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- SWOT/Considerations
- Detailed research findings:
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  - Current & future fleet trends (HBOs)
  - Living in the Broads area (Residents)
  - Visitor behaviour (Visitors)
  - Activities undertaken, & facilities used, on the Broads (PBOs, Residents & Visitors)
  - Awareness of the Broads Authority (Residents & Visitors)
  - Perceptions of Broads Authority performance (PBOs, HBOs, Residents & Visitors)
  - Future challenges & priorities for the Broads area & Broads Authority (PBOs, HBOs, Residents & Visitors)
  - Perceptions of the Broads Authority as the Local Planning Authority (Residents)
  - Perceptions of Broads National Park status (PBOs, HBOs, Residents & Visitors)
  - Representative elections (PBOs, HBOs & Residents)
  - Financial management, comprehension & perceptions of tolls (PBOs & HBOs)
  - Marketing & information sources (Visitors)

- APPENDIX: Audience profiles
Overall objectives

To provide a fact-base about private boat-owners, hire boat operators, residents and visitors in the Broads, in order to inform management decision-making (notably in respect to tolls planning and management), and more specifically to:

- Guide the Broads Authority (BA) in developing the future strategy for tolls management
- Assist the Authority in developing future navigation expenditure plans and proposals
- Help the Authority to determine its strategic priorities and programmes of work in the next three-five years
## Methodology

### Methodologies tailored to audience segments

<table>
<thead>
<tr>
<th>AUDIENCE</th>
<th>Research method(s)</th>
<th>Target sample size</th>
<th>Achieved sample size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td>• Telephone interviews conducted by ITL (using Broads Authority data) &lt;br&gt; <strong>AND</strong>  &lt;br&gt; • Online self-completion survey via Broads Authority dispatched correspondence (with URL survey link)</td>
<td>• 600 tel ints &lt;br&gt; • c. 500 online self-completes</td>
<td>• 600 tel ints &lt;br&gt; • 147 online self-completes &lt;br&gt; <strong>TOTAL = 747</strong></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td>• Telephone interviews conducted by ITL (using Broads Authority data)</td>
<td>c. 25</td>
<td><strong>25</strong></td>
</tr>
<tr>
<td>Residents</td>
<td>• Door-to-door interviews conducted by ITL &lt;br&gt; <strong>AND</strong>  &lt;br&gt; • Online self-completion survey via ITL dispatched ‘calling card’ (with URL survey link)</td>
<td>c. 250</td>
<td>• 238 door-to-door ints &lt;br&gt; • 12 online self-completes &lt;br&gt; <strong>TOTAL = 250</strong></td>
</tr>
<tr>
<td>Visitors</td>
<td>• Online self-completion survey via consumer panel</td>
<td>600</td>
<td><strong>600</strong></td>
</tr>
</tbody>
</table>
### Profiling

<table>
<thead>
<tr>
<th>AUDIENCE</th>
<th>Base</th>
<th>Total sample size statistically significant at a 95% confidence level +/-</th>
<th>Profile</th>
<th>Colour key throughout report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td>747</td>
<td>3.5%</td>
<td>• Owners of boats for use on the Broads</td>
<td>Blue</td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td>25</td>
<td>12.2%</td>
<td>• Decision-makers within HBOs within the Broads catchment area</td>
<td>Blue</td>
</tr>
<tr>
<td>Residents</td>
<td>250</td>
<td>6.1%</td>
<td>• Residents living within an agreed catchment area of The Broads</td>
<td>Orange</td>
</tr>
<tr>
<td>Visitors</td>
<td>600</td>
<td>4.0%</td>
<td>• Visitors to The Broads within the last 5-years (for any purpose) • Aged 18+ • Excluded if resident within agreed Broads Authority Boundary</td>
<td>Yellow</td>
</tr>
</tbody>
</table>
# Summary

<table>
<thead>
<tr>
<th>Category</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td>🚣</td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td>🚤</td>
</tr>
<tr>
<td>Residents</td>
<td>🏡</td>
</tr>
<tr>
<td>Visitors</td>
<td>🚣</td>
</tr>
</tbody>
</table>
Summary: Current boat owning behaviour (PBOs & Residents)

**NUMBER**
- Having applied soft quotas for PBO telephone interviewing, two thirds of PBOs own one boat, and a third multiple boats
- 17% of Residents own a boat for use on the Broads; two thirds of these own one boat, and a third multiple (no quotas applied)

**TYPE**
- Most likely to be motor craft without sails (N.B. soft quotas applied for PBO telephone interviewing)

**TIME**
- Around a third of PBOs are relatively new boat owners (<5 years), a fifth mid-term (5-<10 years) and half long term (10+ years)

**USE**
- In the past 12 months, 29% of PBOs have been out on the Broads for up to 2 weeks; 28% between 2 weeks and 28 days; 39% for 28+ days

**LENGTH**
- Half of PBOs own a longest boat of <25ft and half 25ft+
- Most have a longest boat of 15-34ft (72%)

**LOCATION**
- Horning, Brundall, Hoveton/Wroxham and Stalham are the main locations for boats during the summer months
- Around a fifth of PBOs keep their boats at home in the summer months
Summary: Future boat owning behaviour
(PBOs)

- **NUMBER**
  - Most (70%) think they will own the same number of boats in the next 5-years (12% more; 9% fewer)
  - 18-34s most likely to own more

- **SIZE**
  - Likewise, most (66%) think they will own the same size boat in the next 5-years, although around 1 in 6 think they will own larger boats (again, most likely 18-34s)

- **ON LAND/ON WATER PERIODS**
  - Most (two thirds) say there will be no change in the amount of time their boat(s) will be on the water/on land in the next 5-years; although 1 in 5 say it will be on the water/mooring for longer periods
Summary: Current & future fleet trends

[HBOs]

INCOME FROM BOAT-RELATED ACTIVITY

⇒ Almost two thirds of HBOs say 100% of their income comes from boat-related activity
⇒ Although cabin boat hire (76%) and day boat hire (68%) are main sources of income, they are by no means stand-alone revenue streams, with other tourism and non-tourism related activities being substantial sources

FLEET USE

⇒ Although there is a wide range of responses, the average typical day boat hire (per boat) is 68 days per annum, and 131 days for cabin boat hire (per boat)

WHERE

⇒ Hoveton/Wroxham is the most frequently used fleet location

NUMBER

⇒ On balance, the number of boats in fleets looks to have increased, with a third reporting an increase, compared to just over a fifth reporting a decline
⇒ Future trends appear to be quite balanced, with most expecting fleet size to stay the same, and an almost equal number expecting a decrease as an increase

SIZE

⇒ On balance, most expect the average size of boats in their fleet to remain the same, although with 1 in 5 expecting an increase
Summary: Living in the Broads area

(Residents)

Key positives

✓ Peaceful
✓ Access to water
✓ Friendly communities
✓ Scenery & wildlife
✓ Walks

Key ‘enhancements’

⇒ Better communication with local residents
⇒ Flood management
⇒ Maintenance (footpaths; litter)
⇒ Resident benefits (e.g. discounted bills)
⇒ Limit overdevelopment
Summary: Visitor behaviour

(Visitors)

WHO?

⇒ Frequently couples or families

MOTIVATION TO VISIT

⇒ In line with Visit Norfolk findings, the scenery/environment is the key draw to visiting, as well as access to the waterways
⇒ The uniqueness/novelty of the experience is a draw

SUGGESTED ENHANCEMENTS

⇒ Improved accessibility

RECOMMENDING & RE-VISITING

⇒ There is high propensity to recommend and re-visit; a positive outlook for the future
As found in Visit Norfolk research, walking is the key leisure activity undertaken on the Broads.

- Bird watching and heritage site visits are also popular attractions.
- Cycling and fishing have some appeal.

Whilst it is a popular activity, visitors are not necessarily hiring a boat (48% haven’t).

Younger visitors (18-34s) are significantly more likely to be active visitors, using cycle routes, angling platforms, canoe trails/hire and yacht stations.

Over half have used one of the Broads Authority visitor centres, with high levels of satisfaction; How Hill is most frequently used.

Suggested improvements to visitor centres are minimal; better/cheaper parking and better signage/access are key mentions by those who do make a suggestion.
Summary: Awareness of the Broads Authority
(Residents & Visitors)

UNPROMPTED AWARENESS

The Broads Authority is front of mind as the organisation responsible for the management of the Broads amongst...

✓ Two thirds of residents
✓ 14% of visitors

PROMPTED AWARENESS

When prompted, recall of the Broads Authority is...

✓ 93% of residents
✓ Almost half (46%) of visitors
Summary: Perceptions of the Broads Authority
(PBOs, HBOs, Residents & Visitors)

SATISFACTION

Marked differences by audience:

✓ Visitors are highly satisfied (yet relatively uninformed/passive?)
✓ Residents are reasonably satisfied
✓ PBOs are reasonably satisfied, but around 1 in 6 are not
× HBOs are broadly neutral or dissatisfied

Perceptions of the Broads Authority are broadly positive amongst PBOs, Residents and Visitors

HBOs express their dissatisfaction with descriptors such as ‘wasteful; bureaucratic; ineffective; average; uninformed; invisible; unrepresentative’

Perception management/communications might be considered in terms of support given to HBOs, financial management and transparency, consultation in terms of agenda setting/focus, consultation with the public

UNDERSTANDING

HBOs are highly likely to understand the purposes of the Broads Authority
Residents & Visitors are much less clear in terms of their understanding

IMPORTANCE

Conservation is considered by far the most important purpose of the Broads Authority amongst all audiences, apart from HBOs, who consider the protecting of navigation as most important

Broadly speaking, the Broads Authority is considered to meet its purposes regarding conservation, but less so regarding promoting opportunities and protecting the interest of navigation
Summary: Future challenges & priorities for the Broads Authority (PBOs, HBOs, Residents & Visitors)

**MAIN THEMES ACROSS PBOs, RESIDENTS & VISITORS**
- Flooding
- Pollution
- Overdevelopment (too many people and boats)
- Climate change

**HBOs ARE MORE ECONOMICALLY/COMMERICALLY FOCUSED:**
- Attracting industry
- Attracting tourists
- Sustainability
- Investment

**SPECIFICALLY, FROM PROMPTED LIST (overall importance)**
- Management of flooding
- Dredging rivers and Broads
- Educating the ‘next generation’ about the Broads
- Wildlife conservation

**OTHER PRIORITIES (unprompted)**
- Preventing and penalising speeding
- Improving accessibility and parking

**TOURISM**
- Emphatic support for improving tourism amongst HBOs
- Some, but less emphatic, support amongst Residents and Visitors
- Notably less support amongst PBOs
Summary: Perceptions of the Broads Authority as a Local Planning Authority (Residents)

USE OF SERVICES

Only 1 in 6 residents have used Broads Authority services as a Local Planning Authority.

