

Stakeholder Surveys Analysis
Report by Senior Waterways and Recreation Officer

Summary: This report provides members with a summary of the outcome of the surveys of private boat owners (PBOs), hire boat operators (HBOs), visitors and residents that have recently been carried out for the Authority by Insight Track, a local market research company.

1 Background

- 1.1 In July 2014 Insight Track, a local market research company, was appointed to carry out surveys of the Authority's main stakeholder audiences. The aim of the exercise was to provide the Authority with, for the first time, a fact base about the views and opinions of private boaters, hire boat operators, residents and visitors in order to inform future decision making in a number of areas including the setting of strategic priorities, and the Authority's future tolls strategy.

2 Survey Methodology

- 2.1 The brief given to Insight Track was to gather statistically robust survey data that would provide the Authority with an evidence base about the attitudes and opinions of its customers. In order to ensure objectivity the precise methodology and design of the survey questionnaires used was left to Insight Track.
- 2.2 The survey work was carried out in September and October 2014. Table 1 sets out the research methods used for each audience group and the sample sizes achieved.

Table 1

Audience	Research method(s)	Sample size
Private boat owners	<ul style="list-style-type: none">• Telephone interviews using BA data• Online self- completion survey	<ul style="list-style-type: none">• 600 tel interviews• 147 online responses Total 747
Hire boat operators	<ul style="list-style-type: none">• Telephone interviews	<ul style="list-style-type: none">• 25
Residents	<ul style="list-style-type: none">• Door to door interviews• Online self-completion survey	<ul style="list-style-type: none">• 238• 12 online responses Total 250

Visitors	<ul style="list-style-type: none"> • Online self-completion survey via consumer panel 	Total 600
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2.3 The survey gives the Authority valuable information on the views of its customers in a number of key areas:

- current and future boating behaviour (PBOs and HBOs)
- fleet trends (HBOs)
- living in the Broads (residents)
- visitor behaviour and priorities,
- perceptions and awareness of the Broads Authority (all audiences),
- future challenges and priorities for the Authority (all audiences)
- perceptions of National park status (all audiences)
- perceptions of the Broads Authority as a planning authority (residents)
- Representative elections (PBOs HBOs and residents)
- Tolls (PBOs and HBOs)

2.4 The research carried out by Insight Track accords with the standards and best practice guidance of the Market Research Society and provides statistically robust findings at a 95% confidence level which is the standard applied by most market research companies. The findings of the surveys therefore provide the Authority with a solid evidence base on the views, priorities and opinions of its customers.

3 Summary of Findings

3.1 The survey findings have provided some very positive messages in respect of customer perceptions about the Authority's performance and satisfaction with the quality and availability of the facilities and services we provide.

3.2 Generally there is a good level of satisfaction with the Authority's performance with 63% of PBOs, 65% of residents and 79% of visitors saying that they are quite or very satisfied with our overall performance. Approximately half of residents also feel that there is nothing the Authority could do to enhance their experience of living on the Broads. Very significantly 80% of visitors say that they are quite or very likely to re-visit the Broads which is positive for the local tourism industry.

3.3 Perceptions of the Broads Authority are broadly positive amongst PBOs, residents and visitors and 66% of residents understand that the Authority is the organisation mainly responsible for the management of the Broads.

3.4 Perceptions of the Authority are less positive with the HBOs and this indicates that there is a need to fully understand their views in order to be able to respond to this feedback in a positive manner.

3.5 There were varying levels of awareness across audience that the Broads has the status of a National Park, the lowest being among visitors at 59%. 80% of visitors also felt that more should be done to promote National Park

status, a similar level to residents, while the figure was around 50% for PBOs and HBOs.

- 3.6 In respect of private boat ownership there is good evidence that boat numbers will be stable in the next five years with an extremely positive indication that younger boaters (18-34) are likely to increase their boat ownership. Around half of private boat owners also feel that current tolls give quite or very good value for money with the toll representing approximately 9% of the costs of annual boat ownership for private owners. The full survey results are available at Appendix 1.

4 Future Challenges and Priorities

- 4.1 The survey results also give strong indicators for the setting of future priorities. Dredging is considered to be a high priority across all audiences as is wildlife conservation and educating the next generation about the Broads. Boaters specifically prioritise dredging and the maintenance and provision of moorings with around 50% of PBOs and HBOs indicating that they would like to see more toll income spent in these areas.
- 4.2 Significantly, the survey results also show that walking is the key leisure activity undertaken on the Broads and bird watching is also a highly popular activity. Improving access facilities, footpaths and car parks are mentioned as other priorities for the Authority to focus on and there is a challenge to be faced in delivering improvements in these areas in the face of reductions in funding across the public sector.

5 Conclusions

- 5.1 The survey highlights a number of positive outcomes for the Authority although perceptions of the Authority in the hire boat industry are significantly less positive than in the other audience groups. HBOs particularly feel unsupported and that the toll represents poor value for money. The Chief Executive has met with the Chairman and Secretary of the Broads Hire Boat Federation to discuss the results and identify actions to be taken. These include: continuing the regular meetings between officers of the Association and the Chairman and Chief Executive of the Authority, meetings with individual operators to understand their current concerns and the development of a long term strategy for navigation. Residents and visitors are also not clear on the Authority's purposes and there is some indication that local residents feel that there should be better communication with them. Residents also feel that the prevention of flooding is an area that the Authority should concentrate on. Support for National Park branding is also less appealing to PBOs and HBOs than to visitors and residents.

- 5.2 The main challenge for the future is responding to the outcomes of the research in the context of the Authority's ability or capacity to deliver in some of the areas highlighted by respondents. Clearly there is a need to consider how communication with all audience groups can be improved in order to keep them informed and involved in the work that we do. The intention is to work on a draft action plan in response to the survey results and a further report will be brought to a future meeting of the Forum. Members are invited to note the contents of this report.

Author: Adrian Clarke
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Broads Plan Objectives: None

Appendices: APPENDIX 1 – Insight Track Stakeholder Research, Research Report for the Broads Authority <http://www.broads-authority.gov.uk/broads-authority/committees/broads-forum/broads-forum-5-february-2015>