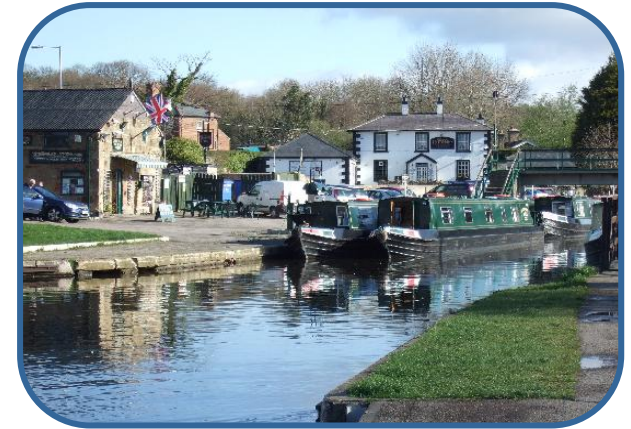


Boat Owners Survey 2009



March 2010

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Objectives

The overall business objective is to delight boat owners throughout their boat ownership experience (not just during trips), ultimately resulting in increased participation.

More specifically:

Monitor the demographic profile of boat owners

Obtain information on characteristics of boat trips

Obtain information on boating related behaviour

Assess levels of satisfaction in relation to key performance measures

To identify key areas of improvement for the future

Methodology

Self completion questionnaires mailed to random sample of 8,298 boat owners in England, Wales and Scotland (slightly higher sample than 2008 to boost response in South East region)

Sent out on the 2/3 November 2009

Mailing – including questionnaire, freepost envelope for reply and covering letter

A total of 2,122 questionnaires were returned by closing date of Friday 27 November 2009

26% response rate was achieved, compared with:

20% in 2008 (1,619 questionnaires)

26% in 2007 (2,011 questionnaires)

22% in 2006 (1,589 questionnaires)



Key



- Higher than 2008
-



- Lower than 2008
-



- Significantly higher than other sub groups
-



- Significantly lower than other sub groups

All differences statistically significant at the 95% level

Boater profile – no. and % of questionnaires returned by region of participation

	2009		2008		2007		2006	
	%	No.	%	No.	%	No.	%	No.
Scotland	6	132	8	135	n/a	n/a	9	143
England & Wales	91	1930	89	1434	95	1912	87	1385
North West	9	196						
North East	6	121						
Manchester & Pennine	7	152						
Wales and Borders	10	211						
West Midlands	8	177						
Central Shires	13	271						
East Midlands	4	89						
South Wales & Severn	6	118						
South East	16	332						
Kennet & Avon	9	189						
London	3	74						
Not stated	3	60	3	50	5	99	4	61



Boater profile – demographics

		2009	2008	2007	2006
Age:	18 – 34	2	5	3	2
	35 – 54	28	36	31	32
	55+	67	57	63	62
	Not stated	3	2	3	2
Gender:	Male	78	79	81	84
	Female	21	20	17	14
	Not stated	1	1	2	1
Income:	Under £20K	23	24	26	n/a
	£20 – 30K	18	17	23	n/a
	£30 – 50K	24	24	19	n/a
	Over £50K	23	22	18	n/a
	Not stated	13	13	13	n/a
Internet access:	Daily	74	68	55	n/a
	Weekly	13	16	19	n/a
	Monthly	2	2	3	n/a
	Less often	3	4	5	n/a
	Never	7	9	16	n/a
	Not stated	1	1	2	n/a
Boat is residence:	Yes	17	18	11	13
	No	81	80	89	87
	Not stated	2	2	0	0



Executive Summary & Conclusions

Executive Summary and Conclusions (I)

Key Performance Measures

Lead Performance Indicator score remained stable in 2009 – 74% would recommend waterways in this area to other boaters (73% in 2008):

- Boaters in Wales & Borders (90%) and Scotland (84%) most likely to recommend
- Boaters in Kennet & Avon (59%) least likely to recommend

Ratings for overall upkeep, value for money and experience versus expectations also remained similar in 2009.

General Upkeep and Performance

Key service drivers of recommendation can be divided into:

- Key to maintain high standard (focus on towpath and moorings quality)
 - Overall upkeep of waterways, clearance of towpath rubbish/litter, condition of towpath, quality of visitor moorings, ease of mooring up, availability of landing points, canal staff efficiency
- Key to improve (focus on canal itself and availability of moorings)
 - Clearance of rubbish, litter and weed from the canal, condition of the bank, ease of lock operation, depth of water, frequency of visitor moorings, availability of space to moor up, security of moorings, vegetation management

Among these key drivers, there have been notable improvements in ratings of landing point availability, towpath condition and ease of mooring. Conversely, ratings for depth of water and vegetation management have declined. Whilst staff are rated highly, their current role in driving recommendation is limited. Perhaps there is not a sufficient level of contact with staff at present for their role to be influential?

Executive Summary and Conclusions (2)

Licence Renewal

Preference for receiving online continues to grow rapidly – 44% would now prefer to renew online compared with 38% in 2008. Reported use of the online facility to renew/apply, whilst growing (to 19% in 2009 from 15% in 2008), has not kept pace with these preferences. What is the barrier?

Only 23% would prefer to renew by post. Those applying for a licence for the first time still tend to apply either by post (43%) or over the telephone (19%). What are the online barriers for this group?

2009 saw some significant improvements in the time taken for boaters to receive their licence. 74% received their licence within the target 15 days, up by +6% on 2008. The movement online has assisted this, 91% of online applicants receiving their licence within this period.

Rating of the renewal service has also improved (32% excellent in 2009 versus 30% in 2008), driven by online renewals. The service ratings for online renewals (mean 4.3 out of 5) were significantly more positive than for postal renewals (3.9).

Executive Summary and Conclusions (3)

Boating Behaviour

We know from BW's IWVS survey that the tourism market shift away from overseas holidays and toward domestic day trips and overnight stays has increased footfall. Similar trends may also have had an impact upon boaters. The proportion of boaters taking 6-10 trips in 2009 has increased at the expense of those taking 0-5 trips.

Spend - Average total boat-related spend in 2009 was £3,873 – primarily mooring fees (average £1,634), maintenance (£733) and licence fees (£692). There has been a significant increase in reported mooring and licence fees in 2009 for England & Wales. Average spend per head per day in 2009 was £24.73.

Congestion - Following reductions in perceived congestion between 2006 and 2008, 2009 once again saw an increase (30% affected by congestion in 2009 versus 25% in 2008). Congestion appears most significant in Wales & Borders and Central Shires. This perceived increase in boats also manifests itself in an increase in the proportion of boaters who feel there are too many boats moored along waterways (31% in 2009, 26% in 2008).

Executive Summary and Conclusions (4)

Moorings and Residential Boating

Ratings for BW home moorings tend to be below those of others, particularly for site security, quality of personal service, quality of site maintenance, quality and range of facilities and value for money.

The proportion of boaters living on their boat has remained stable (17% in 2009), although is significantly higher in London (32%) than other waterway units. Whilst over a third of residential boaters with a home mooring are located at an offline marina with 50 or more berths, the preference is for smaller offline marinas.

Leisure moorings tend to be rated less positively than authorised residential moorings, particularly in terms of cost, site security and quality of the mooring itself.

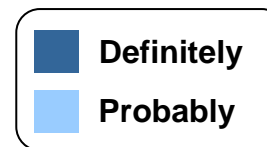
Marketing and Communications

Internet access for boaters is increasing rapidly – 87% now use weekly, with 74% daily compared with just 55% daily in 2007.

‘Peaceful and relaxing’ and ‘places where you can escape for a while’ are the two aspects of boating rated most positively. Perhaps this might be the focus of communications when attracting new boaters? There is a clear overlap here with findings from the IWVS which highlights this theme as the potentially strongest USP of waterways among the public.

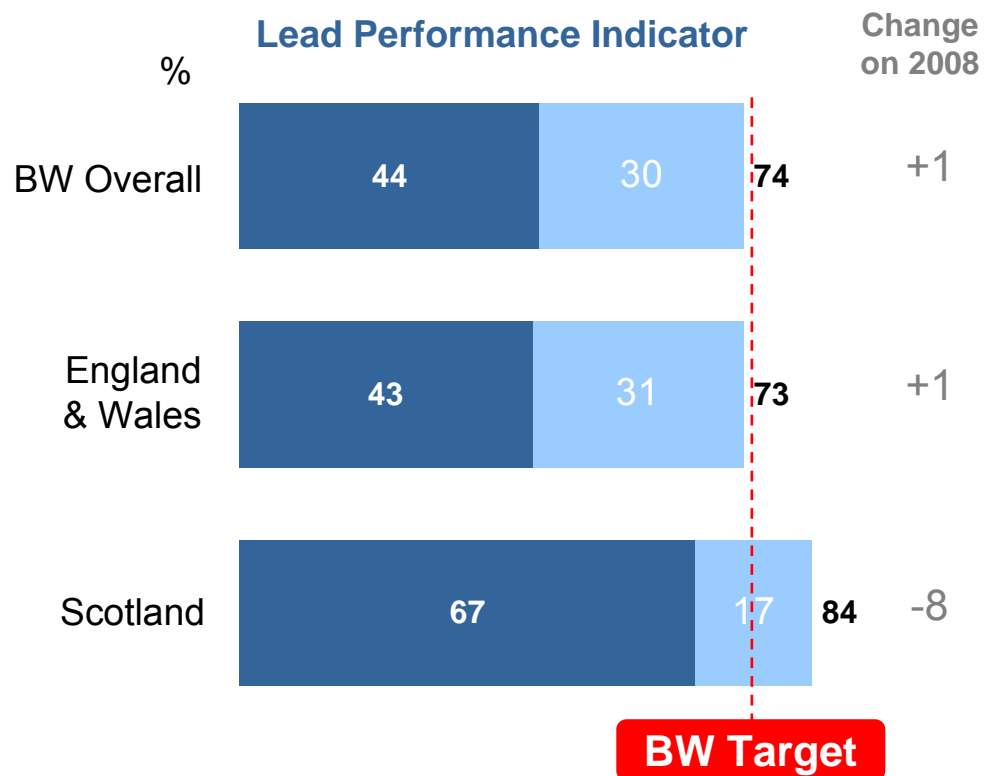
Key performance measures

Propensity to recommend...

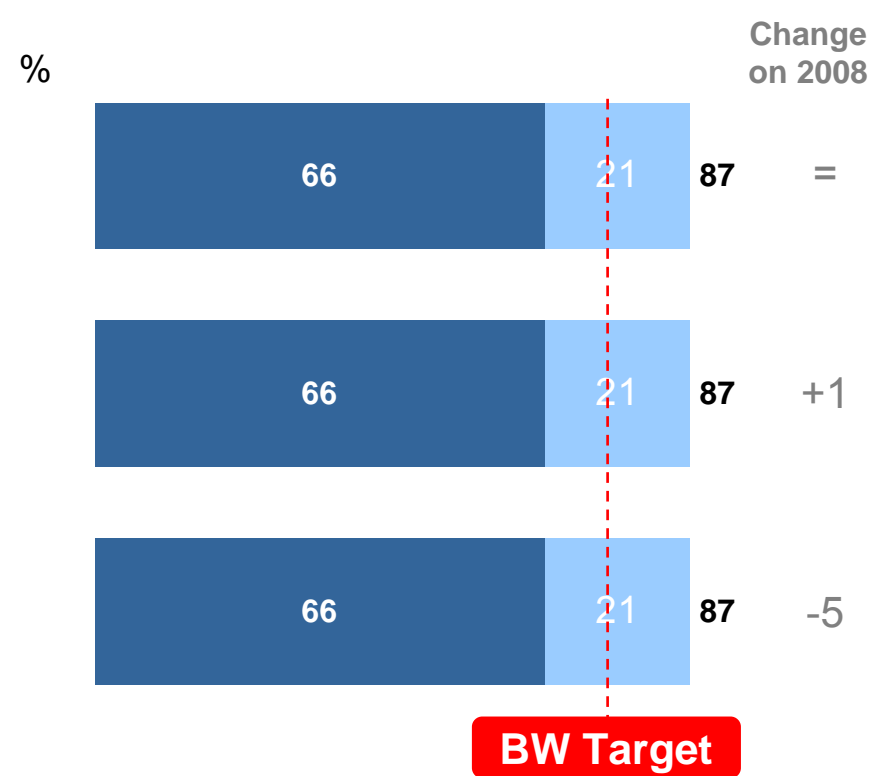


BW Target: 75% Definitely Recommend

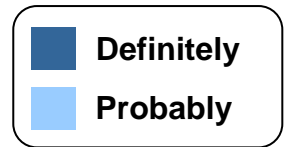
...Waterways in this area to other Boaters



...Boating to other people

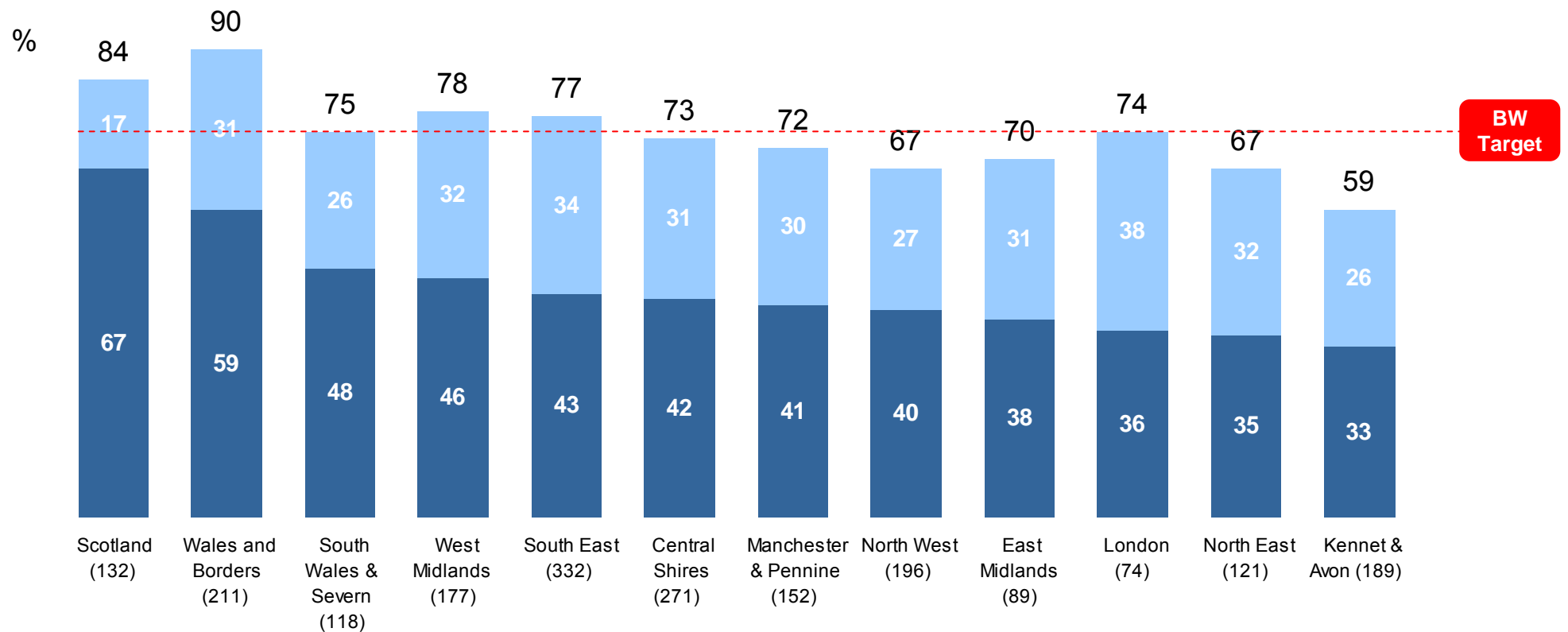


Propensity to recommend waterways in area to other boaters (by region)

