

Broads Authority Stakeholder Research

*Research report for
the Broads Authority*







12th January 2015 (v3)





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- Overall objectives
- Methodology
- Profiling
- Summary
- SWOT/Considerations
- Detailed research findings:
 - ⇒ Current & future boating behaviour (PBOs & Residents)
 - ⇒ 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





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- 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

Methodologies tailored to audience segments

AUDIENCE	Research method(s)	Target sample size	Achieved sample size
Private Boat Owners (PBOs)	<ul style="list-style-type: none"> Telephone interviews conducted by ITL (using Broads Authority data)  AND Online self-completion survey via Broads Authority dispatched correspondence (with URL survey link)  	<ul style="list-style-type: none"> 600 tel ints c. 500 online self-completes 	<ul style="list-style-type: none"> 600 tel ints 147 online self-completes TOTAL = 747
Hire Boat Operators (HBOs)	<ul style="list-style-type: none"> Telephone interviews conducted by ITL (using Broads Authority data)  	c. 25	25
Residents	<ul style="list-style-type: none"> Door-to-door interviews conducted by ITL AND Online self-completion survey via ITL dispatched 'calling card' (with URL survey link)  	c.250	<ul style="list-style-type: none"> 238 door-to-door ints 12 online self-completes TOTAL = 250
Visitors	<ul style="list-style-type: none"> Online self-completion survey via consumer panel  	600	600

AUDIENCE	Base	Total sample size statistically significant at a 95% confidence level +/-	Profile	Colour key throughout report
Private Boat Owners (PBOs)	747	3.5%	<ul style="list-style-type: none"> • Owners of boats for use on the Broads 	
Hire Boat Operators (HBOs)	25	12.2%	<ul style="list-style-type: none"> • Decision-makers within HBOs within the Broads catchment area 	
Residents	250	6.1%	<ul style="list-style-type: none"> • Residents living within an agreed catchment area of The Broads 	
Visitors	600	4.0%	<ul style="list-style-type: none"> • Visitors to The Broads within the last 5-years (for any purpose) • Aged 18+ • <u>Excluded</u> if resident within agreed Broads Authority Boundary 	

Summary

Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

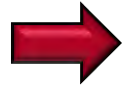
Summary: Current boat owning behaviour

(PBOs & Residents) 

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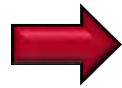
NUMBER



- ⇒ 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)



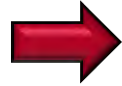
TYPE



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



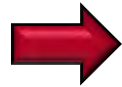
TIME



- ⇒ 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)



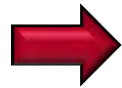
USE



- ⇒ 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**



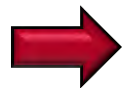
LENGTH



- ⇒ **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

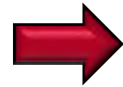
Summary: Future boat owning behaviour

(PBOs) 

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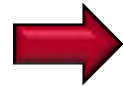
NUMBER



- ⇒ 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



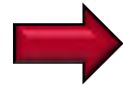
SIZE



- ⇒ 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

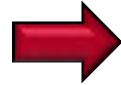
Summary: Current & future fleet trends

(HBOs) 

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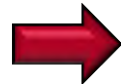
INCOME FROM BOAT-RELATED ACTIVITY



- ⇒ 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



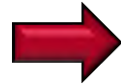
FLEET USE



- ⇒ 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)



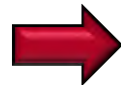
WHERE



- ⇒ **Hoveton/Wroxham** is the most frequently used fleet location



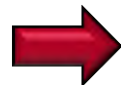
NUMBER



- ⇒ 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

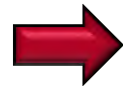
Summary: Visitor behaviour

(Visitors) 

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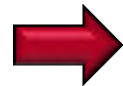
WHO?



⇒ Frequently **couples or families**



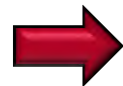
MOTIVATION TO VISIT



⇒ 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



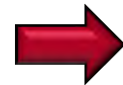
SUGGESTED ENHANCEMENTS



⇒ Improved **accessibility**



RECOMMENDING & RE-VISITING



⇒ There is **high propensity to recommend and re-visit**; a positive outlook for the future

Summary: Activities & facilities on the Broads

(PBOs, Residents & Visitors) 

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- ⇒ 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

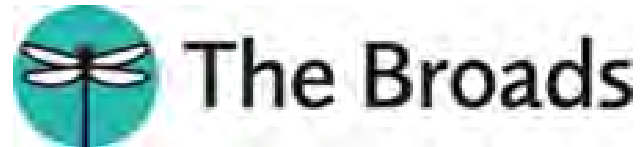


- ⇒ **Suggested improvements** to visitor centres are **minimal**; **better/cheaper parking** and **better signage/access** are key mentions by those who do make a suggestion

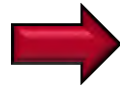
Summary: Awareness of the Broads Authority

(Residents & Visitors)  

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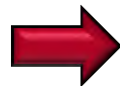
UNPROMPTED AWARENESS



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**

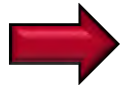
Summary: Perceptions of the Broads Authority

(PBOs, HBOs, Residents & Visitors) 

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SATISFACTION

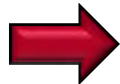


Marked differences by audience:

- ✓ **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**



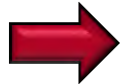
PERCEPTIONS



- ⇒ 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



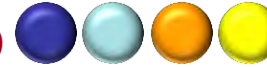
IMPORTANCE



- ⇒ **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)



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MAIN THEMES ACROSS PBOs, RESIDENTS & VISITORS

- ⇒ Flooding
- ⇒ Pollution
- ⇒ Overdevelopment (too many people and boats)
- ⇒ Climate change

HBOs ARE MORE ECONOMICALLY/COMMERCIALY FOCUSED:

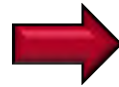
- ⇒ Attracting industry
- ⇒ Attracting tourists
- ⇒ Sustainability
- ⇒ Investment

- ⇒ Management of flooding
- ⇒ Dredging rivers and Broads
- ⇒ Educating the 'next generation' about the Broads
- ⇒ Wildlife conservation

- ⇒ Preventing and penalising speeding
- ⇒ Improving accessibility and parking

- ⇒ Emphatic support for improving tourism amongst HBOs
- ⇒ Some, but less emphatic, support amongst Residents and Visitors
- ⇒ Notably less support amongst PBOs

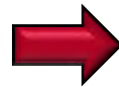
FRONT OF MIND CHALLENGES



HBOs ARE MORE ECONOMICALLY/COMMERCIALY FOCUSED:

- ⇒ Attracting industry
- ⇒ Attracting tourists
- ⇒ Sustainability
- ⇒ Investment

SPECIFICALLY, FROM PROMPTED LIST (overall importance)



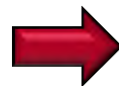
- ⇒ Management of flooding
- ⇒ Dredging rivers and Broads
- ⇒ Educating the 'next generation' about the Broads
- ⇒ Wildlife conservation

OTHER PRIORITIES (unprompted)



- ⇒ Preventing and penalising speeding
- ⇒ Improving accessibility and parking

TOURISM

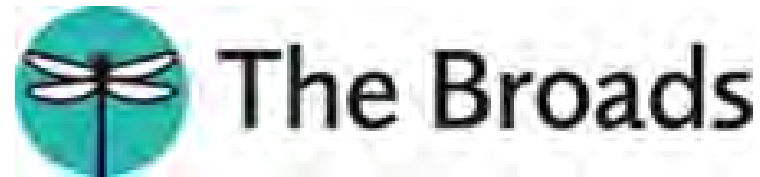


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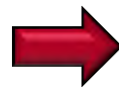


Summary: Perceptions of the Broads Authority as a Local Planning Authority (Residents)

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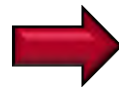


USE OF SERVICES



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

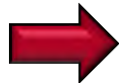
Summary: Perceptions of Broads Authority National Park status

(PBOs, HBOs, Residents & Visitors)

17

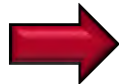


AWARENESS



⇒ 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

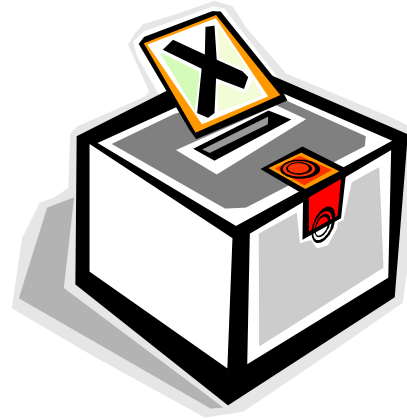


- ⇒ There is lots of support amongst Residents and Visitors for more to be done to promote **National Park status**, but **less support** amongst **PBOs and HBOs**
- ⇒ **Residents and Visitors** are much more likely to consider National Park status to make the Broads **more appealing as a place to visit**, with more **muted views** amongst **PBOs**, and particularly **HBOs**

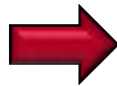
Summary: Representative elections

(PBOs, HBOs & Residents) 

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**AWARENESS OF
PROPOSED
CONSULTATION
ON DIRECT
ELECTIONS**



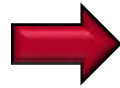
- ⇒ Relatively **limited awareness**, particularly amongst **PBOs and Residents**, despite a likely high propensity to vote (if given the opportunity)
- ⇒ **HBOs** are **the most aware**, and the **most likely** to consider that they will vote

Summary: Tolls

(PBOs & HBOs) 

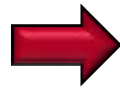
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FINANCIAL IMPACT



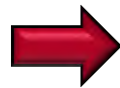
⇒ Broads Authority tolls typically account for around 10% of annual boat ownership costs

VALUE FOR MONEY PERCEPTIONS



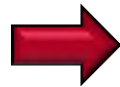
⇒ Whilst PBO perceptions of toll value for money are higher than HBOs, only half agree that they are good value for money
⇒ HBOs have very low value for money perceptions about the toll

VALUE FOR MONEY BY SIZE OF BOAT



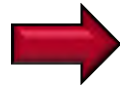
⇒ There is no clear/strong perception as to whether the toll is better value for money for different sizes of boat

DIFFERING FROM PRIVATE BOAT TOLL



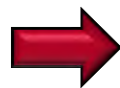
⇒ Most PBOs, who felt able to give a view, correctly think that the hire boat toll varies from the toll paid by private boat owners (for an equivalent boat) (59% think it costs more, but 33% felt unable to give a view)

HIRE BOAT MULTIPLIER



⇒ 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
⇒ Support is markedly weaker amongst HBOs

TOLL INCOME EXPENDITURE



⇒ Half of PBOs and HBOs would like more spent on dredging and/or mooring maintenance
⇒ Half of HBOs (48%) would also like more to be spent on patrolling and safety - notably higher than PBOs (33%)



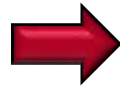
Summary: Marketing & information sources

(Visitors) 

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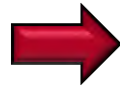
**ONLINE SOURCES
USED BEFORE
VISIT**



⇒ **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)



**OFFLINE
SOURCES USED
BEFORE VISIT**

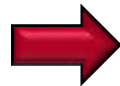


⇒ **Three quarters** used an **offline source** (word-of mouth; memories/previous experience; holiday/destination brochures)

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



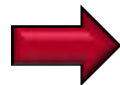
**APPS USED
BEFORE VISIT**



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







**SOURCES USED
DURING VISIT**



⇒ 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

Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

SWOT: Strengths



22



- ✓ 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



24

- ✘ 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



25

PBOs

- ✓ 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

HBOs

- ✓ 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**

Residents

- ✓ **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 ...)





Visitors

- ✓ **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

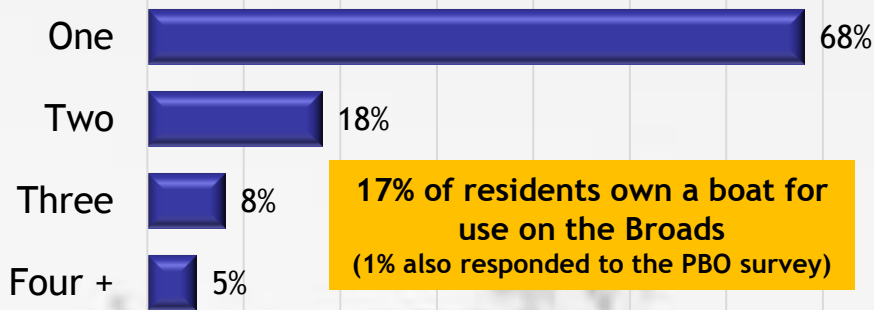
Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Current boat ownership

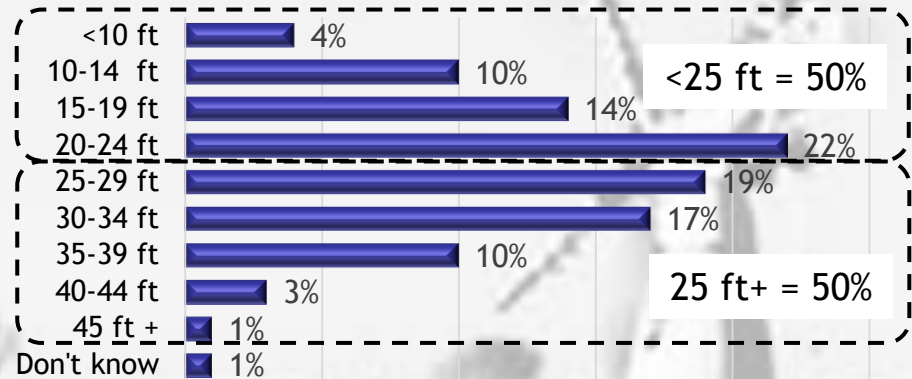
PBOs & RESIDENTS

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

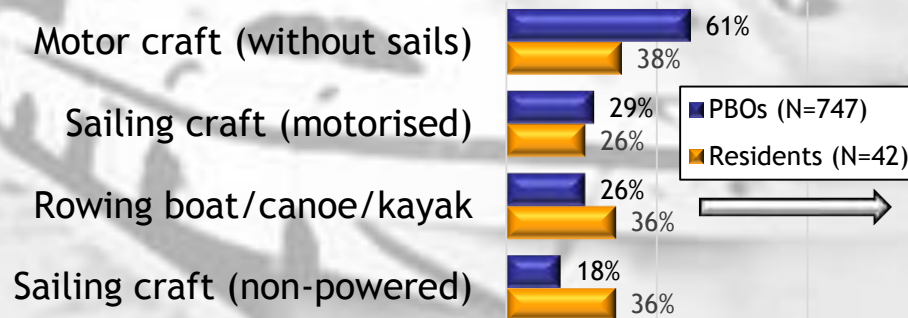
No. of boats owned (soft quotas applied for PBOs)



Length of longest boat owned



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



Number of types of boats owned

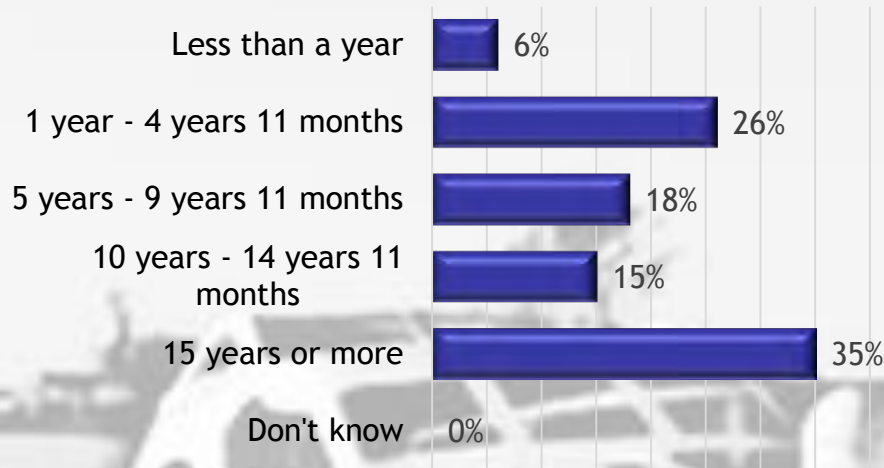
Category	1	2	3	4+
PBOs (N=747)				
Motor craft (without sails)	55%	5%	2%	-
Sailing craft (motorised)	27%	1%	0.1%	0.4%
Rowing boat/ canoe/ kayak	21%	4%	1%	1%
Sailing craft (non-powered)	13%	3%	1%	1%
Residents (N=42)				
Motor craft (without sails)	36%	-	-	2%
Sailing craft (motorised)	24%	2%	-	-
Rowing boat/ canoe/ kayak	21%	7%	5%	2%
Sailing craft (non-powered)	29%	5%	2%	-

Current boat ownership and boating behaviour

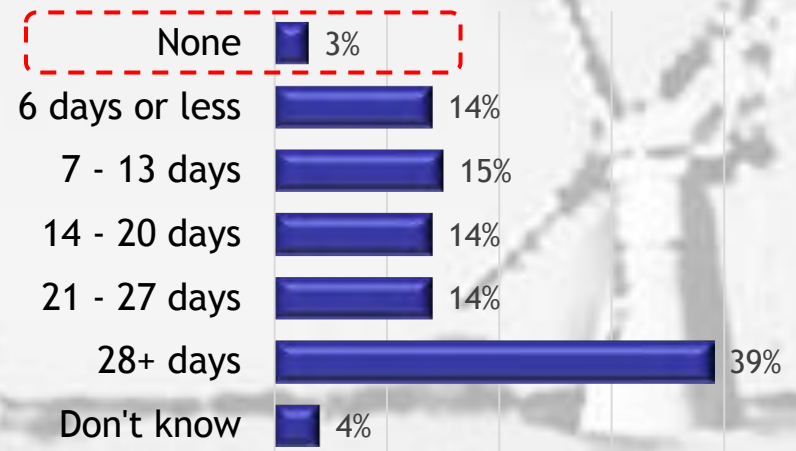
PBOs & RESIDENTS

No quotas set

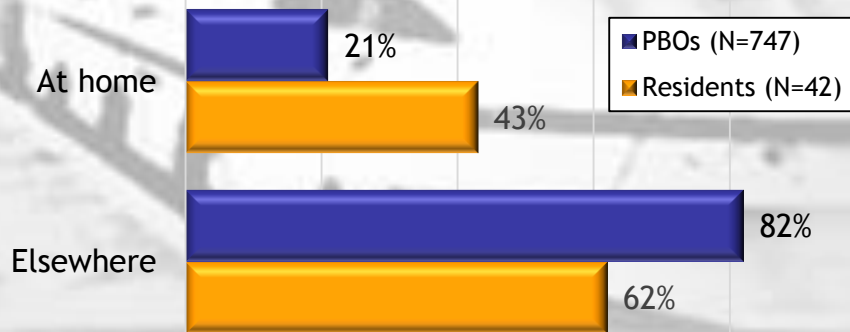
Length of time owned boat on the Broads



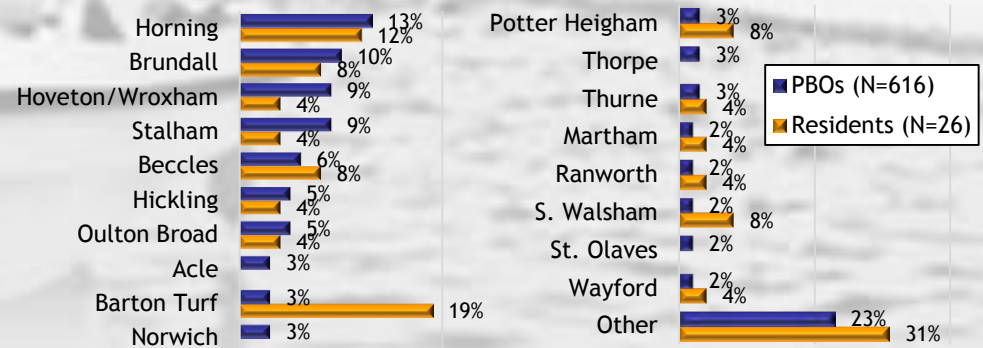
Number of days been out on Broads in past 12 months



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



Location of boat(s) during summer months (if keep elsewhere)



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

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

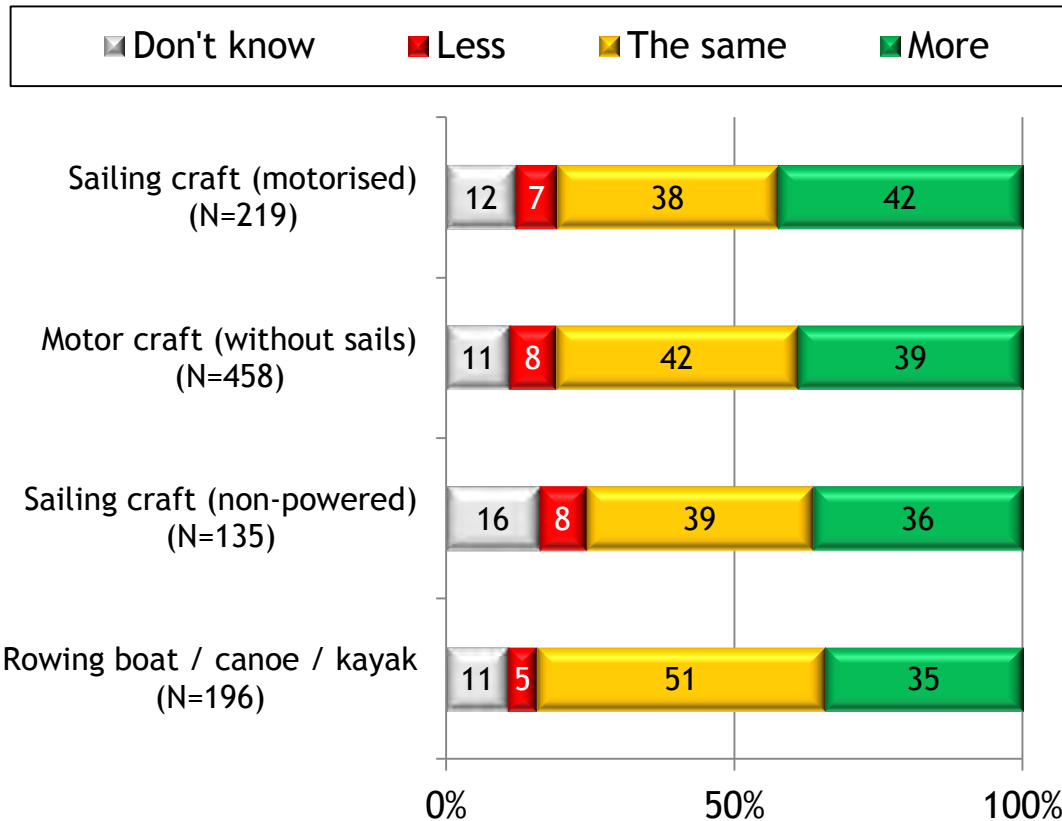
Prompted, single response

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: Those who keep their boats elsewhere

Future boat ownership: Type PBOs

Types of boat likely to use in next 5 years



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

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

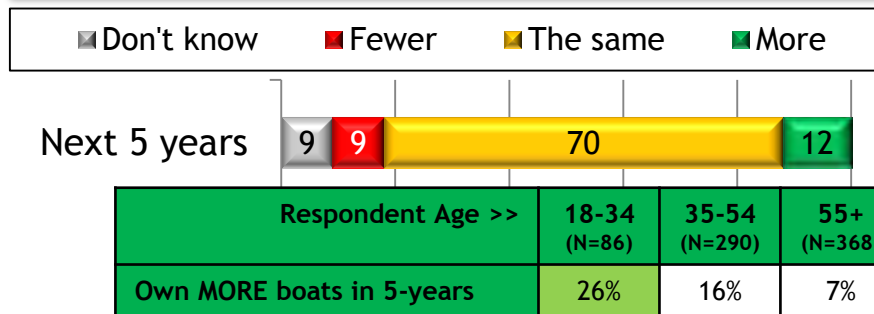
Future boat ownership: Number and size

PBOs

30

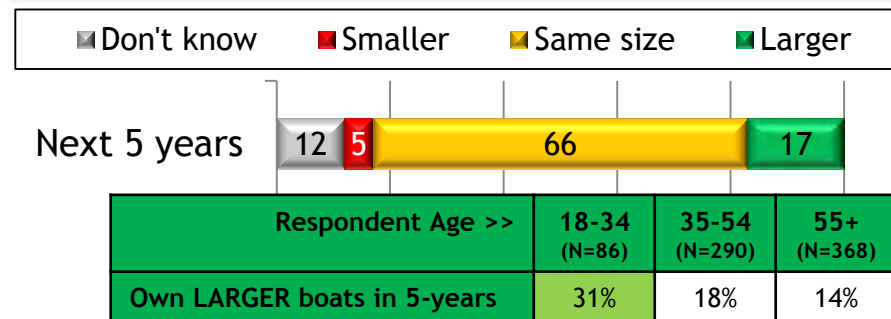
→ Around one in ten PBOs are likely to own more boats on the Broads in the next 5 years; and around one in ten fewer

Number of boats owned in next 5 years



→ And around one in five are likely to own larger boats on the Broads in the next five years

Size of boats in next 5 years



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

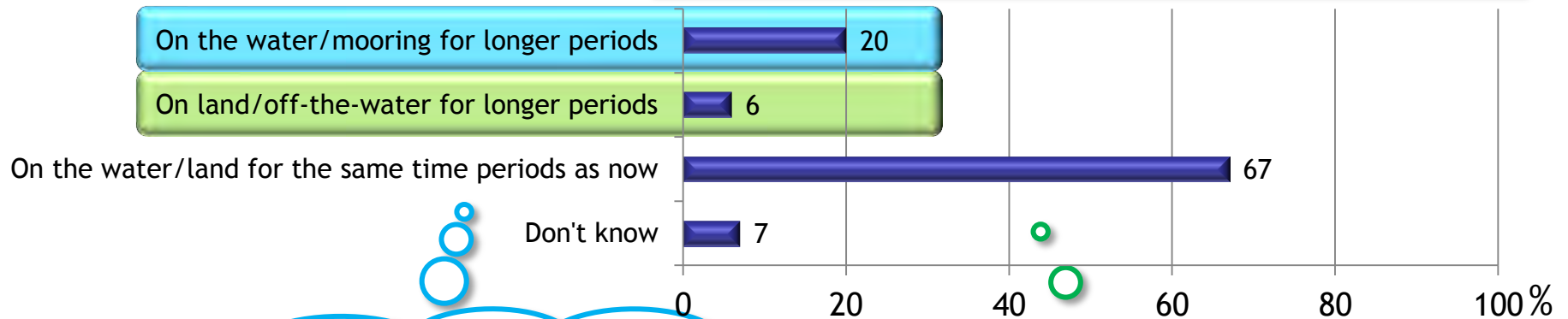
Q: Why do you say that? Unprompted, multiple response

Future boat ownership: On land or off-water?