SUPPORT OF APPLICATIONS

Whilst better visitor facilities are widely supported, there is much less support for:
- More residential mooring
- More housing development
- More second home development
Summary: Perceptions of Broads Authority National Park status (PBOs, HBOs, Residents & Visitors)

AWARENESS

⇒ Whilst most PBOs and HBOs are aware that the Broads has National Park status, there is opportunity to increase awareness amongst both Residents and Visitors

PERCEPTIONS

⇒ There is lots of support amongst Residents and Visitors for more to be done to promote National Park status, but less support amongst PBOs and HBOs

⇒ Residents and Visitors are much more likely to consider National Park status to make the Broads more appealing as a place to visit, with more muted views amongst PBOs, and particularly HBOs
Summary: Representative elections
(PBOs, HBOs & Residents)

AWARENESS OF PROPOSED CONSULTATION ON DIRECT ELECTIONS

⇒ Relatively limited awareness, particularly amongst PBOs and Residents, despite a likely high propensity to vote (if given the opportunity)

⇒ HBOs are the most aware, and the most likely to consider that they will vote
<table>
<thead>
<tr>
<th>Summary: Tolls (PBOs &amp; HBOs)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FINANCIAL IMPACT</strong></td>
<td>⇝ Broads Authority tolls typically account for around 10% of annual boat ownership costs</td>
</tr>
<tr>
<td><strong>VALUE FOR MONEY PERCEPTIONS</strong></td>
<td>⇝ Whilst PBO perceptions of toll value for money are higher than HBOs, only half agree that they are good value for money</td>
</tr>
<tr>
<td></td>
<td>⇝ HBOs have very low value for money perceptions about the toll</td>
</tr>
<tr>
<td><strong>VALUE FOR MONEY BY SIZE OF BOAT</strong></td>
<td>⇝ There is no clear/strong perception as to whether the toll is better value for money for different sizes of boat</td>
</tr>
<tr>
<td><strong>DIFFERING FROM PRIVATE BOAT TOLL</strong></td>
<td>⇝ Most PBOs, who felt able to give a view, correctly think that the hire boat toll varies from the toll paid by private boat owners (for an equivalent boat) (59% think it costs more, but 33% felt unable to give a view)</td>
</tr>
<tr>
<td><strong>HIRE BOAT MULTIPLIER</strong></td>
<td>⇝ The HBO multiplier is well supported amongst PBOs; typically due to it representing more use, hire boats causing more damage and HBOs profiting from use</td>
</tr>
<tr>
<td></td>
<td>⇝ Support is markedly weaker amongst HBOs</td>
</tr>
<tr>
<td><strong>TOLL INCOME EXPENDITURE</strong></td>
<td>⇝ Half of PBOs and HBOs would like more spent on dredging and/or mooring maintenance</td>
</tr>
<tr>
<td></td>
<td>⇝ Half of HBOs (48%) would also like more to be spent on patrolling and safety - notably higher than PBOs (33%)</td>
</tr>
</tbody>
</table>
Three quarters of visitors used an online source for information prior to visiting the Broads (with one in four having used ‘Enjoy the Broads’ website).

Three quarters used an offline source (word-of-mouth; memories/previous experience; holiday/destination brochures).

With 85% using either an online or offline source before their visit.

8% have used an app for smartphones/tablets - those used are broadly spread across those available.

Around half of visitors had used at least one of the prompted information sources during their visit to the Broads; TIC leaflets most commonly used.
## SWOT & Considerations

<table>
<thead>
<tr>
<th>Category</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
SWOT: Strengths

- Appealing place to live for residents
- High propensity to re-visit amongst visitors
- High likelihood to recommend, with a higher NPS score than for Norfolk as a whole (Visit Norfolk research) - a positive indicator for future tourism
- The Broads area is perceived to be a unique place to visit, and is a point of differentiation for Norfolk and Suffolk’s tourism offering
- Highly appealing area for walking, bird-watching and for visiting heritage sites amongst PBOs, Residents and Visitors
- High level of satisfaction with availability and quality of facilities provided in the Broads area
- High level of satisfaction with visitor centres amongst Residents
- High level of satisfaction with the Broads Authority amongst Visitors (although potentially less engaged than other audiences)
- Perceptions of the Broads Authority are most likely to be positive amongst PBOs, Residents and Visitors
- High level of (claimed) understanding of ‘purposes’ of the Broads Authority amongst HBOs
- The Broads Authority is broadly considered to be meeting the ‘purpose’ of conservation and enhancement of nature
- High awareness of National Park status amongst PBOs and HBOs
- High likelihood of voting in direct elections amongst PBOs, HBOs and Residents (if given the opportunity)
SWOT: Weaknesses

✖ Poor (and deep rooted?) perceptions amongst HBOs of the Broads Authority generally, suggesting a distant relationship at present (perceived lack of support)

✖ Residents and Visitors do not seem overly clear on the purposes of the Broads Authority

✖ Low levels of awareness for proposed consultations on direct elections amongst PBOs, HBOs and Residents

✖ Some perception of lack of interaction and involvement with local Residents

✖ Some call for better accessibility (road access, signage, parking …)

✖ The purpose of protecting the interest of navigation is perceived to be poorly met amongst HBOs (who consider this purpose to be of high importance)

✖ As might be expected, perceptions of tolls (value for money) are extremely low amongst HBOs

✖ There appears to be some uncertainty about whether tolls are better value for money for small or large boats (lack of context/relevance?)
SWOT: Threats/considerations

- The commercial objectives of HBOs directly oppose those of other audiences, whose focus is more conservation-oriented - the Broads Authority has a challenging role considering how best to balance the needs of the different audiences.

- The negative perceptions of HBOs are likely to be quite hard to shift in the short term, and continued engagement/consultation may be required to improve relationships.

- Flooding represents a notable perceived risk, and consideration may be given to associated comprehension, along with perception management and responsibility attribution.

- There is resistance to over-development in the Broads area, and future developments may require delicate perception management.

- The National Park status might be an area requiring some reassurance, with differing opinions by audience, noting a high level of appeal amongst Residents and Visitors yet more muted support amongst PBOs and HBOs:
  - PBOs may be potentially concerned about more tourism, whilst HBOs may be concerned about more legislation.

- There is uncertainty about tolls and amounts charged (small vs. large boats; differences between PBO and HBO charges) and this needs to be addressed to avoid umbrage.

- Whilst the A11 offers an opportunity for Norfolk/Suffolk tourism and the Broads, continued delays are likely along the A47 for the Northern Bypass works, potentially leading to continued poor perceptions of accessibility amongst visitors.
SWOT: Opportunities/considerations

✓ PBOs are likely to welcome improved and/or additional mooring
✓ PBOs aged 18-34 present a potential area of growth in terms of the number and size of boats they are likely to own in future

✓ Opportunities to improve relationships and manage perceptions
  ✓ Make them feel supported
  ✓ Consult regarding agenda setting/focus
  ✓ Engage to understand drivers of perceptions (positive and negative)
  ✓ Improve perceptions of financial management

✓ Communicate more effectively and frequently with Residents
✓ Communicate flood management schemes, activity and responsibilities
✓ Improve awareness of the Broads Authority amongst 18-24s
✓ Work /communicate with Norfolk Trails regarding maintenance of footpaths
✓ Consider offering ‘discounts’ to Residents (e.g. tolls, parking …)

✓ Leverage the opening of the ‘new A11’ to improve perceptions of accessibility
✓ Opportunity to promote the Broads area as an all-year-round offering (considering high interest in bird-watching and walking, and not all visitors are hiring a boat)
### DETAILED RESEARCH FINDINGS:
**Current & future boating behaviour**

**PRIVATE BOAT OWNERS & RESIDENTS**

<table>
<thead>
<tr>
<th>Group</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td>🍰</td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td>💧</td>
</tr>
<tr>
<td>Residents</td>
<td>🍊</td>
</tr>
<tr>
<td>Visitors</td>
<td>🍊</td>
</tr>
</tbody>
</table>
Current boat ownership

PBOs & RESIDENTS

No. of boats owned (soft quotas applied for PBOs)

<table>
<thead>
<tr>
<th>Number of Boats</th>
<th>PBOs (N=747)</th>
<th>Residents (N=42)</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>68%</td>
<td>36%</td>
</tr>
<tr>
<td>Two</td>
<td>18%</td>
<td>7%</td>
</tr>
<tr>
<td>Three</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Four +</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Length of longest boat owned