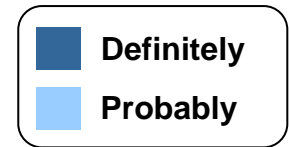


Lead Performance Indicator

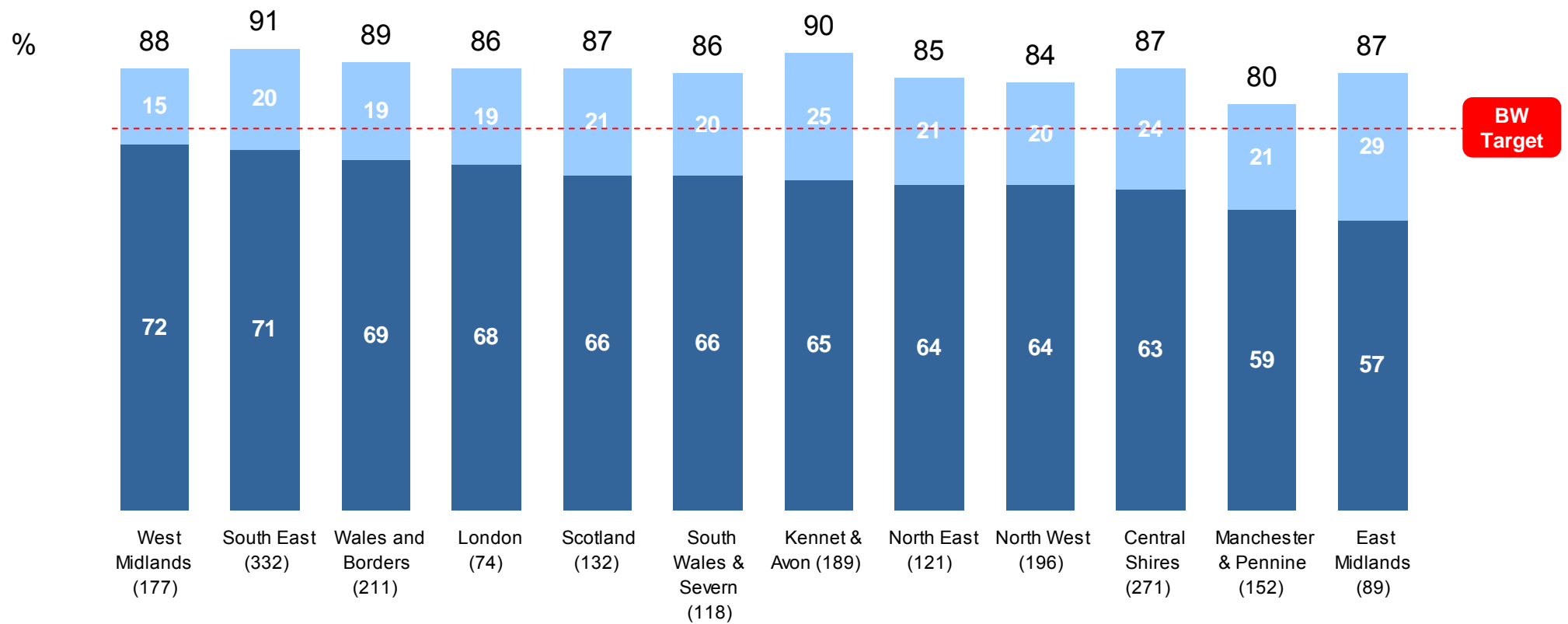
Ranked by 'definitely'



Propensity to recommend boating to other people (by region)



Ranked by 'definitely'

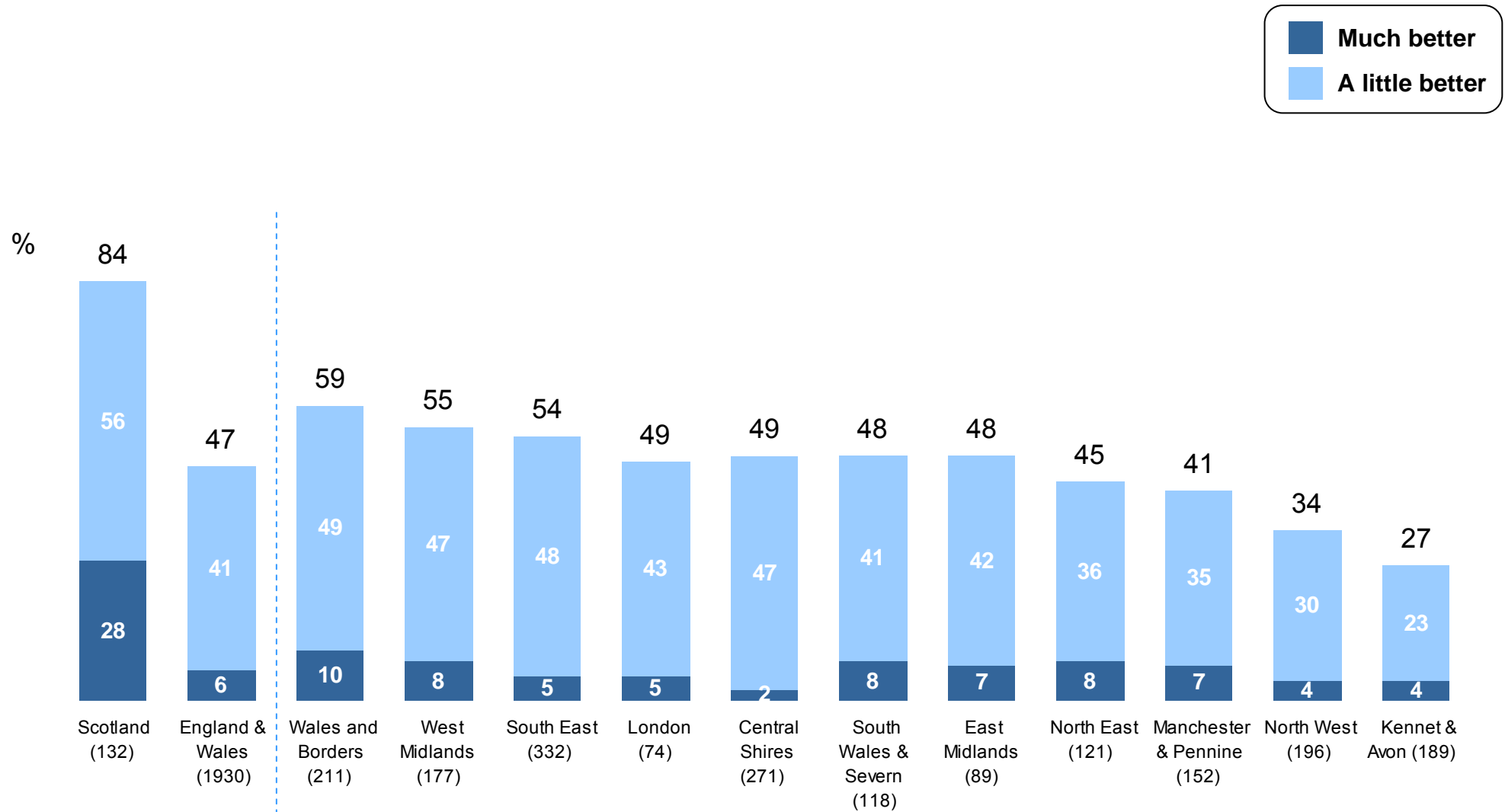


Other key measures – annual trends

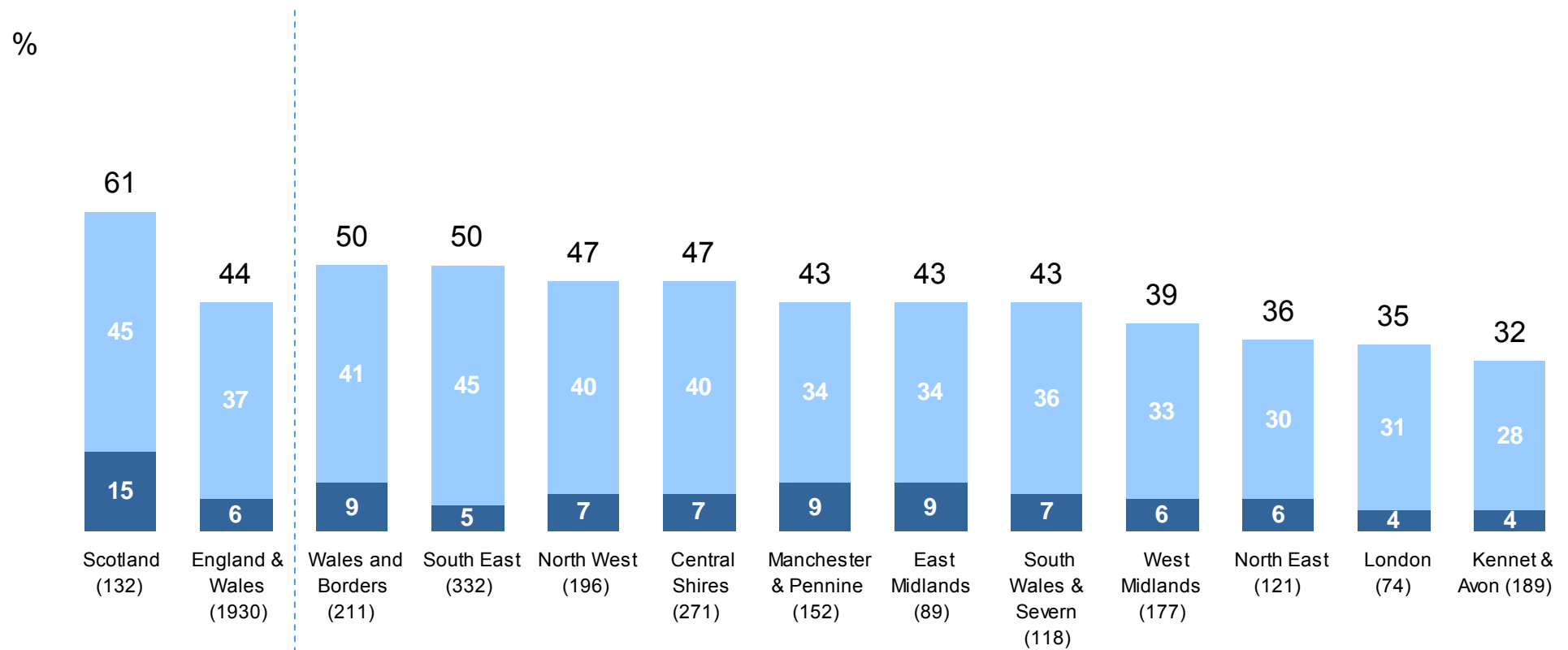
	Overall Upkeep				Value for money			
	2009	2008	2007	2006	2009	2008	2007	2006
<i>Mean score</i>	3.4	3.4	3.3	3.6	3.3	3.3	3.2	3.2
Excellent (5)	7%	7%	3%	4%	7%	8%	6%	4%
Good (4)	42%	43%	41%	59%	38%	34%	34%	32%
Just Ok (3)	32%	31%	35%	28%	39%	40%	41%	42%
Poor (2)	13%	13%	15%	6%	12%	14%	14%	14%
Very poor (1)	4%	4%	4%	2%	3%	3%	4%	5%

	Experience vs expectations			
	2009	2008	2007	2006
<i>Mean score</i>	3.0	3.1	3.0	3.1
Much better (5)	9%	11%	8%	5%
A little better (4)	16%	17%	16%	17%
As expected (3)	48%	44%	49%	58%
Little worse (2)	19%	20%	20%	15%
Much worse (1)	7%	6%	5%	3%

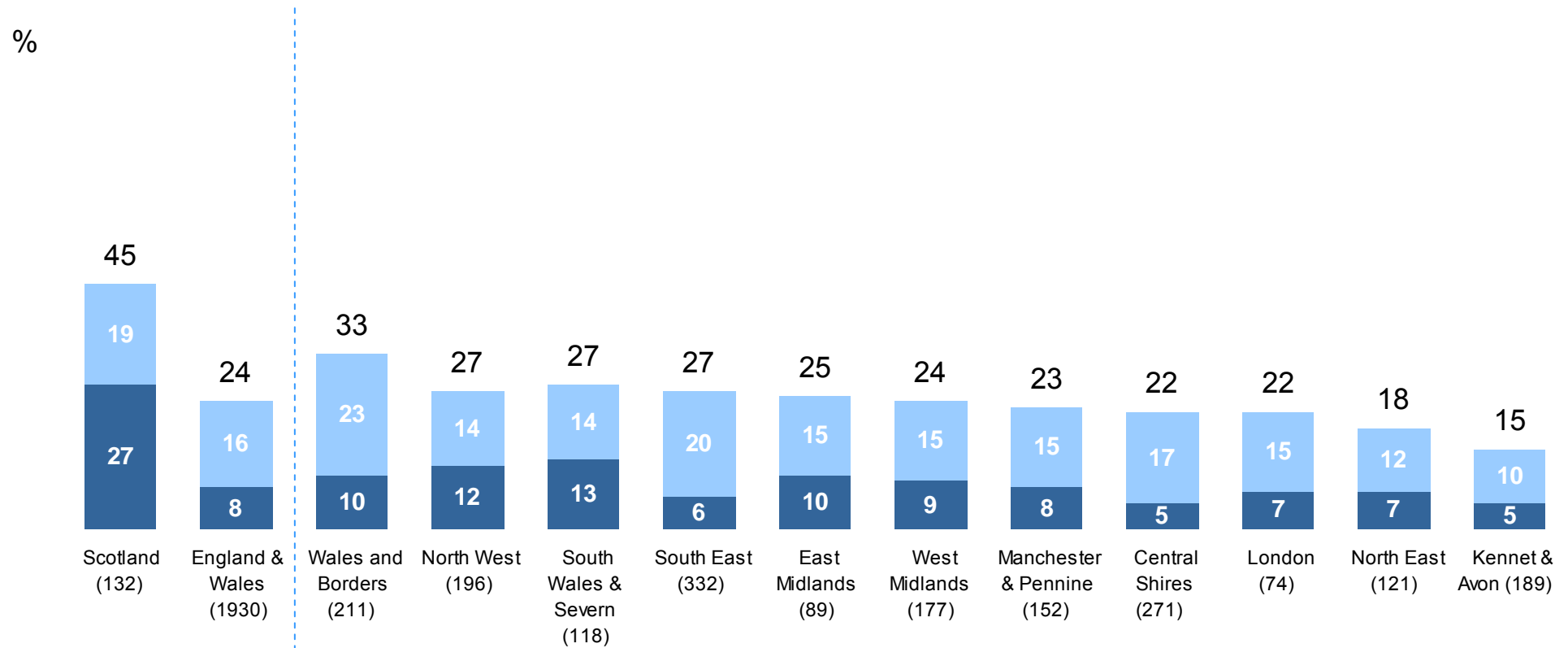
Overall upkeep by region



Value for money of boating activities by region



Experience vs expectations by region



General upkeep & performance

Performance ratings - Upkeep of waterways

	Clearance Canal			Clearance Towpath			Bank Condition			Towpath Condition		
	2009	2008	2007	2009	2008	2007	2009	2008	2007	2009	2008	2007
BW Overall	3.10	3.05	2.9	3.51	3.49	3.3	3.18	3.19	3.1	3.50▲	3.39	3.4
Scotland	3.98▼	4.18	-	4.17▼	4.34	-	3.85	3.99	-	3.98▼	4.23	-
England & Wales	3.04▲	2.95	2.9	3.47▲	3.41	3.3	3.13	3.11	3.1	3.47▲	3.32	3.4
North West	2.55			3.26			3.06			3.52		
North East	2.75			3.41			3.32			3.41		
Manchester & Pennine	2.88			3.35			2.79			3.32		
Wales and Borders	3.52			3.67			3.30			3.45		
West Midlands	3.07			3.45			3.29			3.52		
Central Shires	3.16			3.49			3.13			3.47		
East Midlands	2.87			3.42			3.36			3.6		
South Wales & Severn	3.08			3.63			3.15			3.45		
South East	3.26			3.48			3.15			3.42		
Kennet & Avon	2.89			3.52			2.77			3.48		
London	2.81			3.31			3.31			3.65		

