DBA Members Survey 2019

A series of DBA Members Surveys have been conducted from 2011 through 2017. In 2020, with Brexit negotiations and the COVID-19 pandemic underway, it was decided to repeat the survey for 2019, because this would be the last chance to measure behaviour under "normal" (i.e pre-COVID and pre-Brexit) conditions.

Many thanks to the 528 members (34% response rate) who answered the online survey about the characteristics of their boats, their location and how they were used in 2019. In addition, some questions from the 2017 survey were repeated, and expanded, about members' views on the services offered by DBA, and a new series of questions addressed expenditures by boat owners on various items during the calendar year. The survey produced a total of 44 findings, some of which are highlighted here:

Finding 1: Membership has declined over the last six years predominantly due to the loss of people that do not own a boat – those either Just Interested or Looking for a Boat. The number of members with boats are virtually unchanged over this period. (Table 1). Early indications are that this trend is continuing through Calendar Year 2020.

Table 1 - Number of Members by Situation, 2011

Situation	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Looking for a Boat	311	296	296	287	306	308	303	279	278	269
Just Interested	198	189	183	174	163	157	156	150	133	119
Commercial Interest	29	30	22	21	33	29	31	25	24	22
Boat Owner	1155	1148	1163	1191	1217	1226	1221	1190	1162	1113
Boat Co-Owner	45	48	46	44	39	43	48	46	48	44
TOTAL	1738	1711	1710	1717	1758	1763	1759	1690	1645	1567

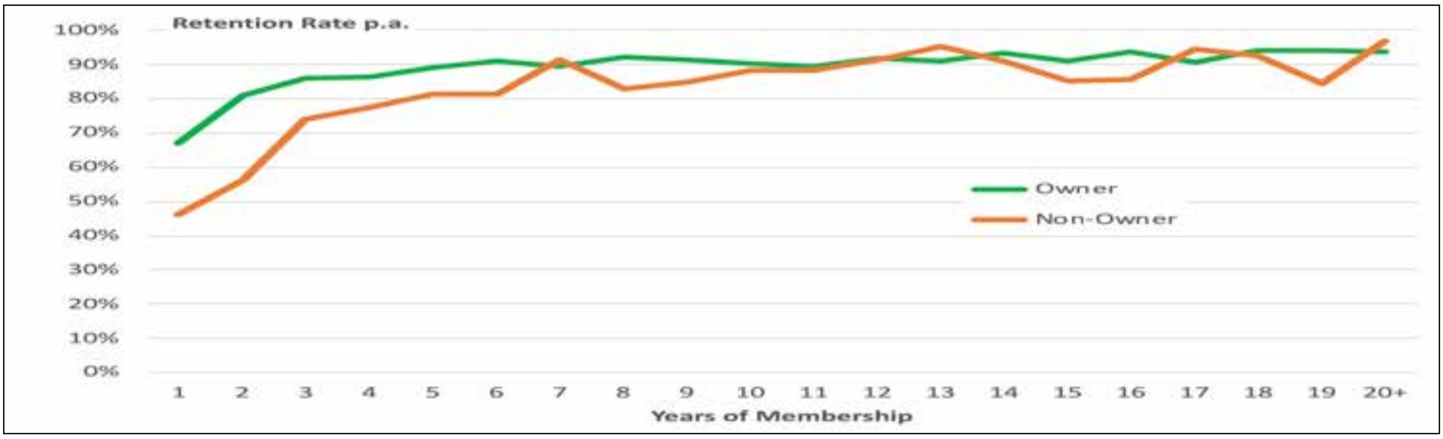
Finding 2: Responses to the Survey were much more likely from boat owners than those who did not own a boat (who are Looking for a Boat or Just Interested in barging), and more likely from those outside the UK than those whose address was in the UK (Table 2). Primary Members were also much more likely to respond than Second Members in a family membership.

Table 2 - Response Rate by Region of Postal Address, Boat Ownership and Member Type

	Primary Members			Second Members		
Postal Region	Owner	Non-Owner	TOTAL	Owner	Non-Owner	TOTAL
British Isles	40%	15%	35%	12%	6%	11%
Europe	53%	22%	45%	23%	0%	19%
Rest of World	62%	30%	50%	21%	0%	16%
TOTAL	45%	20%	39%	15%	4%	13%

Finding 3: Members tend to leave most rapidly soon after joining DBA but if they remain members for five to six years, they tend to stay in DBA for the longer term. Ownership of a boat seems to be a strong characteristic of members that remain members of DBA (Figure 1), as measured by the annual retention rate of members.

Figure 1 - Retention Rates as function of Time and Boat Ownership



Finding 4: Over time, the proportion of new members who own boats has fluctuated in the range of 55 to 60% although the proportion of boat owners in the total membership has increased steadily from 71 to 77% (Table 3).