PBOs

31

Where likely to keep boats in next 5 years



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 you 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

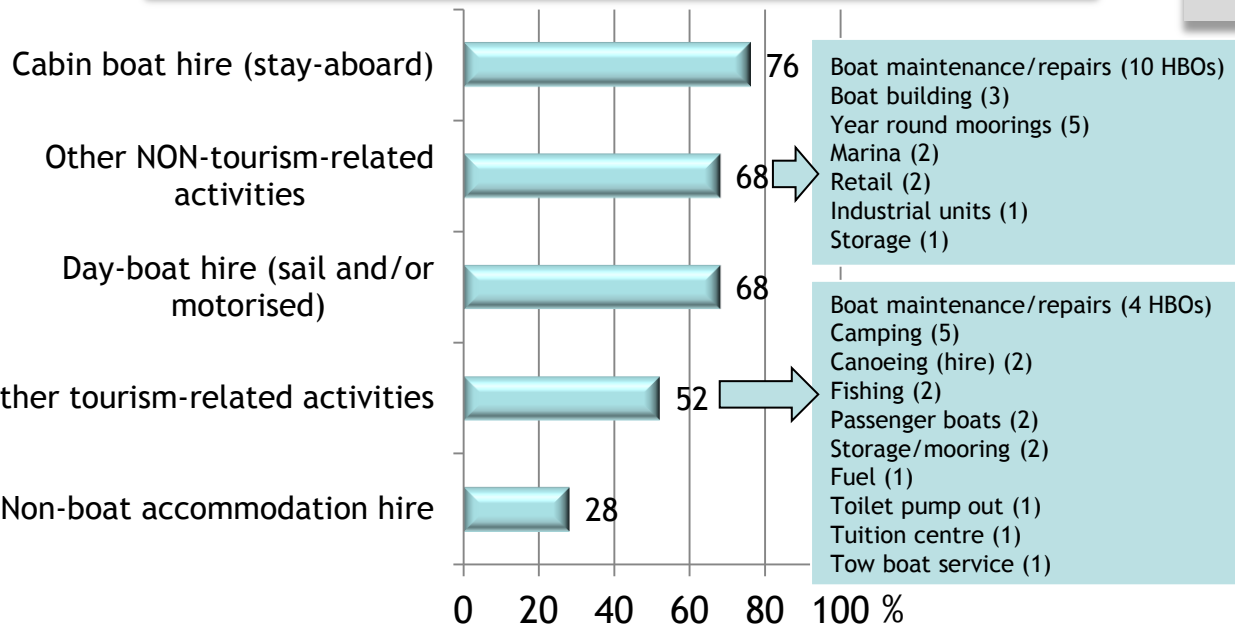
Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Sources of income/revenue generation

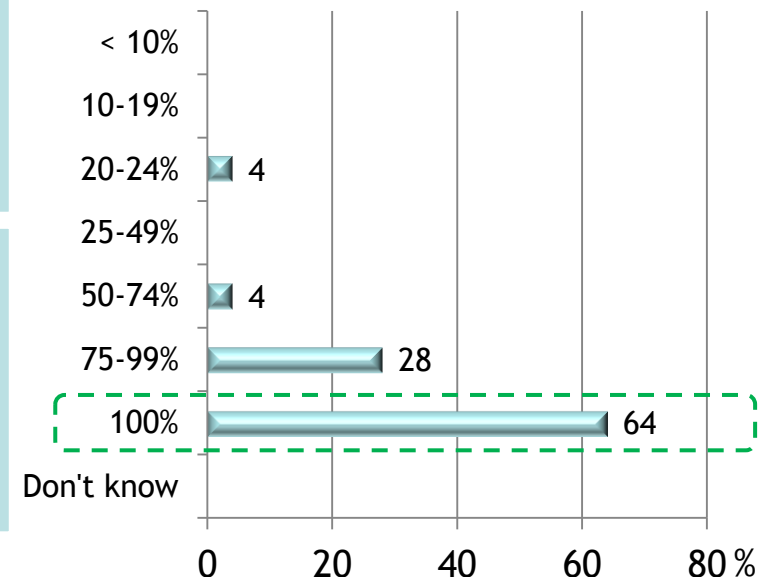
HBOs

- 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



Proportion of income from boat-related activity



Base: 25 HBOs, prompted, multiple response
 Q: Which of the following are principle sources of income/revenue generation for your organisation?

Base: 25 HBOs, prompted, single response
 Q: What proportion of your organisation's income is attributable specifically to boat-related activity?

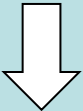
Fleet location and typical use

HBOs

34

→ 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

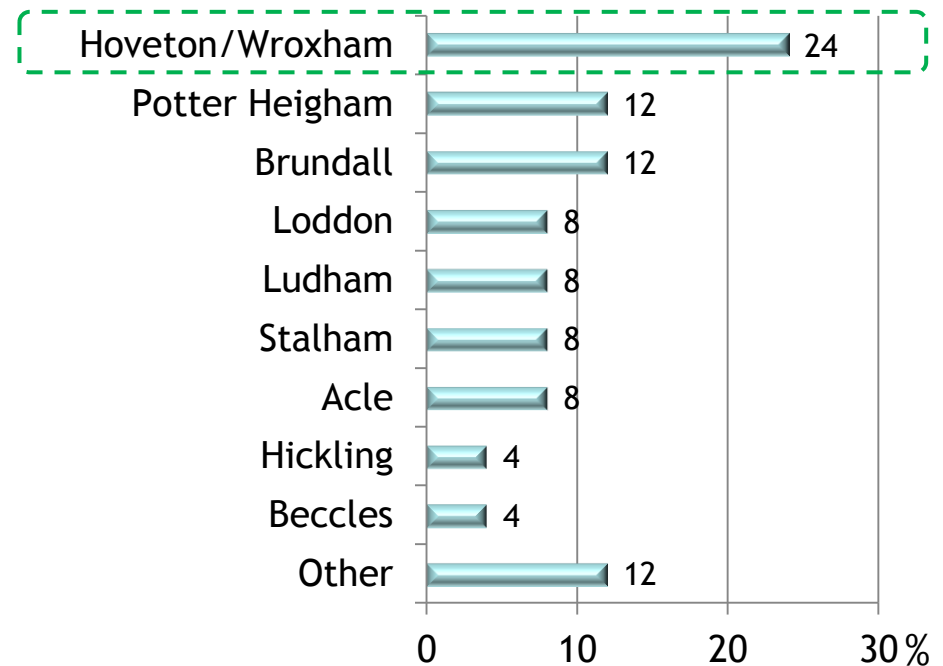
Average number of hire days per boat in the past year

	Any type of power or non-powered:	
	Day boat hire	Cabin boat hire
Mean average number of days in past 12 months	68 (9.7 weeks)	131 (18.7 weeks)
Range (days)	30 - 220	49 - 290

Base: 25 HBOs, prompted, multiple response

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

Fleet locations



Base: 25 HBOs, prompted, single response

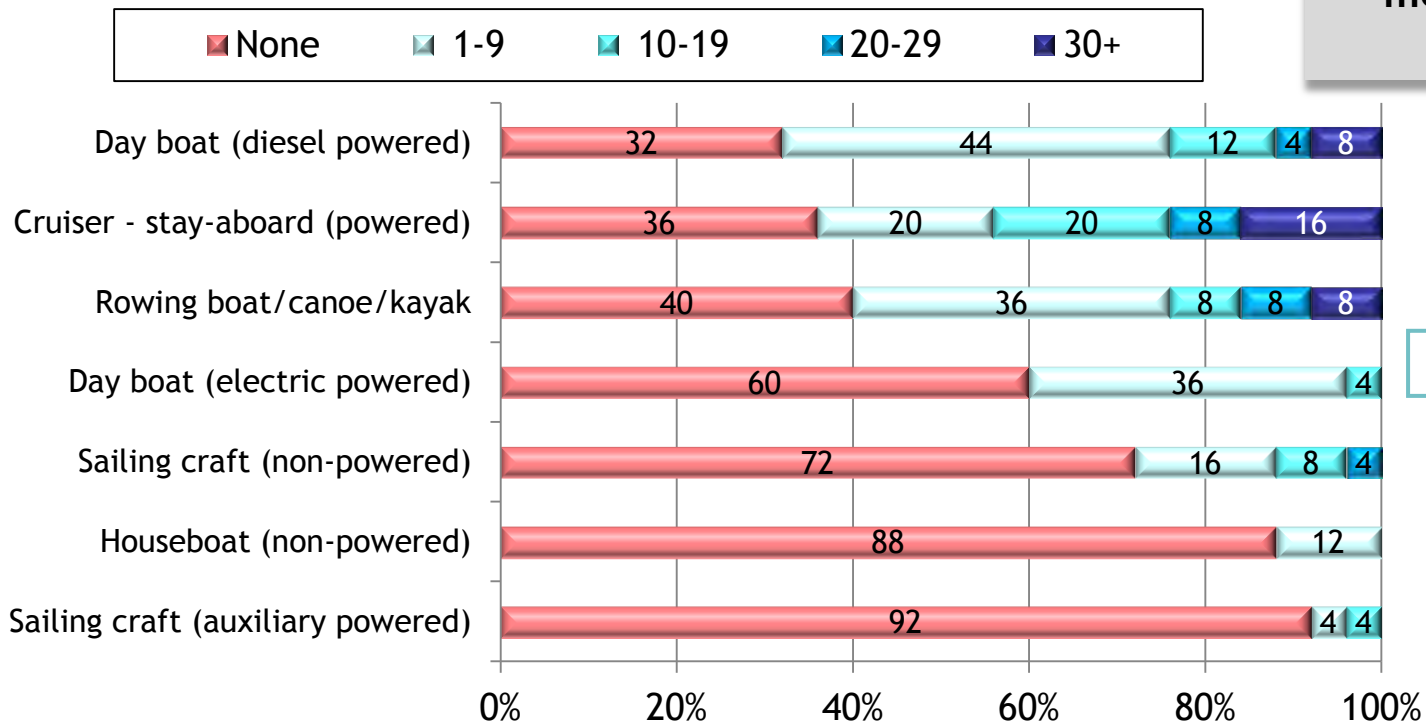
Q: Where on the Broads are you boat fleet bases?

Fleet make-up: Type of boats

HBOs

Number of boats in current fleet

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



Where applicable

Same/less
Same/less
Same
More/same/less
Same
Same
More

Base: 25 HBOs, prompted, single response

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

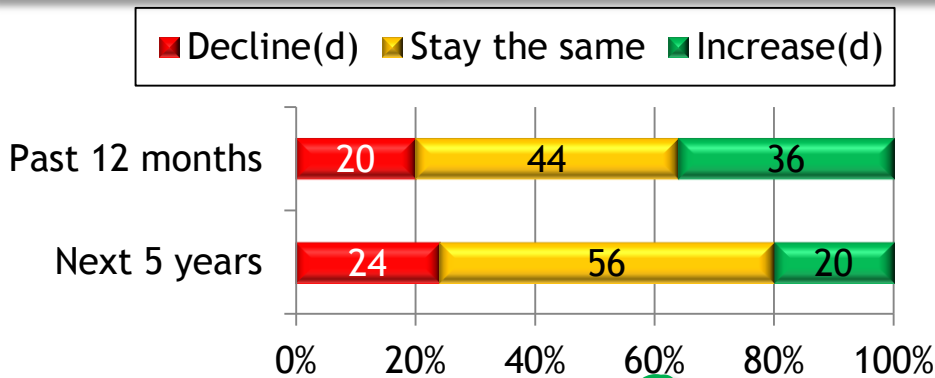
Q: In the next 5-years are you likely to be offering more, the same or less of the following types of crafts?

Fleet make-up: Number of boats

HBOs

- 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



Number of boats in next 5 years >>	Will increase in next 5 years	Will stay the same	Will decrease in next 5 years
Number of boats in last 12 months ∇			
NO. OF RESPONDENTS			
Increased in last 12 months (N=9)	2	7	-
Stayed the same in last 12 months (N=11)	2	7	2
Declined in last 12 months (N=5)	1	-	4

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

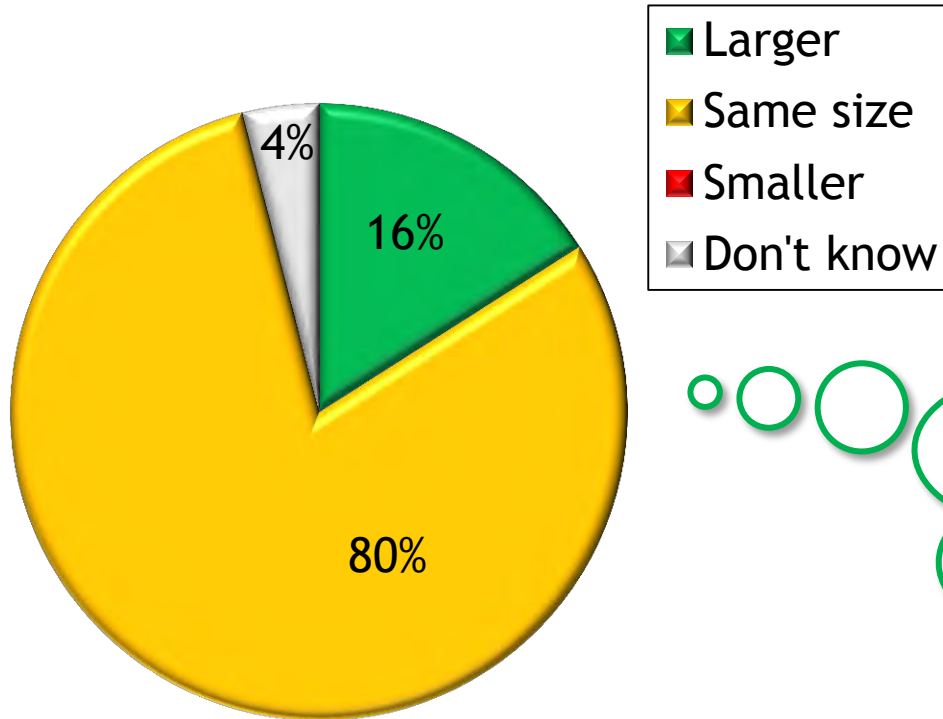
Q: Why do you say that? Unprompted, multiple response

Fleet make-up: Average size of boats

HBOs

37

Average size of boats in fleet in next 5 years







Why larger?

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

Living in the Broads area

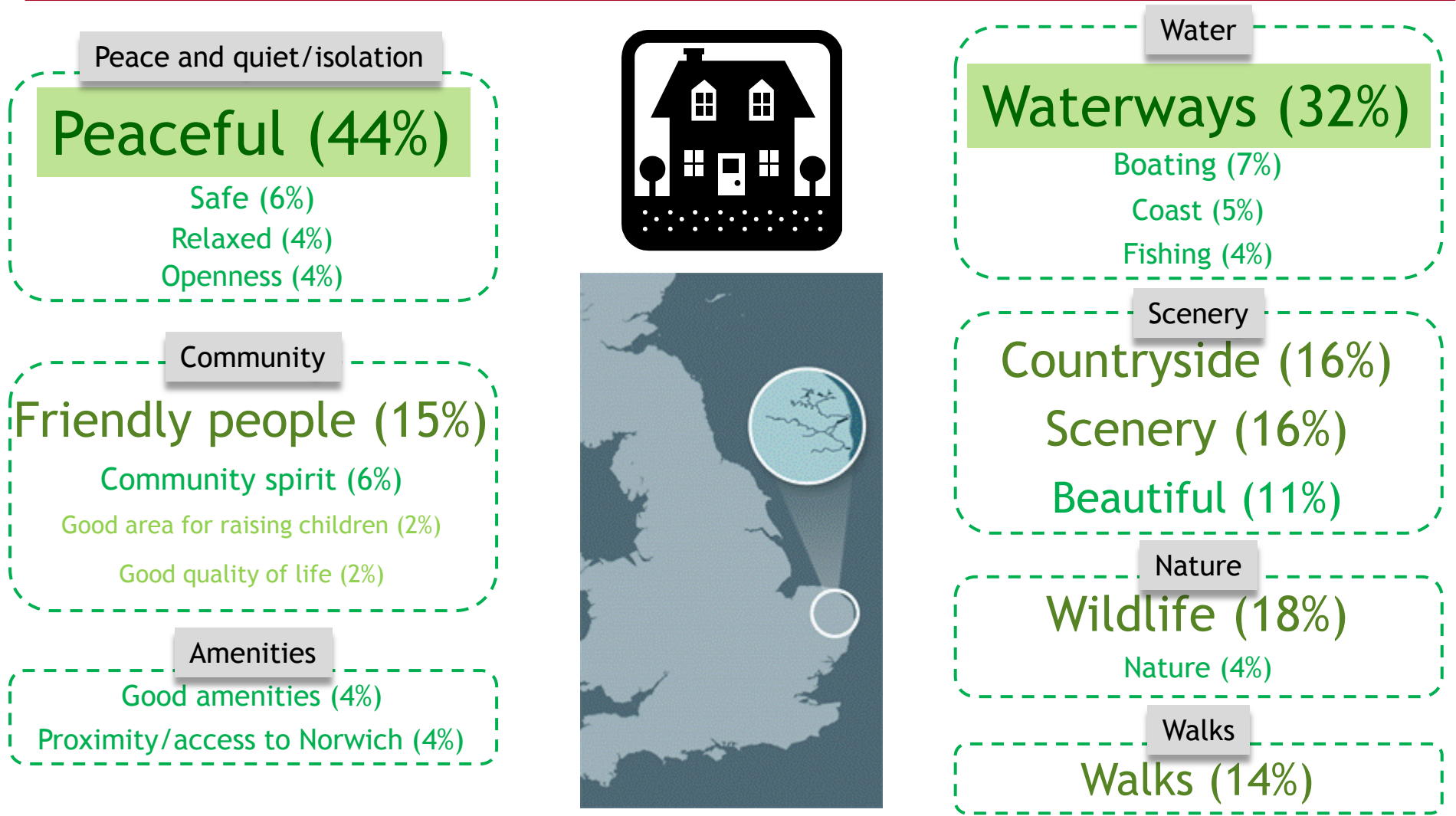
RESIDENTS

Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Best aspects of living in the Broads area

(unprompted) (key responses) RESIDENTS

39



How the Broads Authority could enhance experience of living on the Broads (unprompted) (key responses) RESIDENTS

40

Nothing
47%

Don't
know
16%

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”

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”

No overdevelopment

“Stop overdevelopment of Broads villages with overpriced housing”

“Limiting development. No more building please!”