Performance ratings - Vegetation management

	Vegetation management		
	2009	2008	2007
BW Overall	3.09 ▼	3.17	3.0
Scotland	3.85	3.96	-
England & Wales	3.05	3.10	3.0
North West	2.97		
North East	3.12		
Manchester & Pennine	2.87		
Wales and Borders	3.18		
West Midlands	3.22		
Central Shires	2.99		
East Midlands	3.13		
South Wales & Severn	3.15		
South East	3.04		
Kennet & Avon	2.91		
London	3.12		



Performance ratings - Locks

	Landing point availability				Water Depth				Ease of operation			
	2009	2008	2007	2006	2009	2008	2007	2006	2009	2008	2007	2006
BW Overall	3.58 ▲	3.52	3.5	3.6	3.18 ▼	3.27	3.2	3.2	3.22	3.27	3.2	3.3
Scotland	3.85	3.87	-	-	3.79	3.96	-	-	3.82	4.07	-	-
England & Wales	3.56	3.49	3.5	3.6	3.14	3.21	3.2	3.2	3.19	3.19	3.2	3.3
North West	3.48				2.87				2.89			
North East	3.45				3.60				3.03			
Manchester & Pennine	3.45				2.75				3.22			
Wales and Borders	3.60				3.33				3.50			
West Midlands	3.72				3.2				3.34			
Central Shires	3.54				3.26				3.10			
East Midlands	3.53				3.16				3.39			
South Wales & Severn	3.55				3.21				3.69			
South East	3.63				3.28				3.32			
Kennet & Avon	3.57				2.69				2.60			
London	3.45				3.26				3.17			

Performance ratings - Visitor moorings

	Quality				Frequency				Security			
	2009	2008	2007	2006	2009	2008	2007	2006	2009	2008	2007	2006
BW Overall	3.65	3.61	3.6	3.6	3.11	3.12	3.0	3.2	3.07	3.07	2.9	3.1
Scotland	4.02	4.00	-	-	3.52	3.56	-	-	3.39	3.59	-	-
England & Wales	3.63	3.58	3.6	3.6	3.08	3.08	3.0	3.2	3.06	3.04	2.9	3.1
North West	3.64				3.08				2.96			
North East	3.38				2.84				2.70			
Manchester & Pennine	3.49				2.99				2.91			
Wales and Borders	4.06				3.64				3.45			
West Midlands	3.72				3.21				3.03			
Central Shires	3.64				3.04				3.04			
East Midlands	3.57				2.69				2.98			
South Wales & Severn	3.52				2.95				2.95			
South East	3.57				3.15				3.15			
Kennet & Avon	3.57				2.79				3.20			
London	3.55				3.04				2.85			

Performance ratings - Mooring along towpath

	Ease of mooring			Availability of space		
	2009	2008	2007	2009		
BW Overall	3.47▲	3.09	3.1	2.94		
Scotland	3.99▲	3.44	-	3.52		
England & Wales	3.44▲	3.08	3.1	2.90		
North West	3.36			3.01		
North East	3.52			2.96		
Manchester & Pennine	3.16			2.97		
Wales and Borders	3.60			3.30		
West Midlands	3.62			2.94		
Central Shires	3.53			2.87		
East Midlands	3.64			2.64		
South Wales & Severn	3.35			2.98		
South East	3.47			2.87		
Kennet & Avon	3.23			2.47		
London	3.31			2.56		



Performance ratings - Rubbish disposal points

	Quality				Frequency			
	2009	2008	2007	2006	2009	2008	2007	2006
BW Overall	3.40 ▲	3.34	3.3	3.4	2.97	2.97	2.9	3.1
Scotland	3.68	3.79	-	-	3.40	3.56	-	-
England & Wales	3.38	3.30	3.3	3.4	2.95	2.91	2.9	3.1
North West	3.25				2.87			
North East	3.19				2.91			
Manchester & Pennine	3.22				2.69			
Wales and Borders	3.50				2.85			
West Midlands	3.50				3.05			
Central Shires	3.41				2.89			
East Midlands	3.40				3.01			
South Wales & Severn	3.46				2.90			
South East	3.43				3.06			
Kennet & Avon	3.52				3.24			
London	2.94				2.63			



Performance ratings - BW recycling

	Quality			Signage		
	2009	2008	2007	2009	2008	2007
BW Overall	2.51	2.54	2.3	2.36	2.39	2.1
Scotland	2.81 ▼	3.17	-	2.68	2.94	-
England & Wales	2.49	2.48	2.3	2.33	2.33	2.1
North West	2.45			2.31		
North East	2.48			2.29		
Manchester & Pennine	2.47			2.24		
Wales and Borders	2.48			2.27		
West Midlands	2.6			2.43		
Central Shires	2.54			2.32		
East Midlands	2.59			2.43		
South Wales & Severn	2.28			2.15		
South East	2.48			2.27		
Kennet & Avon	2.53			2.72		
London	2.48			2.13		



Performance ratings - Winding holes

	Quality				Frequency			
	2009	2008	2007	2006	2009	2008	2007	2006
BW Overall	3.48	3.47	3.4	3.5	3.27	3.27	3.2	3.3
Scotland	3.57	3.71	-	-	3.47	3.69	-	-
England & Wales	3.48	3.47	3.4	3.5	3.27	3.25	3.2	3.3
North West	3.35				3.35			
North East	3.39				3.35			
Manchester & Pennine	3.38				3.36			
Wales and Borders	3.64				3.24			
West Midlands	3.48				3.20			
Central Shires	3.55				3.19			
East Midlands	3.44				3.14			
South Wales & Severn	3.50				3.29			
South East	3.54				3.22			
Kennet & Avon	3.43				3.41			
London	3.38				3.19			

Performance ratings - Frequency of diesel supply

	Frequency of diesel supply		
	2009	2008	2007
BW Overall	3.08	3.12	3.1
Scotland	2.96	3.07	-
England & Wales	3.09	3.13	3.1
North West	2.83		
North East	2.40		
Manchester & Pennine	3.06		
Wales and Borders	3.32		
West Midlands	2.98		
Central Shires	3.30		
East Midlands	2.94		
South Wales & Severn	3.02		
South East	3.48		
Kennet & Avon	2.84		
London	3.06		



Performance ratings - Information & advice

	Quality of waterside information relating to navigation		Quality of waterside information relating to the local area		Timeliness of information provided		Condition of signage		Quality of safety advice from BW staff	
	2009	2008	2009	2008	2009	2008	2009	2008	2009	2008
BW Overall	3.36	3.40	3.13	3.19	3.01	3.09	3.19	3.29	3.74	3.75
Scotland	3.90 ▼	4.16	3.68	3.77	3.68 ▼	3.90	3.76 ▼	4.06	4.29	4.33
England & Wales	3.33	3.32	3.10	3.13	2.96	3.01	3.16	3.21	3.70	3.68
North West	3.24		3.09		2.89		3.03		3.73	
North East	3.14		2.80		2.80		3.01		3.64	
Manchester & Pennine	3.24		2.99		3.05		3.16		3.54	
Wales and Borders	3.45		3.20		3.12		3.24		3.98	
West Midlands	3.32		3.27		2.96		3.15		3.78	
Central Shires	3.37		3.11		2.89		3.17		3.69	
East Midlands	3.58		3.24		3.13		3.27		3.83	
South Wales & Severn	3.28		2.99		2.96		3.17		3.71	
South East	3.28		3.05		2.9		3.11		3.69	
Kennet & Avon	3.44		3.16		3.05		3.24		3.52	
London	3.24		3.26		2.95		3.29		3.44	

Performance ratings - Canal & riverside employees

	Courtesy				Helpfulness				Efficiency			
	2009	2008	2007	2006	2009	2008	2007	2006	2009	2008	2007	2006
BW Overall	4.46	4.4	4.3	4.4	4.43	4.4	4.3	4.4	4.22	4.2	4.0	4.1
Scotland	4.65	4.8	-	-	4.66	4.7	-	-	4.54	4.7	-	-
England & Wales	4.45▲	4.4	4.3	4.4	4.42	4.4	4.3	4.4	4.19▲	4.1	4.0	4.1
North West	4.45				4.42				4.16			
North East	4.38				4.32				4.17			
Manchester & Pennine	4.49				4.42				4.20			
Wales and Borders	4.55				4.55				4.31			
West Midlands	4.49				4.45				4.28			
Central Shires	4.44				4.38				4.16			
East Midlands	4.47				4.45				4.19			
South Wales & Severn	4.43				4.42				4.29			
South East	4.46				4.44				4.20			
Kennet & Avon	4.35				4.34				4.05			
London	4.40				4.35				4.02			

Performance ratings - Office employees

	Courtesy				Helpfulness				Efficiency			
	2009	2008	2007	2006	2009	2008	2007	2006	2009	2008	2007	2006
BW Overall	4.29	4.3	4.2	4.2	4.18	4.1	4.0	4.0	3.99	4.0	3.8	3.8
Scotland	4.68	4.7	-	-	4.67	4.6	-	-	4.56	4.6	-	-
England & Wales	4.26	4.2	4.2	4.2	4.14	4.1	4.0	4.0	3.95	3.9	3.8	3.8
North West	4.27				4.09				3.91			
North East	4.18				4.05				3.83			
Manchester & Pennine	4.22				4.08				3.87			
Wales and Borders	4.26				4.08				3.96			
West Midlands	4.31				4.2				4.03			
Central Shires	4.33				4.26				4.06			
East Midlands	4.18				4.06				3.93			
South Wales & Severn	4.19				4.11				3.94			
South East	4.25				4.17				3.89			
Kennet & Avon	4.24				4.12				4.00			
London	4.4				4.27				3.98			

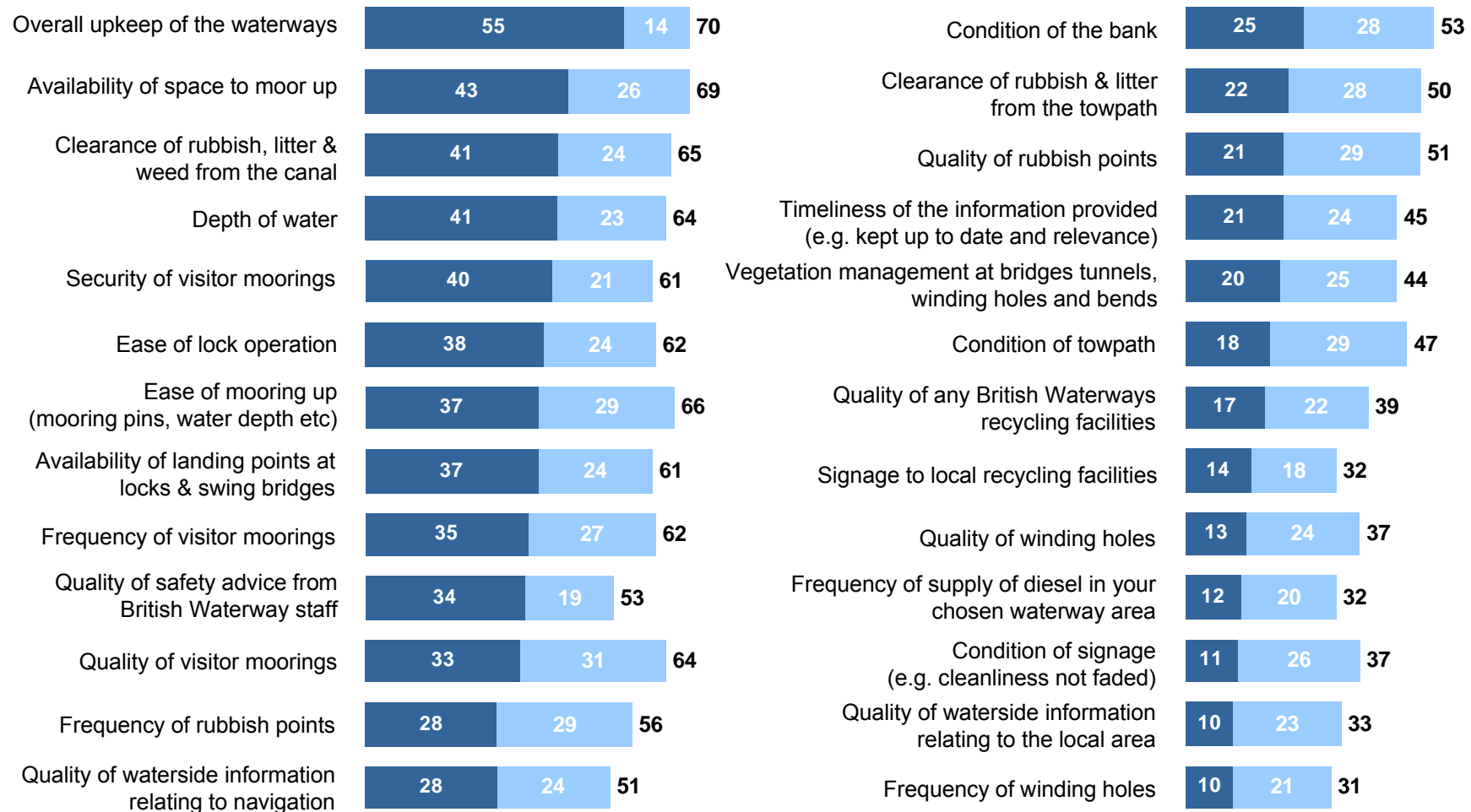
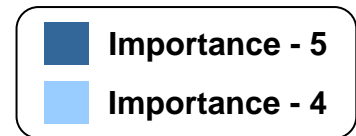
Performance ratings - Pre-booking of lock, bridge or tunnel passage

	Ease of booking passage		Punctuality attending on site		Helpfulness of service offered	
	2009	2008	2009	2008	2009	2008
BW Overall	4.20	4.29	4.30	4.33	4.34	4.41
Scotland	4.48	4.51	4.51	4.33	4.57	4.63
England & Wales	4.17	4.26	4.28	4.33	4.32	4.38
North West	4.10		4.48		4.47	
North East	4.18		4.25		4.27	
Manchester & Pennine	4.32		4.37		4.35	
Wales and Borders	4.25		4.41		4.49	
West Midlands	4.15		4.16		4.32	
Central Shires	4.10		4.04		4.15	
East Midlands	4.06		4.11		4.27	
South Wales & Severn	3.80		4.00		3.97	
South East	4.27		4.19		4.23	
Kennet & Avon	3.83		4.00		3.77	
London	4.43		4.39		4.52	



Key driver analysis – propensity to recommend

Importance (claimed) in determining enjoyment / appreciation of waterways



Source: Q5b, Q6aii, Q7b, Q8b Base: All (2122)
 Response scale: 5=extremely important, 4, 3, 2, 1 = not at all important

Key driver analysis explanation

The simple key driver chart overleaf was created using cross-tab analysis to gain basic information about the relationship between different variables (e.g. the association between recommendation and courtesy of staff for instance).

The overall measure or KPI is called the **Dependent variable** (because it depends on the scores of the underlying variables) – in this case it is recommendation.

Underlying variables or drivers are called **Independent variables** (because they do not depend on anything else in the model).

On the **horizontal axis** of the chart overleaf: Performance rating is the top two box score ie. excellent or very good for the various aspects eg. for frequency of winding holes 36% of boaters rate this excellent/very good.