<table>
<thead>
<tr>
<th>Length of Boat</th>
<th>PBOs (N=747)</th>
<th>Residents (N=42)</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;10 ft</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>10-14 ft</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>15-19 ft</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td>20-24 ft</td>
<td>17%</td>
<td>1%</td>
</tr>
<tr>
<td>25-29 ft</td>
<td>19%</td>
<td>3%</td>
</tr>
<tr>
<td>30-34 ft</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>35-39 ft</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>40-44 ft</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>45+ ft</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Type(s) of boat(s) owned (soft quotas applied for PBOs)

<table>
<thead>
<tr>
<th>Type of Boat</th>
<th>PBOs (N=747)</th>
<th>Residents (N=42)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor craft (without sails)</td>
<td>38%</td>
<td>18%</td>
</tr>
<tr>
<td>Sailing craft (motorised)</td>
<td>26%</td>
<td>21%</td>
</tr>
<tr>
<td>Rowing boat/ cano/ kayak</td>
<td>26%</td>
<td>22%</td>
</tr>
<tr>
<td>Sailing craft (non-powered)</td>
<td>18%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Number of types of boats owned

<table>
<thead>
<tr>
<th>Number of Types</th>
<th>PBOs (N=747)</th>
<th>Residents (N=42)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>55%</td>
<td>36%</td>
</tr>
<tr>
<td>2</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>3</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>4+</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

For PBO telephone interviews, soft quotas were set by number of boats owned (single/multiple) and type of boats owned (motor/other)

Base: 747 PBOs & 250 Residents (N.B. Residents asked select questions)

Q: In total, how many boats do you own on the Broads? Prompted, single response
Q: What type(s) of boat(s) is it/are they? Prompted, multiple response
Q: What is the length of the longest boat you own, in feet? Unprompted, single response

Visual source: www.exchange.smarttech.com
**Current boat ownership and boating behaviour**

**PBOs & RESIDENTS**

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**Length of time owned boat on the Broads**

- Less than a year: 6%
- 1 year - 4 years 11 months: 26%
- 5 years - 9 years 11 months: 18%
- 10 years - 14 years 11 months: 15%
- 15 years or more: 35%
- Don't know: 0%

**Number of days been out on Broads in past 12 months**

- None: 3%
- 6 days or less: 14%
- 7 - 13 days: 15%
- 14 - 20 days: 14%
- 21 - 27 days: 14%
- 28+ days: 39%
- Don't know: 4%

**Keep boat(s) at home/elsewhere in summer?**

- At home: 21%
- Elsewhere: 82%

**Location of boat(s) during summer months**

- Horning: 13%
- Brundall: 12%
- Hoveton/Wroxham: 10%
- Stalham: 8%
- Beccles: 4%
- Hickling: 4%
- Oulton Broad: 3%
- Acle: 3%
- Barton Turf: 3%
- Norwich: 3%

- Potter Heigham: 3%
- Thorpe: 3%
- Thurne: 3%
- Martham: 3%
- Ranworth: 2%
- S. Walsham: 2%
- St. Olaves: 2%
- Wayford: 2%
- Other: 31%

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The Broads

**Q:** For how many days have you been out on the Broads in one of your boats in the past 12 months? Prompted, single response

**Q:** During the summer months, do you keep your boat(s) ...? Prompted, multiple response

**Q:** Where do you keep your boat(s) in the summer months? Prompted, multiple response

*Base: 747 PBOs & 250 Residents (N.B. Residents asked select questions)*

No quotas set
**Future boat ownership: Type**

PBOs

### Types of boat likely to use in next 5 years

<table>
<thead>
<tr>
<th>Type of Boat</th>
<th>Don't know</th>
<th>Less</th>
<th>The same</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sailing craft (motorised) (N=219)</td>
<td></td>
<td>12</td>
<td>7</td>
<td>38</td>
</tr>
<tr>
<td>Motor craft (without sails) (N=458)</td>
<td></td>
<td>11</td>
<td>8</td>
<td>42</td>
</tr>
<tr>
<td>Sailing craft (non-powered) (N=135)</td>
<td></td>
<td>16</td>
<td>8</td>
<td>39</td>
</tr>
<tr>
<td>Rowing boat / canoe / kayak (N=196)</td>
<td></td>
<td>11</td>
<td>5</td>
<td>51</td>
</tr>
</tbody>
</table>

### Why change?

**Why use MORE (generally) in future?**
- Kids old enough to use (particularly for non-powered boats)
- Retiring
- Better health
- More spare time

**Why use LESS (generally) in future?**
- Health problems
- Moving away from area
- Cost

Base: 747 PBOs (owners of type of boat)

Q: In the next 5-years are you likely to be using the following types of boats on the Broads more, the same or less...? Prompted, single response

Q: Why do you say that about your future use of...? Unprompted, multiple response
**Future boat ownership: Number and size**

**PBOs**

- **Number of boats owned in next 5 years**

<table>
<thead>
<tr>
<th></th>
<th>Don't know</th>
<th>Fewer</th>
<th>The same</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next 5 years</td>
<td>9</td>
<td>9</td>
<td>70</td>
<td>12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Respondent Age &gt;&gt;</th>
<th>18-34 (N=86)</th>
<th>35-54 (N=290)</th>
<th>55+ (N=368)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own MORE boats in 5-years</td>
<td>26%</td>
<td>16%</td>
<td>7%</td>
</tr>
</tbody>
</table>

- **Size of boats in next 5 years**

<table>
<thead>
<tr>
<th></th>
<th>Don't know</th>
<th>Smaller</th>
<th>Same size</th>
<th>Larger</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next 5 years</td>
<td>12</td>
<td>5</td>
<td>66</td>
<td>17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Respondent Age &gt;&gt;</th>
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<th>35-54 (N=290)</th>
<th>55+ (N=368)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own LARGER boats in 5-years</td>
<td>31%</td>
<td>18%</td>
<td>14%</td>
</tr>
</tbody>
</table>

- **Why own MORE in future?**
  - Buy something suitable for children
  - Buy a dinghy/sailing boat
  - Buy a motor boat

- **Why own FEWER in future?**
  - Due to old age/illness
  - Outgrown by children
  - Cost

- **Why own LARGER in future?**
  - Can afford to! (aspirational)
  - Need more space (as get older)
  - For growing family

- **Why own SMALLER in future?**
  - Due to old age/illness
  - Children leaving home

---

**Base: 747 PBOs**

Q: In the next 5 years, are you likely to own more, the same or fewer boats on the Broads? Prompted, single response

Q: In the next 5 years, are you likely to own generally larger, the same size or smaller boats on the Broads? Prompted, single response

Q: Why do you say that? Unprompted, multiple response
Future boat ownership: On land or off-water?

PBOs

Where likely to keep boats in next 5 years

- On the water/mooring for longer periods: 20
- On land/off-the-water for longer periods: 6
- On the water/land for the same time periods as now: 67
- Don’t know: 7

Why ON WATER for LONGER?
- Convenience/ease
- Kept in year round mooring
- Maximise use

Why ON LAND for LONGER?
- Convenience
- For maintenance
- Cheaper

Base: 747 PBOs
Q: In the next 5-years, do you think your are likely to keep your boat(s) on the Broads? Prompted, single response
Q: Why do you say that? Unprompted, multiple response
Current & future fleet trends

HIRE BOAT OPERATORS

<table>
<thead>
<tr>
<th>Private Boat Owners (PBOs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire Boat Operators (HBOs)</td>
</tr>
<tr>
<td>Residents</td>
</tr>
<tr>
<td>Visitors</td>
</tr>
</tbody>
</table>

The Broads

insightTRACK
Although stay-aboard cabin boat hire is most likely the principal source of income for HBOs, it is in no way in isolation as a revenue generator.

Two out of three HBOs say that boat-related activity is attributable to 100% of their organisation’s income.

**Principle income sources**

- **Cabin boat hire (stay-aboard)**: 76%
- **Day-boat hire (sail and/or motorised)**: 68%
- **Other tourism-related activities**: 52%
- **Other NON-tourism-related activities**: 68%
- **Non-boat accommodation hire**: 28%

**Proportion of income from boat-related activity**

- < 10%: 4 HBOs
- 10-19%: 4 HBOs
- 20-24%: 28 HBOs
- 25-49%: 4 HBOs
- 50-74%: 28 HBOs
- 75-99%: 28 HBOs
- 100%: 64 HBOs

Don’t know

Base: 25 HBOs, prompted, multiple response

Q: Which of the following are principle sources of income/revenue generation for your organisation?

Q: What proportion of your organisation’s income is attributable specifically to boat-related activity?

The Broads
Fleet location and typical use

HBOs

- HBOs are hiring a ‘typical’ day boat out for 68 days a year on average; whereas a typical cabin boat is hired out for 131 days per year on average

### Average number of hire days per boat in the past year

<table>
<thead>
<tr>
<th></th>
<th>Any type of power or non-powered:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Day boat hire</td>
</tr>
<tr>
<td>Mean average number</td>
<td>68 (9.7 weeks)</td>
</tr>
<tr>
<td>of days in past 12</td>
<td>30 - 220</td>
</tr>
<tr>
<td>months</td>
<td></td>
</tr>
<tr>
<td>Range (days)</td>
<td></td>
</tr>
</tbody>
</table>

### Fleet locations

- Hoveton/Wroxham: 24
- Potter Heigham: 12
- Brundall: 12
- Loddon: 8
- Ludham: 8
- Stalham: 8
- Acle: 8
- Hickling: 4
- Beccles: 4
- Other: 12

Base: 25 HBOs, prompted, multiple response

Q: In the last 12-months, approximately how many days did you hire an average boat in your fleet for...?