Table 3 - Boat Ownership of DBA Primary Members, 2011-2020

% Boat Owners	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	AVE.
New Members	57%	60%	55%	63%	55%	56%	59%	60%	60%	51%	57%
All Members	71%	72%	73%	74%	74%	74%	75%	76%	77%	77%	74%

Finding 5: Members of DBA are mostly of UK nationality, although the proportion of EU and other overseas members (mainly North American and Australasian) has been increasing at the expense of UK membership. The proportion of UK members has fallen from 76% to 69% since 2011 (as shown in the top half of Table 3). However, the absolute number of UK members has fallen by 18% from 2011 (as shown in the bottom half of Table 4), while the EU numbers have remained stable, and the Rest of World members have increased by 39%.

Table 4 - Postal Address Region of DBA Members

Postal Region	2011	2012	2013	2017	2019	2019/2011
United Kingdom	76%	76%	75%	73%	69%	91%
Europe	13%	12%	11%	12%	14%	109%
Rest of World	11%	12%	14%	15%	17%	153%
Total Primary Members	1449	1424	1410	1424	1319	91%
United Kingdom	1099	1083	1051	1041	906	82%
Europe	186	167	162	166	184	99%
Rest of World	164	174	197	217	228	139%

Finding 6: DBA has over 1500 (1319 Primary Members and 326 Second members) members who collectively own around 1000 boats (Table 5).

Table 5 - Boat Ownership across the Surveys

Survey Year >>>	2011	2012	2013	2017	2019
Memberships	1449	1424	1410	1424	1319
Members	1740	1714	1710	1764	1645
Boats	949	958	986	985	993
Members/Membership	1.20	1.20	1.21	1.24	1.25
Boats/Membership	0.65	0.67	0.70	0.69	0.75

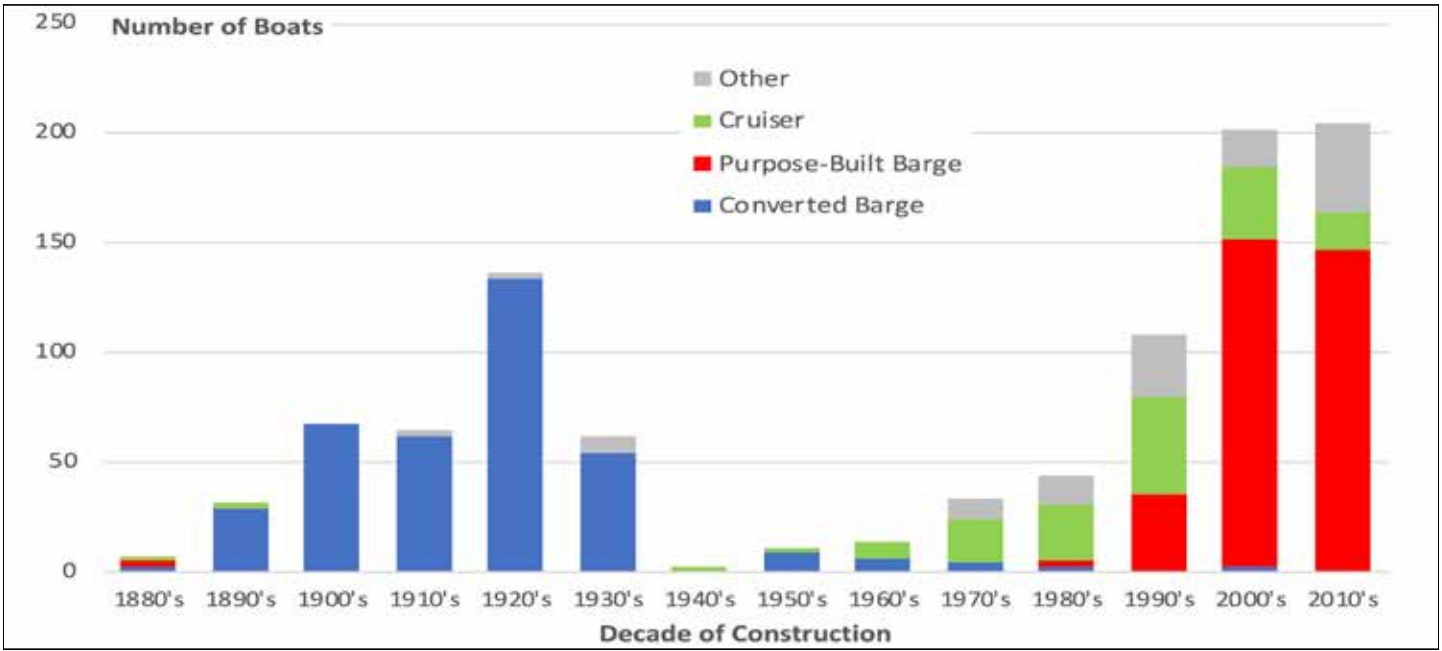
Finding 7: On the basis of the mooring location of the boats owned by DBA members, DBA is now overwhelmingly centred in Europe with 70% of the vessels located there. Eight years ago, almost half the boats (45%) were moored in the UK (Table 6).