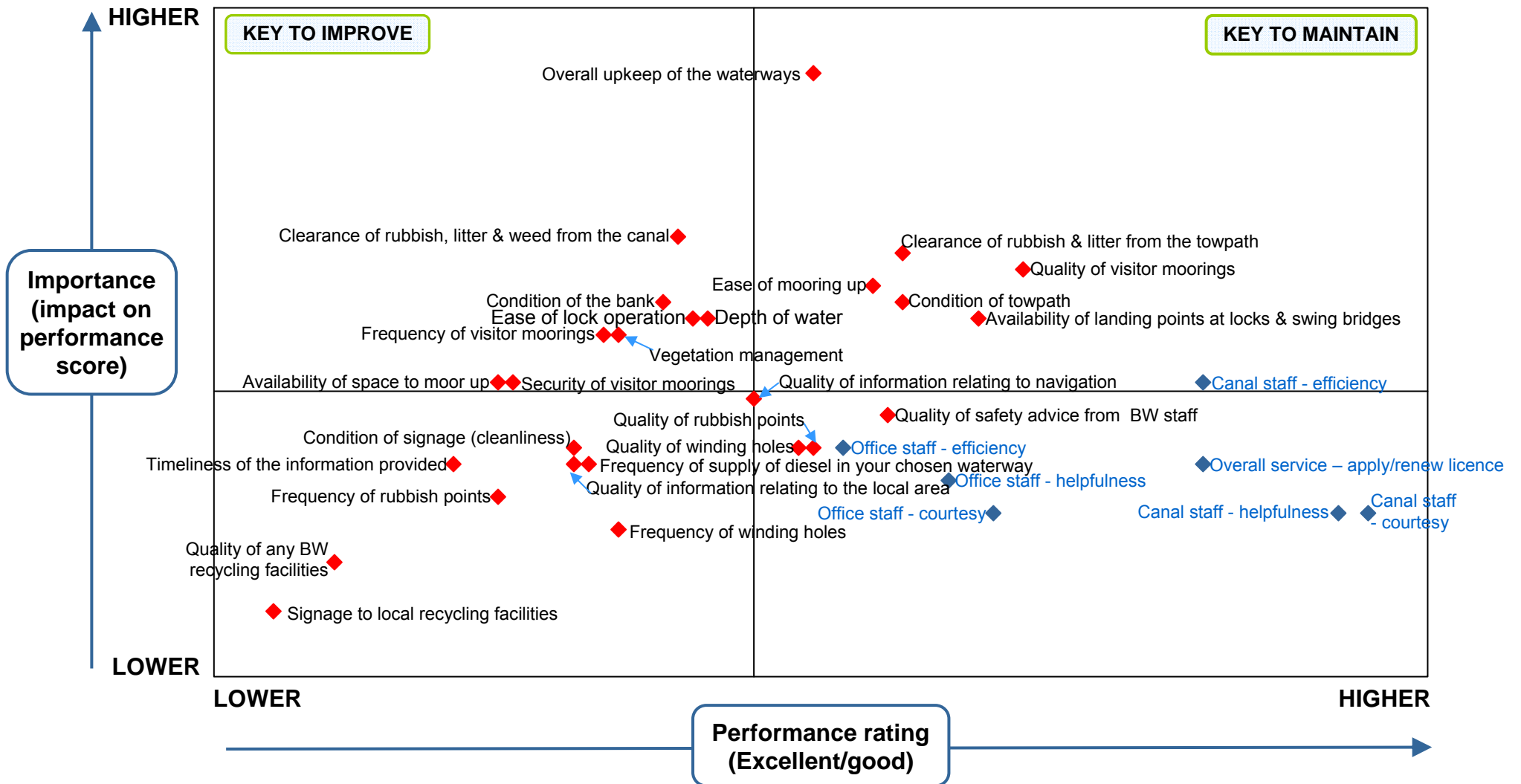
On the **vertical axis**: Importance is calculated by recommenders minus non-recommenders among those rating a particular waterway aspect excellent/very good thus deriving the (**relative**) impact on performance rating eg. for frequency of winding holes, the impact score is 9% .

An item with a high score along the horizontal axis in terms of performance and also has a high score along the vertical axis ie. high impact means it is a key driver of recommendation and British Waterways score well and would therefore appear somewhere in the top left quadrant / box.

Example

Take 'canal staff helpfulness' for example – BW achieves a high score (excellent/good rating) on this item as indicated by it's location on horizontal axis but in terms of impact on recommendation it is not very high on the vertical axis. This means whilst BW's canal staff are seen as very helpful, this isn't a key driver of recommendation. Therefore this aspect appears in the lower left box.

Importance (derived) – key drivers of recommendation



Source: Q5a, Q6ai, Q6bi, Q7a, Q8a, Q11a, Q11b, Q12 Base: All (2122)

Vertical axis: Importance is calculated by recommenders minus non-recommenders among those rating a particular waterway aspect excellent/very good thus deriving the (relative) impact on performance rating eg. for frequency of winding holes impact score is 9%.

Horizontal axis: Performance rating is the top two box score ie. excellent or very good for the various aspects eg. for frequency of winding holes 36% rate this excellent/very good

Service / facilities mean performance score ratings – ranked summary

1	Courtesy of canal/riverside employees	4.46
2	Helpfulness of canal/riverside employees	4.43
3	Helpfulness of services offered (pre-booked lock, bridge, tunnel passage)	4.34
4	Punctuality attending site (pre-booked lock, bridge, tunnel passage)	4.30
5	Courtesy of office employees	4.29
6	Efficiency of canal/riverside employees	4.22
7	Ease of booking passage	4.20
8	Helpfulness of office employees	4.18
9	Efficiency of office employees	3.99
10	Quality of safety advice from BW staff	3.74
11	Quality of visitor mooring	3.65
12▲	Landing point availability at locks	3.58
13	Towpath clearance (rubbish, litter, weeds)	3.51
14▲	Condition of towpath	3.50
15	Quality of winding holes	3.48
16▲	Ease of mooring	3.47
17▲	Quality of rubbish disposal points	3.40
18	Quality of waterside information relating to navigation	3.36

19	Overall upkeep of waterways	3.36
20	Frequency of winding holes	3.27
21	Ease of lock operation	3.22
22▼	Condition of signage	3.19
23	Condition of bank	3.18
24▼	Depth of water	3.18
25▼	Quality of waterside information relating to the local area	3.13
26	Frequency of visitor mooring	3.11
27	Canal clearance (rubbish, litter, weeds)	3.10
28▼	Vegetation management	3.09
29	Frequency of diesel supply	3.08
30	Security of visitor mooring	3.07
31▼	Timeliness of information provided	3.01
32	Frequency of rubbish disposal points	2.97
33	Availability of space to moor up	2.90
34	Quality of BW recycling facilities	2.51
35	Signage to BW recycling facilities	2.36

Key driver of recommendation (LPI)

Drivers of propensity to recommend waterways in area to other boaters

Would recommend

“This area, on the whole, is relatively better maintained and is fortunate in terms of interesting features and countryside.”

(Wales & Borders)

“Generally it’s a nice area with no major security concerns and appealing countryside. The canals and facilities are well maintained with the exception of the Aylesbury arm.”

(South East)

“Adequate maintenance (in this area) of waterways and structures. decent depth, decent upkeep of towing path, clean water.”

(North West)

“Good towpaths, plenty of water points.”

(Central Shires)

“It is well maintained, no vandalism, water/toilet services good, good maintenance of locks and easy moorings.”

(West Midlands)

“I would recommend this area of the system because it has a lot of stunning scenery. especially along the Macclesfield and upper peak sections.”

(Manchester & Pennine)

Would not recommend

“All visitor moorings & large number of lock hard standings taken up by liveaboards. Also at deeper water areas on towpaths where you can get a boat in.”

(London)

“Rubbish in canals around Blackburn/Burnley. Difficulties in using Wigan flight. No lock keepers to be seen. Stiffness of locks and bridges. Lack of suitable overnight mooring.”

(North West)

“Lack of mooring spaces because you couldn't get the boat within 4 foot of the towpath and where you could, there was too much rubbish and smelt horrible.”

(South East)

“Over crowding by live aboards who moor permanently at popular moorings, including bridges and visitor moorings.”

(Kennet & Avon)

“Due to the amount of boat traffic in this area waiting at lock etc limits cruising time.”

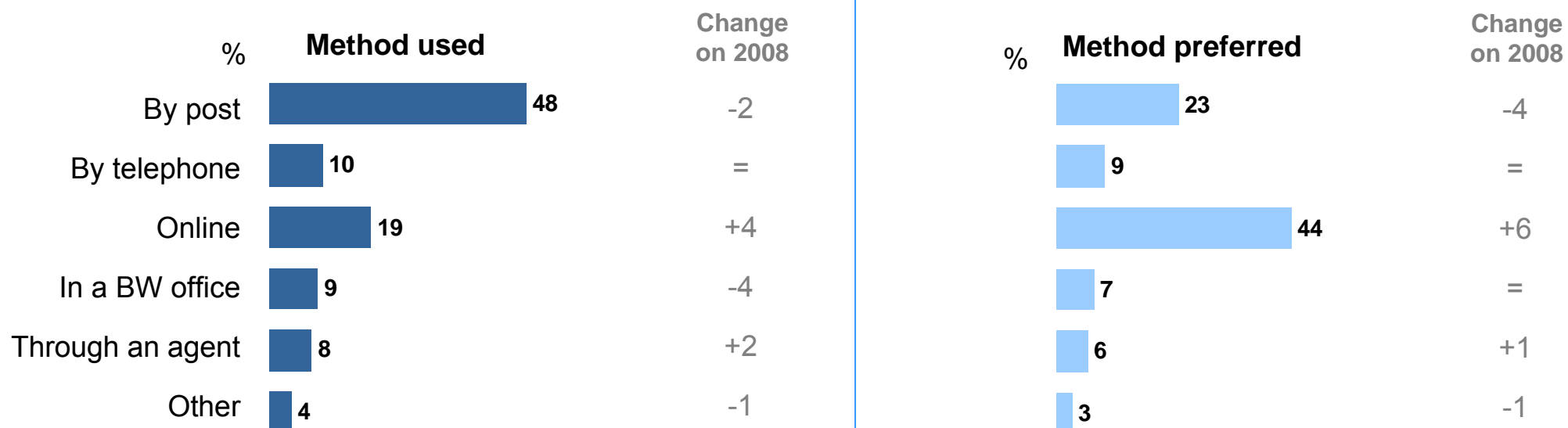
(Central Shires)

The visitor moorings next to residential and long term moorings are frequented by continuous cruisers who pay nothing for moorings.

(North East)

Licence renewal

Methods used to renew/apply for BW licence



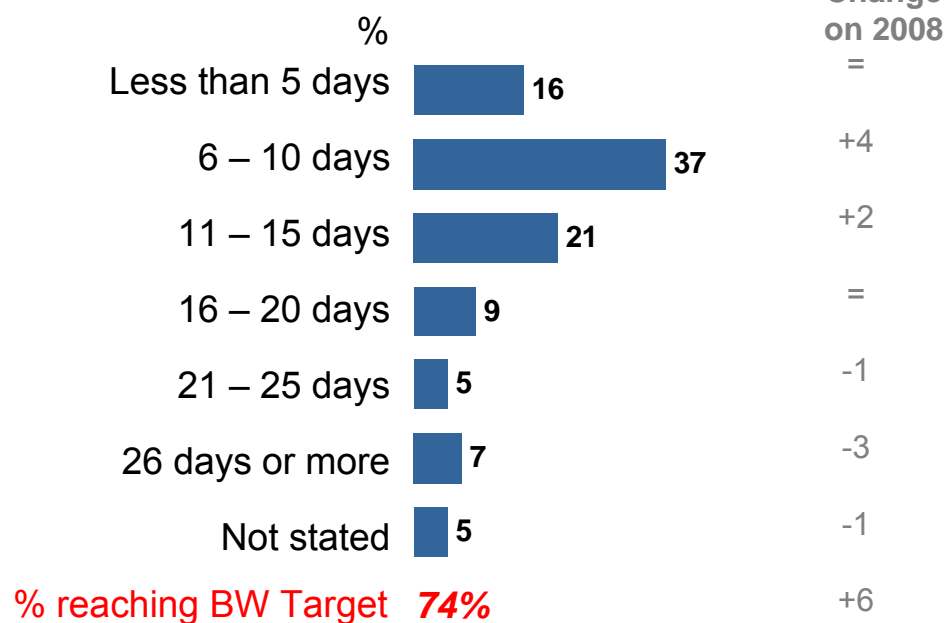
Methods used to renew/apply for BW licence by licence type

	Type of licence				
	BW Overall	<12 months BW licence (75)	12> months BW licence (1872)	Gold licence (85)	Scottish Transit (70)
By post	48	43	49	72	13
By telephone	10	19	11	8	7
Online	19	7	21	13	3
In a BW office	9	11	7	-	67
Through an agent	8	21	7	7	
Other	4	-	4	-	4

Length taken to receive licence from submitting application /renewal

BW Target: 15 days

All applications/renewals



Application/renewal method

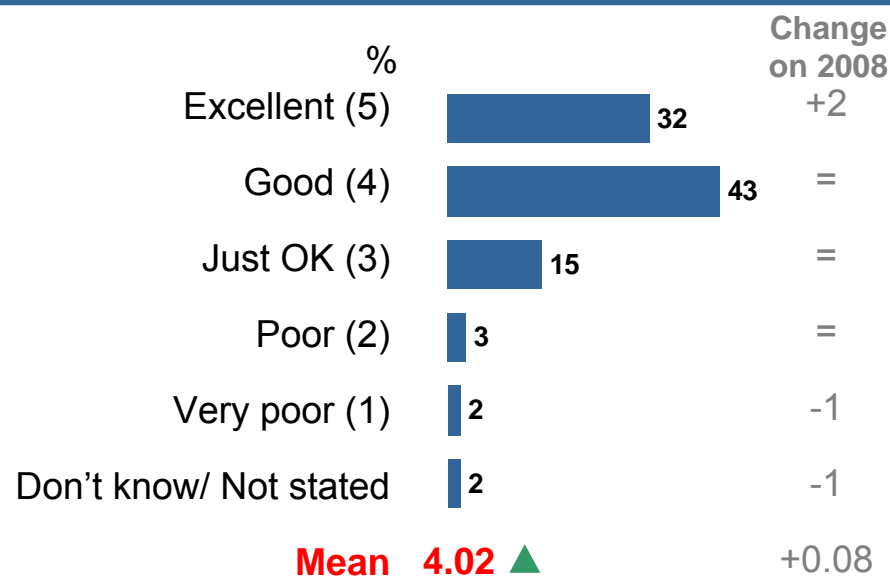
Post	Telephone	Online	BW office	Agent	Other
9	19	31	24	6	21
40	41	43	22	29	26
23	21	17	19	26	16
10	6	4	9	19	5
6	3	2	6	6	3
8	5	2	10	14	6
3	4	1	10	1	23
72	81▲	91▲	65	61▲	63

Length taken to receive licence from submitting application /renewal by type of licence

	Type of licence				
	%	All	<12 months BW licence (75)	>12 months BW licence (1872)	Gold licence (85)
Less than 5 days		16	12	16	2
6 – 10 days		37	25	40	24
11 – 15 days		21	27	22	25
16 – 20 days		9	13	8	19
21 – 25 days		5	7	4	12
26 days or more		7	15	7	14
Not stated		5	1	4	5
% reaching BW Target		74	64	78	51



Opinion of overall service when applying/renewing licence



Overall opinion of service – mean scores by type of licence/speed of response/method






Type of licence	2009	2008
<12 months BW	3.68	3.62
>12 months BW	4.04	3.96
Gold	3.55	3.52
Scottish Transit	4.50	4.54
Other	4.09	3.62

Length of time taken to receive licence	2009	2008
< 5 days	4.60	4.54
6 – 10 days	4.26	4.24
11 – 15 days	3.97	3.94
16 – 20 days	3.56	3.68
21 – 25 days	3.53	3.45
26> days	2.45	2.55

Application/renewal method	2009	2008
Post	3.87	3.86
Telephone	4.23 ▲	3.87
Online	4.30	4.24
BW office	4.08	4.04
Agent	3.85	3.76
Other	4.03	4.09