Base: 25 HBOs, prompted, single response

Q: Where on the Broads are you boat fleet bases?
Fleet make-up: Type of boats

HBOs

**Number of boats in current fleet**

<table>
<thead>
<tr>
<th>Type of boats</th>
<th>None</th>
<th>1-9</th>
<th>10-19</th>
<th>20-29</th>
<th>30+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day boat (diesel powered)</td>
<td>32</td>
<td></td>
<td>44</td>
<td>12</td>
<td>4</td>
</tr>
<tr>
<td>Cruiser - stay-aboard (powered)</td>
<td>36</td>
<td></td>
<td>20</td>
<td>20</td>
<td>8</td>
</tr>
<tr>
<td>Rowing boat/canoe/kayak</td>
<td>40</td>
<td></td>
<td>36</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Day boat (electric powered)</td>
<td>60</td>
<td></td>
<td>36</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Sailing craft (non-powered)</td>
<td>72</td>
<td></td>
<td>16</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Houseboat (non-powered)</td>
<td>88</td>
<td></td>
<td></td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Sailing craft (auxiliary powered)</td>
<td>92</td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
</tbody>
</table>

**Whether likely to be offering more, the same or less of types of craft?**

- Day boat (diesel powered)
  - Same/less
- Cruiser - stay-aboard (powered)
  - Same/less
- Rowing boat/canoe/kayak
  - Same
- Day boat (electric powered)
  - More/same/less
- Sailing craft (non-powered)
  - Same
- Houseboat (non-powered)
  - Same
- Sailing craft (auxiliary powered)
  - More

Base: 25 HBOs, prompted, single response

Q: How many of each type of boat do you own within your fleet?

Q: In the next 5-years are you likely to be offering more, the same or less of the following types of crafts?
Fleet make-up: Number of boats

- Around a third of HBOs say the number of boats in their fleet has increased in the past 12 months; although a fifth have experienced a decline in numbers.
- Four of the five who have experienced a decline say their fleet will continue to decline.

Number of boats in past 12 months and in next 5 years:

![Bar chart showing the number of boats in the past 12 months and in the next 5 years.]

### Why INCREASE in future?
- Diversification: more trips, fishing, day boats
- Growing business
- Electric boats
- Building new boats

### Why DECREASE in future?
- Our strategy
- Too expensive
- Less demand
- Retiring
- Not profitable
- Selling

Base: 25 HBOs
Q: In the last 12 months, has the number of boats in your fleet increased, stayed the same or declined? Prompted, single response
Q: In the next 5 years, is the number of boats in your fleet on the Broads likely to increase, stay the same or decrease? Prompted, single response
Q: Why do you say that? Unprompted, multiple response
Fleet make-up: Average size of boats
HBOs

Average size of boats in fleet in next 5 years

- Larger: 80%
- Same size: 16%
- Smaller: 4%
- Don’t know: 4%

Why larger?

- More profitable
- Higher customer demand
- More space
- Better facilities
- Better return on investment

Base: 25 HBOs
Q: In the next 5-years, is the average size of boats in your fleet on the Broads likely to be larger, the same size or smaller? Prompted, single response
Q: Why do you say that? Unprompted, multiple response
## Living in the Broads area

### RESIDENTS

<table>
<thead>
<tr>
<th>Category</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
Best aspects of living in the Broads area
(unprompted) (key responses) RESIDENTS

Peaceful (44%)
- Safe (6%)
- Relaxed (4%)
- Openness (4%)

Friendly people (15%)
- Community spirit (6%)
- Good area for raising children (2%)
- Good quality of life (2%)

Community

Amenities
- Good amenities (4%)
- Proximity/access to Norwich (4%)

Waterways (32%)
- Boating (7%)
- Coast (5%)
- Fishing (4%)

Countryside (16%)
- Scenery (16%)
- Beautiful (11%)

Nature

Wildlife (18%)
- Nature (4%)

Walks

Walks (14%)

Base: 250 Residents, unprompted, multiple response
Q: What are the three best aspects of living in the Broads area?
How the Broads Authority could enhance experience of living on the Broads (unprompted) (key responses) RESIDENTS

Avoiding overdevelopment
“Stop overdevelopment of Broads villages with overpriced housing”
“Limiting development. No more building please!”

Maintaining footpaths
“Footpaths are poor particularly Ludham Bridge and St Benets Abbey”
“…keeping paths clear of brambles and maintaining footpaths”

Better communication with local residents
“Newsletter twice a year showing their [Broads Authority] activities”
“To encourage involvement of local residents”
“Take more attention to the local people above that of the tourists”
“Listening and consulting with the locals”
“Local people don’t know what’s out there, more info needed”

Flood management
“Keeping us free from floods”
“PRIORITISE the flooding etc, educate the residents as to what they have on their doorstep”

Keeping area clean and tidy
“Just keep it litter free, clean and tidy”
“Just managing the area - keep it tidy”

More ‘perks’ for local residents
“Give Broadland residents free boat tolls”
“Something for local residents - to get discounts, free passes etc.”
“Better amenities for local people volunteer bus maybe”

Better accessibility
“Some access for local residents to rivers and Broads which are not available now”
“Better road access - the villages have such tiny poor access roads to them”

No overdevelopment
“Stop overdevelopment of Broads villages with overpriced housing”
“Limiting development. No more building please!”

Not sure
47%

Don’t know
16%

Q: How could the Broads Authority enhance the experience of living on the Broads?
**Visitor behaviour**

**VISITORS**

<table>
<thead>
<tr>
<th>Category</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td>🛥️</td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td>🛥️</td>
</tr>
<tr>
<td>Residents</td>
<td>🏡</td>
</tr>
<tr>
<td>Visitors</td>
<td>🎈</td>
</tr>
</tbody>
</table>
At their last visit, nine out of 10 visitors had visited the Broads with other people.

And most likely as a couple; although as a group of four also commonly mentioned.

Base: 600 Visitors, prompted, single response

Q: Thinking about your last visit to the Broads, how many people did you visit with, including yourself?
Reasons for visiting the Broads (unprompted) (key responses)

VISITORS

Boating (12%)
- Lots to see/do (4%)
- Good for children (1%)

Beautiful (scenery) (14%)
- Like/love area (12%)
- Relaxing (3%)
- Peaceful (3%)
- Nature/wildlife (2%)

Holiday (11%)
- Short/weekend break (2%)

Familiarity
- Been before (5%)
- Childhood memories (2%)
- Used to live there (1%)

Doing something new
- Hadn’t been before (7%)
- Something different (4%)
- Recommendation (3%)

Location
- Visiting friends/family (8%)
- Close/nearby (8%)
- Day out (3%)

Environment
- Close/nearby (8%)
- Day out (3%)

Things to do
- Visiting friends/family (8%)
- Close/nearby (8%)
- Day out (3%)

Environment

Holiday

Boating (12%)
- Lots to see/do (4%)
- Good for children (1%)

Beautiful (scenery) (14%)
- Like/love area (12%)
- Relaxing (3%)
- Peaceful (3%)
- Nature/wildlife (2%)

Holiday (11%)
- Short/weekend break (2%)

Familiarity
- Been before (5%)
- Childhood memories (2%)
- Used to live there (1%)

Doing something new
- Hadn’t been before (7%)
- Something different (4%)
- Recommendation (3%)

Location
- Visiting friends/family (8%)
- Close/nearby (8%)
- Day out (3%)

Base: 600 Visitors, unprompted, multiple response
Q: Why do you choose to visit the Broads?
## Suggested improvements to visitor experience

### (unprompted) (key responses) VISITORS

<table>
<thead>
<tr>
<th>Improved access</th>
<th>Better prices</th>
<th>Better facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved road access (into Norfolk/Suffolk and within) (5%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Better access to the more remote waterways”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“The road network. Travelling to Norfolk by road is a nightmare!”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better parking provision (3%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“More convenient parking at more extreme locations of the Broads”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better public transport (1%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Easier access for people like me with no transport”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Some places are not accessible by public transport”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better signage (1%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Better signage - it was a nightmare on the roads to find any tourist attractions”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Better signposting in very rural areas”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cheaper prices (unspec) (4%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cheaper accommodation (3%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“The cost of staying in UK tourist accommodation is so high. I wish it could be cheaper!”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Perhaps more special offers on accommodation”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cheaper boat hire (2%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Bring down the cost of hiring a boat”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Boat trips at a more reasonable cost”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wider to do (3%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wider catering offering (2%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“More places to sit and get light refreshments”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>More information (points) (2%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cleaner facilities/streets (2%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Clean up the rubbish!”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>More mooring facilities (1%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“More mooring spots as it can be very busy”</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Less commercialisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less touristy/crowded (2%)</td>
</tr>
<tr>
<td>“Not make it too commercial”</td>
</tr>
<tr>
<td>Fewer boats (1%)</td>
</tr>
<tr>
<td>“Less congestion on the waterways”</td>
</tr>
<tr>
<td>“Limit the number of motorboats”</td>
</tr>
</tbody>
</table>
Future visiting and recommendation (prompted)

VISITORS

How likely are you to visit the Broads in the next 5-years?

80% of visitors are quite or very likely to re-visit the Broads

Mean score-

4.3

(On a scale of 1 to 5, where 1 = not at all likely and 5 = very likely)

Would you recommend a visit to the Broads to a friend?

Detractors: 15%
Passives: 46%
Promoters: 39%

Visiting Norfolk (Visit Norfolk research)
Overall, ever visited: -19

NPS score, where 100=max and -100=min

Visiting the Broads (Broads Authority research) Overall, ever visited: +24

Base: 600 Visitors, prompted, single response
Q: How likely are you to visit the Broads in the next 5 years?
Q: How likely is it that you would recommend a visit to the Broads to family or friends, on a scale of
0 - 10, where 0 = not at all likely and 10 = extremely likely?
~Mean score significant at a 95% confidence level +/- 0.1
Activities undertaken, & facilities used, on the Broads

*PBOs, RESIDENTS & VISITORS*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
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<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
Leisure activities undertaken on the Broads (prompted)
PBOs & RESIDENTS

➤ Walking is the most commonly undertaken activity on the Broads by PBOs and Residents alike (at least once a year)

➤ PBOs are markedly more likely to participate in specific water-related activities, such as sailing, fishing and canoeing than Residents

Base: 747 PBOs & 250 Residents, prompted, multiple response
Q: Which of the following leisure activities do you do in the Broads at least once a year?
Walking is also a key activity undertaken by visitors when in the Broads area (and for the future)

Heritage site visits are also popular

Boating (day boat hire/holidays) is likely to be popular in future
Facilities used whilst visiting the Broads (prompted)

VISITORS

Q: Which of the following facilities did you use whilst visiting the Broads?

