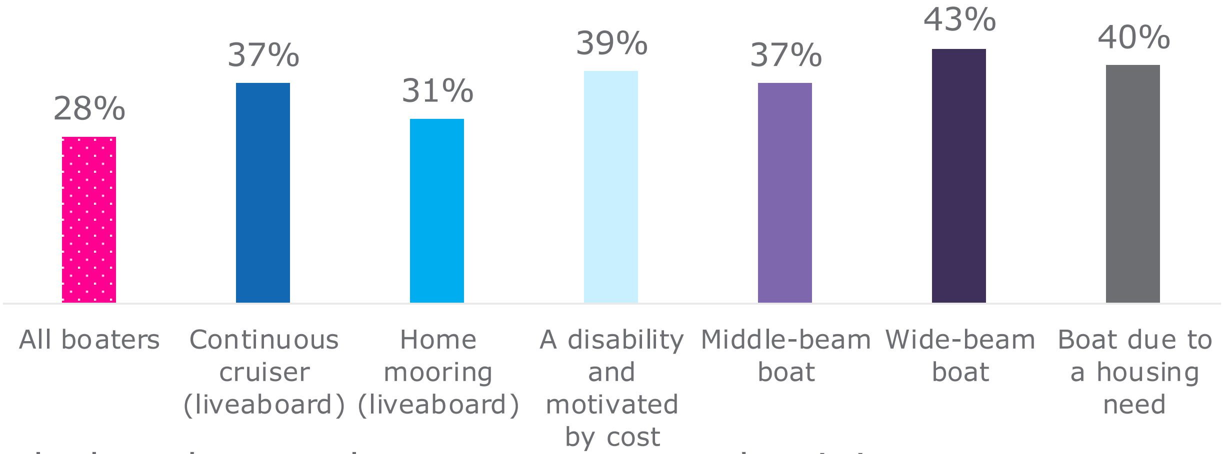
Base: All respondents. Q17. To what extent do agree or disagree with the following statement about the boat licensing fee?

Those paying a surcharge, liveaboard boaters, and disabled boaters motivated by cost, are among the least accepting of fee rises for waterway care

Audiences most likely to agree that it is reasonable for the Trust to raise fees to care for waterways (% Agree or strongly agree)



Audiences most likely to disagree that it is reasonable for the Trust to raise fees to care for waterways (% Disagree or strongly disagree)



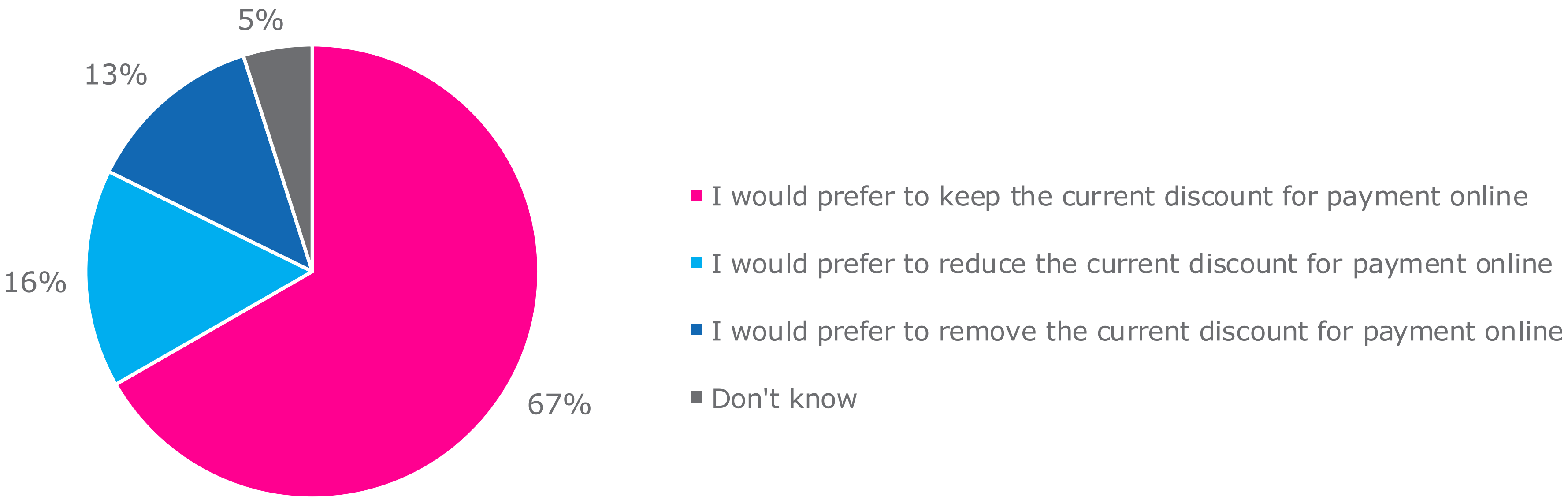
Leisure boaters with a home mooring were a little more likely than the sample average to agree that it is reasonable for the Trust to increase the boat licence to further support its work.