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”

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”





Maintaining footpaths

“Footpaths are poor particularly Ludham Bridge and St Benets Abbey”

“...keeping paths clear of brambles and maintaining footpaths”

Visitor behaviour

VISITORS

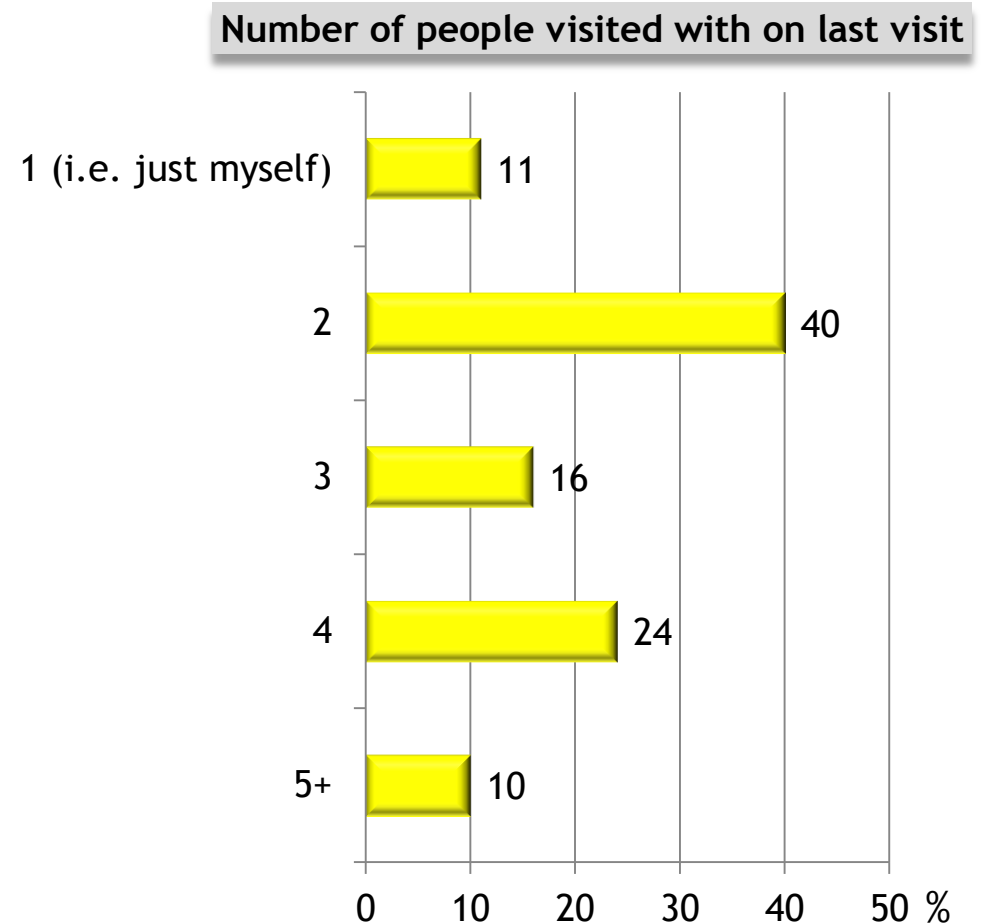
Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Number of people visited the Broads with on last visit

VISITORS

42

- 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

Things to do



Boating (12%)

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

Environment



Beautiful (scenery) (14%)

Like/love area (12%)

Relaxing (3%)
Peaceful (3%)
Nature/wildlife (2%)

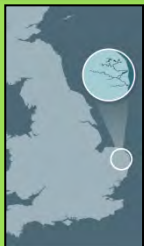
Holiday



Holiday (11%)

Short/weekend break (2%)

Location



Visiting friends/family (8%)

Close/nearby (8%)

Day out (3%)

Doing something new

Hadn't been before (7%)

Something different (4%)

Recommendation (3%)

Familiarity



Been before (5%)

Childhood memories (2%)

Used to live there (1%)

Suggested improvements to visitor experience

(unprompted) (key responses) VISITORS

44

Nothing
49%

Don't know
10%

Improved access

Improved road access (into Norfolk/Suffolk and within) (5%)

"Better access to the more remote waterways"

"The road network. Travelling to Norfolk by road is a nightmare!"

Better parking provision (3%)

"More convenient parking at more extreme locations of the Broads"

Better public transport (1%)

"Easier access for people like me with no transport"

"Some places are not accessible by public transport"

Better signage (1%)

"Better signage - it was a nightmare on the roads to find any tourist attractions"

"Better signposting in very rural areas"

Better prices

Cheaper prices (unspec) (4%)

Cheaper accommodation (3%)

"The cost of staying in UK tourist accommodation is so high. I wish it could be cheaper!"

"Perhaps more special offers on accommodation"

Cheaper boat hire (2%)

"Bring down the cost of hiring a boat"
"Boat trips at a more reasonable cost"

Less commercialisation

Less touristy/crowded (2%)

"Not make it too commercial"

Fewer boats (1%)

"Less congestion on the waterways"
"Limit the number of motorboats"

Better facilities

More to do (3%)

Wider catering offering (2%)

"More places to sit and get light refreshments"

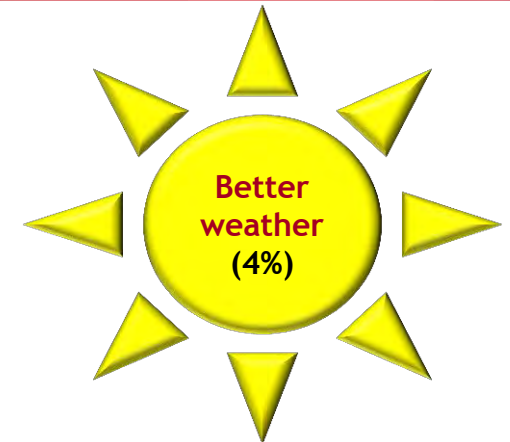
More information (points) (2%)

Cleaner facilities/streets (2%)

"Clean up the rubbish!"

More mooring facilities (1%)

"More mooring spots as it can be very busy"



Future visiting and recommendation (prompted)

VISITORS

45

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

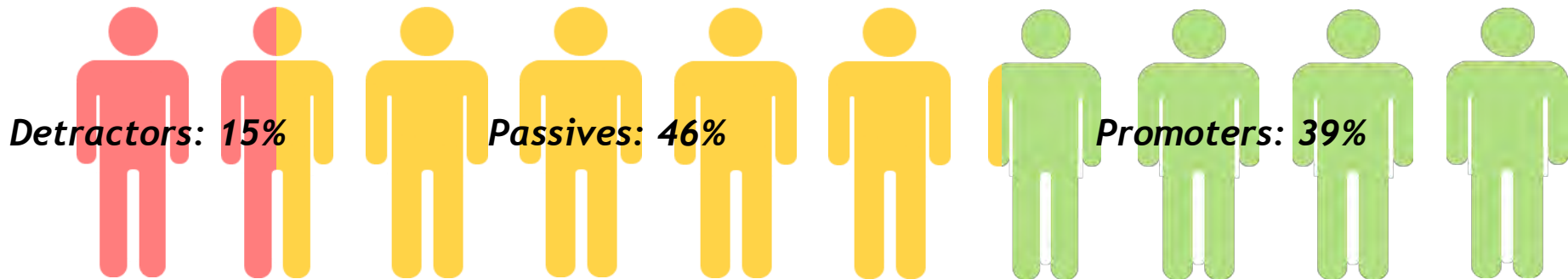


Mean score~



(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?







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

Activities undertaken, & facilities used, on the Broads

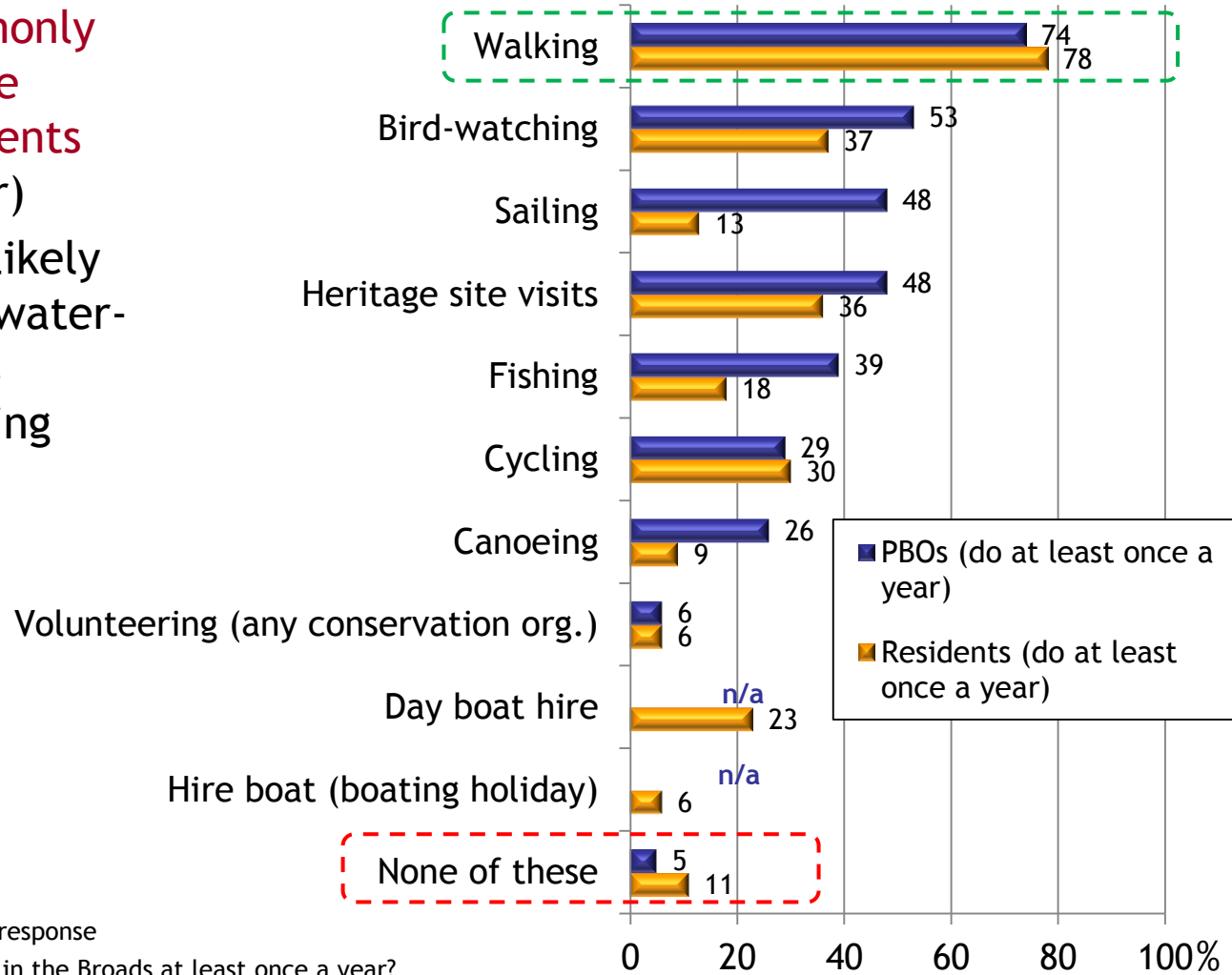
PBOs, RESIDENTS & VISITORS

Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

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



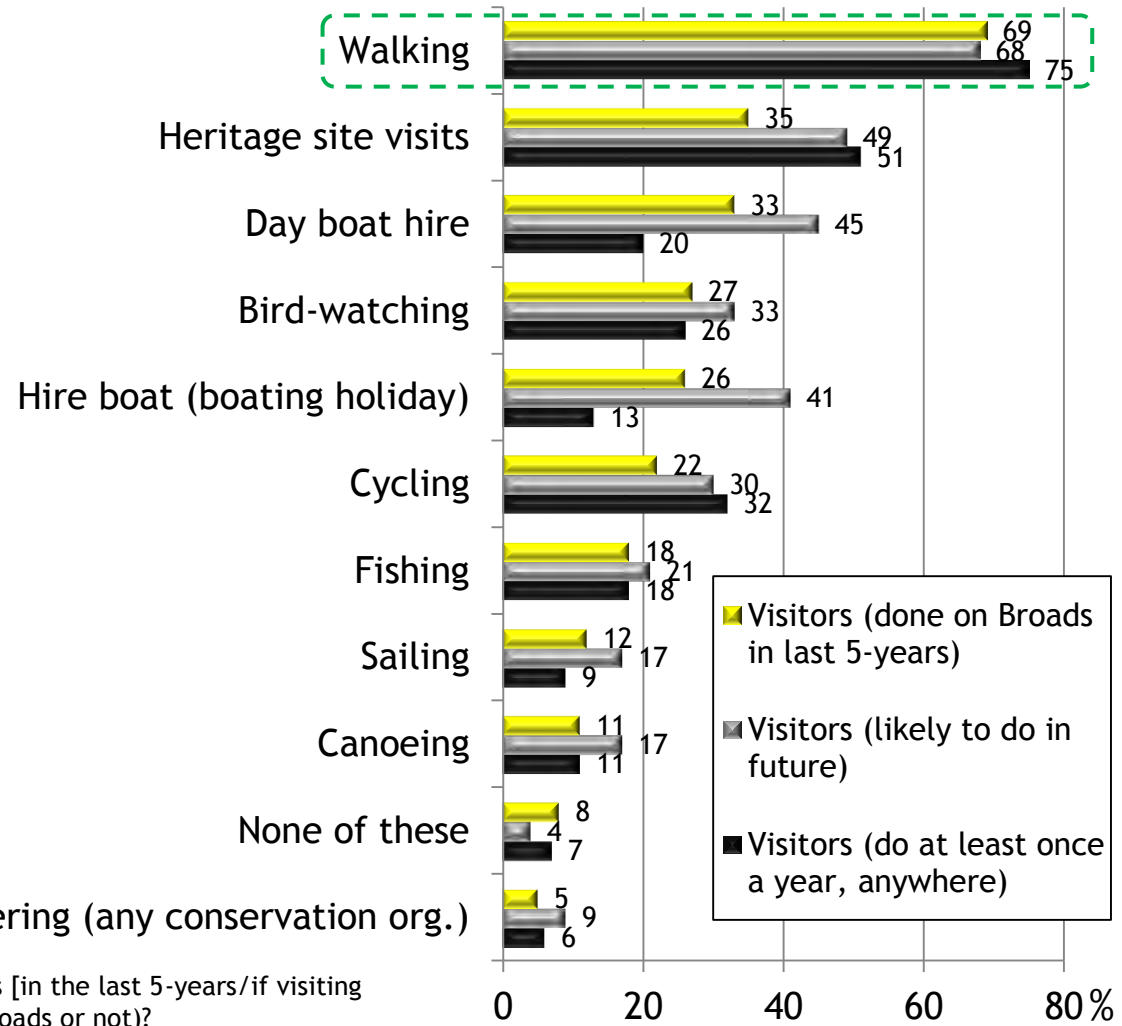
Base: 747 PBOs & 250 Residents, prompted, multiple response

Q: Which of the following leisure activities do you do in the Broads at least once a year?

Activities on the Broads (prompted)

VISITORS

- 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

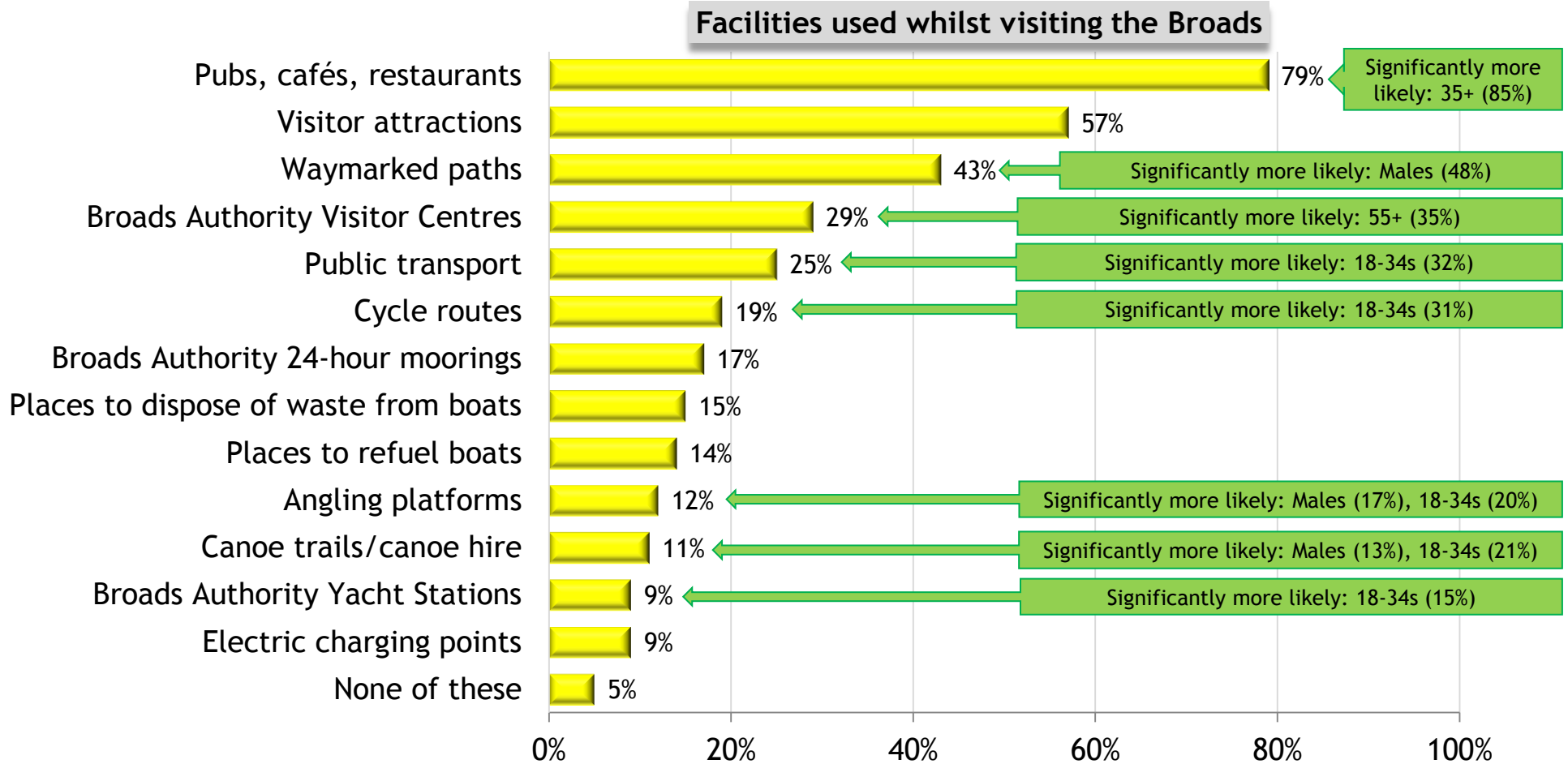


Base: 600 Visitors, prompted, multiple response

Q: Which of the following leisure activities do you do in the Broads [in the last 5-years/if visiting the Broads in the future/do at least one a year (whether on the Broads or not)?

Facilities used whilst visiting the Broads (prompted)

VISITORS



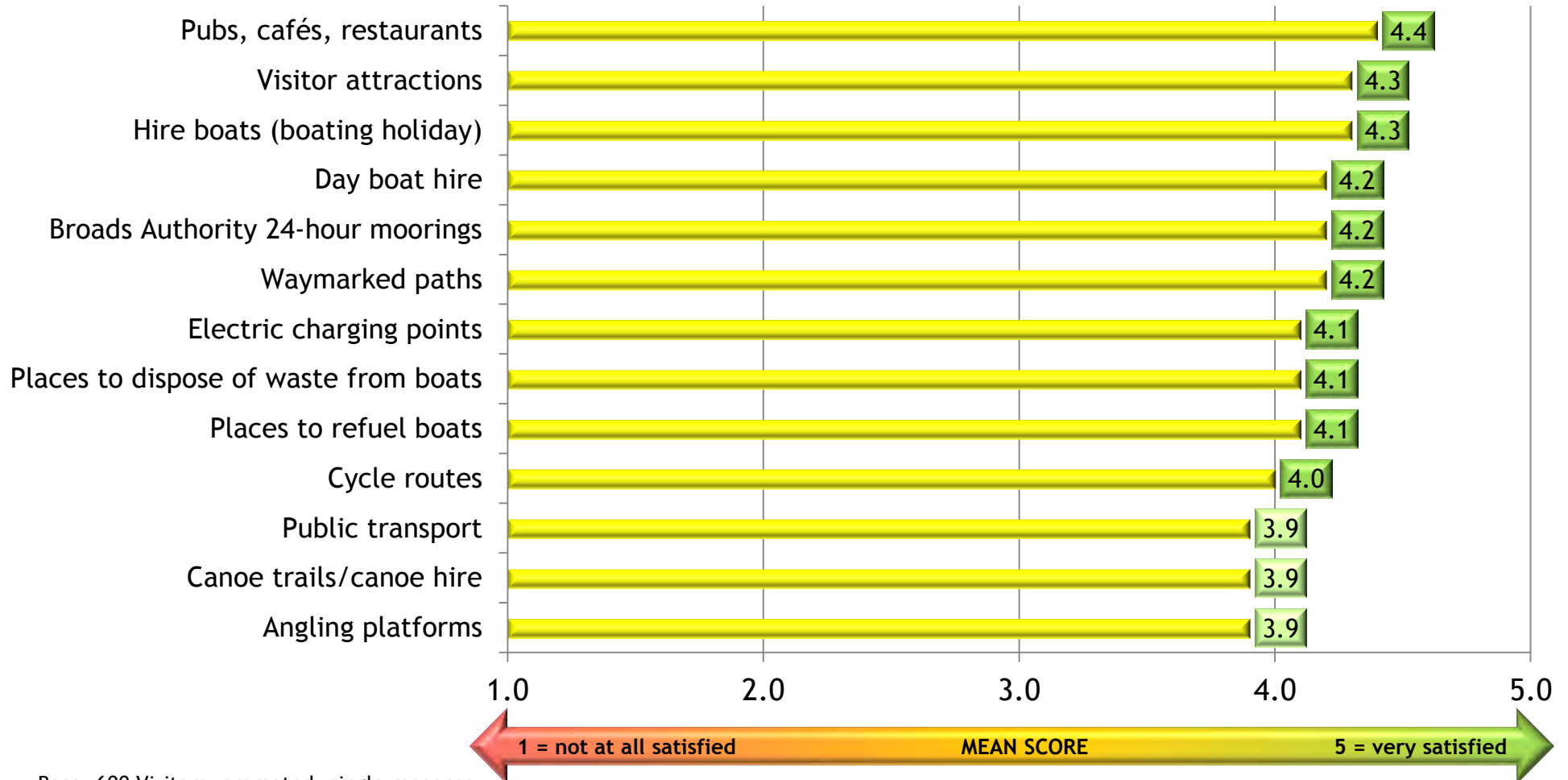
Base: 600 Visitors, prompted, multiple response

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

Satisfaction with availability of facilities on the Broads

(prompted: Mean scores) VISITORS

50



Base: 600 Visitors, prompted, single response

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

Satisfaction with quality 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 quality of the following on the Broads?

Broads Authority Visitor Centres used and satisfaction

(prompted) RESIDENTS

- 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



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

53



← Most likely:

Better (free) parking

Better signage/access

Better catering facilities

More to do/interactive displays

More moorings/boating facilities

More information

Open more hours/seasons

More/friendlier staff





Modernisation/refurbishment

	Residents	Visitors
Better (free) parking	10%	3%
Better signage/access	5%	4%
Better catering facilities	2%	2%
More to do/interactive displays	2%	2%
More moorings/boating facilities	2%	3%
More information	2%	3%
Open more hours/seasons	1%	4%
More/friendlier staff	1%	3%
Modernisation/refurbishment	No mentions	2%



Awareness of the Broads Authority

RESIDENTS & VISITORS

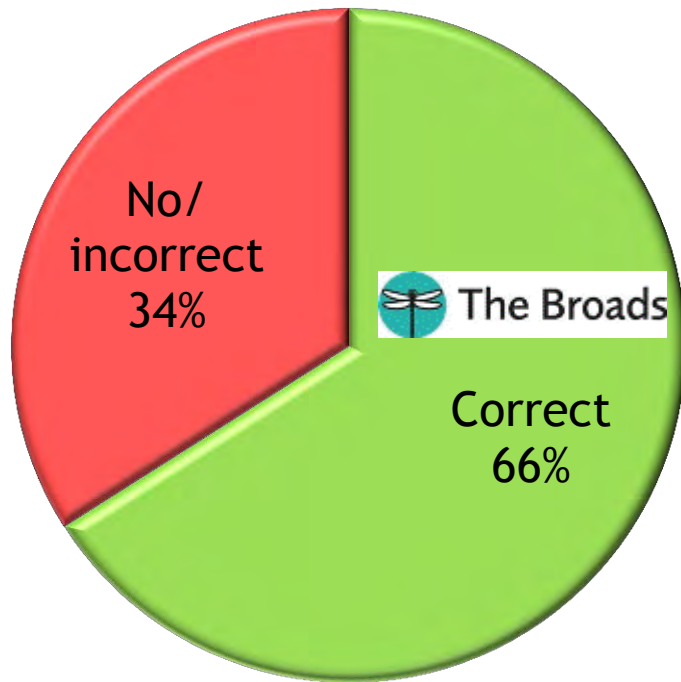
Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Organisation mainly responsible for management of the Broads?