- Pubs, cafés, restaurants
- Visitor attractions
- Waymarked paths
- Broads Authority Visitor Centres
- Public transport
- Cycle routes
- Broads Authority 24-hour moorings
- Places to dispose of waste from boats
- Places to refuel boats
- Angling platforms
- Canoe trails/canoe hire
- Broads Authority Yacht Stations
- Electric charging points
- None of these

Base: 600 Visitors, prompted, multiple response

Significantly more likely: Males (48%), 35+ (85%)
Significantly more likely: Males (13%), 18-34s (21%)
Significantly more likely: Males (17%), 18-34s (20%)
Significantly more likely: Males (13%), 18-34s (21%)
Significantly more likely: 18-34s (32%)
Significantly more likely: 18-34s (31%)
Significantly more likely: 18-34s (15%)
Significantly more likely: 55+ (35%)
Significantly more likely: 18-34s (32%)
Significantly more likely: 18-34s (31%)
Significantly more likely: 18-34s (15%)
Satisfaction with availability of facilities on the Broads
(prompted: Mean scores) VISITORS

Base: 600 Visitors, prompted, single response
Q: In your experience, how satisfied are you with the availability of the following on the Broads?

Mean scores significant at a 95% confidence level +/- 0.1
Satisfaction with quality of facilities on the Broads
(prompted: Mean scores) VISITORS

Q: In your experience, how satisfied are you with the quality of the following on the Broads?

1. Pubs, cafés, restaurants
2. Visitor attractions
3. Hire boats (boating holiday)
4. Day boat hire
5. Broads Authority 24-hour moorings
6. Waymarked paths
7. Electric charging points
8. Places to dispose of waste from boats
9. Places to refuel boats
10. Cycle routes
11. Canoe trails/canoe hire
12. Angling platforms
13. Public transport

Mean scores significant at a 95% confidence level +/ - 0.1

Base: 600 Visitors, prompted, single response
Over half of residents (57%) have visited one of the prompted Broads Authority visitor centres; with How Hill most likely used.

High levels of satisfaction for all centres, and particularly for How Hill.

Visitor Centres used:
- How Hill: 42%
- Hoveton: 27%
- Whitlingham: 25%
- None: 40%
- Don’t know: 3%

Satisfaction with Visitor Centres:
- How Hill (N=105):
  - 1 = Not at all satisfied: 42
  - 2 = Not very satisfied: 8
  - 3 = Neutral: 24
  - 4 = Quite satisfied: 62
  - 5 = Very satisfied: 40

- Whitlingham (N=62):
  - 1 = Not at all satisfied: 6
  - 2 = Not very satisfied: 22
  - 3 = Neutral: 10
  - 4 = Quite satisfied: 39
  - 5 = Very satisfied: 42

- Hoveton (N=68):
  - 1 = Not at all satisfied: 13
  - 2 = Not very satisfied: 10
  - 3 = Neutral: 44
  - 4 = Quite satisfied: 40

Mean scores significant at a 95% confidence level +/- 0.2

Base: 250 Residents
Q: Which of these Broads Authority visitor centres have you ever used? Prompted, multiple response
Q: How satisfied are you with the quality of what is offered at each of the visitor centres? Prompted, single response
**Improvements to visitor centres?** (unprompted) (key responses)

**RESIDENTS & VISITORS**

<table>
<thead>
<tr>
<th>Residents</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better (free) parking</td>
<td>10%</td>
</tr>
<tr>
<td>Better signage/access</td>
<td>5%</td>
</tr>
<tr>
<td>Better catering facilities</td>
<td>2%</td>
</tr>
<tr>
<td>More to do/interactive displays</td>
<td>2%</td>
</tr>
<tr>
<td>More moorings/boating facilities</td>
<td>2%</td>
</tr>
<tr>
<td>More information</td>
<td>2%</td>
</tr>
<tr>
<td>Open more hours/seasons</td>
<td>1%</td>
</tr>
<tr>
<td>More/friendlier staff</td>
<td>1%</td>
</tr>
<tr>
<td>Modernisation/refurbishment</td>
<td>No mentions</td>
</tr>
</tbody>
</table>

Base: Residents & Visitors who have visited at least one visitor centre, unprompted, multiple response

Q: Specifically, how do you think the visitor centre facilities (at Hoveton, Whitlingham and How Hill) could be improved?
## Awareness of the Broads Authority

**RESIDENTS & VISITORS**

<table>
<thead>
<tr>
<th>Category</th>
<th>Awareness Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
Organisation mainly responsible for management of the Broads? (unprompted) (key responses) RESIDENTS & VISITORS

- Unprompted, two out of three residents recall that the Broads Authority is responsible for the management of the Broads - which means that one in three residents do not!
- Correct recall is at just over one in ten amongst visitors

Residents (N=250)

- Correct 66%
- No/incorrect 34%

Visitors (N=600)

- Correct 14%
- No/incorrect 84%

Base: 250 Residents & 600 Visitors, unprompted, multiple response
Q: What organisation do you think is mainly responsible for the sustainable management of the Broads?
When prompted, although the large majority of residents have heard of the Broads Authority, around one in 10 have not.

With around half of visitors having heard of the Broads Authority.

Significantly less likely:
- Younger residents, 18-24s (63%)

Significantly more likely:
- Recent visitors (within last 6 months) (57%)

Significantly less likely:
- Younger visitors, 18-24s (31%)
Perceptions of Broads Authority performance

*PBOs, HBOs, RESIDENTS & VISITORS*

<table>
<thead>
<tr>
<th>Category</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
Descriptors of the Broads Authority (unprompted) (key responses)

PBOs & HBOs

Q: How would you describe your overall impression of the Broads Authority using three separate words?

Base: 747 PBOs & 25 HBOs, unprompted, multiple response
Q: How would you describe your overall impression of the Broads Authority using three separate words?

**Residents & Visitors**

**Residents**
- Good
- Caring
- Helpful
- Efficient
- Respected
- Competent
- Important
- Improvement
- Management
- OK

**Visitors**
- Nice
- Helpful
- Efficient
- Useful
- Local
- Professional
- Knowledgeable
- Conservation
- Preservation
- Anonymous
- Competent
- Dedicated
- Modern
- Busy
- Impressive
- Trustworthy

Base: 250 Residents & 600 Visitors, unprompted, multiple response
Satisfaction with the Broads Authority performance (prompted) PBOs, HBOs, RESIDENTS & VISITORS

- Satisfaction with the Broads Authority is highest (and good) amongst visitors (but least amount of contact with the Broads Authority?)
- Reasonable levels of satisfaction amongst PBOs and Residents
- HBOs show low levels of satisfaction

Mean scores significant at a 95% confidence level +/- 0.1 - 0.3

Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, prompted, single response
Q: How satisfied are you with the overall performance of the Broads Authority, on a 5-point scale, where 1 = not at all satisfied and 5 = very satisfied?
### Satisfaction with the Broads Authority performance

**(unprompted) (key responses) PBOs, HBOs & RESIDENTS**

<table>
<thead>
<tr>
<th>PBOs</th>
<th>HBOs</th>
<th>Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>They do a good job</strong></td>
<td><strong>They do a good job</strong></td>
<td><strong>They do a good job</strong></td>
</tr>
<tr>
<td>25%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Seen improvements to Broads</strong></td>
<td><strong>Excellent frontline staff</strong></td>
<td><strong>Broads are well maintained</strong></td>
</tr>
<tr>
<td>7%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td><strong>Helpful staff</strong></td>
<td><strong>Don’t feel supported</strong></td>
<td><strong>Good experience/no problems</strong></td>
</tr>
<tr>
<td>7%</td>
<td>36%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Employ great people</strong></td>
<td><strong>Focus on the wrong things</strong></td>
<td><strong>Helpful staff</strong></td>
</tr>
<tr>
<td>2%</td>
<td>28%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Staff/rangers are visible</strong></td>
<td><strong>Wasteful with money</strong></td>
<td><strong>Haven’t seen improvements</strong></td>
</tr>
<tr>
<td>2%</td>
<td>16%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Wasteful with money</strong></td>
<td><strong>Inefficient/slow</strong></td>
<td><strong>Little public consultation</strong></td>
</tr>
<tr>
<td>4%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Haven’t seen improvements</strong></td>
<td><strong>Focus on the wrong things</strong></td>
<td><strong>Haven’t seen improvements</strong></td>
</tr>
<tr>
<td>4%</td>
<td>28%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Inefficient/slow</strong></td>
<td><strong>Wasteful with money</strong></td>
<td><strong>Not very knowledgeable</strong></td>
</tr>
<tr>
<td>3%</td>
<td>16%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Focus on the wrong things</strong></td>
<td><strong>Inefficient/slow</strong></td>
<td><strong>Too top heavy</strong></td>
</tr>
<tr>
<td>2%</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Too top heavy</strong></td>
<td><strong>Poor leadership</strong></td>
<td><strong>Too top heavy</strong></td>
</tr>
<tr>
<td>2%</td>
<td>8%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Base:** 747 PBOs, 25 HBOs & 250 Residents, unprompted, multiple response

