

Private Boat Owners Survey
Report by Senior Waterways and Recreation Officer

Summary: This report provides members with an update on the progress made on the proposed survey of private boat owners which is due to take place this summer.

1 Background

- 1.1 Members will be aware that the Authority has previously sought the views of boat owners on priorities for expenditure and other matters in surveys carried out in parallel with the circulation of toll reminders. While these surveys have provided valuable information the Authority still knows relatively little about the characteristics, opinions and behaviours of private boat owners on the Broads. At the meeting of the Navigation committee on 5 September 2013 members supported a proposal put forward by Professor Jacquie Burgess the Vice Chair of the Authority that the Authority should undertake a wider survey of private boat owners. The proposal was to work with stakeholders to manage a professionally executed and statistically representative survey in order to obtain information about the opinions, attitudes and behaviours of private boat owners who use the Broads.

2 Progress

- 2.1 Since September a Steering Group was convened whose members were drawn from a range of organisations and users of the Broads. The Group agreed on the subject matter that should be included in the survey and worked on a draft questionnaire. Initial advice on the questionnaire was then sought from a professional market research company who advised that a more efficient way of gathering the required information would be to first mine the data that the Authority already holds on private boat owners and then to go out to tender to a number of market research companies seeking the submission of quotations including a research proposal and methodology for the survey.
- 2.2 Officers have therefore met with CACI the company who market the ACORN consumer classification profiler and are seeking to obtain the ACORN software to use to provide background information to the successful market research company. The ACORN consumer classification profiler can then be used for further survey work on hire boat users and other visitors to the Broads. Additionally a draft research brief has been circulated to the Stakeholder Steering Group for use in the tender process (see Appendix 1). This research brief is intended to ensure that the Authority uses the most appropriate methodology to obtain the information required.

3 Financial Implications

- 3.1 Tenders have now been sent out to a range of commercial market research companies seeking research proposals and quotations for the work required. While it is not possible to place an exact figure on the cost of the proposed research initial feedback is that the costs could be in the order of £25,000.

4 Conclusions

- 4.1 Having taken initial advice, officers consider that a professionally designed and executed survey is the most appropriate way of proceeding with this project. Such a survey will produce data that can be trusted to be objective and reliable. An appropriate research methodology will also allow for further research to be undertaken providing evidence that will be of value to the Broads Authority and its stakeholders in the future.
- 4.2 The findings from the research will assist in the development of new policies and initiatives to benefit water and land-based activities and businesses across the Broads. Further survey work on hire boat users and other visitors to the Broads will also contribute to this process.
- 4.3 Members' comments on the contents of this report are welcomed.

Background papers: Nil

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Broads Plan Objectives: None

Appendices: Appendix 1 Draft Research Brief

Research brief for Broads Authority private boat owners' survey
April-June 2014

1. Background

The Broads Authority is a Special Statutory Authority with a duty to manage the Broads for the purposes of:

- Conserving and enhancing the natural beauty, wildlife and cultural heritage of the Broads;
- Promoting opportunities for the understanding and enjoyment of the special qualities of the Broads by the public; and
- Protecting the interests of navigation.

The Broads has a status equivalent to that of a national park but because of its navigation role has its own legislation, the Norfolk and Suffolk Broads Act 1988, which has similar provisions to those in the National Parks and Access to the Countryside Act 1949. This means that while the area is a member of the national park family it is not, strictly speaking, a national park.

The Authority is the third largest inland navigation authority in the UK and has specific responsibilities to protect the interests of navigation and maintain the navigation area to an appropriate standard.

The Broads Authority receives its core funding from two sources:

- National Park Grant from Defra, in respect of its activities under the first and second purposes set out above which include conservation, planning, recreation and tourism, and provision of information and interpretation

and

- tolls paid by users of the Broads waterways in respect of its navigation activities.

In the current context of cuts in funding for public authorities from central government, the Broads Authority's National Park Grant is declining. At the same time, tolls income, which has to be used solely for the purposes of managing the navigation, is increasing.

Tolls are payable on all vessels kept in the Broads navigation area or adjacent waters for more than 28 days in any year. They are set based on the square metre area of the vessel, so the larger the vessel the higher the toll.

The Authority has 16,407 'live' boats on file of which approximately 12,500 paying an annual toll for the use of the Broads. There are 10,877 registered owners with 'live' boats on the Broads Authority database. Of these owners, 8424 are recorded as owning one craft, 1687 have two craft and 422 have three or more registered craft. At the other end of the scale, three owners have a total of 614 boats registered. These boats are hire craft which are run by commercial operators. Toll charges for hire boats are set differently by using a multiplier on the toll for a private boat of a similar size. Currently for weekly hire craft this is set at 2.62%. Around 80 hire boat

operator licences were issued in 2013-14 which means that we have just under 10,800 registered private owners, not all of whom renew every year. Historically, tolls have been set on an annual basis. In the most recent exercise the process was informed by a working group of stakeholders who agreed a set of principles that should be applied to the process (see appendix 1). The Authority has data on boats and boat ownership going back to 1977 which provides a valuable starting point for the Project. This data has been analysed using the ACORN consumer classification in order to acquire a better understanding of the demographics of the Broads Authority's customers and the results of the analysis will be made available to the successful contractor.