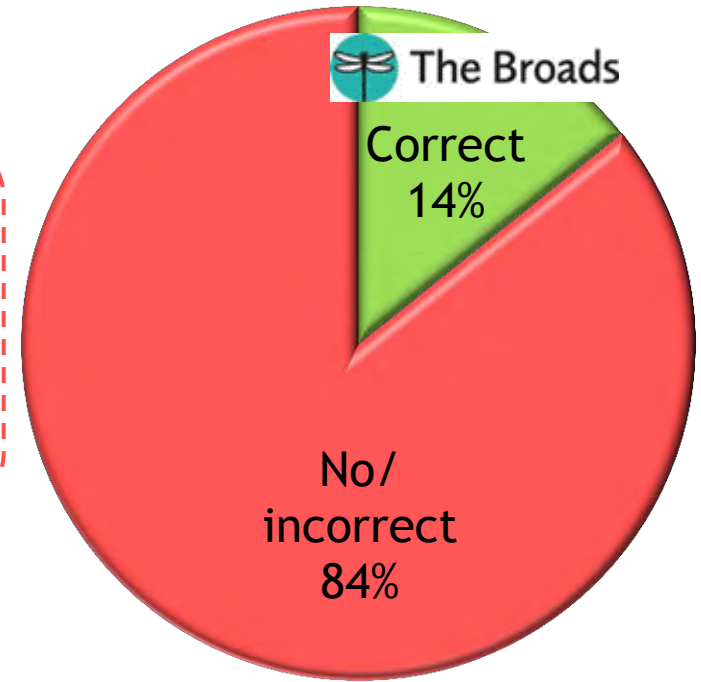
(unprompted) (key responses) RESIDENTS & VISITORS

- 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)



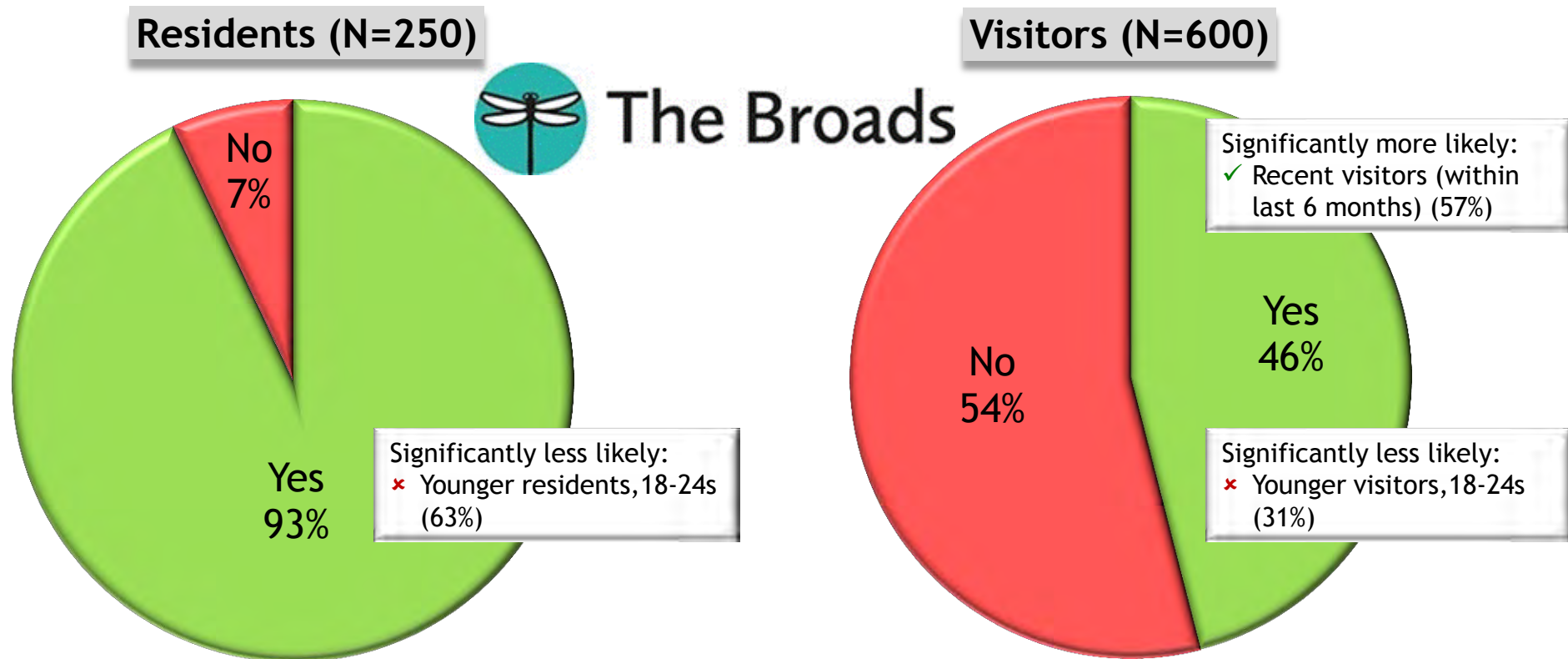
Visitors (N=600)



Whether heard of the Broads Authority (prompted)





RESIDENTS & VISITORS

- 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



Perceptions of Broads Authority performance

PBOs, HBOs, RESIDENTS & VISITORS

Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Descriptors of the Broads Authority (unprompted) (key responses)

PBOs & HBOs

PBOs



HBOs



Descriptors of the Broads Authority (unprompted) (key responses)

RESIDENTS & VISITORS

Residents



Visitors



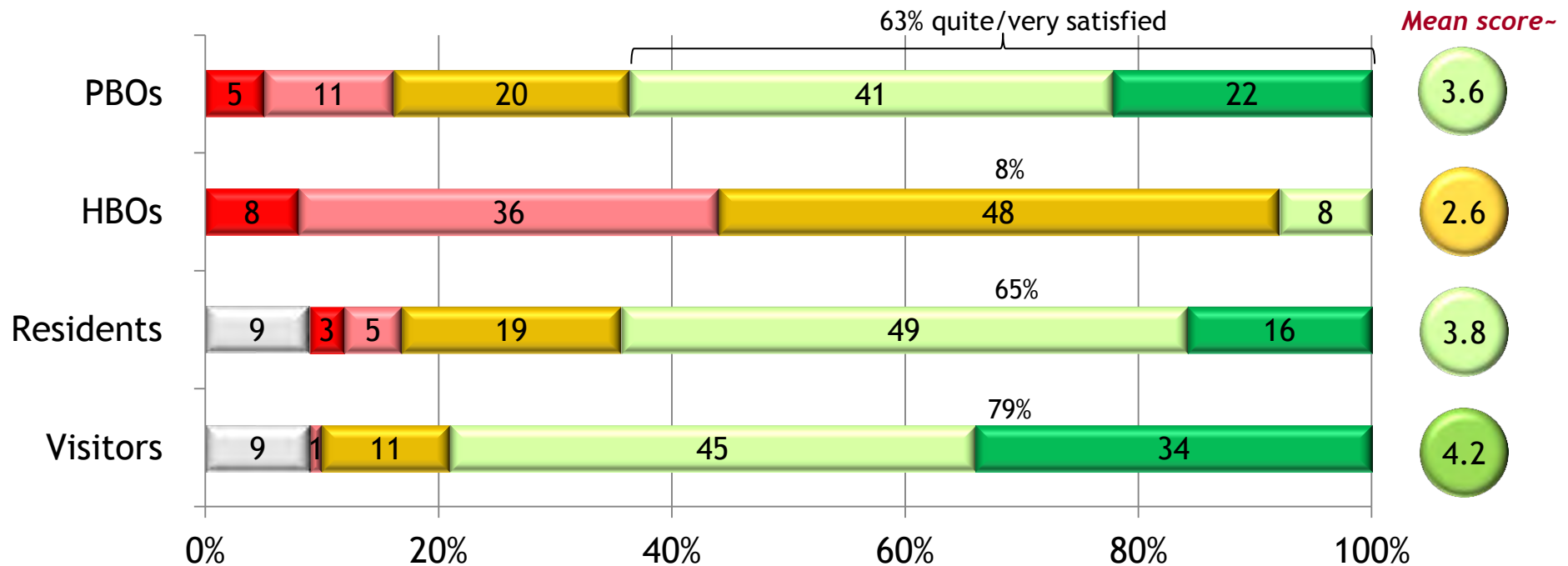
Satisfaction with the Broads Authority performance

(prompted) PBOs, HBOs, RESIDENTS & VISITORS

60

- 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

■ Don't know
 ■ 1 = Not at all satisfied
 ■ 2 = Not very satisfied
 ■ 3 = Neutral
 ■ 4 = Quite satisfied
 ■ 5 = Very satisfied



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

61

PBOs

- 25% They do a good job
- 7% Seen improvements to Broads
- 7% Helpful staff
- 2% Employ great people
- 2% Staff/rangers are visible

HBOs

- 24% They do a good job
- 12% Excellent frontline staff

Residents

- 26% They do a good job
- 11% Broads are well maintained
- 8% Good experience/no problems
- 3% Helpful staff

- 4% Wasteful with money
- 4% Haven't seen improvements
- 3% Inefficient/slow
- 2% Focus on the wrong things
- 2% Too top heavy

- 36% Don't feel supported
- 28% Focus on the wrong things
- 16% Wasteful with money
- 8% Inefficient/slow
- 8% Poor leadership

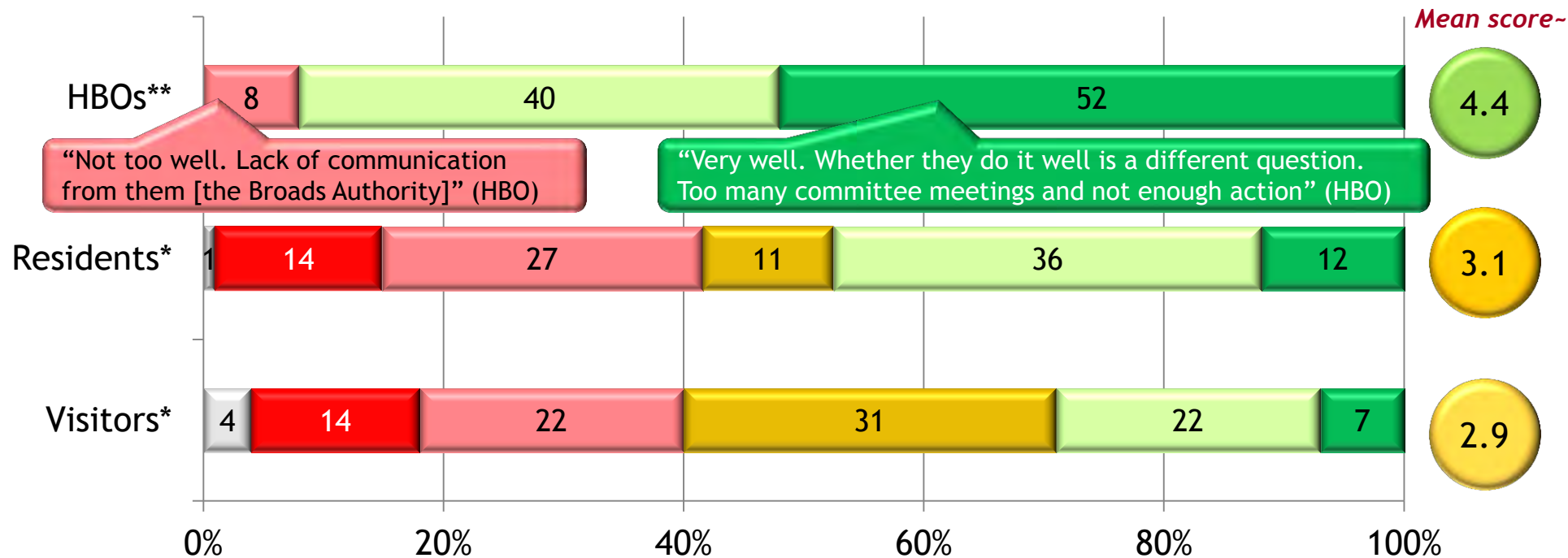
- 2% Little public consultation
- 2% Haven't seen improvements
- 1% Not very knowledgeable
- 1% Too top heavy

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)

■ Don't know
■ 1 = Not at all well
■ 2 = Not very well
■ 3 = Neutral
■ 4 = Quite well
■ 5 = Very well



Base: 25 HBOs, 250 Residents & 600 Visitors, *prompted, single response; ** unprompted, multiple response

Q: How well do you feel you understand the purposes of the Broads Authority?

How would describe current primary purpose(s) of the Broads Authority

(unprompted) (key responses) PBOs & HBOs

63

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**
- ✗ *Around one in ten don't know the current purpose*

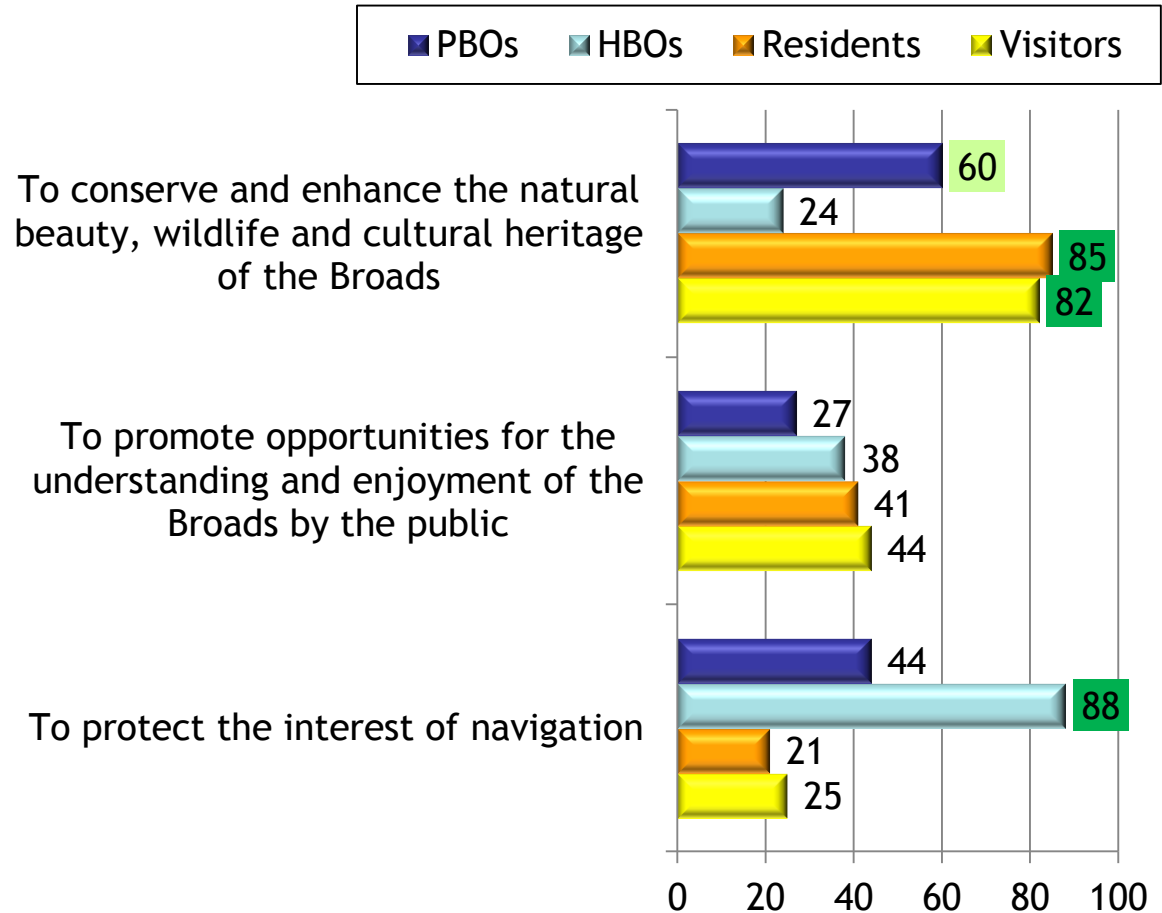
HBOs

- ✓ **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*

Ranking of Broads Authority 'purposes' (prompted: Weighted scores)

PBOs, HBOs, RESIDENTS & VISITORS 64

- 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?

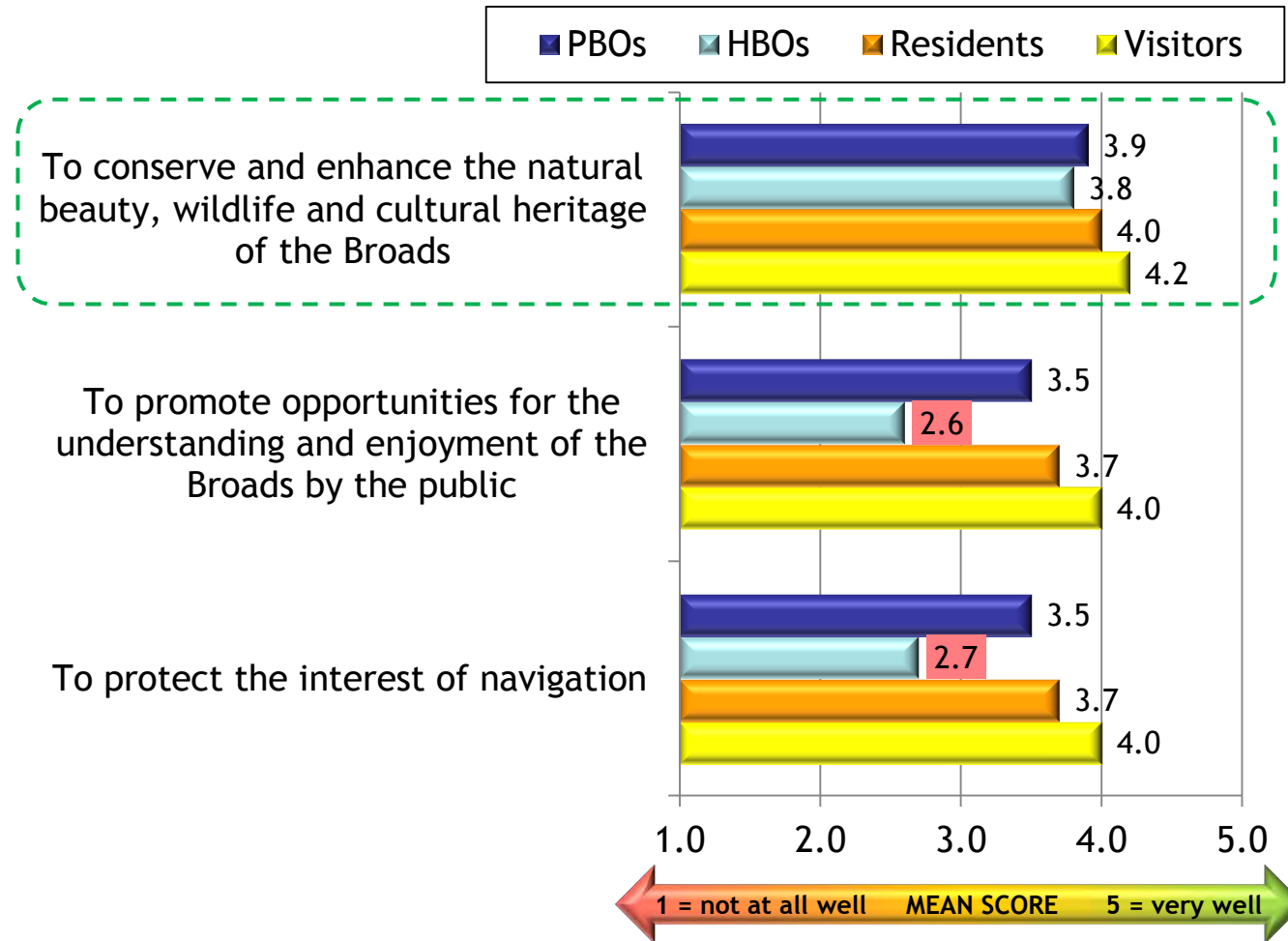
Weighted score where min = 0 and max = 100

To what extent Broads Authority meets ‘purposes’

(prompted: Mean scores) PBOs, HBOs, RESIDENTS & VISITORS





65

- 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



Future challenges & priorities for the Broads area & Broads Authority

PBOs, HBOs, RESIDENTS & VISITORS

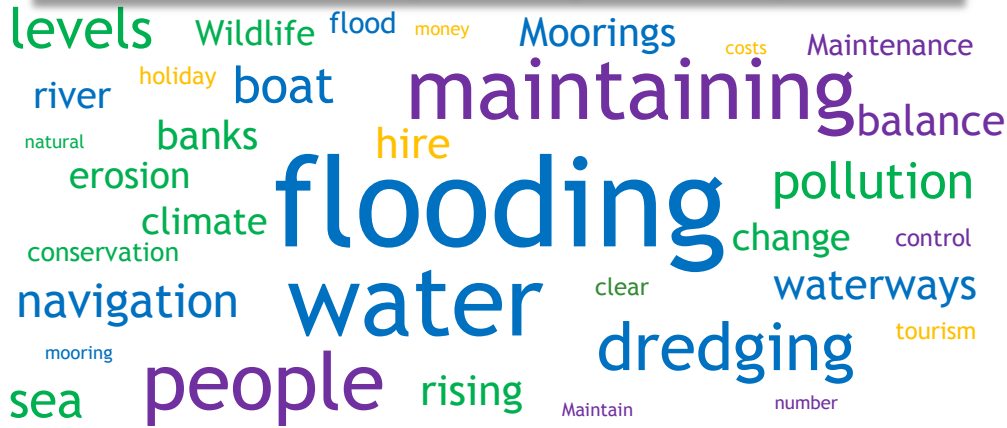
Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Challenges facing the Broads in next 25 years

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

Key:
Environment/climate
Boating/waterways
Economy/tourism
Development/sustainability

PBOs: Mainly boating/waterways



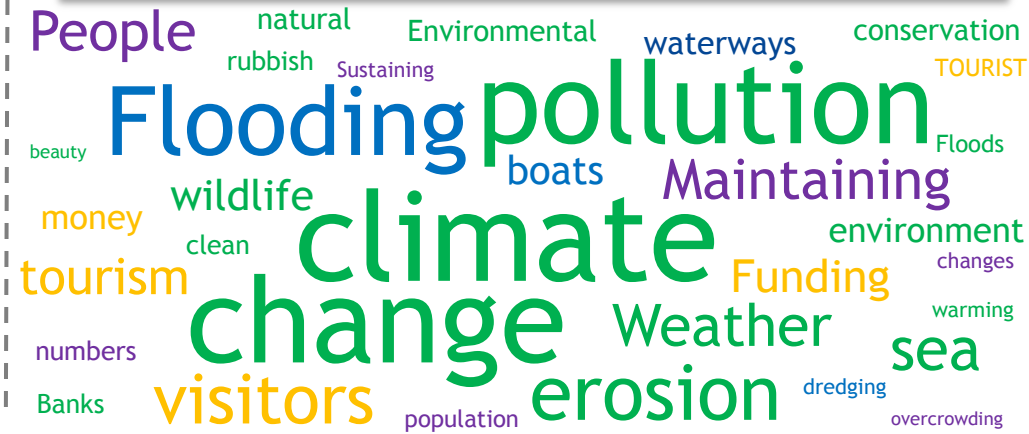
HBOs: Mainly tourism/economy



Residents: Mainly development/sustainability



Visitors: Mainly environment/climate

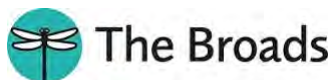


Priorities for the Broads Authority (prompted: Mean scores)