**Q:** Why do you say that?
Understand purposes of the Broads Authority? (prompted)

HBOs, RESIDENTS & VISITORS

- HBOs have a good level of understanding of the purposes of the Broads Authority (although not all claim to understand the purposes ‘very well’)
- There is some polarity in understanding amongst residents and visitors (with a similar proportion claiming to understand as no)

<table>
<thead>
<tr>
<th>Don’t know</th>
<th>1 = Not at all well</th>
<th>2 = Not very well</th>
<th>3 = Neutral</th>
<th>4 = Quite well</th>
<th>5 = Very well</th>
</tr>
</thead>
<tbody>
<tr>
<td>HBOs**</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>8</td>
<td>40</td>
<td>52</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residents*</td>
<td>1</td>
<td>14</td>
<td>27</td>
<td>11</td>
<td>36</td>
</tr>
<tr>
<td>Visitors*</td>
<td>4</td>
<td>14</td>
<td>22</td>
<td>31</td>
<td>22</td>
</tr>
</tbody>
</table>

Mean scores significant at a 95% confidence level +/- 0.1 - 0.3
How would you describe the current primary purpose(s) of the Broads Authority (unprompted) (key responses) PBOs & HBOs

**PBOs**

- Navigation protection most likely mentioned by PBOs (by around half)
- Conservation/environment / wildlife protection mentioned by around two-fifths
- Only around a tenth mention the promotion of tourism

**HBOs**

- Navigation protection most likely mentioned by HBOs (and by nearly all)
- Conservation/environment / wildlife protection mentioned by around half
- Around a quarter mention the promotion of tourism
- Around a third spontaneously mention all three of the above

Base: 747 PBOs & 25 HBOs, unprompted, multiple response

Q: How would you describe the current primary purpose(s) of the Broads Authority?
When ranking the three ‘purposes’ of the Broads Authority, Residents and Visitors are notably most likely to rank ‘conservation’ as the most important; and, to a lesser, extent, PBOs.

HBOs, however, are markedly most likely to rank the purpose about protecting the interest of navigation as most important.

Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, prompted, single response
Q: The Broads Authority has three purposes. Please rank how relatively important you think these are?
To what extent Broads Authority meets ‘purposes’
(prompted: Mean scores) PBOs, HBOs, RESIDENTS & VISITORS

The Broads Authority is considered by all audiences to meet its purpose (at least reasonably well) to conserve and enhance the natural beauty, wildlife and cultural heritage of the Broads.

Ratings are typically lower for purposes relating to the promoting of the Broads to the public and protecting the interest of navigation; and markedly lower amongst HBOs.

Visitors are most strongly in agreement with all purposes.

Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, prompted, single response.

Q: How well do you think that the Broads Authority performs in meeting each of these purposes, on a 5-point scale, where 1 = not at all well and 5 = very well?

Mean scores significant at a 95% confidence level ± 0.1 - 0.4.

The Broads Authority is considered by all audiences to meet its purpose (at least reasonably well) to conserve and enhance the natural beauty, wildlife and cultural heritage of the Broads.

Ratings are typically lower for purposes relating to the promoting of the Broads to the public and protecting the interest of navigation; and markedly lower amongst HBOs.

Visitors are most strongly in agreement with all purposes.

Mean scores significant at a 95% confidence level ± 0.1 - 0.4.
Future challenges & priorities for the Broads area & Broads Authority

*PBOs, HBOs, RESIDENTS & VISITORS*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
Challenges facing the Broads in the next 25 years

PBOs: Mainly boating/waterways
- Flooding
- Weather
- Maintenance
- Moorings
- Boats
- Money
- Erosion
- Waterways
- River
- Holiday
- Hire
- Natural

HBOs: Mainly tourism/economy
- Flooding
- Moorings
- Tourists
- Visitors
- Tourism
- Sustaining
- Numbers
- Promoting
- Attractions
- Industry
- Boats
- Promotions
- Charges
- Competition
- Conservation
- Sustainability
- Companies
- Development
- Financial

Residents: Mainly development/sustainability
- Flooding
- People
- Housing
- Access
- Tourism
- Maintenance
- Public
- Natural
- Wildlife
- Money
- Climate
- Climate

Visitors: Mainly environment/climate
- Flooding
- Pollution
- Wildlife
- Money
- Climate
- Change
- Weather
- Visitors
- Erosion
- Boats
- Damage
- Rubbish
- Holiday
- Building
- Maintenance
- Populations
- Waterways
- Conservation

Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, unprompted, multiple responses
Q: What do you think are the biggest challenges facing the Broads over the next 25 years?
### Priorities for the Broads Authority  
**(prompted: Mean scores)**  
PBOs, HBOs, RESIDENTS & VISITORS

<table>
<thead>
<tr>
<th>Prompted priority</th>
<th>PBOs</th>
<th>HBOs</th>
<th>Residents</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management of flooding</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅</td>
</tr>
<tr>
<td>Wildlife conservation</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅</td>
</tr>
<tr>
<td>Dredging the rivers and Broads</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅</td>
</tr>
<tr>
<td>Managing invasive species</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Promoting the area for tourism</td>
<td>✅</td>
<td>✅✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Educating the next generation about the Broads</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅</td>
</tr>
<tr>
<td>Responding to climate change</td>
<td>✅</td>
<td></td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Preserving windmills</td>
<td>✅</td>
<td></td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Improving the quality of tourism facilities</td>
<td>✅</td>
<td>✅✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Assessing planning permission applications</td>
<td></td>
<td>✅</td>
<td>✅</td>
<td></td>
</tr>
<tr>
<td>Improving moorings</td>
<td>✅✅</td>
<td>✅✅</td>
<td>✅</td>
<td></td>
</tr>
</tbody>
</table>

**Mean score of:**

- 4.5 or more = ✅✅✅
- 4.0 - 4.4 = ✅✅
- 3.5 - 3.9 = ✅

*Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, prompted, single response*

Q: To what extent do you regard the following as priorities for the Broads Authority, on a 5-point scale, where 1 = very low priority and 5 = very high priority?

*Mean scores significant at a 95% confidence level +/- 0.1 - 0.6*
## Other priorities for the Broads Authority to focus on

### (unprompted) (key responses) PBOs, HBOs, Residents & Visitors

<table>
<thead>
<tr>
<th>Priority</th>
<th>PBOs</th>
<th>HBOs</th>
<th>Residents</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preventing/penalising speeding</td>
<td>9%</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provision of more electric points</td>
<td>6%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tree maintenance/clearance</td>
<td>6%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better facilities in general</td>
<td>5%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improving access</td>
<td>4%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improving access/parking</td>
<td>6%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance of footpaths</td>
<td>4%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improving planning department</td>
<td>3%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flood management/prevention</td>
<td>3%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limiting development</td>
<td>2%</td>
<td>2%</td>
<td></td>
<td>1%</td>
</tr>
<tr>
<td>More effective rangers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promotion to tourists</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preventing/penalising speeding</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reduction of toll multiplier</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provision of more electric points</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improving access/parking</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appealing/catering to visitors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wildlife conservation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>More attractions</td>
<td></td>
<td></td>
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<tr>
<td>Educational facilities/materials</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

*Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, unprompted, multiple response*

Q: Are there any other priorities that you think the Broads Authority should focus on in respect to meeting the needs of boat owners/hire boat operators/residents/visitors?
Agreement with statements about Broads tourism
(prompted: Mean scores) PBOs, HBOs, RESIDENTS & VISITORS

- HBOs are most emphatically in agreement with all statements relating to tourism in the Broads
- With agreement levels also consistently reasonably strong amongst visitors
- PBOs are typically less likely to agree with statements

Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, prompted, single response
Q: The Broads is a popular tourist destination. To what extent do you agree with the following statements regarding tourism in the Broads, on a 5-point scale, where 1 = strongly disagree and 5 = strongly agree?

Mean scores significant at a 95% confidence level +/- 0.1 - 0.4
Q: Do you have any suggestions or concerns in respect to how the Broads Authority could support the development of tourism in the Broads?

- **PBOs**
  - More promotion/advertising: 13%
  - More/improved moorings: 10%
  - More/improved facilities: 8%
  - Promote/educate about wildlife: 3%
  - Support hire boat operators: 2%

- **HBOs**
  - Focus on being child friendly: 12%
  - More/improved facilities: 8%
  - More/improved moorings: 8%
  - Balance tourism & environment: 8%

- **Residents**
  - Support the local area: 7%
  - More/improved facilities: 6%
  - More promotion/advertising: 6%
  - Better access/parking: 4%
  - Support local businesses: 3%

- **Visitors**
  - Better access/parking/roads: 6%
  - More promotion/advertising: 5%
  - Maintain the quality experience: 1%
  - Encourage more attractions/events: 1%
  - Help businesses reduce their costs: 1%

**Base:** 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, unprompted, multiple response
### Perceptions of the Broads Authority as the Local Planning Authority

**RESIDENTS**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td>🟢</td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td>🟡</td>
</tr>
<tr>
<td>Residents</td>
<td>🟠</td>
</tr>
<tr>
<td>Visitors</td>
<td>🟤</td>
</tr>
</tbody>
</table>
Use of, and satisfaction with, the Broads Authority as the Local Planning Authority (prompted) RESIDENTS

- Around one in five residents (16%) have used the services of the Broads Authority as the Local Planning Authority in any of the prompted capacities
- Reasonable, and highest, satisfaction levels as an Applicant
- Relatively low levels of satisfaction as an Interested party and/or Objector
- N.B. numbers are extremely small

Use of services

- Objector: 6
- Interested party: 6
- Applicant: 6
- Not used services: 84

Satisfaction with services

- Applicant (N=15):
  - Not at all satisfied: 27
  - Not very satisfied: 7
  - Neutral: 40
  - Quite satisfied: 27
  - Very satisfied: 3

- Interested party (N=15):
  - Not at all satisfied: 7
  - Not very satisfied: 40
  - Neutral: 33
  - Quite satisfied: 13
  - Very satisfied: 7

- Objector (N=16):
  - Not at all satisfied: 38
  - Not very satisfied: 19
  - Neutral: 13
  - Quite satisfied: 31

Mean scores significant at a 95% confidence level +/- 0.5 - 0.8

Base: 250 Residents, prompted, multiple response
Q: In the past 5-years, have you used the services of the Broads Authority as the Local Planning Authority in any of these capacities?