Boat & boating behaviour

Boat type and age

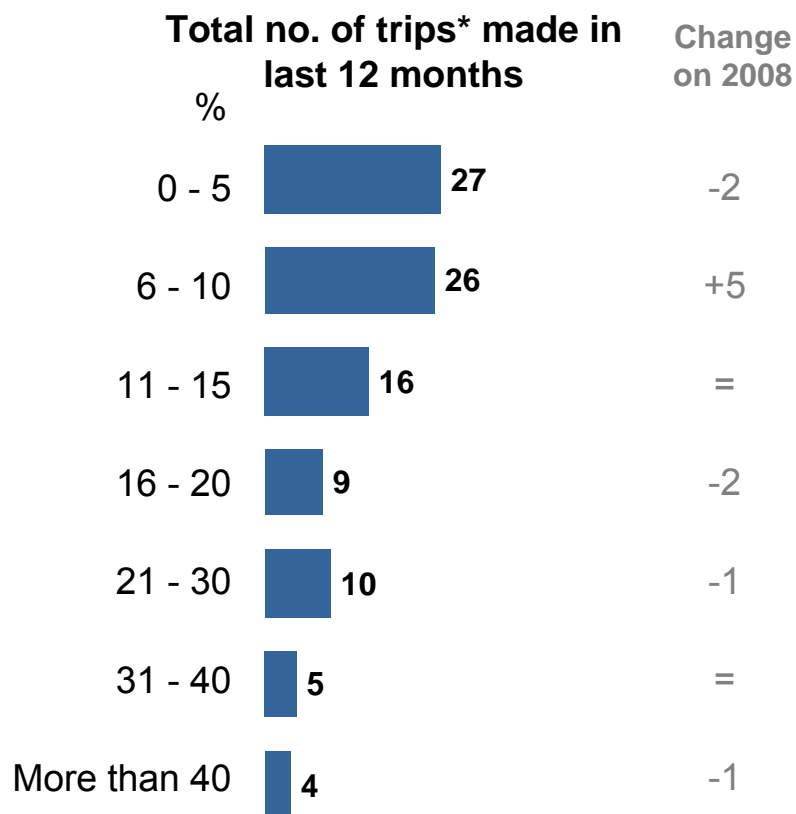
%	Type of boat		Change on 2008
83	Narrowboat		+14
7	A cruiser		-14
4	A yacht		-2
5	Other		+2
1	Not stated		=

Average...	2009	2008
...age of boat	9.5 years	17 years
...years owned boat	5 years	5 years
...beam width	2.25m	2.35m
...length of boat	16.7m	14.8m
...length of time owned boat for use on canals/rivers	9 years	8 years
...length of time holding BW boat licence	8 years	7 years

Boat by mooring management (E&W)

	All England & Wales (1930)	Marina / Boatyard (incl BWML) (75)	Private landowner (1872)	British Waterways (85)	Boat Club (70)
Average age of boat	8.5	7.6	10.6	9.6	9.5
Average years owned boat	5.1	4.8	4.7	5.1	5.8
Narrowboat	88%	91%	85%	83%	83%
Cruiser	6%	5%	7%	6%	15%
Yacht	*	*	-	*	1
Other	5%	4%	9%	11%	1%

Boating behaviour



	BW overall	Scotland	England & Wales
Average no. of trips*	13.4 ▼	14.5 ▼	13.5 ▼
Average days spent cruising	58	43 ▼	59
Average miles travelled per day	12.9	19.9 ▼	12.6
Average no. of locks passed through per day	7	6	7
Average no. of hours spent cruising on typical day	6	6	6
Average no. of adults in party	2.31 ▼	2.64 ▼	2.29 ▼
Average no. of children in party	0.36	0.56 ▲	0.35

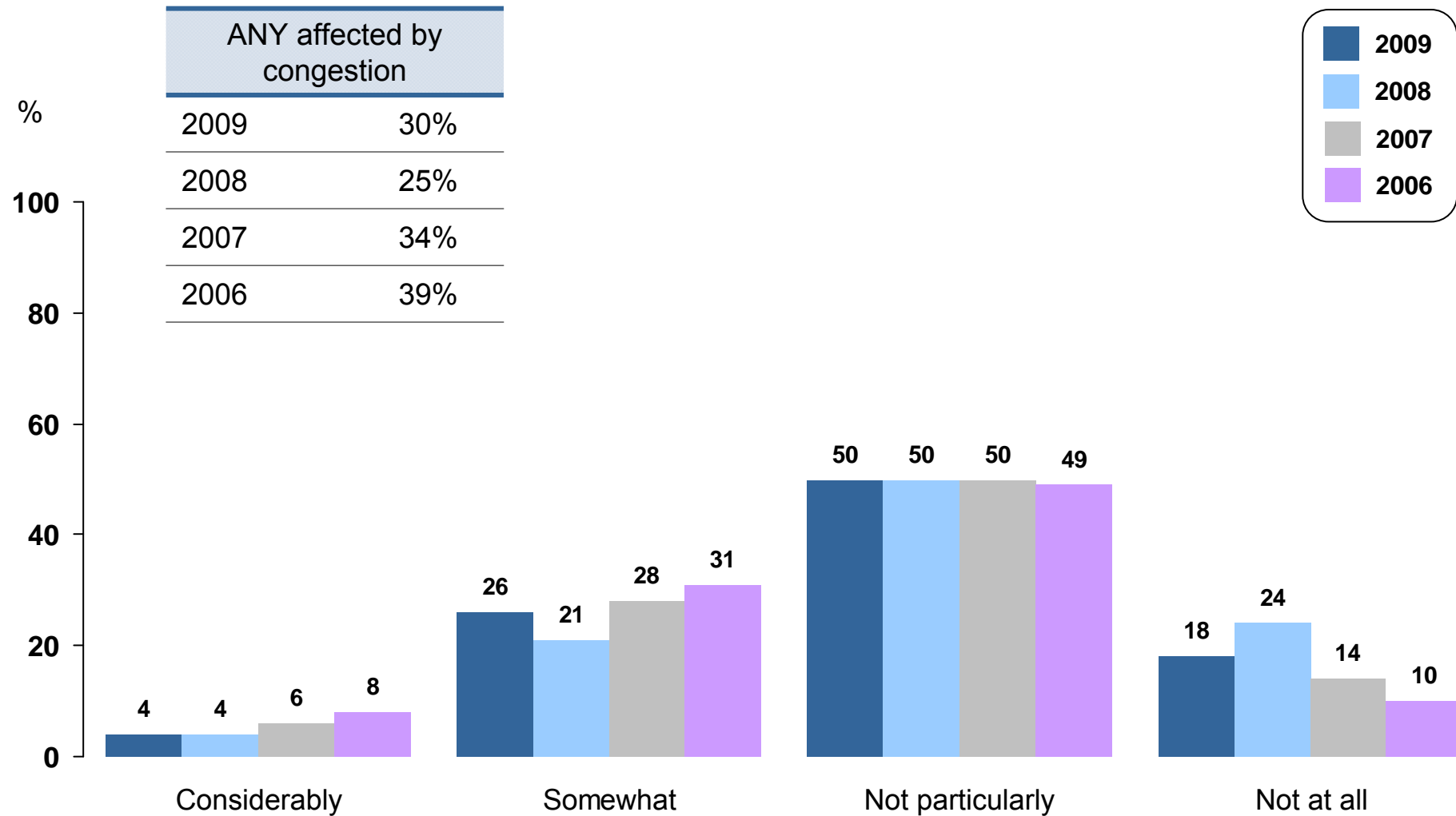
Boating behaviour by experience

	BW overall	4 years or less (867)	5 – 9 years (497)	10 – 19 years (398)	20 years or more (319)
Average no. of trips*	13.4	13.0	13.7	14.2	13.7
Average days spent cruising	58	51	63	62	62
Average miles travelled per day	12.9	12.3	12.7	13.4	13.7
Average no. of locks passed through per day	7	7	7	7	8
Average no. of hours spent cruising on typical day	6	5.7	5.5	5.6	5.8
Average no. of adults in party	2.31	2.33	2.32	2.23	2.29
Average no. of children in party	0.36	0.35	0.33	0.27	0.57

Boat ownership and licence by motivations to purchase first boat (E&W)

	Average years owned boat	Average years held BW boat licence
Hiring a boat for a holiday	7.95	7.26
Always been interested in boats	10.21	8.49
Going out on a boat with family, friends or work mates	8.22	7.35
Watching boats	7.84	6.93
Reading books, newspapers/magazines	7.51	6.51
Visiting a boat show	7.39	6.62
Coastal boating experience	9.69	7.79
Boat trips with school or youth group	11.90	11.00
Other	8.24	7.15

Extent affected by congestion

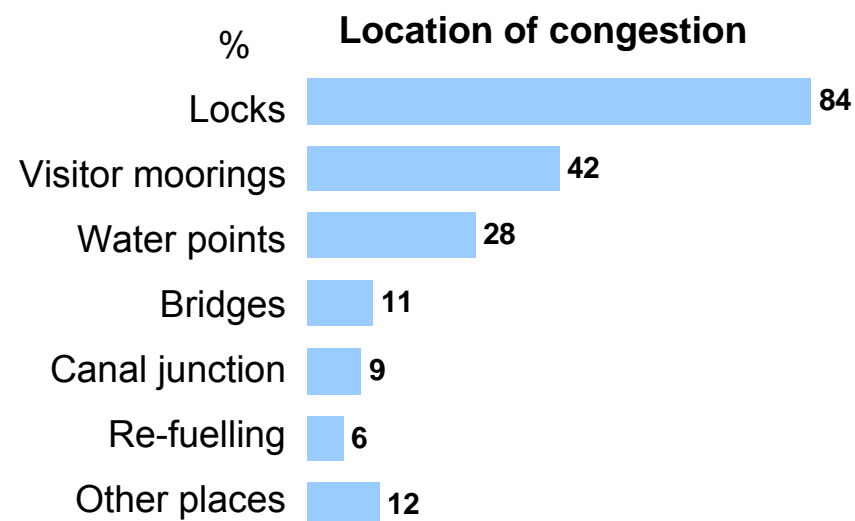
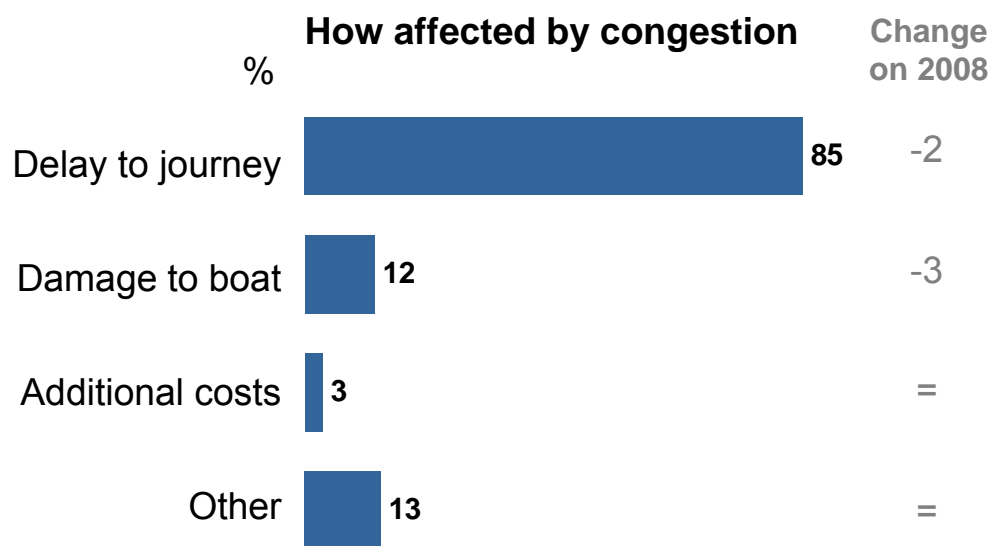


Extent affected by congestion by region

	%	Considerably	Somewhat	Not particularly	Not at all
BW Overall		4	26	50	18
Scotland		1	7	37	49
England & Wales		5	27	51	15
North West		2	20	51	25
North East		4	16	45	30
Manchester & Pennine		5	28	49	14
Wales and Borders		6	41	48	4
West Midlands		5	24	55	14
Central Shires		7	39	49	4
East Midlands		1	21	51	22
South Wales & Severn		1	15	53	30
South East		5	30	52	12
Kennet & Avon		6	21	56	16
London		3	14	53	30



Experiencing congestion



Effect of congestion by region

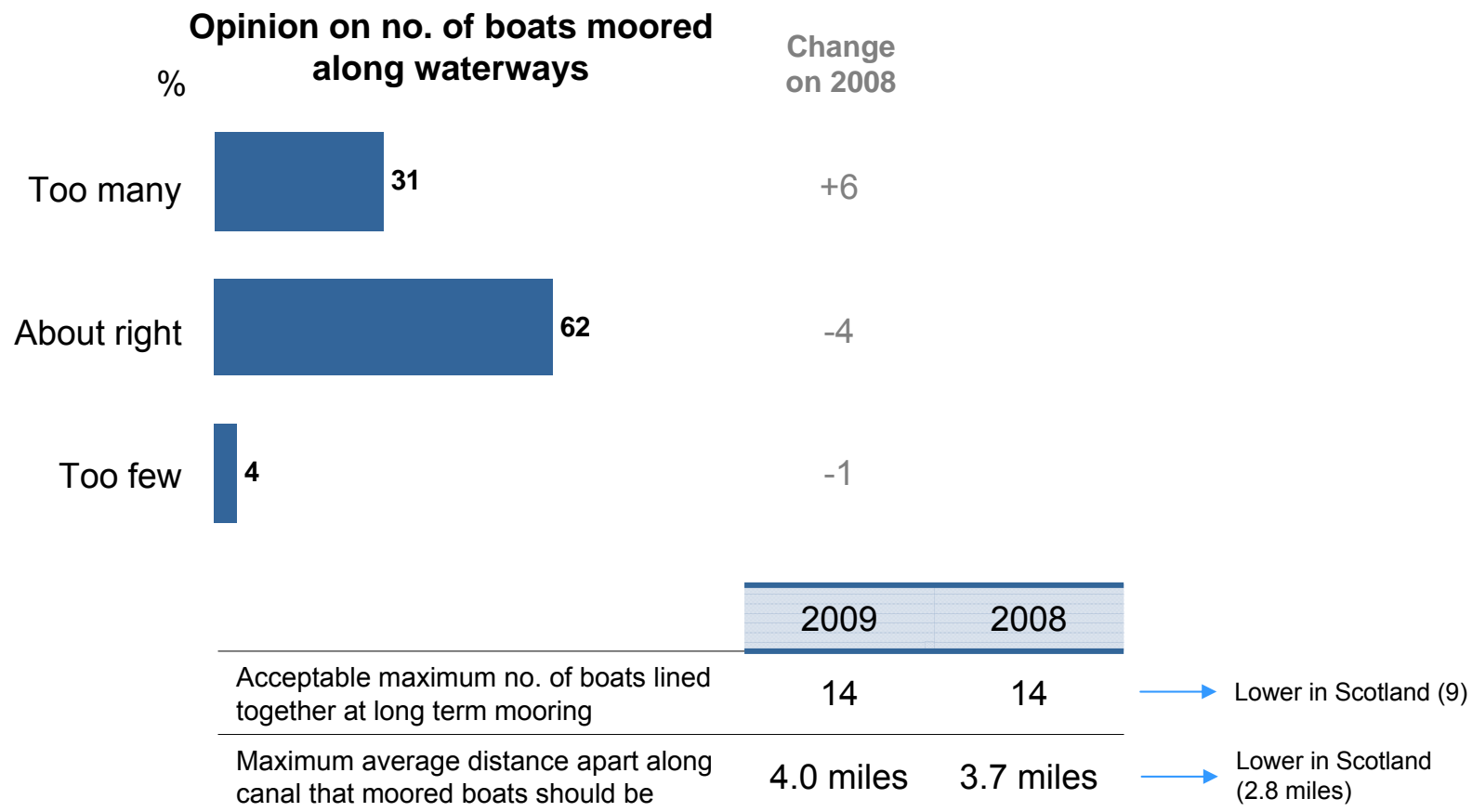
	%	Delay to journey	Damage to boat	Additional costs	Other
BW Overall	26	4	1	4	
Scotland	5	3	0	1	
England & Wales	27	4	1	4	
North West	15	3	0	8	
North East	16	2	2	3	
Manchester & Pennine	30	5	2	3	
Wales and Borders	42	4	1	3	
West Midlands	27	5	2	2	
Central Shires	43	5	3	8	
East Midlands	18	2	1	2	
South Wales & Severn	10	4	1	3	
South East	30	3	0	5	
Kennet & Avon	21	4	1	4	
London	14	3	0	1	