PBOs, HBOs, RESIDENTS & VISITORS

Prompted priority	PBOs	HBOs	Residents	Visitors
Management of flooding	✓✓		✓✓✓	✓✓
Wildlife conservation	✓✓		✓✓✓	✓✓
Dredging the rivers and Broads	✓✓	✓✓	✓✓✓	✓✓
Managing invasive species	✓✓		✓✓	✓✓
Promoting the area for tourism	✓	✓✓	✓	✓✓
Educating the next generation about the Broads	✓✓	✓✓	✓✓✓	✓✓
Responding to climate change	✓		✓	✓✓
Preserving windmills	✓		✓✓	✓✓
Improving the quality of tourism facilities	✓	✓✓	✓	✓✓
Assessing planning permission applications			✓	✓
Improving moorings	✓✓	✓✓	✓	✓

Mean score of:	4.5 or more = ✓✓✓	4.0 - 4.4 = ✓✓	3.5 - 3.9 = ✓
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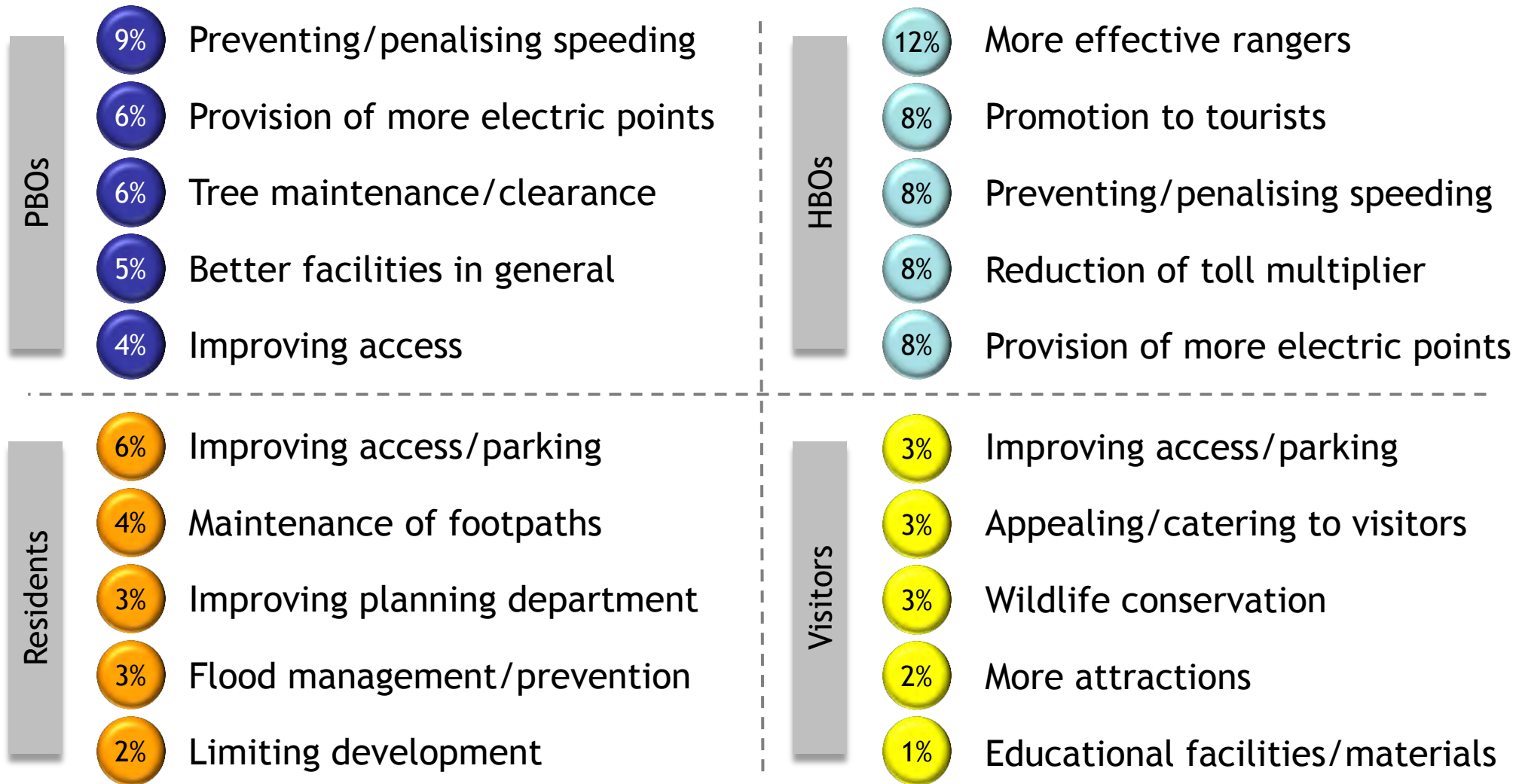
Base: 747 PBOs, 25 HBOs, 250 Residents & 600 Visitors, prompted, single response
 Q: To what extent do you regard the following as priorities for the Broads Authority, on a 5-point scale, where 1 = very low priority and 5 = very high priority?
 Mean scores significant at a 95% confidence level +/- 0.1 - 0.6



Other priorities for the Broads Authority to focus on

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

69

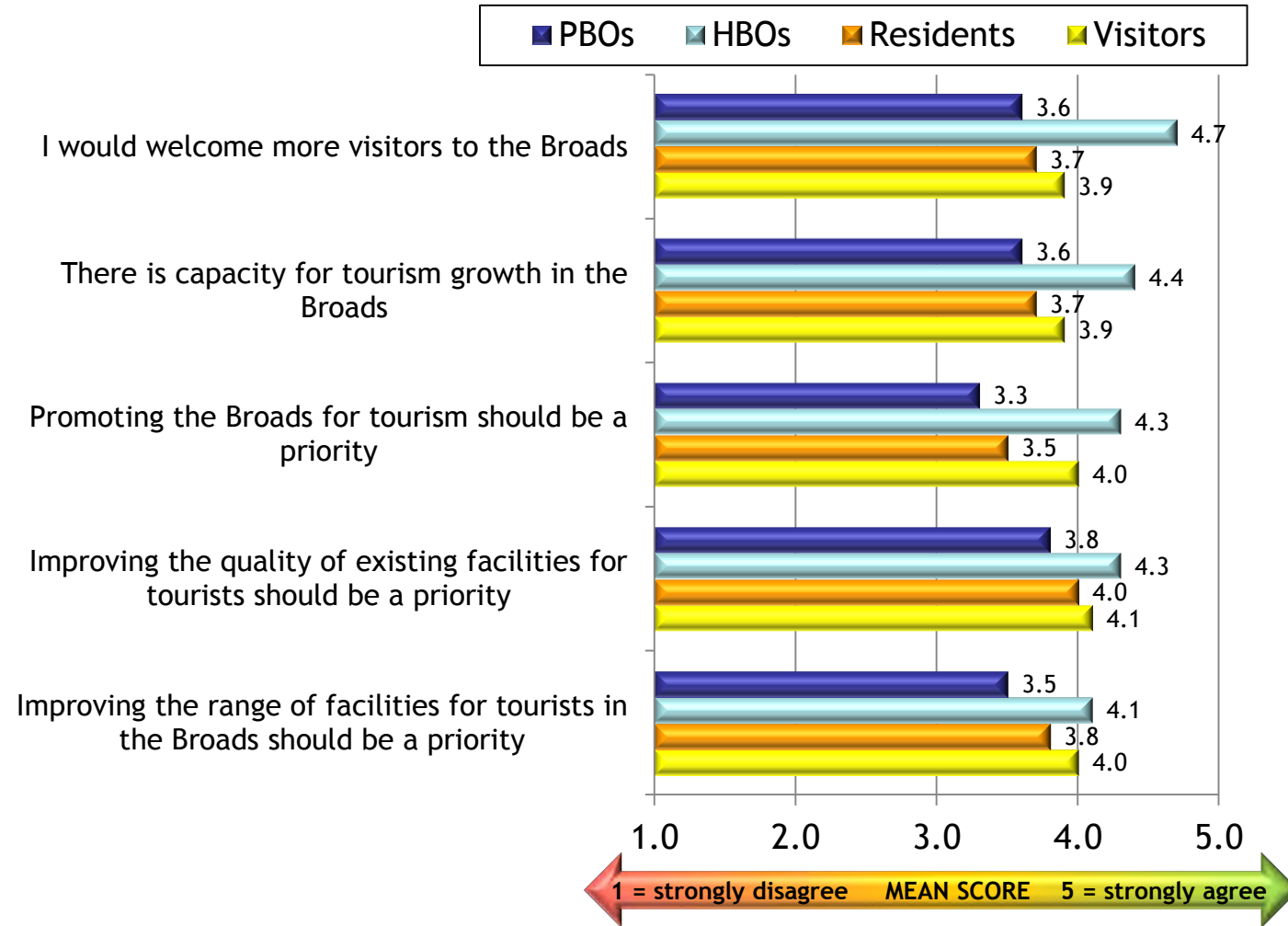


Agreement with statements about Broads tourism

(prompted: Mean scores) PBOs, HBOs, RESIDENTS & VISITORS

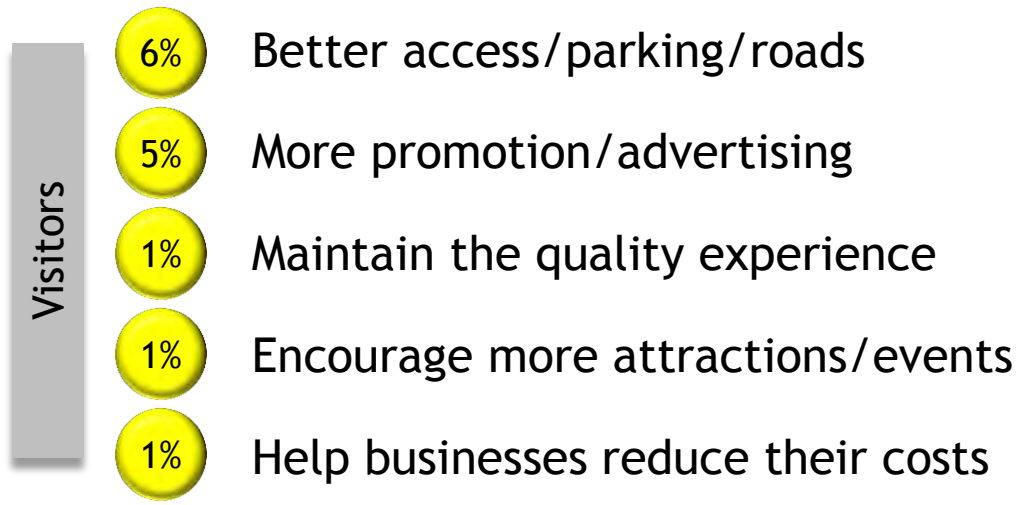
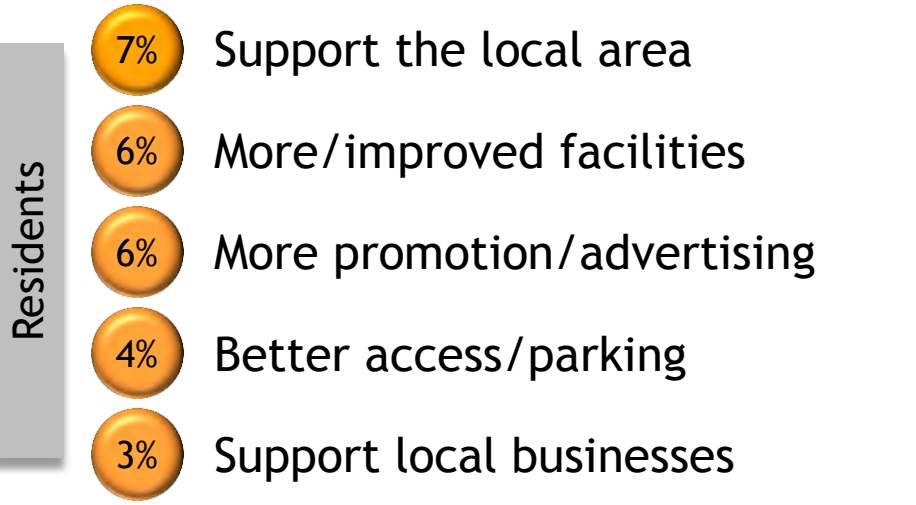
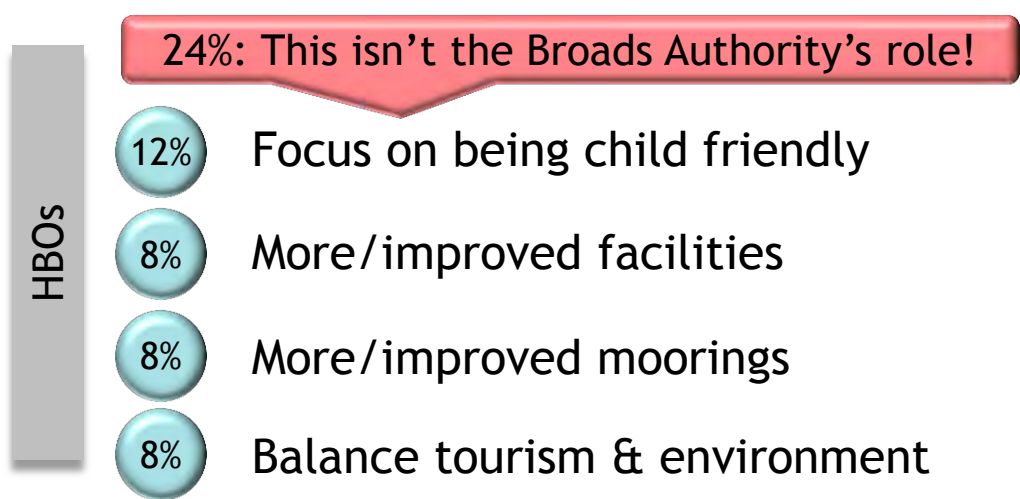
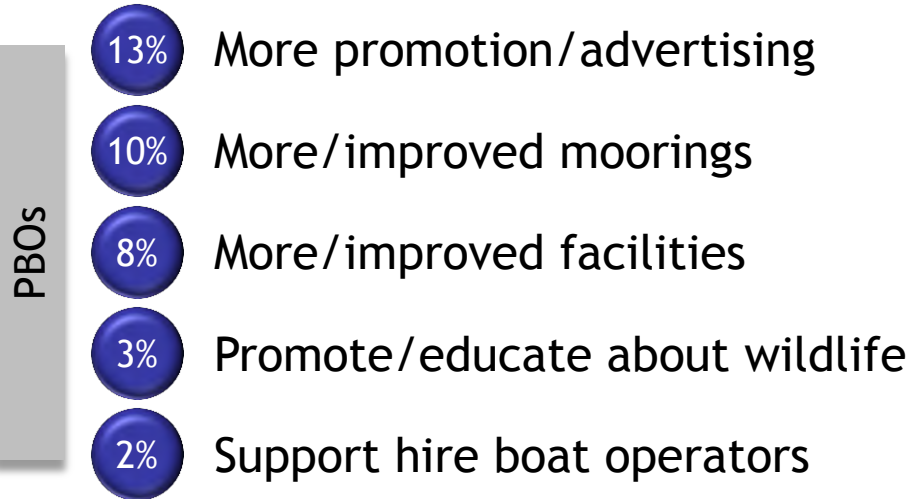
70

- 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







How the Broads Authority could support development of tourism

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



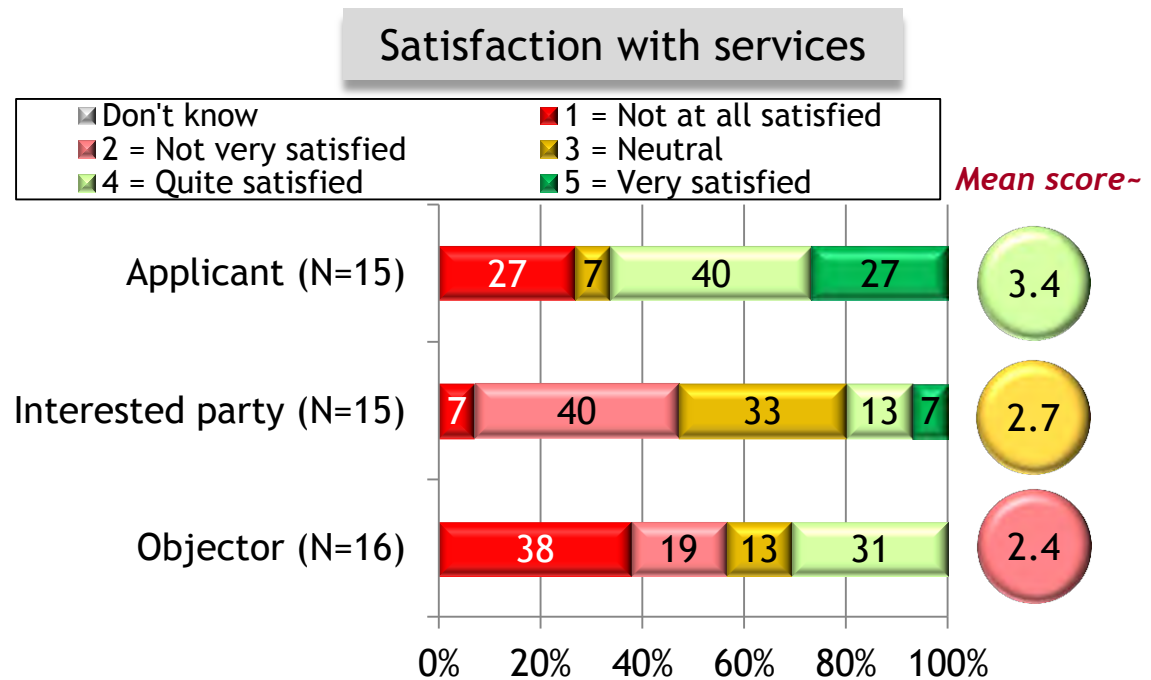
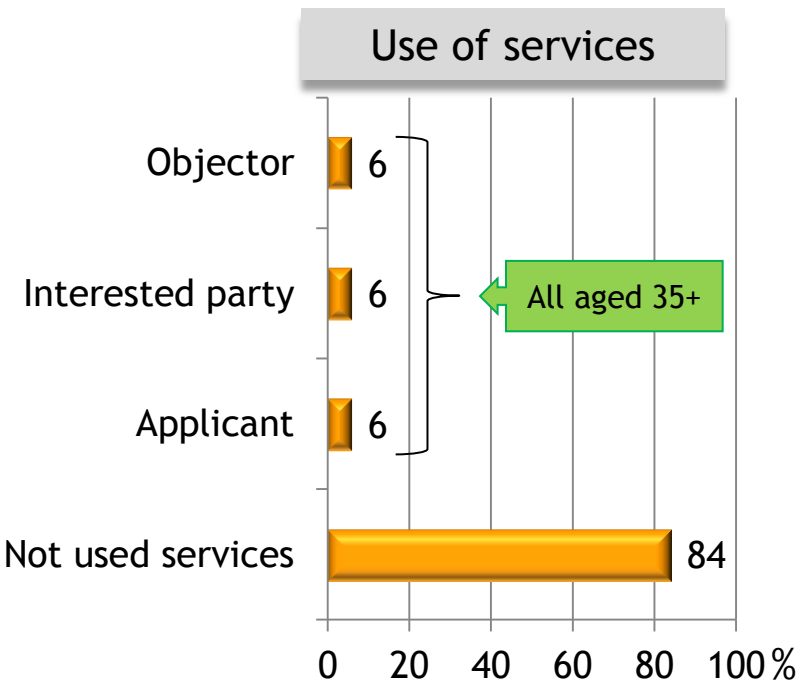
Perceptions of the Broads Authority as the Local Planning Authority

RESIDENTS

Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

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



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?

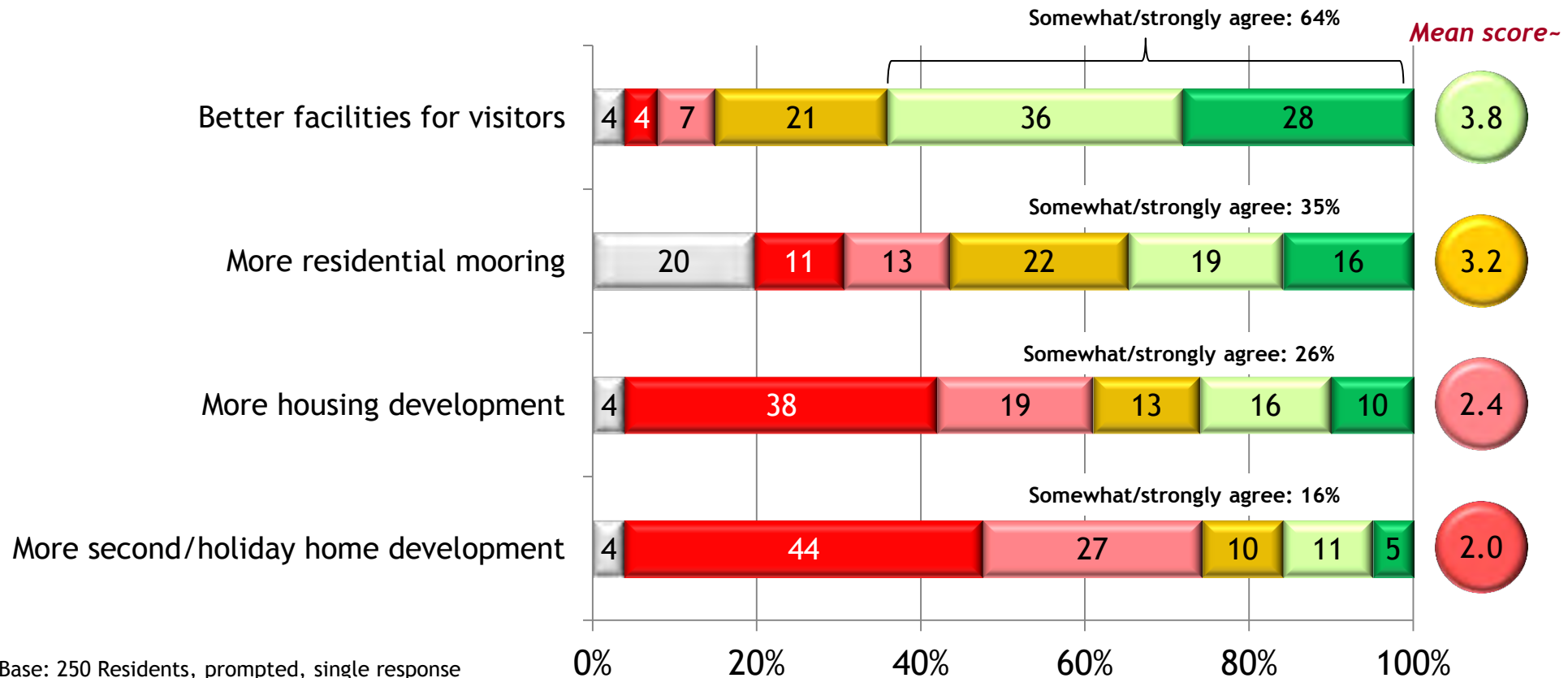
Base: Residents, prompted, single response
 Q: How satisfied were you with the service you received in each of these capacities?

Extent support local planning applications (prompted)

RESIDENTS

➔ 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

■ Don't know
 ■ 1 = Strongly disagree
 ■ 2 = Somewhat disagree
 ■ 3 = Neutral
 ■ 4 = Somewhat agree
 ■ 5 = Strongly agree







Base: 250 Residents, prompted, single response

Q: To what extent do you support the approval of local planning applications for...?