Base: All respondents. Q17. To what extent do agree or disagree with the following statement about the boat licensing fee?

Current discount schemes

Over two thirds of the boating community would prefer to retain the current discount for making payment online

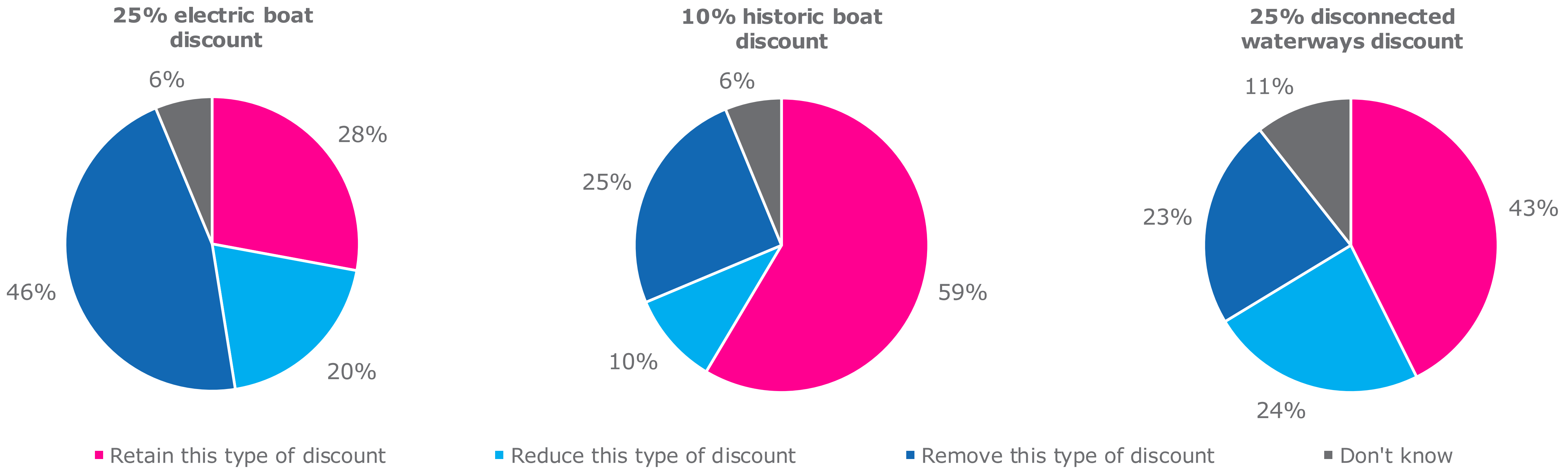
Less than 30% of boaters would choose to either reduce or remove the current discount for making payment online (29%) to enable this income to be used to help maintain the waterways. This preference to retain the online payment discount is also shared by the continuous cruisers (64%) and boating without a mooring groups (68%).



Base: All respondents. Q14. Would you support the Trust reducing or removing the current discounts for paying online and using that additional income to help maintain the waterways or would you prefer the current discounts to be retained? n=8,479

At an overall level the boating community are more open to the reduction or removal of specific, tailored discounts

Two thirds of the boating community would be open to the reduction or removal of the 25% electric boat discount. This view is shared by over 50% of continuous cruisers and over 70% of boaters without a mooring.



Base: All respondents. Q14B. For each of these discounts, we would like your view as to whether the Trust should retain this discount, reduced the amount of the discount, or remove this discount entirely. n=8,479

For more information

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