Location of congestion by region

	%	At water points	Locks	Visitor moorings	Bridges	Canal junctions	Re-fuelling	Other places
BW Overall		9	25	13	3	3	2	4
Scotland		-	5	2	2	-	-	1
England & Wales		9	27	13	3	3	2	4
North West		5	16	9	5	2	2	3
North East		6	13	9	1	1	2	3
Manchester & Pennine		10	26	11	4	3	2	3
Wales and Borders		15	44	13	4	5	2	8
West Midlands		6	25	11	5	5	-	2
Central Shires		14	44	20	3	6	3	5
East Midlands		3	21	10	1	2	2	1
South Wales & Severn		1	9	9	3	2	1	3
South East		12	30	17	3	2	2	4
Kennet & Avon		11	16	16	3	1	3	4
London		5	15	11	-	-	4	-

Attitudes towards the number of boats moored along waterways



Attitudes towards the number of boats moored along waterways – by region

<i>Horizontal %</i>	Too many	About right	Too few
BW Overall	31	63	4
Scotland	1	77	13
England & Wales	33	62	3
North West	16	81	3
North East	15	66	15
Manchester & Pennine	26	67	4
Wales and Borders	42	55	2
West Midlands	31	65	3
Central Shires	44	54	2
East Midlands	18	78	1
South Wales & Severn	13	82	4
South East	45	53	1
Kennet & Avon	46	52	2
London	28	66	5



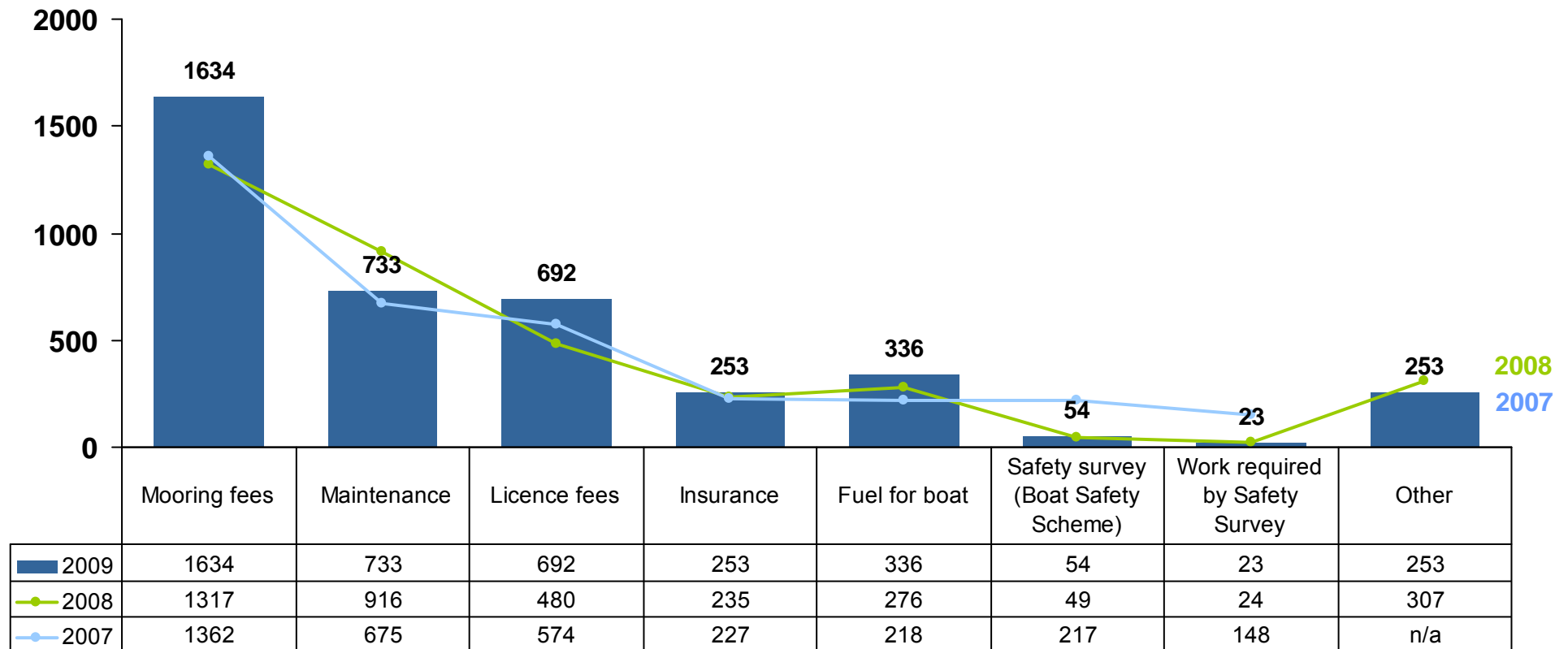
Average (boat-related) spending over past 12 months

Average total annual spend

2009

£3,873 pa

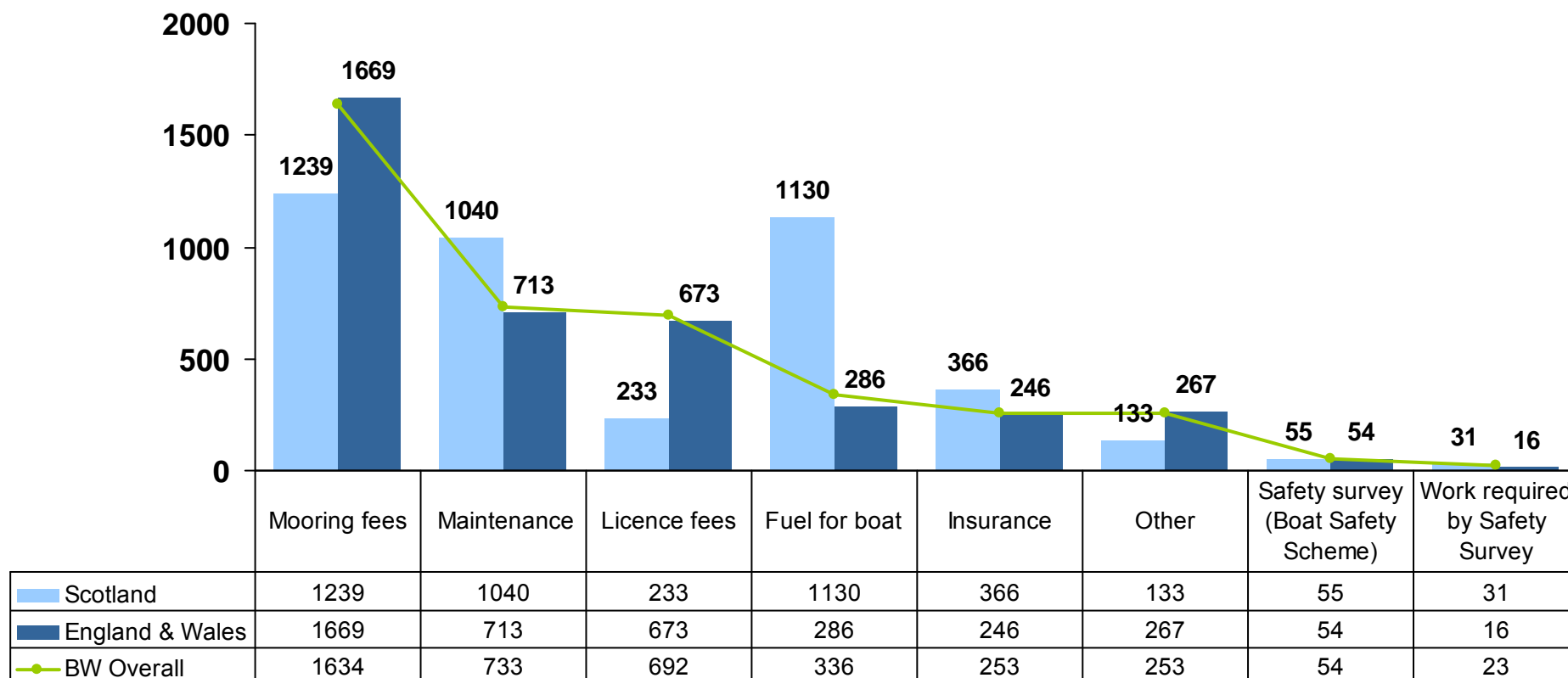
Average spend £



Average (boat-related) spending over past 12 months by region

Average total annual spend		
	Scotland	E&W
2009	£3,400 pa	£3,863 pa

Average spend £



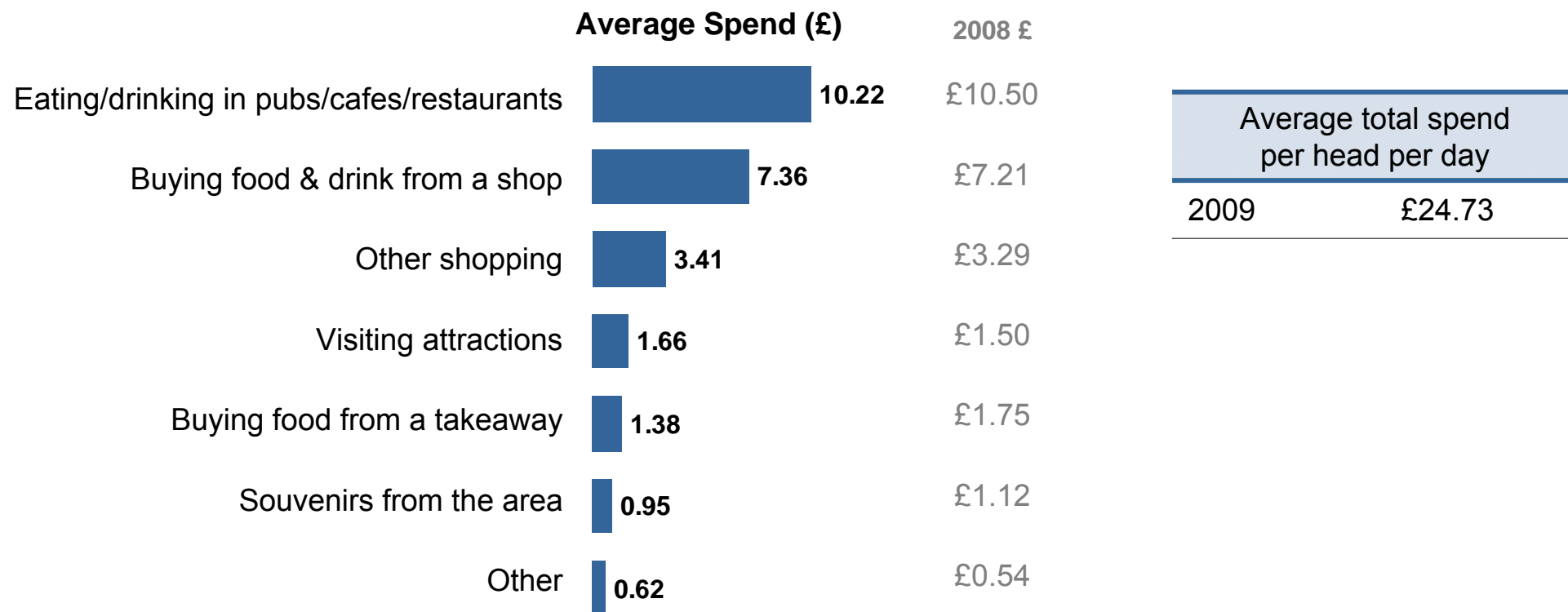
British Waterways

Source: Q31 Base: All (2122)

61 **bdrc**[®]

J29166/Boat Owners – National Report 2009/SM/BQ

Average discretionary spending per head per day while cruising

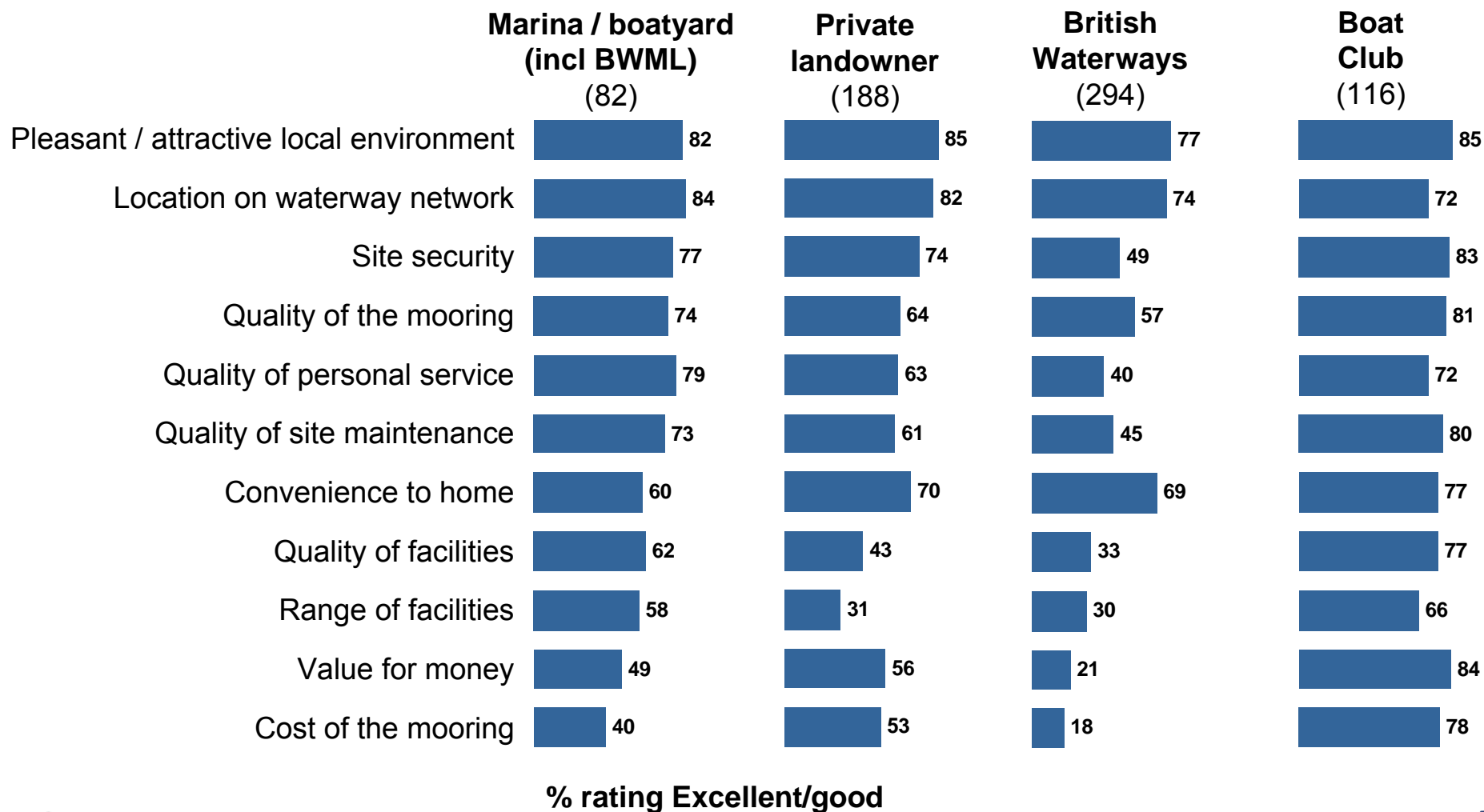


Average discretionary spending per head per day while cruising - by region

£	Eating/drinking in pubs/cafes/restaurants	Buying food & drink from a shop	Other shopping	Visiting attractions	Buying food from a takeaway	Souvenirs from the area	Other	Total
BW Overall	10.22	7.36	3.41	1.66	1.38	0.95	0.62	24.73
Scotland	12.87	7.70	2.85	1.05	2.06	1.66	0.76	28.46
England & Wales	10.12	7.40	3.45	1.70	1.30	0.88	0.62	24.59
North West	10.70	6.51	4.97	2.16	2.19	1.45	0.91	26.35
North East	9.97	7.03	4.94	2.10	1.07	0.67	0.36	24.71
Manchester & Pennine	7.77	8.17	2.63	1.38	1.72	0.76	1.01	23.16
Wales and Borders	10.06	7.09	2.76	1.47	0.88	1.01	0.44	22.75
West Midlands	10.20	7.05	3.95	2.18	1.41	0.83	0.69	26.22
Central Shires	9.05	7.28	3.02	1.49	1.23	0.82	0.36	23.08
East Midlands	9.92	6.05	3.92	1.09	1.92	0.41	0.31	22.09
South Wales & Severn	12.50	8.28	3.70	2.62	1.44	1.04	0.70	28.05
South East	10.35	8.16	2.70	1.52	0.68	0.76	0.60	24.60
Kennet & Avon	10.74	7.55	2.98	1.56	1.44	0.81	0.98	24.92
London	11.45	7.25	4.62	1.19	1.20	1.11	0.26	26.38