Perceptions of Broads National Park status

PBOs, HBOs, RESIDENTS & VISITORS

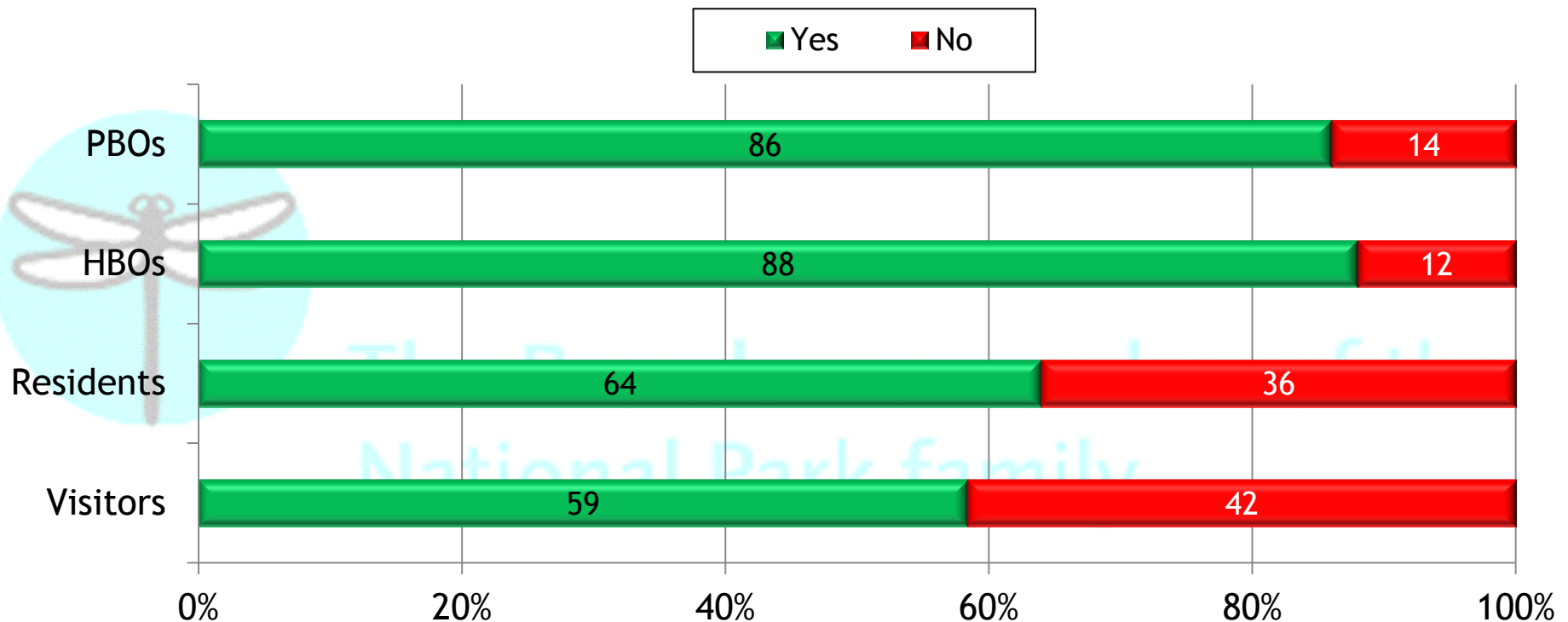
Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Aware that the Broads has status of a National Park?

(prompted) PBOs, HBOs, RESIDENTS & VISITORS

76

- 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

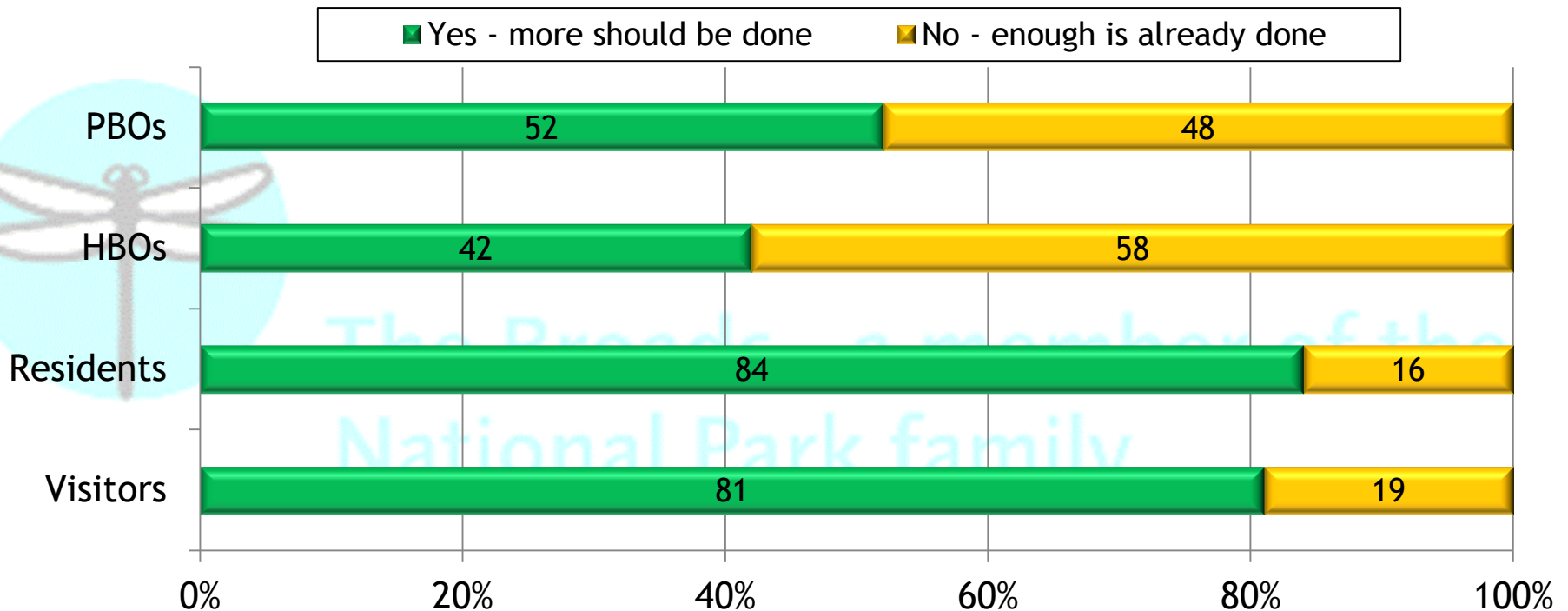
Q: Are you aware that the Broads has the status of a National Park?

Should more be done to promote National Park status?

(prompted) PBOs, HBOs, RESIDENTS & VISITORS

77

- 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



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?

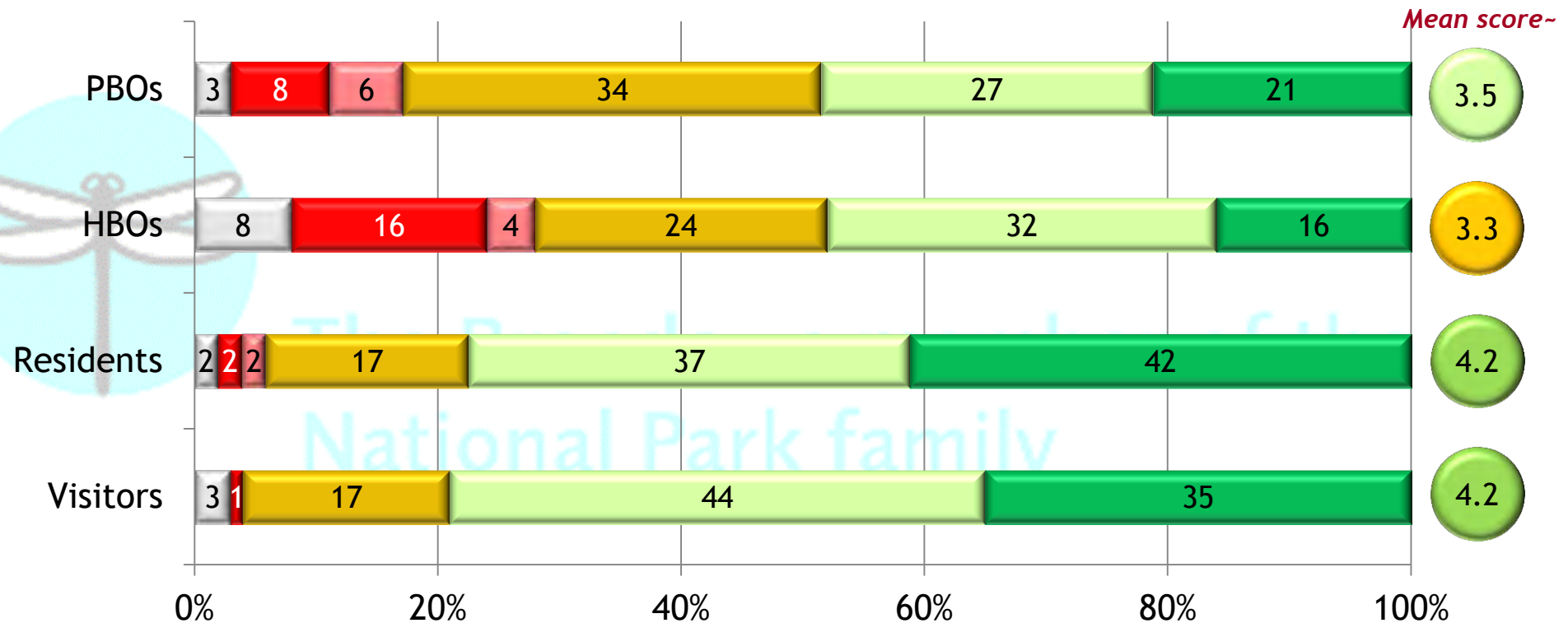
National Park status makes the Broads more appealing?

(prompted) PBOs, HBOs, RESIDENTS & VISITORS

78

- The Broads having National Park status is markedly more appealing to residents and visitors than PBOs and HBOs

■ 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







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

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? ~ Mean scores significant at a 95% confidence level +/- 0.1 - 0.5

Representative elections

PBOs, HBOs & RESIDENTS

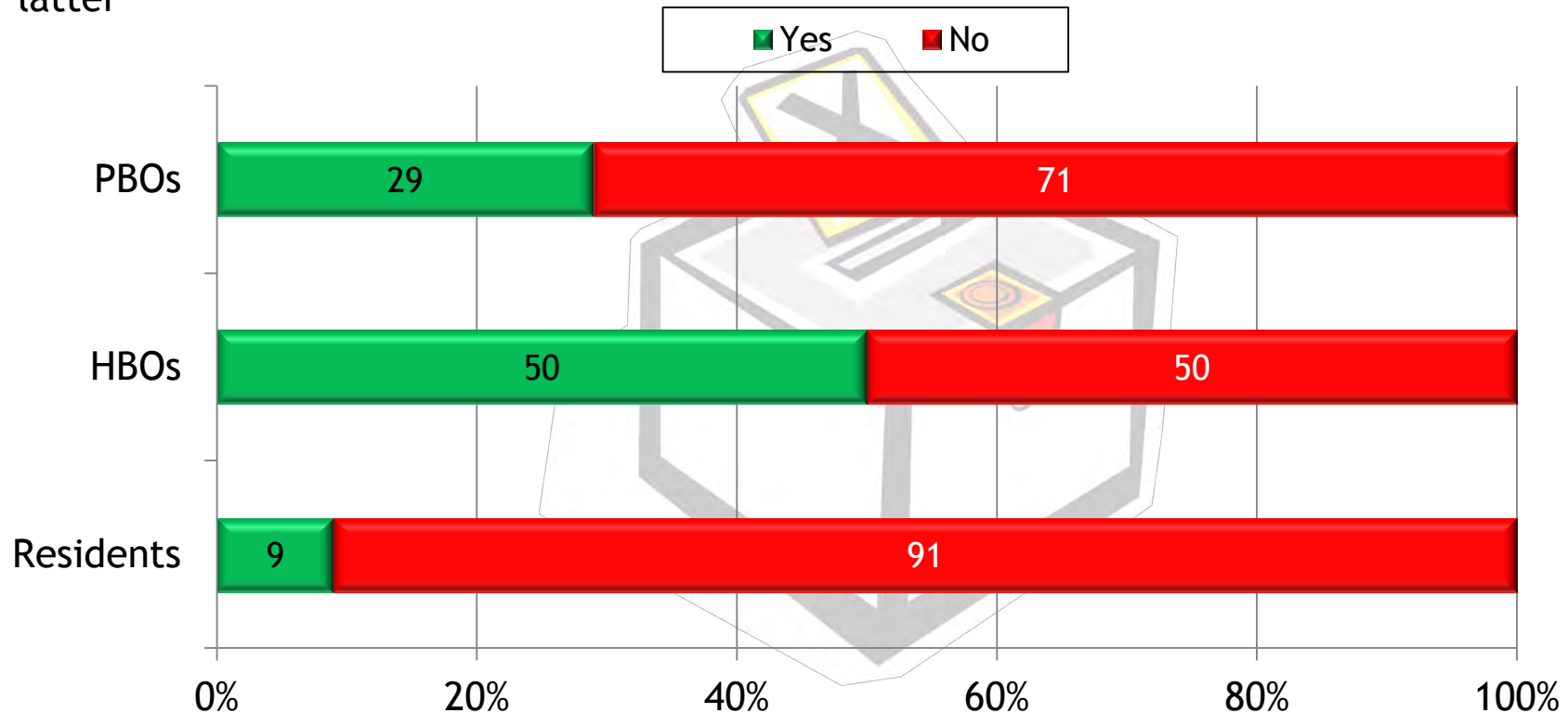
Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Aware of proposed consultation on direct elections?

(prompted) PBOs, HBOs & RESIDENTS

80

- 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



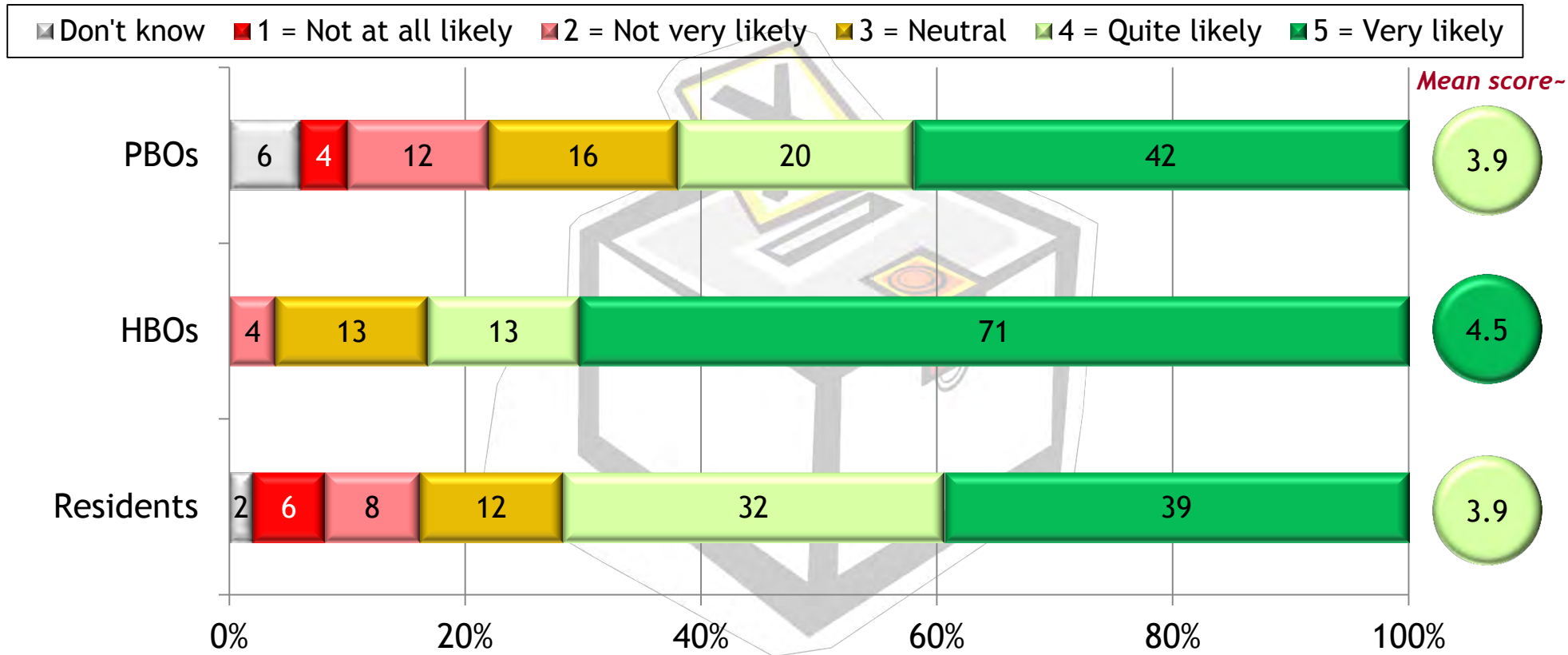
Base: 747 PBOs, 25 HBOs & 250 Residents, prompted, single response

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







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?

Financial management, comprehension & perceptions of tolls

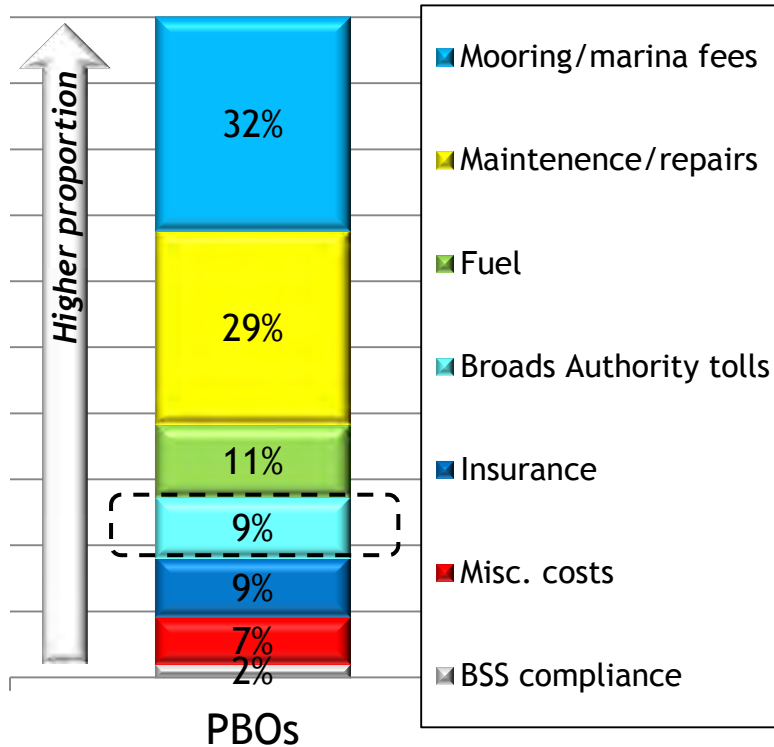
PBOs & HBOs

Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

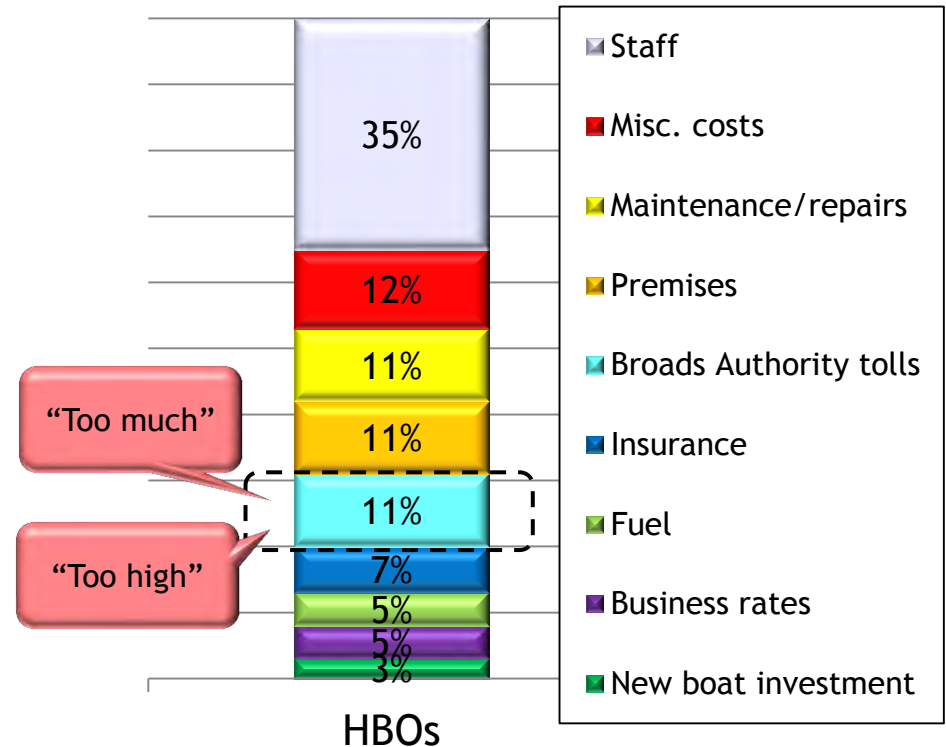
Financial impact of the toll (prompted)

PBOs & HBOs

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



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



➔ 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 ...)

Influence of the toll in keeping a boat on the Broads

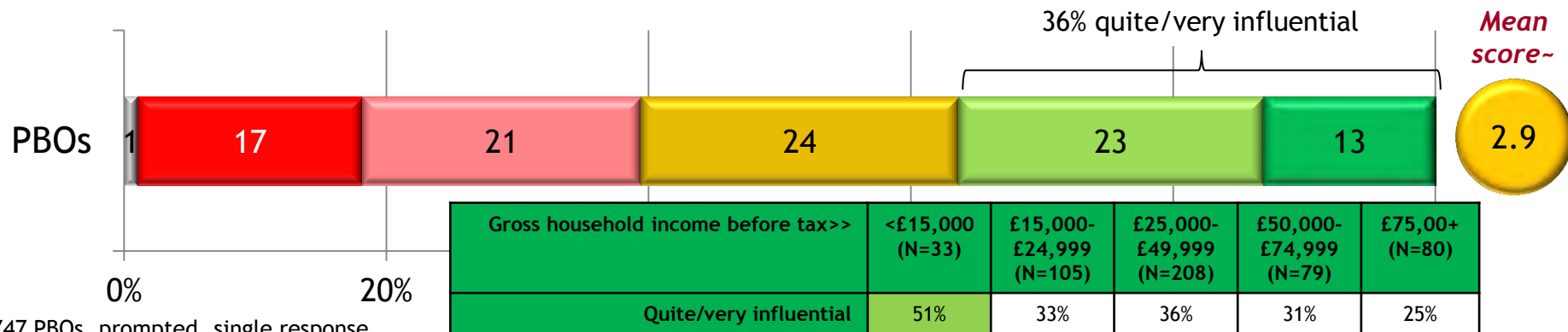
(prompted) PBOs

84

- 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

■ Don't know ■ 1 = Not at all influential ■ 2 = Not very influential ■ 3 = Neutral ■ 4 = Quite influential ■ 5 = Very influential



Base: 747 PBOs, prompted, single response

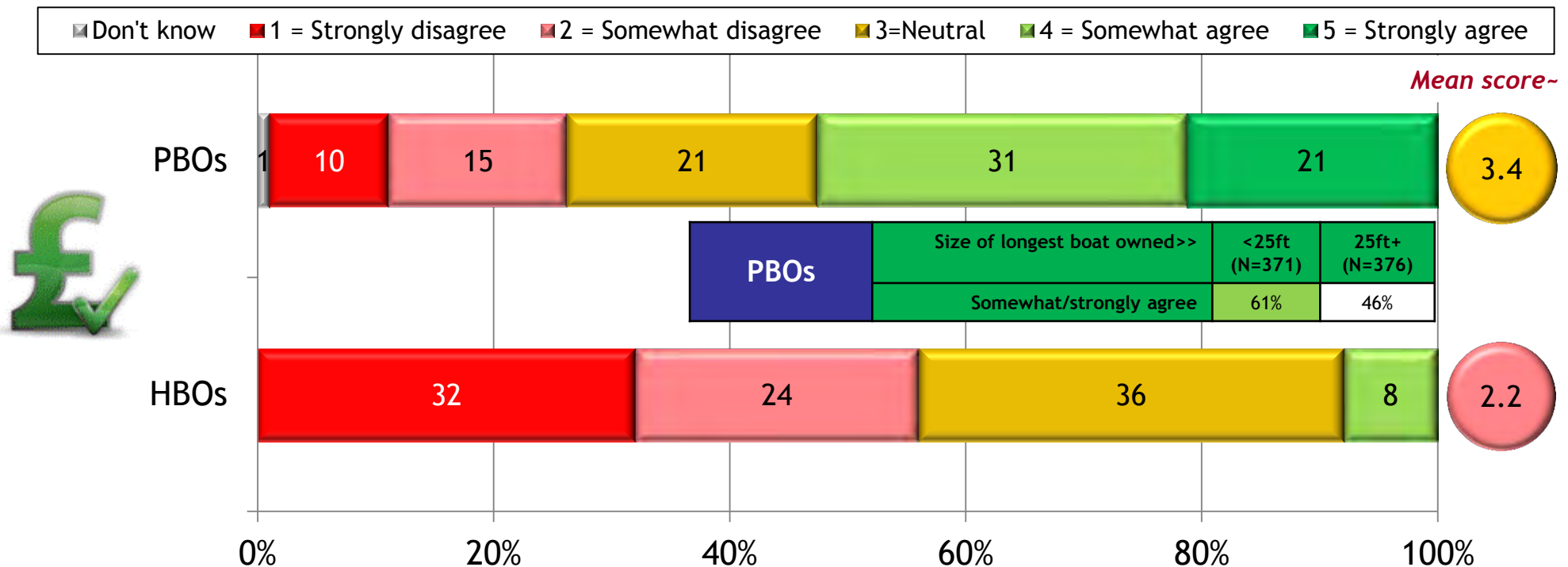
Q: Now, specifically thinking about the toll, how influential is the cost of the toll in your decision to keep a boat on the Broads, on a 5-point scale, where 1 = not at all influential and 5 = very influential?