Base: Residents, prompted, single response
Q: How satisfied were you with the service you received in each of these capacities?
Residents are most likely, and reasonably highly, in support of local planning applications for better visitor facilities; and markedly less supportive towards more housing development.

Mean scores significant at a 95% confidence level ± 0.2
Perceptions of Broads National Park status
_PBOs, HBOs, RESIDENTS & VISITORS_

<table>
<thead>
<tr>
<th>Category</th>
<th>Symbol</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
Aware that the Broads has status of a National Park?

(prompted) PBOs, HBOs, RESIDENTS & VISITORS

- The majority of PBOs and HBOs are aware that the Broads has the status of a National Park (although not all)
- Two thirds of residents are aware of the status; only slightly more than the visitor sample

Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, prompted, single response
Q: Are you aware that the Broads has the status of a National Park?
Should more be done to promote National Park status?  
(prompted) PBOs, HBOs, RESIDENTS & VISITORS

- Around half of PBOs think more should be done to promote the National Park status of the Broads; and just under half of HBOs
- The proportion of those who think more should be done increases markedly amongst residents and visitors

<table>
<thead>
<tr>
<th></th>
<th>Yes - more should be done</th>
<th>No - enough is already done</th>
</tr>
</thead>
<tbody>
<tr>
<td>PBOs</td>
<td>52</td>
<td>48</td>
</tr>
<tr>
<td>HBOs</td>
<td>42</td>
<td>58</td>
</tr>
<tr>
<td>Residents</td>
<td>84</td>
<td>16</td>
</tr>
<tr>
<td>Visitors</td>
<td>81</td>
<td>19</td>
</tr>
</tbody>
</table>

Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, prompted, single response
Q: Do you think the Broads Authority should do more to promote the fact that the Broads have the status of a National Park?
The Broads having National Park status is markedly more appealing to residents and visitors than PBOs and HBOs.

Q: To what extent do you think that the status of the Broads as a National Park makes the area more appealing to visit, on a 5-point scale, where 1 = a lot less appealing and 5 = a lot more appealing?

- Don’t know
- 1 = A lot less appealing
- 2 = A little less appealing
- 3 = Neutral
- 4 = A little more appealing
- 5 = A lot more appealing

Mean scores significant at a 95% confidence level ± 0.1 - 0.5
## Representative elections

*PBOs, HBOs & RESIDENTS*

<table>
<thead>
<tr>
<th>Role</th>
<th>Symbol</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td>![Symbol]</td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td>![Symbol]</td>
</tr>
<tr>
<td>Residents</td>
<td>![Symbol]</td>
</tr>
<tr>
<td>Visitors</td>
<td>![Symbol]</td>
</tr>
</tbody>
</table>
Aware of proposed consultation on direct elections?

(prompted) PBOs, HBOs & RESIDENTS

- Half of the HBO sample are aware of the proposed consultation on introducing direct elections for the Boards of National Parks and the Broads Authority.
- Notably higher than the proportion of PBOs and residents; and *markedly* more so than the latter.

Base: 747 PBOs, 25 HBOs & 250 Residents, prompted, single response
Q: Are you aware that the Government is proposing to consult on introducing direct elections for the Boards of National Parks and the Broads Authority?
**Likely to vote for representatives?**

*(prompted) PBOs, HBOs & RESIDENTS*

- HBOs are much more likely to say they will vote for representatives than PBOs and residents; although all audiences have high likely take-up.

<table>
<thead>
<tr>
<th></th>
<th>Don’t know</th>
<th>1 = Not at all likely</th>
<th>2 = Not very likely</th>
<th>3 = Neutral</th>
<th>4 = Quite likely</th>
<th>5 = Very likely</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PBOs</strong></td>
<td>6</td>
<td>4</td>
<td>12</td>
<td>16</td>
<td>20</td>
<td>42</td>
</tr>
<tr>
<td><strong>HBOs</strong></td>
<td>4</td>
<td>13</td>
<td>13</td>
<td>71</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Residents</strong></td>
<td>2</td>
<td>6</td>
<td>8</td>
<td>12</td>
<td>32</td>
<td>39</td>
</tr>
</tbody>
</table>

Base: 747 PBOs, 25 HBOs & 250 Residents, prompted, single response

Q: If representatives of toll payers/local residents were directly elected, how likely would you be to vote for a toll payer/local resident representative, on a 5-point scale, where 1 = not at all likely and 5 = very likely?

*Mean scores significant at a 95% confidence level +/− 0.1 - 0.3
Financial management, comprehension & perceptions of tolls

PBOs & HBOs

<table>
<thead>
<tr>
<th>Category</th>
<th>Symbol</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
Financial impact of the toll (prompted)
PBOs & HBOs

PBOs: % proportion of total annual boat ownership costs (average breakdown)

- Mooring/marina fees: 32%
- Maintenance/repairs: 29%
- Fuel: 11%
- Broads Authority tolls: 9%
- Insurance: 9%
- Misc. costs: 7%
- BSS compliance: 2%

HBOs: % proportion of total annual fleet running costs (average breakdown)

- Staff: 35%
- Misc. costs: 12%
- Maintenance/repairs: 11%
- Premises: 11%
- Broads Authority tolls: 7%
- Insurance: 5%
- Fuel: 5%
- Business rates: 3%
- New boat investment: 3%

“Too much”
“Too high”

No significant differences in terms of proportion of total annual boat ownership costs attributed to tolls by PBO key demographics (e.g. respondent age, size of largest boat owned …)

Base: 747 PBOs & 25 HBOs, prompted, single response

Q: Considering the annual cost of [running your fleet/boat ownership] on the Broads (including labour and materials), what is the approximate proportion of that total cost you attribute to each of the following categories...?
Influence of the toll in keeping a boat on the Broads (prompted) PBOs

- Around one in three PBOs say that the toll is quite or very influential in their decision to keep a boat on the Broads
- Opinion is spread across rating bands
- There is some indication that those with four or more boats are more likely to be quite/very influenced by toll costs
- No significant differences by respondent age, social grade or size of largest boat owned (<25ft/25ft+)

**Influence of toll in decision to keep boat on Broads**

![Bar chart showing the distribution of responses to the question on toll influence.]

- **Mean score**: 2.9
- **36% quite/very influential**

<table>
<thead>
<tr>
<th>Gross household income before tax</th>
<th>&lt;£15,000 (N=33)</th>
<th>£15,000-£24,999 (N=105)</th>
<th>£25,000-£49,999 (N=208)</th>
<th>£50,000-£74,999 (N=79)</th>
<th>£75,000+ (N=80)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quite/very influential</td>
<td>51%</td>
<td>33%</td>
<td>36%</td>
<td>31%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Base: 747 PBOs, prompted, single response

Q: Now, specifically thinking about the toll, how influential is the cost of the toll in your decision to keep a boat on the Broads, on a 5-point scale, where 1 = not at all influential and 5 = very influential?

- Mean score significant at a 95% confidence level +/- 0.1
Broads Authority tolls good value for money? (prompted)
PBOs & HBOs

- Around half of PBOs agree that Broads Authority tolls are quite or very good value for money; although one in four disagree
- Less than one in ten HBOs agree; indeed, one in three strongly disagree

<table>
<thead>
<tr>
<th>Don’t know</th>
<th>1 = Strongly disagree</th>
<th>2 = Somewhat disagree</th>
<th>3 = Neutral</th>
<th>4 = Somewhat agree</th>
<th>5 = Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>PBOs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HBOs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: 747 PBOs & 25 HBOs, prompted, single response
Q: To what extent do you agree that the Broads Authority tolls represent good value for money, on a 5-point scale, where 1 = strongly disagree and 5 = strongly agree?

- Mean scores significant at a 95% confidence level +/- 0.1 - 0.4

Visual source: www.oxbridgemedica.com
There appears to be some difference in opinion, and uncertainty, as to whether Broads Authority tolls are better value for money for small or large boats; and with around half of PBOs felt unable to give a view.

Don’t know 52%

Small boats (<25 feet) 30% better value for money

Large boats (25 feet+) 18% better value for money

Base: 747 PBOs, prompted, single response
Q: Do you think the Broads Authority toll represents better value for money for owners of ...?
How think hire boat toll varies from private boat toll (prompted) PBOs

- The majority of PBOs, who are able to give a view about how a hire boat toll varies from a private boat toll, correctly think hire boat tolls cost more than those paid by PBOs.
- One in three PBOs, however, felt unable to give a view.

Don't know  | Hire boat toll costs less | Hire boat toll costs the same | Hire boat toll costs more
---|---|---|---
33 | 4 | 4 | 59

Base: 747 PBOs, prompted, single response
Q: How do you think the hire boat toll (per boat) varies from the toll paid by private boat owners (for an equivalent boat)?
Support Hire Boat Operator ‘multiplier’? (prompted)
PBOs & HBOs

- The HBO ‘multiplier’ is well supported amongst PBOs
- As might be expected, support is markedly weaker amongst HBOs!