2. Purpose of research

The purpose of this research project is to establish an evidence base about boating on the Broads. This piece of research, the first in a number of surveys being planned over the next two years, is concerned only with the **10,800 private boat owners** who have 'live' boats registered on the Authority's database.

In particular the Authority requires the research project to provide answers and information on the following questions:

2.1 What are the costs and benefits to private boat owners of keeping their craft on the Broads? The Authority needs to know to what extent the navigation charge is a significant factor in private boat owners' decision-making. For example, is the level of toll affecting individuals' choices in relation to the type of craft they pay a toll for, or craft which are not tolled but still 'live', or the number of craft they own? Some important aspects to this issue include information about the extent to which rising costs (e.g. marina charges, transport costs) and scarcity of resources (such as moorings, slipways) may be influential in changing any aspect of individuals' behaviour (which may include disposing of craft, or moving out of the Broads). Are there significant differences between different categories of boat owner (based on, for example, socio-economic status, age, length of time they have owned craft on the Broads)? *Answers will help the Broads Authority decide how to manage future tolls, as well as how (with our stakeholders) we can address any scarcity issues which emerge from the research.*

2.2 How accurate is the information/ knowledge that private boat owners have about how navigation tolls are set and how the money raised by the tolls is spent? The absolute level of tolls for different types and sizes of craft, the relative allocation of tolls between different types and sizes of craft, and the 'multiplier' applied to hire boat industry craft, are all contested. These disagreements are causing significant difficulties for the Broads Authority in its annual toll-setting decision, as well as potentially damaging relationships with different interest groups and the wider public. Key questions for the Authority include the following: to what extent is there support among private boat owners for the decision-rules the Authority uses in setting annual tolls? When the allocation of tolls expenditure is explained and justified (from the Authority's perspective), to what extent do different

sub-groups of private boat owners support or reject this allocation both in terms of the processes of arriving at the allocation, and the pattern of expenditure? Do private boat owners understand the hire boat multiplier principle? To what extent do they consider it valid/appropriate? *Answers to these questions will assist the Authority in setting its navigation tolls and deciding future navigation expenditure plans and proposals.*

2.3 How often do private boat owners use the facilities, resources and opportunities available in the Broads? How satisfied are they with current levels of service being supplied by BA and by partner organisations who are supporting this research? The Authority's capacity for investment in services and infrastructure is limited and requires choices to be made between different options which may not satisfy all its customers. These include expenditure on activities such as channel dredging, bank clearance and construction/maintenance of free moorings. It is impossible to provide similar levels of provision across the complete Broads system. Key questions of interest therefore, include the following: Is the authority right to concentrate its efforts in areas which experience the heaviest demands? Are there opportunities for private investment to resolve shortages and scarcities in provision of services? What attitudes do private boat owners hold towards Broads tourism and tourists? Do they support the expansion of investment to grow the industry? Are there issues/locations where conflict between private owners and tourists arise and, if so, what should the Authority /its partners do to alleviate these? *Answers to these questions will help the Authority to determine its strategic priorities and programmes of work in the next three-five years.*

2.4 What do private boat owners know about the BA's status as a 'member of the national park family?' Do they support the 3 purposes of the BA and if so, equally or not? There is a range of opinion about the designation of the Broads and it would be helpful for the Authority to ascertain the extent to which private boat owners understand the multiple responsibilities that the Authority has under the 1988 and 2009 Broads Acts.

Please note If this thread of questioning is pursued advice will be sought from the successful contractor as to how this section is phrased in order to obtain the required information or whether it would be best to undertake more qualitative work with regard to national park status?

3. Research methodology

The Broads Authority is open to suggestions as to the most appropriate methodology to provide the evidence it requires from its 10,800 private boat owners. It will be able to provide the contractor with the results of the CACI analysis of the tolls database to assist in the design of the project. The Authority hopes to be able to recruit a standing panel of private boat owners from the

study to help provide advice and guidance on future policy issues. Suggestions as to how this could be done should be included in the submission.

4. Proposal requirements

The Authority requires a research proposal to be submitted in writing which provides:

1. Evidence of understanding of our research needs
2. Suggests a methodology
3. Demonstrates the appropriateness of the proposed methodology.
4. Provides details of the staff who will be involved
5. Provides a detailed work-plan with key milestones
6. Provides a detailed quotation and breakdown of costings for the research.
This should include, as a separate element, the cost of recruiting a standing panel of private boat owners for follow-up work.

5. Timescale

1. Tenders should be received by 5pm on Monday, 24th February 2014.
2. The successful contractor will be notified by Monday 10th March 2014.
3. Research to be carried out during the period April to June 2014
4. Interim report on progress in May 2014
5. Draft report and recommendations in mid July 2014
6. Final report and recommendations by end of July 2014

6. Management of the project

A Steering Group with representatives from the range of organisations working in the Broads has been established to oversee this project, reporting to the Broads Authority's Navigation Committee. Adrian Clarke, Senior Recreation and Waterways Officer, Broads Authority is responsible for managing the project. Further information about this tender, previous survey work undertaken by the Authority with private boat owners, and other contextual information may be obtained from Adrian.

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