Broads Authority tolls good value for money? (prompted)

PBOs & HBOs

85

- 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



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?

Broads Authority better value for money for small or large boats? (prompted) PBOs

- 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

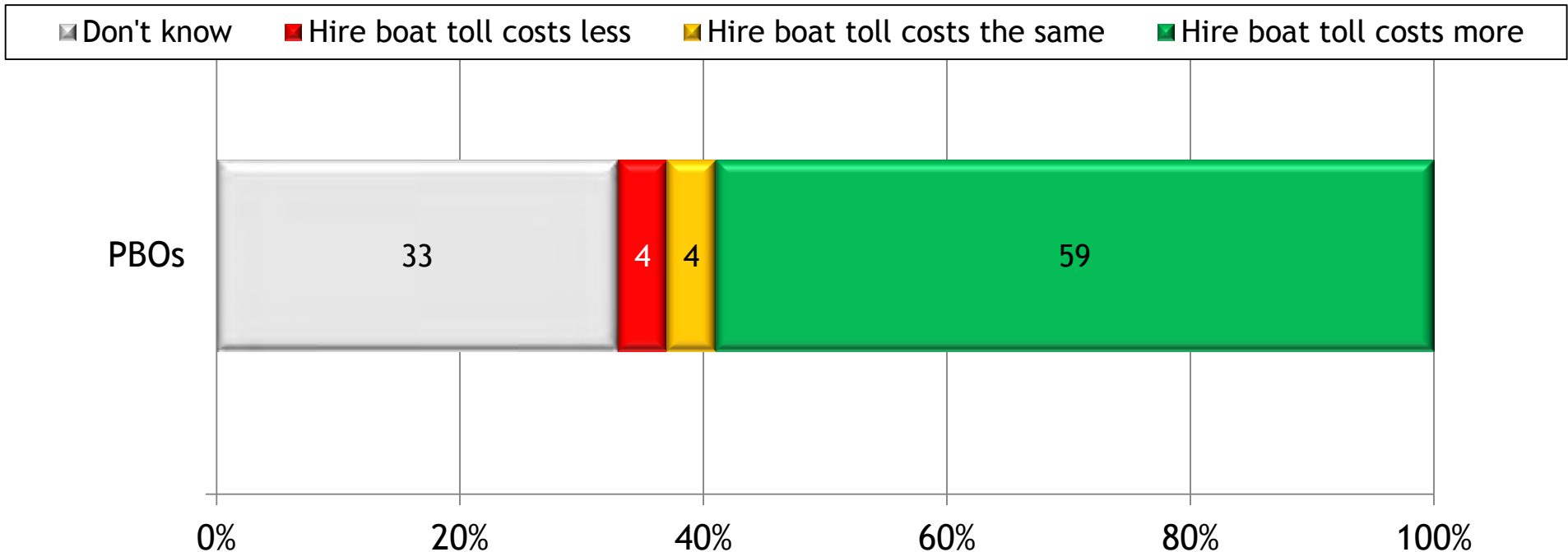
Q: Do you think the Broads Authority toll represents better value for money for owners of ...?

How think hire boat toll varies from private boat toll

(prompted) PBOs

87

- 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



Base: 747 PBOs, prompted, single response

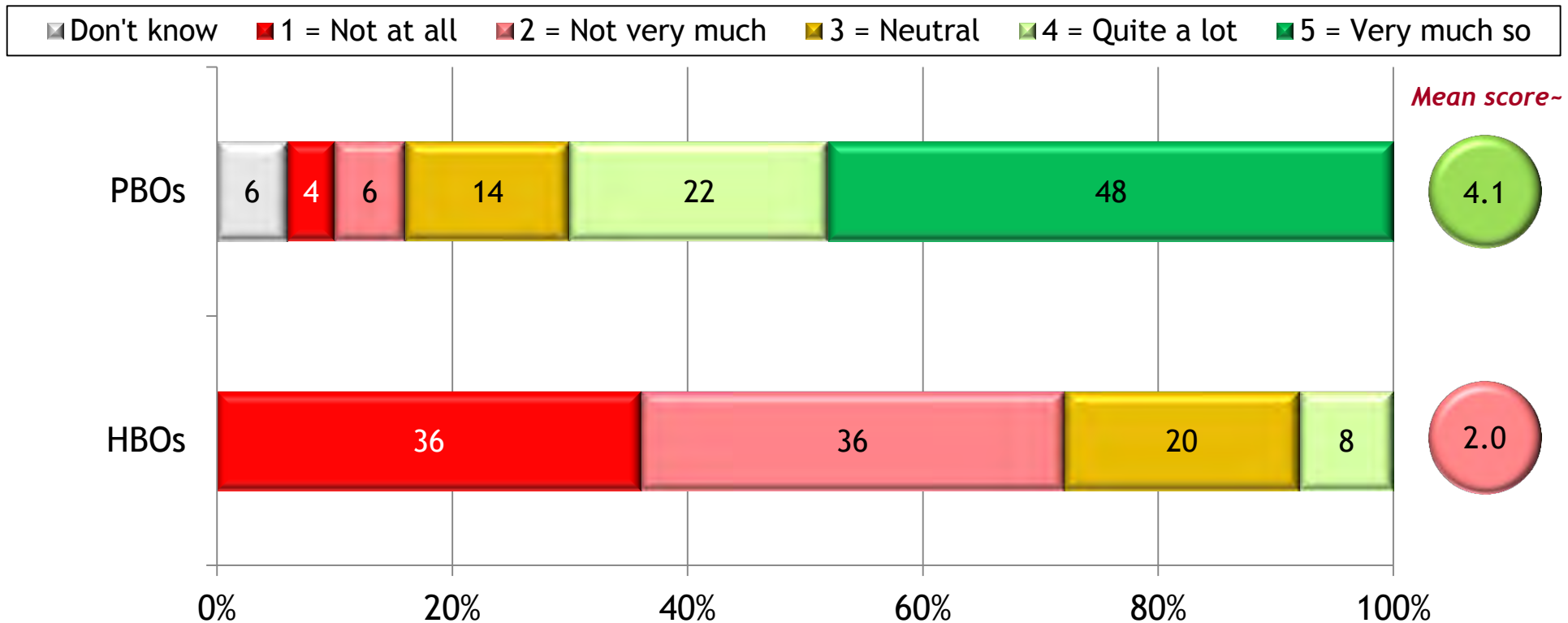
Q: How do you think the hire boat toll (per boat) varies from the toll paid by private boat owners (for an equivalent boat)?

Support Hire Boat Operator 'multiplier'? (prompted)

PBOs & HBOs

88

- The HBO 'multiplier' is well supported amongst PBOs
- As might be expected, support is markedly weaker amongst 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?

Support Hire Boat Operator ‘multiplier’? (unprompted)

PBOs

89

Quite a lot / very much so

- 36% Represents more use
- 19% Hire boats cause more damage
- 13% They make profit from use
- 8% Those hiring speed & litter
- 2% Provides revenue for the Broads

Not at all / not very much

- 2% Damages tourism/
local economy
- 1% x2.5 is too steep
- 1% It's not fair to HBOs
- 1% Damages profitability

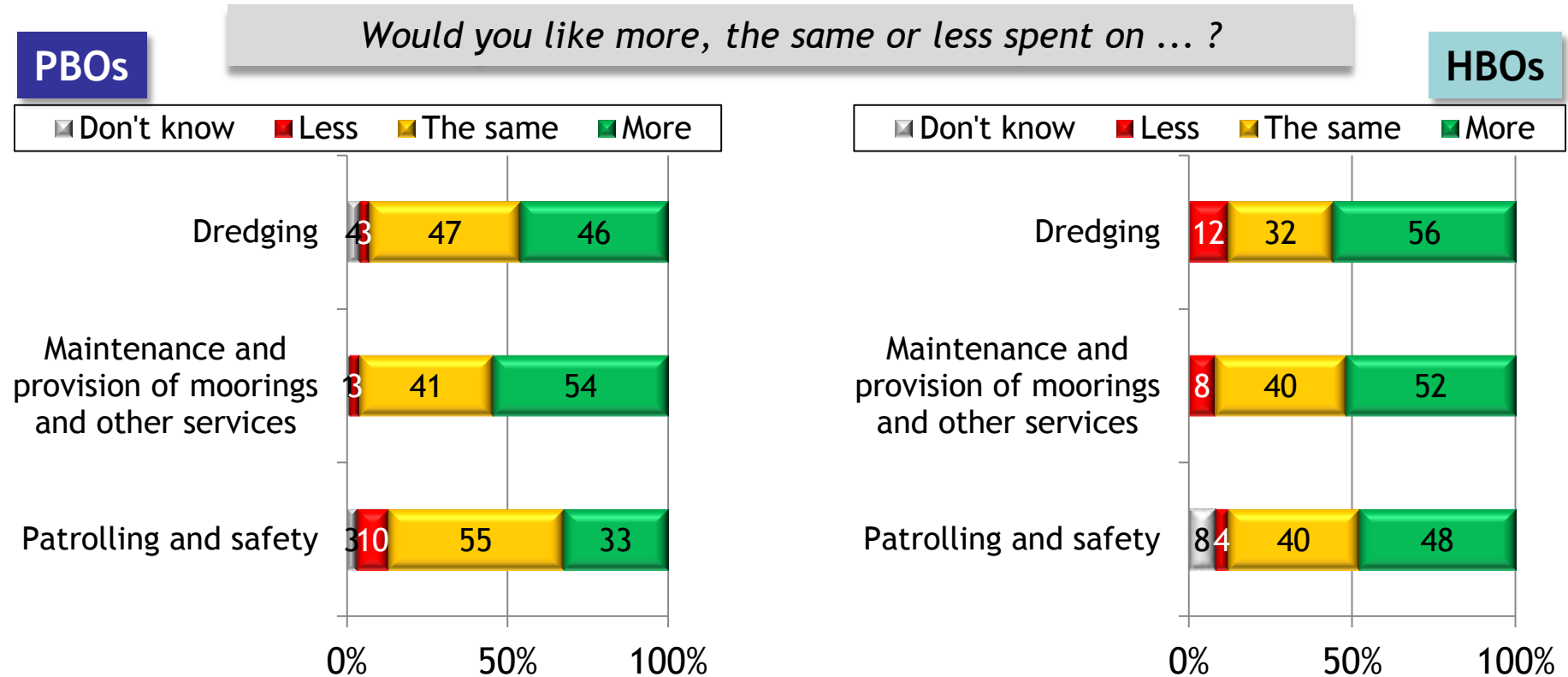
Base: 747 PBOs, unprompted, multiple response

Q: Why do you say that?

Toll income expenditure (prompted)

PBOs & HBOs

- 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







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 ...?

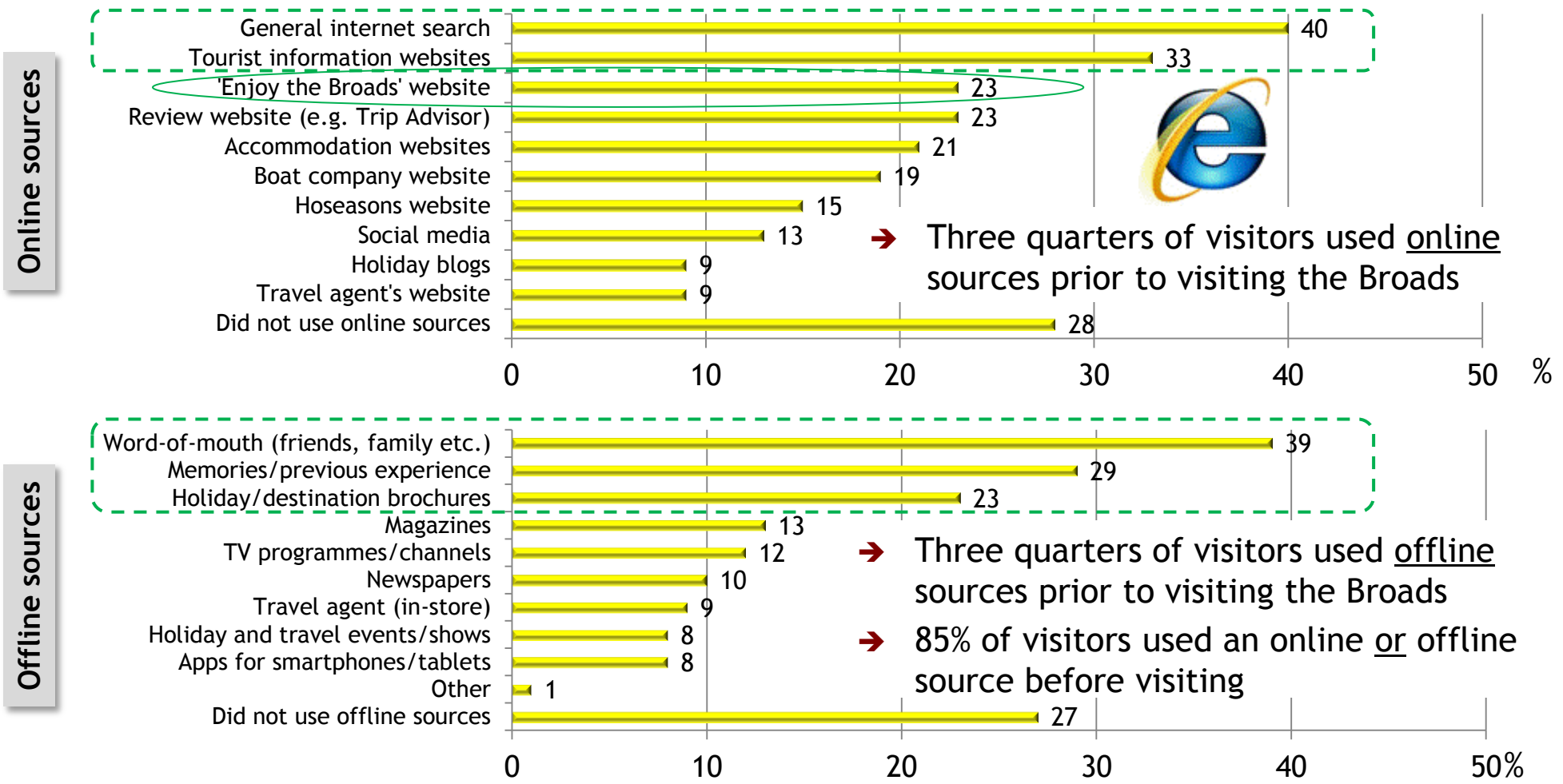
Marketing & information sources

VISITORS

Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Information sources prior to visiting the Broads (prompted)

VISITORS



Base: 600 Visitors, prompted, multiple response

Q: Prior to visiting the Broads, which of these online/offline sources of information did you refer to?

Sources used prior to visiting: Newspapers/magazines/ holiday destination brochures (unprompted) (key responses) VISITORS 93

Holiday/destination brochures (N=136)


By Wyndham Vacation Rentals

(25 respondents)

Eastern Daily Press
THE NORFOLK
Broads

(9 respondents)

Eastern Daily Press
Norfolk

(4 respondents)

Magazines (N=77)

Eastern Daily Press
Norfolk

*Sunday newspaper
magazine supplements*

(5 respondents respectively)

**Take
aBreak**

RadioTimes

Good Housekeeping

(2 respondents respectively)

Newspapers (N=59)

Daily Mail

(8 respondents)

THE Sun

(6 respondents)

The Daily Telegraph

METRO

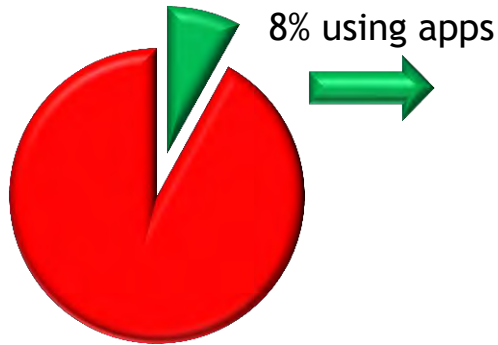
THE INDEPENDENT

DAILY Mirror

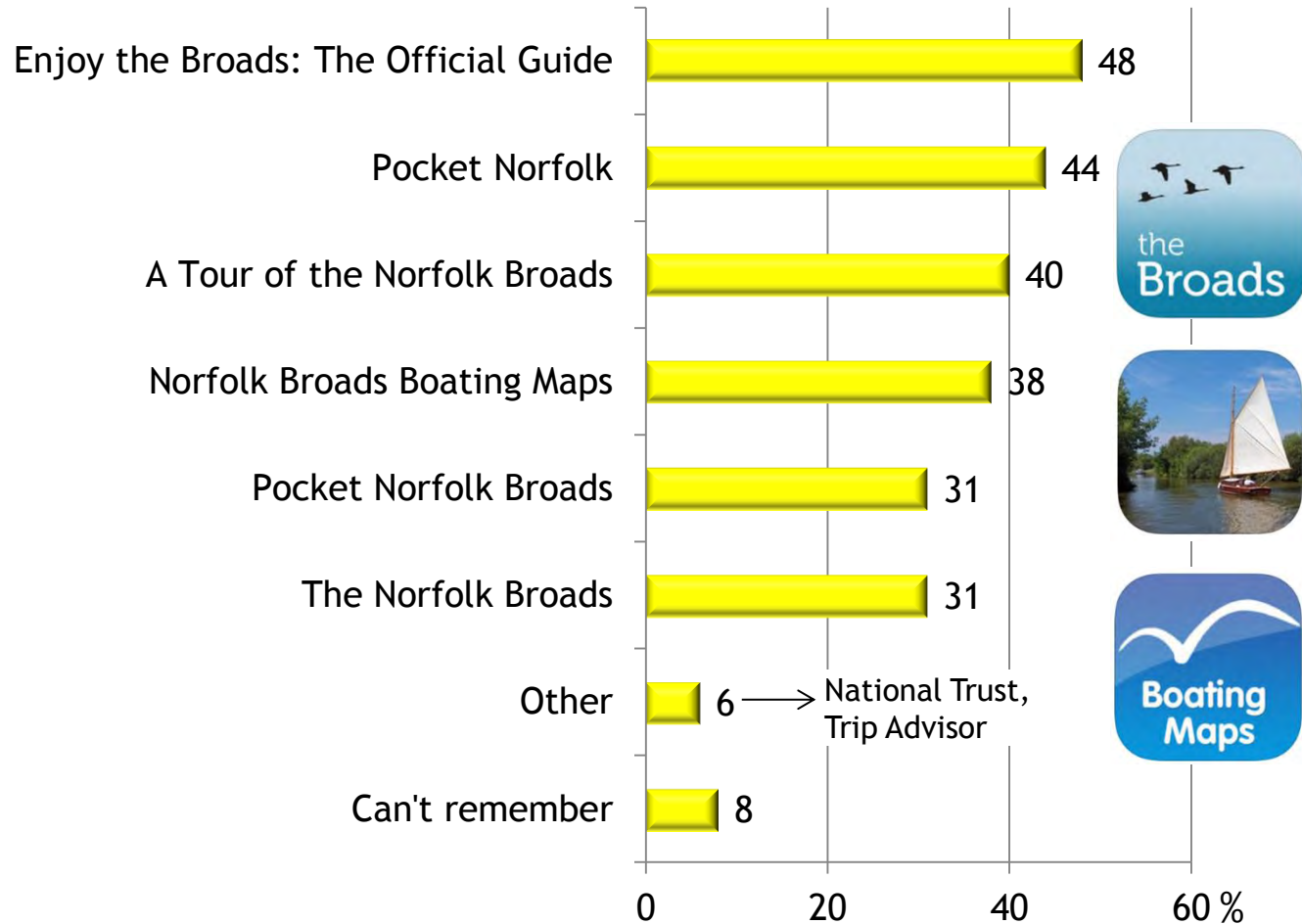
(3 respondents respectively)

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

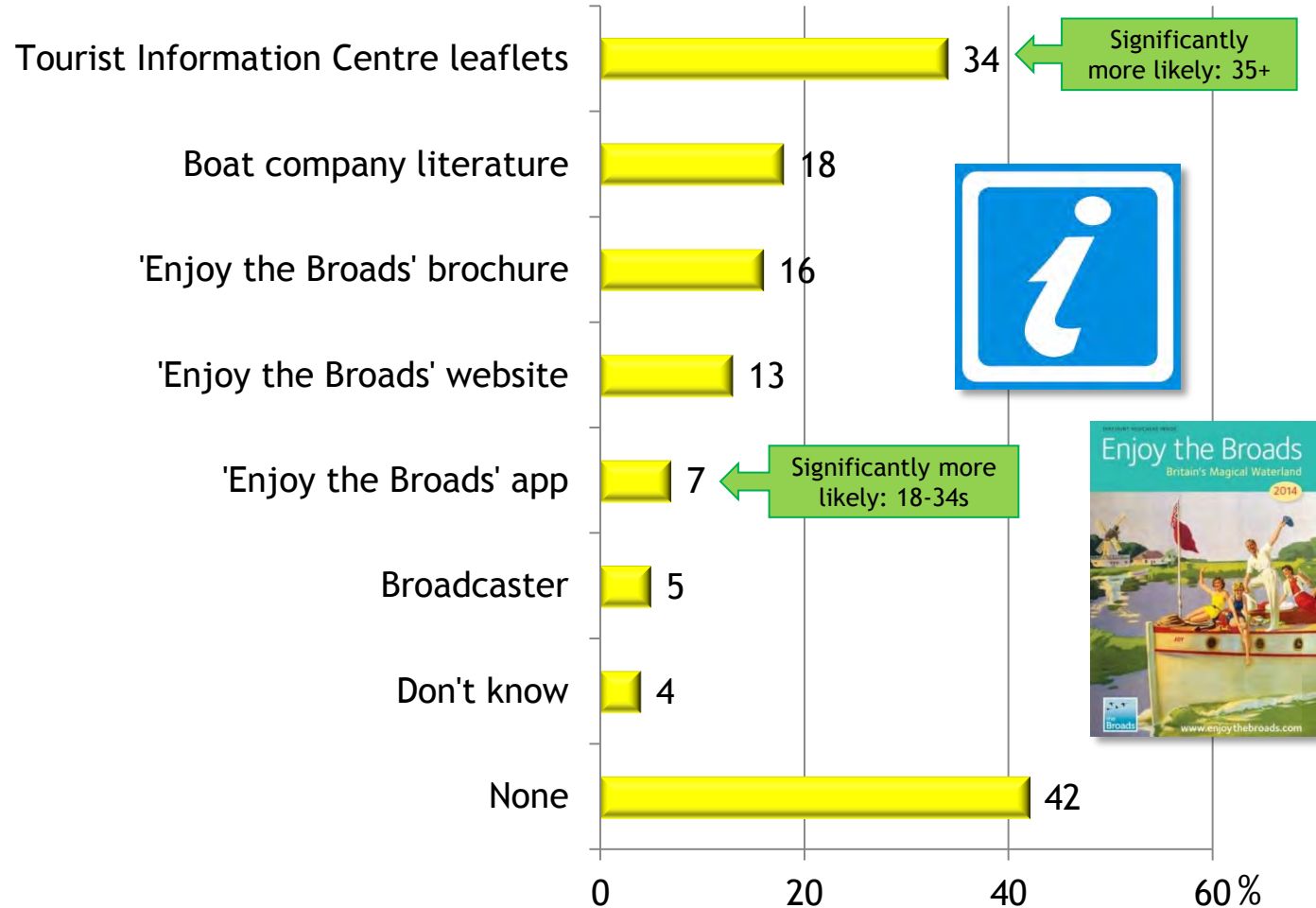


Base: 48 - all Visitors using these sources, unprompted, multiple response
 Q: Which apps for smartphones/tablets did you refer to prior to visiting the Broads?