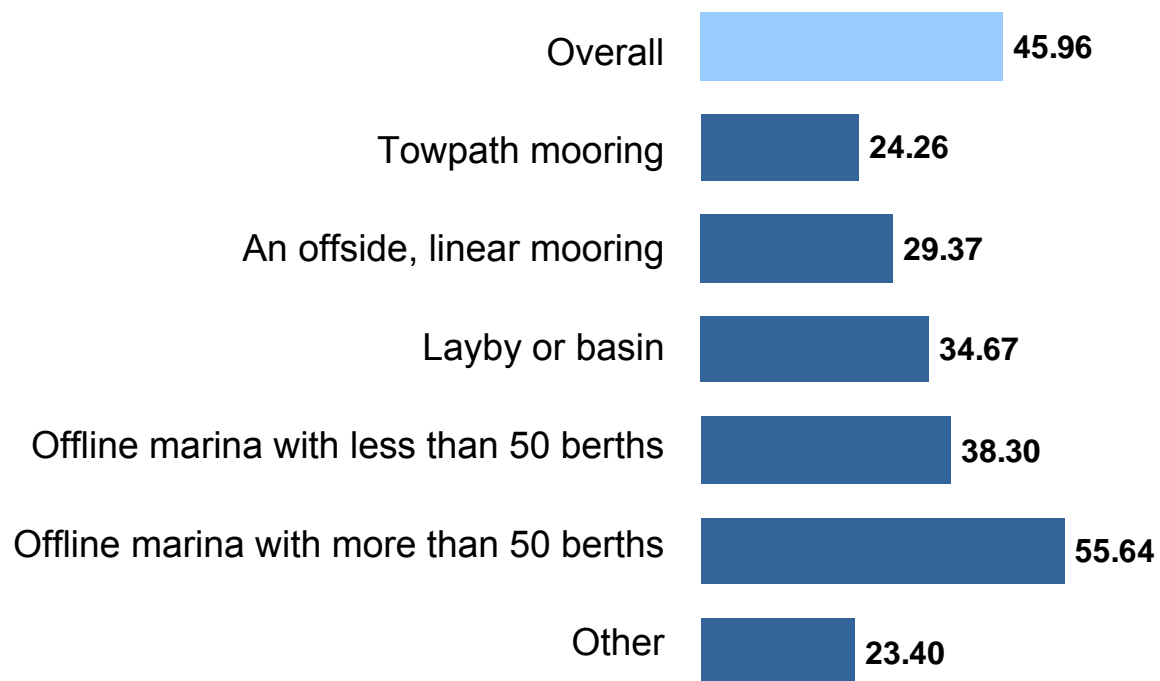
Mooring

Rating of home mooring – by mooring management (E&W)



Average distance of home mooring – by type of home mooring (E&W)

Average distance from home (miles)



Mooring provision – by household income (E&W)

	BW Overall	Under £20k (482)	£20-£30k (373)	£30-£50k (514)	Over £50k (483)
A home mooring on a BW waterway	74	64	78	77	78
A home mooring on a non -BW waterway	16	20	14	13	15
Out of the water (i.e. trailed)	*	*	*	-	*
Not applicable (continuous cruising)	2	5	2	1	1
Other	6	8	5	8	64



Type of home mooring and mooring management – by household income (E&W)

	%	BW Overall	Under £20k (377)	£20-£30k (318)	£30-£50k (416)	Over £50k (404)
A towpath mooring	8	8	10	7	10	5
An offside, linear mooring	20	20	24	18	23	13
A layby or basin	8	8	8	7	7	8
An offline marina with less than 50 berths	12	12	12	13	10	13
An offline marina with more than 50 berths	45	45	35	47	43	56
Marina/boatyard (incl BWML)	62	62	54	64	60	74
British Waterways	17	17	22	16	18	12
Private landowner	11	11	15	9	11	8
Boat club	7	7	7	5	8	4
Don't pay for mooring	1	1	1	1	2	1
Other	2	2	2	3	2	1

BW region of home mooring – by household income (E&W)

	%	BW Overall	Under £20k (377)	£20-£30k (318)	£30-£50k (416)	Over £50k (404)
South East		17	11	15	19	24
Central Shires		12	18	14	9	11
North West		10	12	11	10	6
North Wales and Borders		10	9	9	8	12
West Midlands		9	9	10	11	6
Kennet & Avon		9	7	8	9	9
North East Waterways		6	9	5	7	4
Manchester and Pennine		6	7	8	6	4
East Midlands		6	7	7	5	4
South Wales & Severn		6	5	6	8	7
London		4	3	3	3	7

Preferred mooring – by current type of home mooring (E&W)

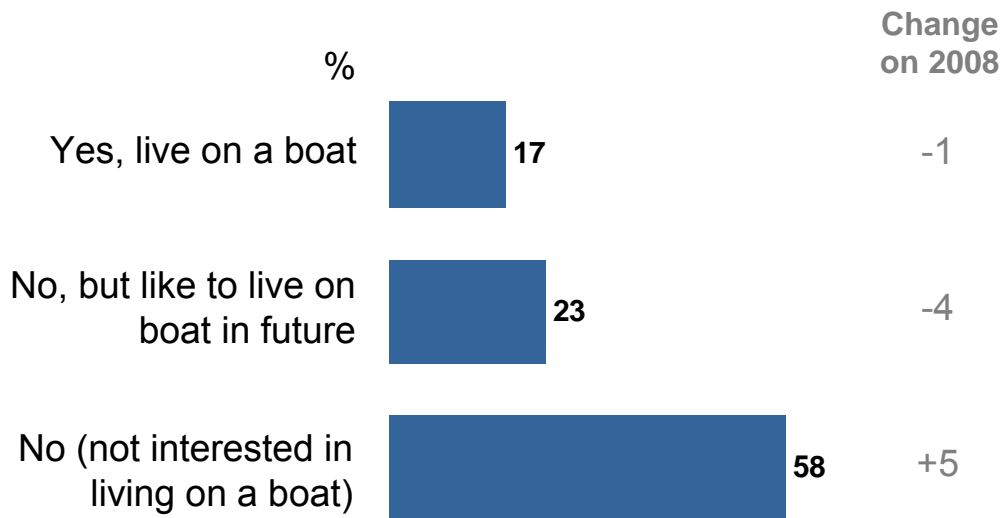
Current type of home mooring

	BW Overall	A towpath mooring (140)	An offside, linear mooring (339)	A layby or basin (133)	An offline marina with less than 50 berths (207)	An offline marina with more than 50 berths (771)	Other (57)
<i>Preferred mooring %</i>							
A towpath mooring	4	39	*	-	1	1	-
An offside, linear mooring	15	17	54	3	2	5	5
A layby or basin	8	8	10	56		2	4
An offline marina with less than 50 berths	21	9	14	20	61	17	12
An offline marina with more than 50 berths	26	4	2	2	6	54	5
Other	3	3	*	1	2	1	51
Not stated	25	22	22	20	29	20	24

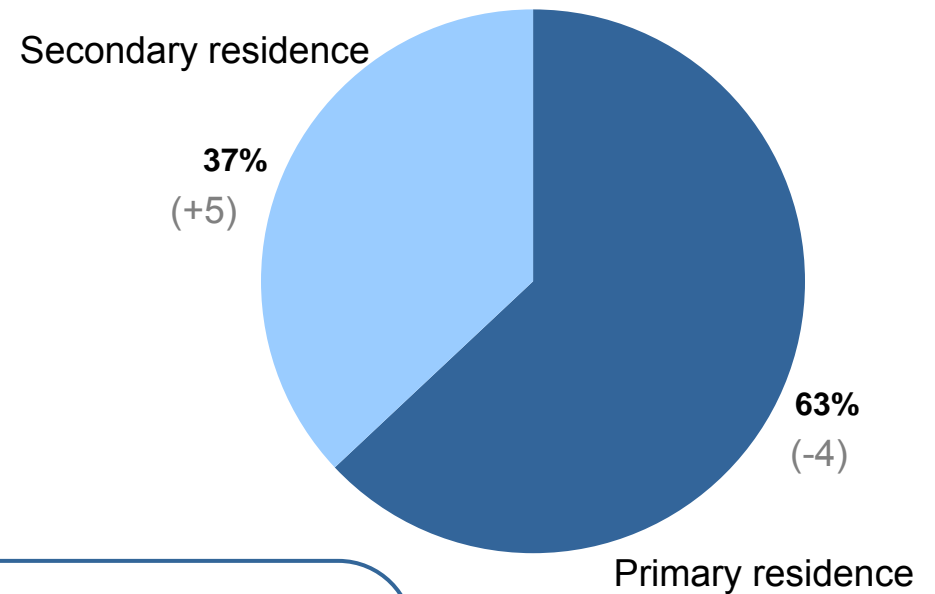
Residential boating

Residential boating

Do you live on a boat?



Type of residence



Live on a boat more likely than other boaters to be:

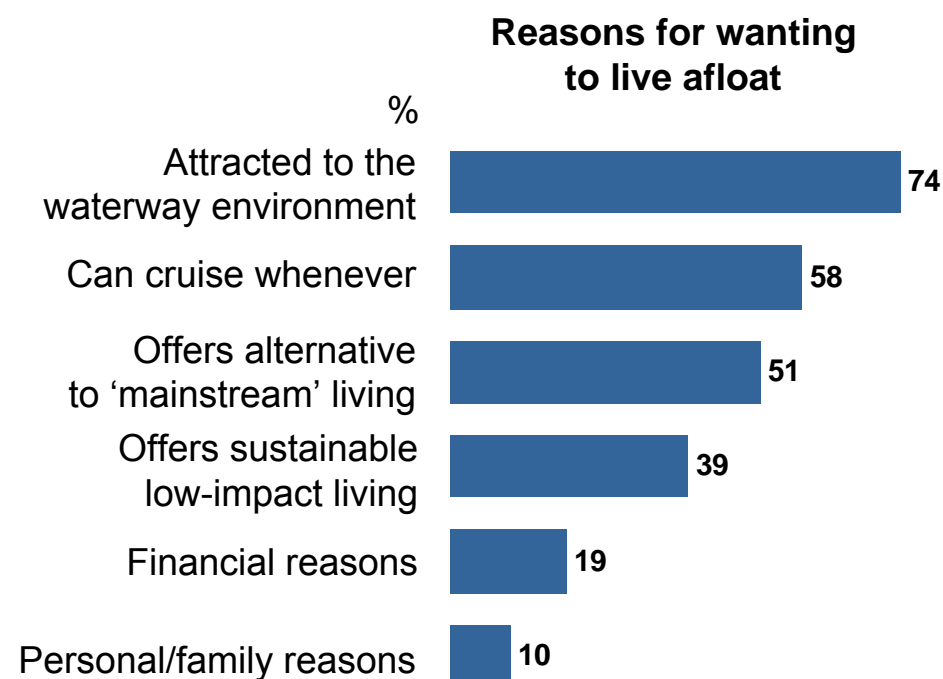
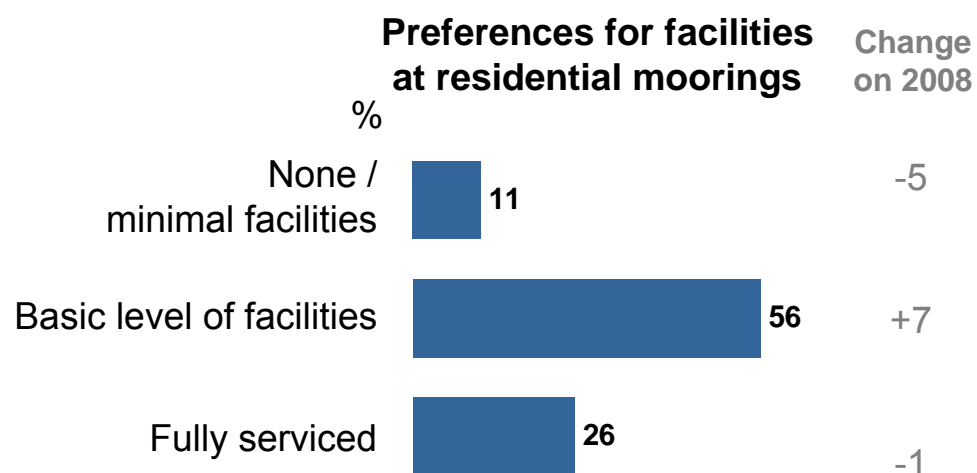
- From London (32%) or Central Shires (21%)
- Younger (18-44 years – 34%)
- Quarter who live on boat are female (23%)
- Third have income under £20K
- 41% live on 'other' boats, 18% live on narrowboats