Don't know 1 = Not at all 2 = Not very much 3 = Neutral 4 = Quite a lot 5 = Very much so

Mean score~

PBOs

HBOs

Base: 747 PBOs & 25 HBOs, prompted, single response
Q: Hire boat operators currently pay a ‘multiplier’ of over two-and-a-half times the toll of the private owner fee on each hire boat in their fleet. To what extent do you support the hire boat ‘multiplier’, on a 5-point scale, where 1 = not at all and 5 = very much so?

Mean scores significant at a 95% confidence level +/- 0.1 - 0.4
Support Hire Boat Operator ‘multiplier’? (unprompted)

<table>
<thead>
<tr>
<th>Quite a lot / very much so</th>
<th>Not at all / not very much</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>36%</strong> Represents more use</td>
<td><strong>2%</strong> Damages tourism/local economy</td>
</tr>
<tr>
<td><strong>19%</strong> Hire boats cause more damage</td>
<td><strong>1%</strong> x2.5 is too steep</td>
</tr>
<tr>
<td><strong>13%</strong> They make profit from use</td>
<td><strong>1%</strong> It’s not fair to HBOs</td>
</tr>
<tr>
<td><strong>8%</strong> Those hiring speed &amp; litter</td>
<td><strong>1%</strong> Damages profitability</td>
</tr>
<tr>
<td><strong>2%</strong> Provides revenue for the Broads</td>
<td></td>
</tr>
</tbody>
</table>

Base: 747 PBOs, unprompted, multiple response
Q: Why do you say that?
Around half of the PBO and HBO samples would like more spent on dredging and/or maintenance of moorings.

Around half of HBOs would also like more spent on patrolling and safety - notably higher proportion than PBOs.

Would you like more, the same or less spent on ...?

Base: 747 PBOs & 25 HBOs, prompted, single response

Q: The Broads Authority spends tolls income on three key elements. Would you like more, the same or less spent on each of the following ...?
## Marketing & information sources

**VISITORS**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td></td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
</tr>
</tbody>
</table>
Q: Prior to visiting the Broads, which of these online/offline sources of information did you refer to?

<table>
<thead>
<tr>
<th>Information sources</th>
<th>% of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online sources</strong></td>
<td></td>
</tr>
<tr>
<td>General internet search</td>
<td>40%</td>
</tr>
<tr>
<td>Tourist information websites</td>
<td>33%</td>
</tr>
<tr>
<td>Enjoy the Broads’ website</td>
<td>23%</td>
</tr>
<tr>
<td>Review website (e.g. Trip Advisor)</td>
<td>23%</td>
</tr>
<tr>
<td>Accommodation websites</td>
<td>19%</td>
</tr>
<tr>
<td>Boat company website</td>
<td>15%</td>
</tr>
<tr>
<td>Hoseasons website</td>
<td>13%</td>
</tr>
<tr>
<td>Social media</td>
<td>9%</td>
</tr>
<tr>
<td>Holiday blogs</td>
<td>9%</td>
</tr>
<tr>
<td>Travel agent’s website</td>
<td>8%</td>
</tr>
<tr>
<td>Did not use online sources</td>
<td>28%</td>
</tr>
<tr>
<td><strong>Total Online</strong></td>
<td>91%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Offline sources</strong></th>
<th>% of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word-of-mouth (friends, family etc.)</td>
<td>39%</td>
</tr>
<tr>
<td>Memories/previous experience</td>
<td>29%</td>
</tr>
<tr>
<td>Holiday/destination brochures</td>
<td>23%</td>
</tr>
<tr>
<td>Magazines</td>
<td>13%</td>
</tr>
<tr>
<td>TV programmes/channels</td>
<td>12%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>10%</td>
</tr>
<tr>
<td>Travel agent (in-store)</td>
<td>9%</td>
</tr>
<tr>
<td>Holiday and travel events/shows</td>
<td>8%</td>
</tr>
<tr>
<td>Apps for smartphones/tablets</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Did not use offline sources</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Total Offline</strong></td>
<td>100%</td>
</tr>
</tbody>
</table>

Three quarters of visitors used **online** sources prior to visiting the Broads

Three quarters of visitors used **offline** sources prior to visiting the Broads

85% of visitors used an online or offline source before visiting

Base: 600 Visitors, prompted, multiple response
Sources used prior to visiting: Newspapers/magazines/holiday destination brochures  (unprompted) (key responses) VISITORS

Holiday/destination brochures (N=136)
- HOSEASONS
  (25 respondents)
- Broads
  (9 respondents)
- Norfolk
  (4 respondents)

Magazines (N=77)
- Eastern Daily Press
  (5 respondents respectively)
- Sunday newspaper magazine supplements
- Take a Break
- RadioTimes
- Good Housekeeping
  (2 respondents respectively)

Newspapers (N=59)
- Daily Mail
  (8 respondents)
- The Sun
  (6 respondents)
- The Daily Telegraph
  (3 respondents respectively)

Base: all Visitors using these sources, unprompted, multiple response
Q: In which newspapers/magazines/holiday/destination brochures did you read about visiting the Broads?
Sources prior to visiting: Apps (prompted)

VISITORS

Use of apps for smartphones/tablets is broadly spread across prompted, specific apps

N.B. numbers are extremely small

Enjoy the Broads: The Official Guide
Pocket Norfolk
A Tour of the Norfolk Broads
Norfolk Broads Boating Maps
Pocket Norfolk Broads
The Norfolk Broads
Other
Can't remember

National Trust, Trip Advisor

Base: 48 - all Visitors using these sources, unprompted, multiple response
Q: Which apps for smartphones/tablets did you refer to prior to visiting the Broads?
Information sources used during visit (prompted)

VISITORS

- Around half of visitors had used at least one of the prompted information sources during their visit to the Broads (an average of one source per respondent)
  - 18-34s significantly more likely to have done so than older visitors (55+)
- Most likely use of TIC leaflets
- Although notable usage of other prompted sources

Base: 600 Visitors, prompted, multiple response
Q: And while you were visiting the Broads, did you use any of these information sources?
**APPENDIX:**

**Audience profiles: Key demographics**

<table>
<thead>
<tr>
<th>Audience Type</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Boat Owners (PBOs)</td>
<td>Blue</td>
</tr>
<tr>
<td>Hire Boat Operators (HBOs)</td>
<td>Green</td>
</tr>
<tr>
<td>Residents</td>
<td>Orange</td>
</tr>
<tr>
<td>Visitors</td>
<td>Yellow</td>
</tr>
</tbody>
</table>
All respondents were screened in as current owners of a boat for use on the Broads.
Softer quotas were set by respondent gender, age (aged 18+), social grade and boat type owned - to achieve a mix of respondents.
Respondent profile: Key demographics

HBOs

- Contact data provided by the Broads Authority of HBOs operating within a defined Broads catchment area
- No quotas were implemented - all contacts were eligible
- The Broads Authority sent out research ‘introduction’ letters to all HBOs, introducing, and inviting them to participate in, the research, prior to the commencement of fieldwork

**Gender**
- 84% male
- 16% female

**Number of employees**

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 5</td>
<td>36%</td>
</tr>
<tr>
<td>5-9</td>
<td>44%</td>
</tr>
<tr>
<td>10-19</td>
<td>4%</td>
</tr>
<tr>
<td>20</td>
<td>16%</td>
</tr>
<tr>
<td>30+</td>
<td>0%</td>
</tr>
</tbody>
</table>

**Length of business establishment**

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 5 years</td>
<td>4%</td>
</tr>
<tr>
<td>5-9 years</td>
<td>4%</td>
</tr>
<tr>
<td>10-14 years</td>
<td>4%</td>
</tr>
<tr>
<td>1-9 years</td>
<td>88%</td>
</tr>
<tr>
<td>20+ years</td>
<td>0%</td>
</tr>
</tbody>
</table>

**Approximate annual turnover**

<table>
<thead>
<tr>
<th>Turnover Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; £100,000</td>
<td>12%</td>
</tr>
<tr>
<td>£100-249,999</td>
<td>32%</td>
</tr>
<tr>
<td>£250-499,000</td>
<td>24%</td>
</tr>
<tr>
<td>£500-999,999</td>
<td>4%</td>
</tr>
<tr>
<td>£1-1.5m</td>
<td>4%</td>
</tr>
<tr>
<td>£1.5-3m</td>
<td>4%</td>
</tr>
<tr>
<td>£3m+</td>
<td>4%</td>
</tr>
<tr>
<td>Rather not say</td>
<td>20%</td>
</tr>
</tbody>
</table>
Respondent profile: Key demographics

- Respondents were screened in to live in an agreed Broads catchment area
- A natural fall-out sample was achieved in terms of demographics (gender, age, social grade ...)

**Gender**
- 47% Male
- 53% Female

**Age**
- 18-34: 10%
- 35-54: 27%
- 55+: 64%

**Social grade**
- ABC1: 45%
- C2DE: 55%

**Time lived in Broads area**
- < a year: 2%
- 1 year - 4 years 11 months: 9%
- 5 years - 9 years 11 months: 8%
- 10 - 14 years 11 months: 13%
- 15+ years: 68%

Base: 250 Residents, single response
Respondent profile: Key demographics

VISITORS

- Respondents were screened in to have visited the Broads (for any purpose) within the last 5 years.
- But were screened out if living in a defined ‘resident’ catchment area.
- Quotas were set by respondent gender, age (aged 18+) and social grade - to achieve a mix of respondents.

### Gender

- 50% Male, 50% Female

### Age

- 18 - 34: 35%
- 35 - 54: 33%
- 55+: 33%

### Social grade

- ABC1: 57%
- C2DE: 43%

### Respondent main residence (UK)

- North: 22%
- South: 33%
- East: 34%
- West: 11%

### Last visit to the Broads

- Within past 6 months: 32%
- 6 months - 1 year ago: 21%
- 1 - 2 years ago: 21%
- 2 - 5 years ago: 25%
- Can’t remember: 1%

Base: 600 Visitors, single response