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

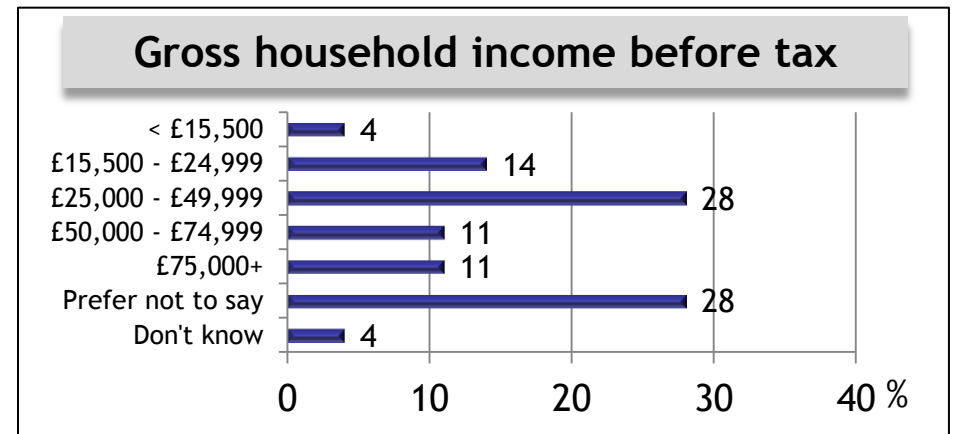
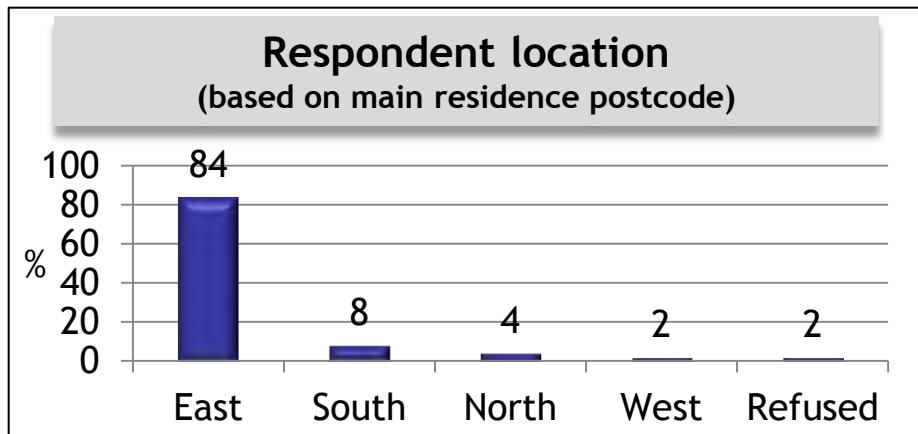
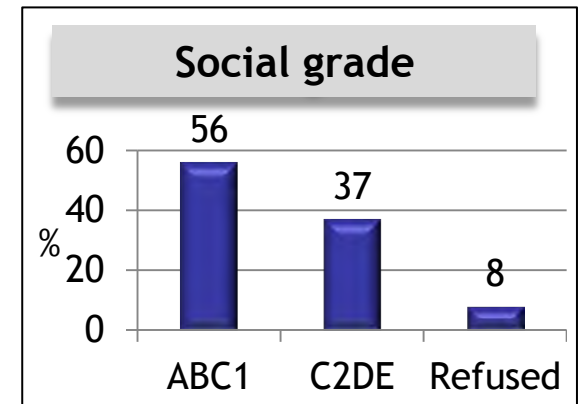
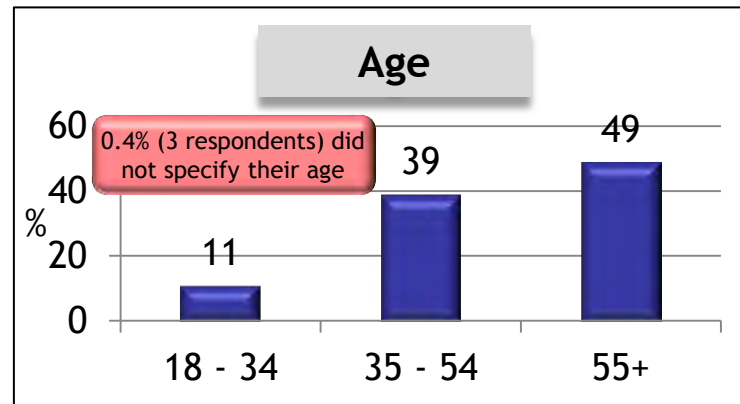
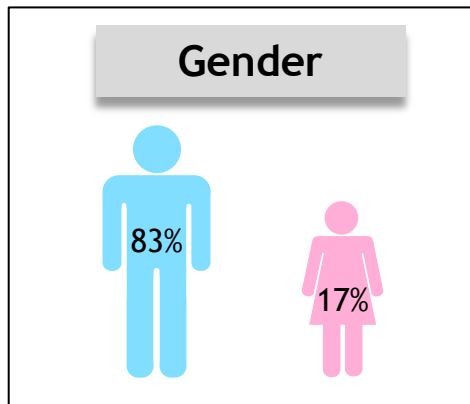
Private Boat Owners (PBOs)	
Hire Boat Operators (HBOs)	
Residents	
Visitors	

Respondent profile: Key demographics

PBOs

97

- All respondents were screened in as current owners of a boat for use on the Broads
- Softs quotas were set by respondent gender, age (aged 18+), social grade and boat type owned - to achieve a mix of respondents

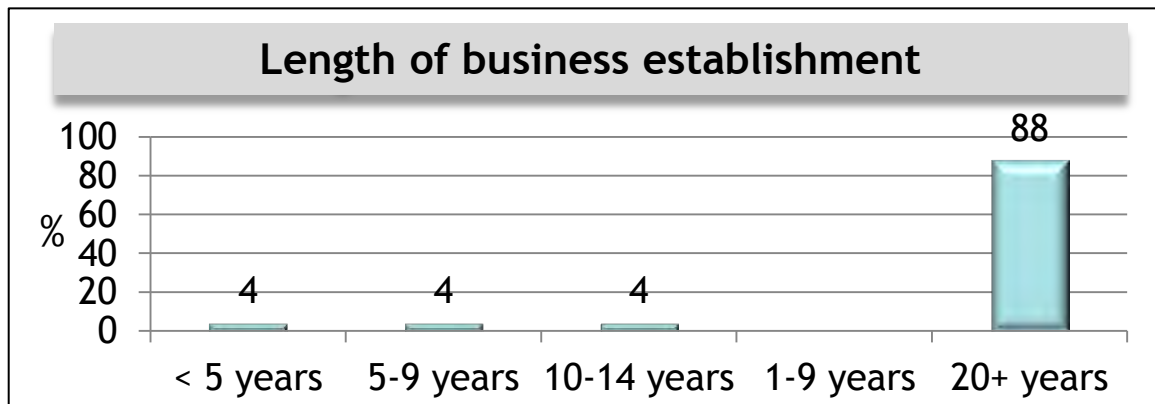
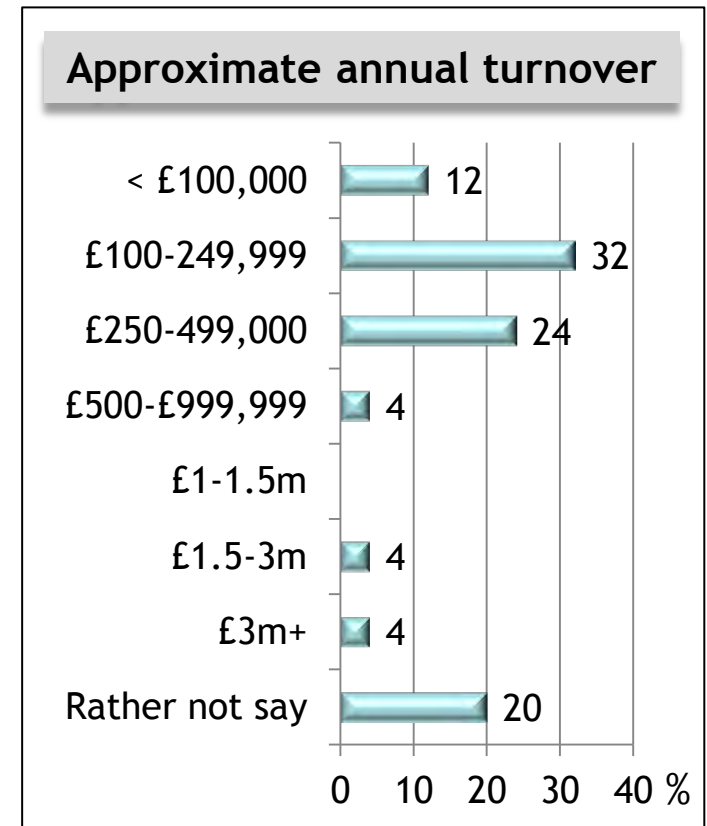
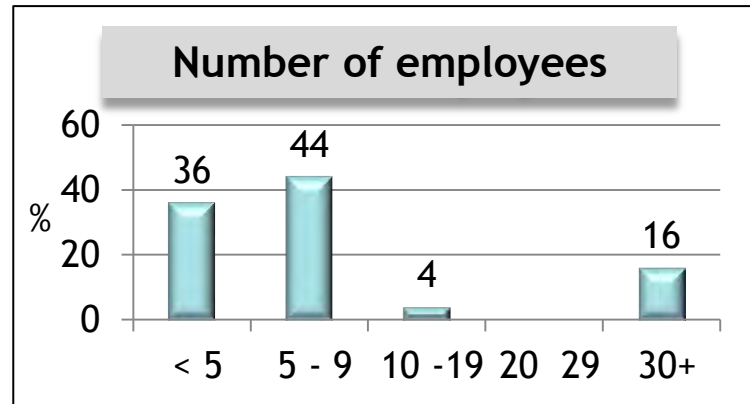
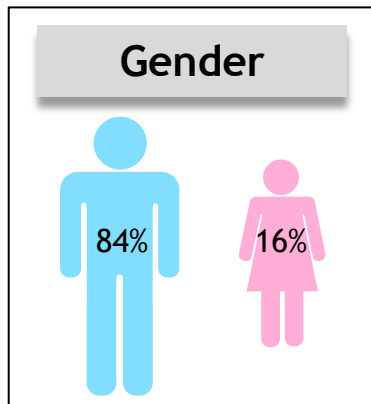


Respondent profile: Key demographics

HBOs

98

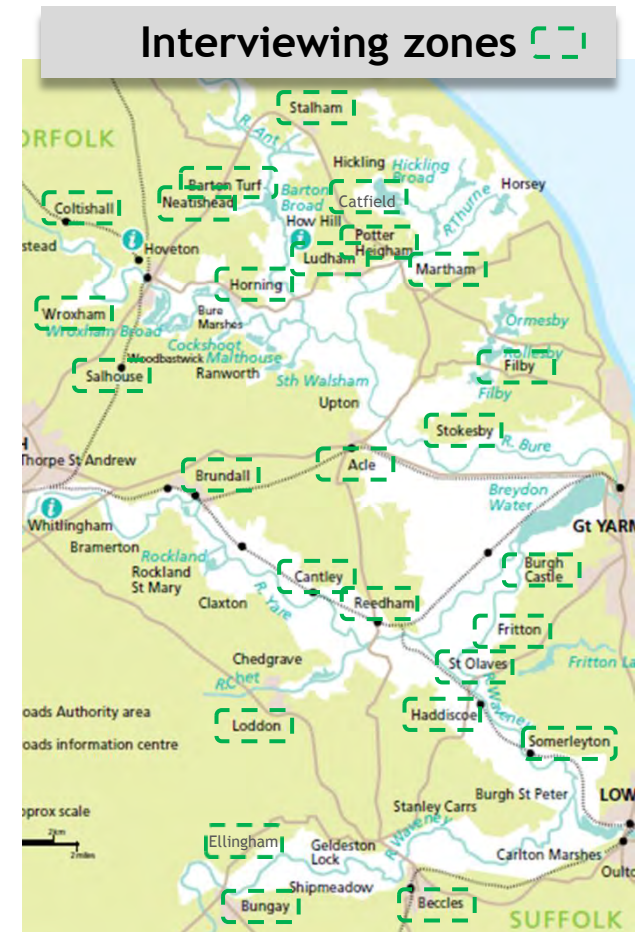
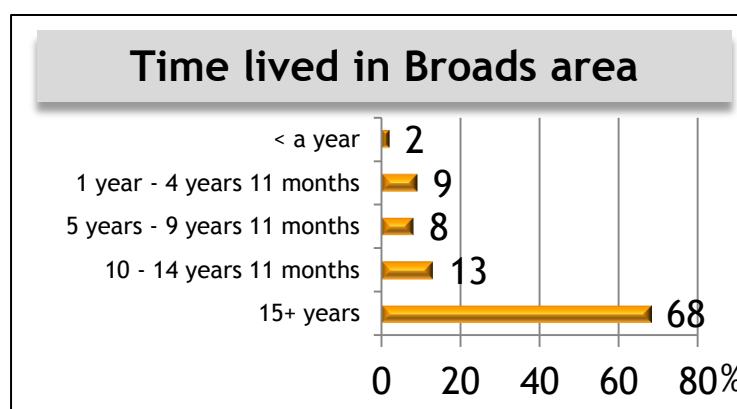
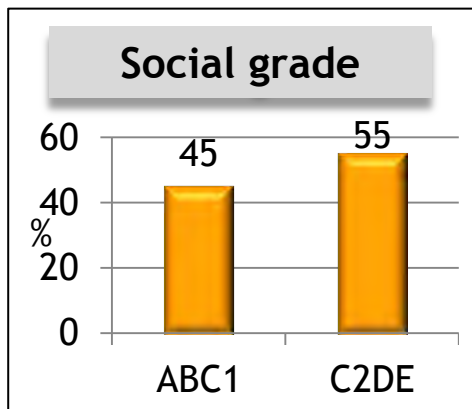
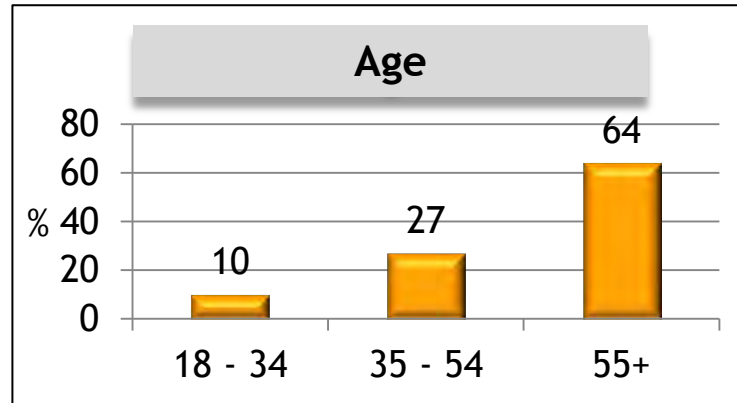
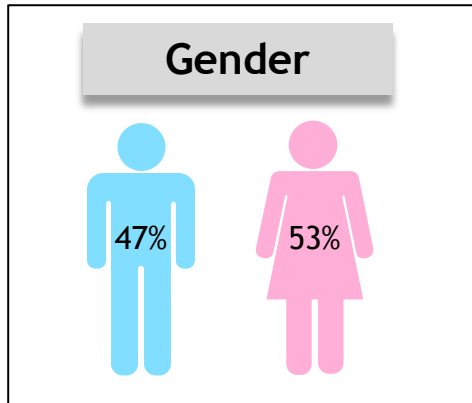
- ➔ Contact data provided by the Broads Authority of HBOs operating within a defined Broads catchment area
- ➔ No quotas were implemented - all contacts were eligible
- ➔ The Broads Authority sent out research 'introduction' letters to all HBOs, introducing, and inviting them to participate in, the research,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



Respondent profile: Key demographics

RESIDENTS

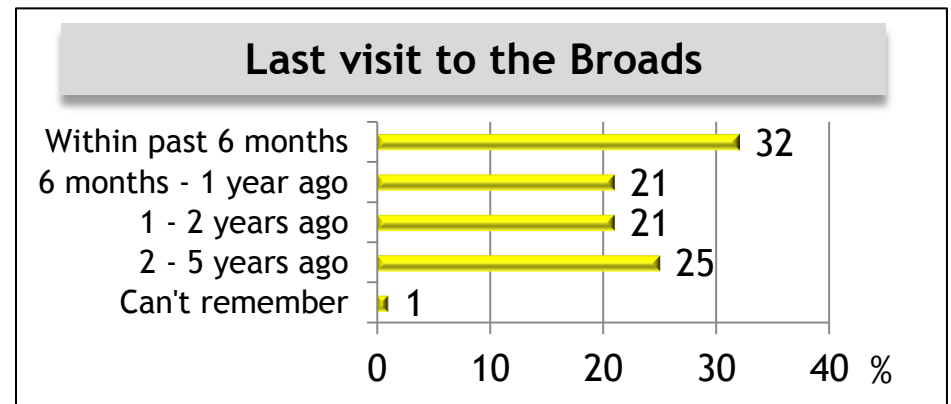
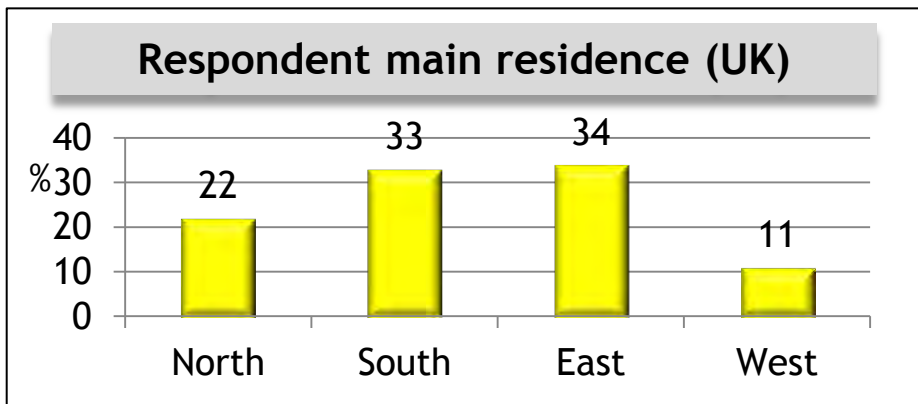
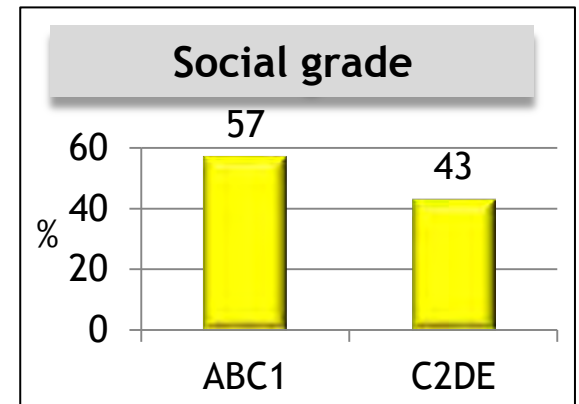
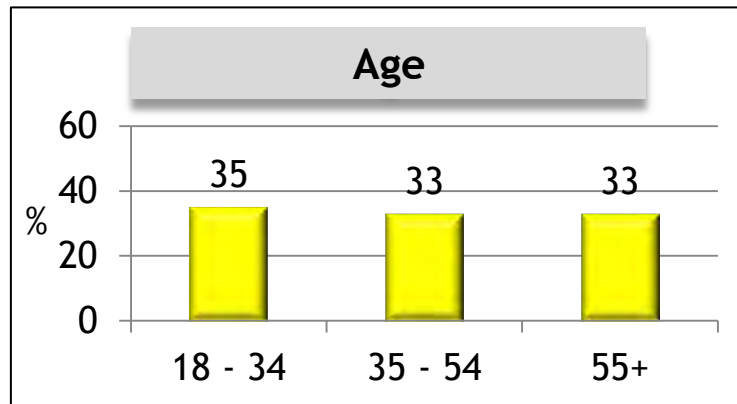
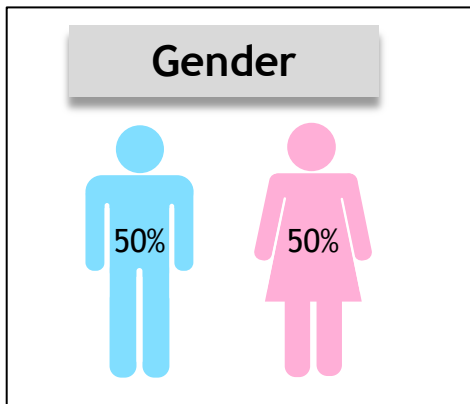
- ➔ Respondents were screened in to live in an agreed Broads catchment area
- ➔ A natural fall-out sample was achieved in terms of demographics (gender, age, social grade ...)

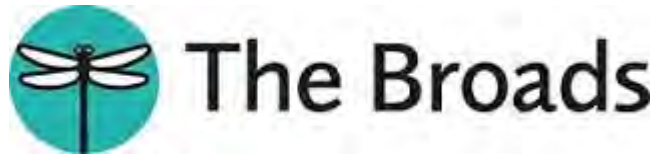


Respondent profile: Key demographics

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





Broads Authority Stakeholder Research

*Research report for
the Broads Authority*

19th December 2014 (SECOND DRAFT)

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