Residential boating by region

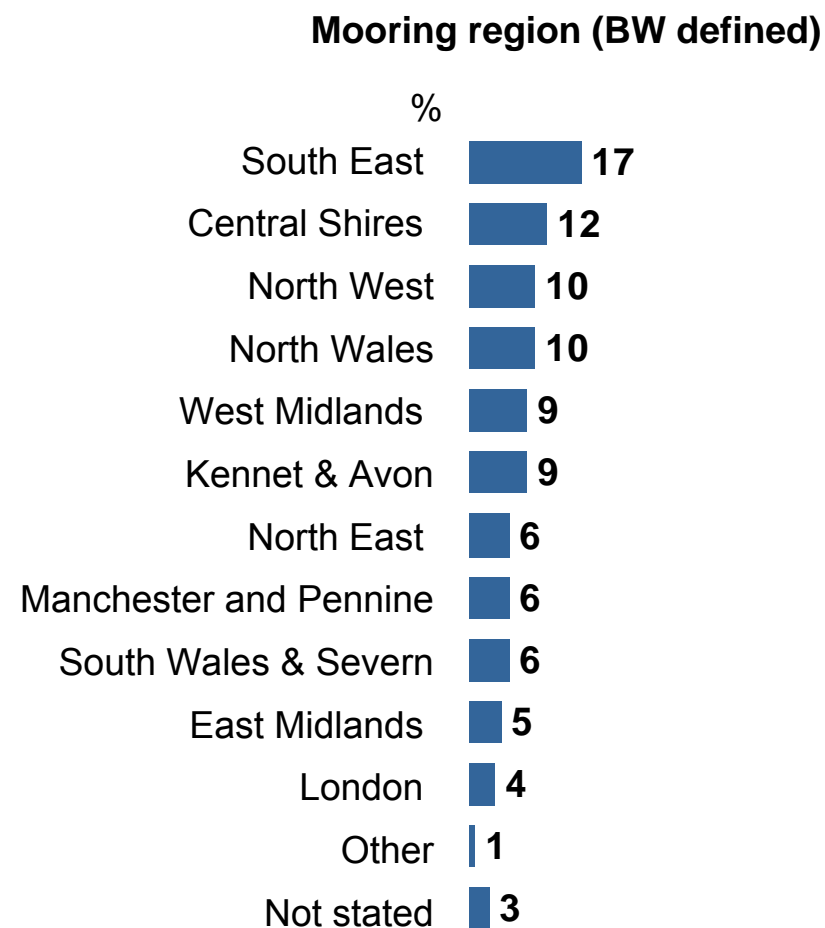
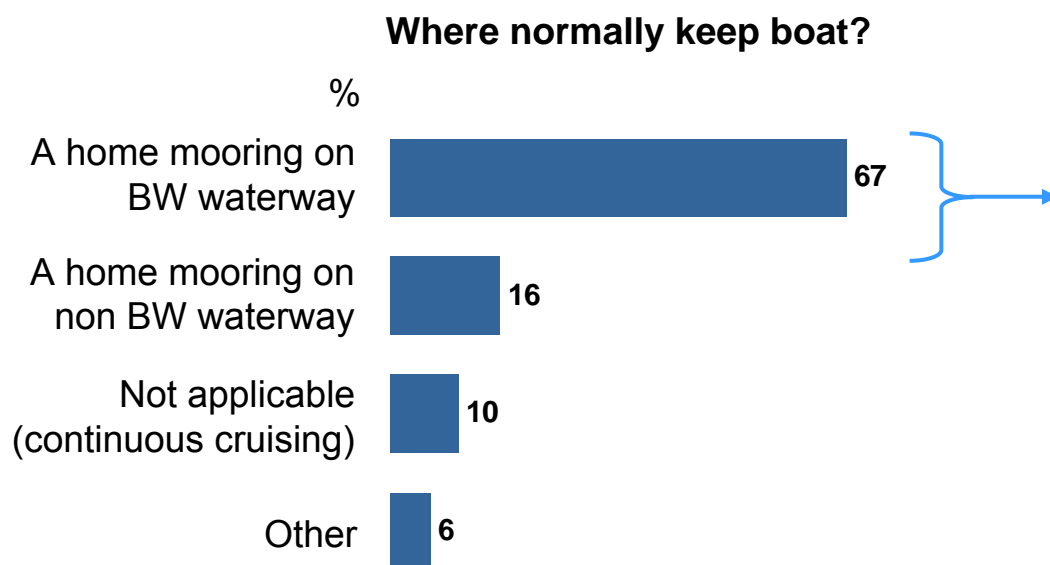
	%	Live on a boat (369)	Would like to live on a boat in future (486)	No / not interested (1227)
BW Overall		17	23 ▼	58 ▲
Scotland		11	21	64 ▲
England & Wales		18	23 ▼	58 ▲
North West		15	25	58
North East		21	26	50
Manchester & Pennine		16	24	58
Wales and Borders		13	25	62
West Midlands		15	27	57
Central Shires		19	19	61
East Midlands		28	22	49
South Wales & Severn		12	26	62
South East		20	17	61
Kennet & Avon		18	23	56
London		32	32	34



Residential moorings – preferred facilities

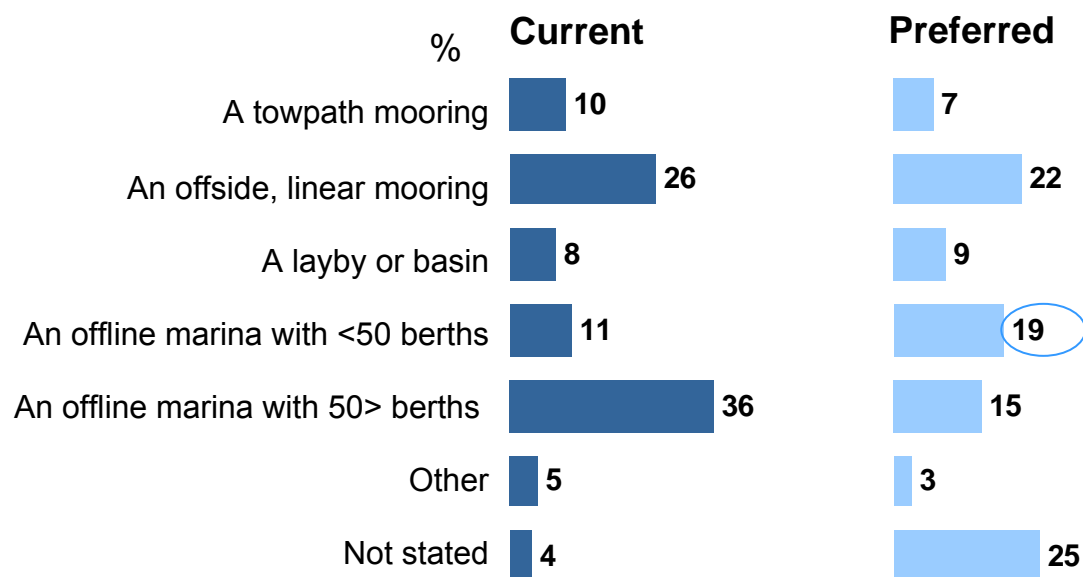


Residential mooring (E&W)

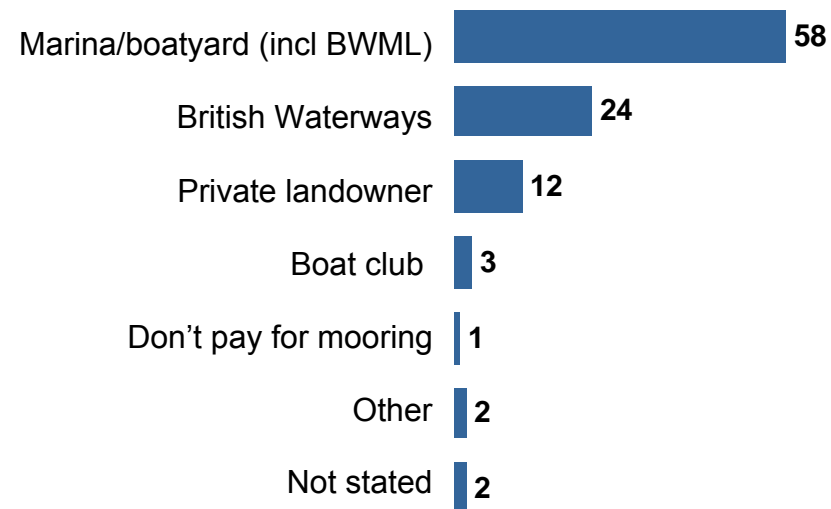


Type of residential home mooring & management (E&W)

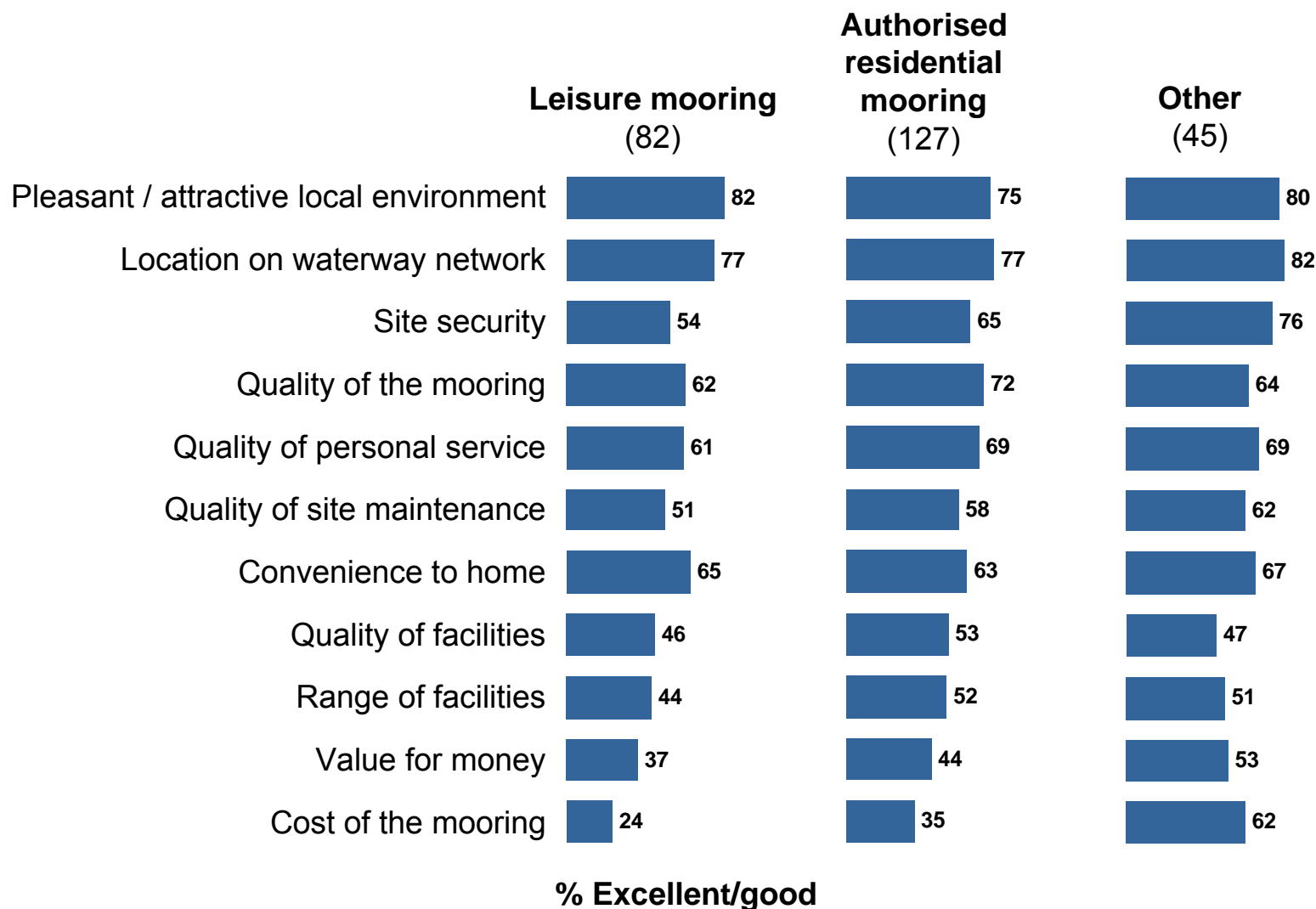
Type of residential home mooring



Mooring management



Rating of home mooring among boat residents (E&W)



Residential boating behaviour (E&W)

	Live on a boat (347)	Would like to live on a boat in future (445)	No / not interested (1110)
Average no. of trips*	10.2	17.1	13.2
Average days spent cruising*	77.5	54.4	54.4
Average no. of hours spent cruising on typical day	5.3	5.8	5.7
Average no. of adults in party	2.23	2.18	2.35
Average no. of children in party	0.24	0.46	0.35

Profile of residential moorings – those living on a boat / I

		Leisure mooring (98)	Authorised residential mooring (140)	Continuous cruisers (62)	Other (58)
Age:	18 – 44	18	19 ▼	16 ▼	12
	45 – 54	28	28	6	24
	55+	54	50 ▲	76 ▲	62
Income:	Under £20K	48	38	53	45
	£20 – 30K	13	19	18	19
	£30 – 50K	22	21	15	14
	Over £50K	10	11	10	9
Boating experience:	4 years or less	49	47	44	40
	5-9 years	28	28	23	40
	10-19 years	13	19	21	14
	20 years or more	10	6	13	7

Profile of residential moorings – those living on a boat /2

	%	Leisure mooring	Authorised residential mooring	Continuous cruisers	Other
BW Overall		27 ▲	38 ▲	17 ▼	16
Scotland*		43	29	21	7
England & Wales		26 ▲	38 ▲	17 ▼	16
North West*		31	24	24	17
North East		31	31	15	12
Manchester & Pennine*		25	42	21	13
Wales and Borders*		15	26	19	41
West Midlands*		19	50	12	19
Central Shires		21	48	17	10
East Midlands*		12	60	4	16
South Wales & Severn*		64	29	-	7
South East		32	30	23	14
Kennet & Avon		26	24	24	26
London*		21	67	8	

Marketing & communications

Opinion of boating experience on the waterways



Opinion of boating experience on the waterways by region

<i>Mean score</i>	BW Overall	Scotland	England & Wales	North West	North East	Manchester & Pennine	Wales and Borders	West Midlands	Central Shires	East Midlands	South Wales & Severn	South East	Kennet & Avon
Peaceful and relaxing	4.70	4.62	4.7	4.73	4.66	4.65	4.67	4.66	4.71	4.68	4.79	4.75	4.71
Places where you can escape for a while	4.65	4.41	4.66	4.75	4.56	4.66	4.67	4.68	4.61	4.63	4.74	4.67	4.65
Places that offer something different	4.42	4.20	4.43	4.51	4.35	4.52	4.52	4.39	4.40	4.32	4.38	4.41	4.40
Good places for meeting likeminded people	4.32	4.09	4.34	4.43	4.31	4.36	4.39	4.29	4.35	4.30	4.32	4.28	4.36
Places where I feel welcome	4.27	4.19	4.27	4.39	4.24	4.26	4.33	4.19	4.24	4.24	4.26	4.26	4.25
Good ways of meeting friends	4.18	4.04	4.18	4.33	4.19	4.17	4.14	4.10	4.21	4.23	4.26	4.11	4.21
Imaginative and inspiring	3.94	3.81	3.95	4.14	3.79	3.96	3.99	3.88	3.91	3.80	3.97	3.85	4.01
Places where you learn more than you expect	3.76	3.58	3.76	3.90	3.71	3.86	3.79	3.68	3.77	3.76	3.84	3.65	3.74
Places where there is lots going on	3.38	3.49	3.37	3.53	3.30	3.32	3.43	3.39	3.33	3.43	3.44	3.28	3.36
Lively and exciting places	3.02	3.04	3.01	3.12	3.07	2.96	3.01	3.08	2.98	3.05	3.14	2.91	2.95
Places where there is lots to do for children	2.94	3.12	2.92	3.04	2.81	2.74	2.89	2.96	2.72	2.92	3.12	2.97	2.96

As per last year, ratings score by boaters with fewer years experience (especially 4 years or less) score higher

Opinion of boating experience on the waterways by residential boating

	BW Overall	Live on a boat (369)	Would like to live on a boat in future (486)	No / not interested (1227)	Boat is not residence (1713)
Peaceful and relaxing	4.70	4.72	4.77	4.67	4.70
Places where you can escape for a while	4.65	4.63	4.73	4.62	4.65
Places that offer something different	4.42	4.43	4.48	4.39	4.41
Good places for meeting likeminded people	4.32	4.43	4.39	4.27	4.30
Places where I feel welcome	4.27	4.29	4.35	4.23	4.26
Good ways of meeting friends	4.18	4.28	4.29	4.10	4.15
Imaginative and inspiring	3.94	4.07	4.10	3.85	3.92
Places where you learn more than you expect	3.76	3.84	3.85	3.69	3.74
Places where there is lots going on	3.38	3.42	3.45	3.35	3.38
Lively and exciting places	3.02	3.16	3.03	2.98	3.00
Places where there is lots to do for children	2.94	3.03	2.96	2.90	2.91

Quality standards and other details

BDRC comply with ISO 20252, the recognised international quality standard for market research, thus the project has been carried out in accordance with this standard.

- Adherence to the standard is independently audited twice per year.
- Where subcontractors are used by BDRC, they are briefed to ensure any outsourced parts of the research is conducted in adherence to ISO 20252

Full methodological details relevant to the project, are available upon request

Statistical difference

This research was designed to ensure robust sample sizes for analysis

As the survey is conducted with a sample of the target audience, we cannot be 100% certain that a census of the whole population would yield the same results

We can be 95% certain that the actual figure (in the population as a whole) falls within a certain range of the survey figure

The percentages within the table represent the error variance

Base	Survey finding of...		
	5 / 95%	20 / 80%	50 / 50%
Total Sample (2122)	+/- 0.9%	+/- 1.6%	+/- 2.0%
England & Wales (1930)	+/- 0.9%	+/- 1.7%	+/- 2.1%
Scotland (132)	+/- 3.7%	+/- 6.8%	+/- 8.5%