Table 6 - Country of Current Home Port

Mooring Country	2011	2012	2013	2017	2019
United Kingdom	45%	41%	38%	32%	30%
France	37%	40%	43%	41%	39%
Netherlands	10%	11%	10%	15%	17%
Belgium	6%	5%	7%	10%	10%
Other	2%	3%	3%	1%	4%

Finding 8: The DBA fleet is predominantly made up of boats constructed before 1940 or after 1990. In the 2019 survey, boats constructed after 1990 represent the majority (52%) of all members' boats (Figure 2). Most of the DBA boats originally built before 1940 are now "converted commercial barges", while most built after 1990 are "purpose-built leisure barges". Those built between 1940 and 1990 are mostly "cruisers".

Figure 2 - Retention Rates as function of Time and Boat Ownership



Finding 9: Over the period 2011-2019, the average age of DBA members has increased 3.5 years from 62.5 to 66, while the average age of DBA boats has decreased 8 years from 56 to 48

Finding 10: The DBA fleet is increasingly characterised by smaller boats. Boats under 20m now make up 74% of the fleet in continental Europe compared to 65% six years ago. Only 27% of the total DBA fleet is now over 20m in length (Table 7).

Table 7 - Length of Boat as a Function of Mooring Region

	Mooring Region					
	2013		2017		2019	
Length of Boat	UK	Europe	UK	Europe	UK	Europe
<15m	18%	27%	20%	34%	25%	38%
15-20m	49%	38%	49%	35%	43%	36%
20m+	33%	35%	30%	32%	32%	26%
Average Length	19.5	19.3	19.8	18.6	19.3	18.2

Finding 11: Members on-board boats in the UK spent much more time on their vessels (30 weeks/year) than those in Europe (20 weeks/year), with nearly a third in the UK spending all year aboard (Table 7).

Table 8 - Weeks Spent On-Board by Region of Mooring 2019

	Mooring Region		
Weeks On-Board	UK	Europe	Both Regions
0 weeks	6%	3%	4%
1-6 weeks	17%	16%	17%
7-13 weeks	11%	22%	19%
14-26 weeks	15%	33%	28%
27-51 weeks	18%	17%	18%
52 weeks	32%	7%	15%
AVERAGE (weeks)	29.5	19.9	22.8

Finding 12: Those aboard boats in Europe spend an average of 12 weeks/year cruising, whereas those on boats in the UK only spend 6 weeks/year cruising (Table 9).

Table 9 - Weeks Spent Cruising by Region of Mooring 2019

	Mooring Region		
Weeks Cruising	UK	Europe	Both Regions
0 weeks	37%	11%	19%
1-6 weeks	40%	29%	32%
7-13 weeks	7%	24%	19%
14-26 weeks	12%	29%	24%
27-51 weeks	4%	8%	7%
52 weeks	0%	0%	0%
AVERAGE (weeks)	5.6	11.7	9.9
Cruising/Onboard Weeks	19%	59%	43%

Finding 13: On average, Members on-board boats in the UK spent much more time on their vessels (30 weeks/year) than those in Europe (20 weeks/year), but less time cruising (6 weeks cf 12 weeks). As a result, members' boats in the UK tend to be used more for residential purposes (with only 20% of their time aboard spent cruising), while those in Europe use their boats more for cruising (spending 60% of their time aboard cruising) (Table 8).

Finding 14: Members on older and longer boats tend to spend more time aboard per year, but spend less time cruising per year (Table 10, 11).

Table 10 - Usage of Boat as a Function of Boat Age 2019

	Age of Boat		
	pre-1940	1940-1989	post-1990
Average Weeks On-Board 2019	26.2	17.7	21.3
Average Weeks Cruising 2019	7.5	8.1	12.1
Cruising/Onboard Ratio 2019	29%	46%	57%

Table 11 - Usage of Boat as a Function of Boat Length 2019

	Boat Length (m)		
	< 15m	15-20m	>20m
Average Weeks On-Board 2019	14.5	22.8	29.7
Average Weeks Cruising 2019	9.7	11.1	7.8
Cruising/Onboard Ratio 2019	67%	49%	26%

Finding 15: Overall, France (and especially Central France) is by far the most used cruising Country (being visited by about 40% of DBA boats), with the UK, Netherlands and Belgium each being visited by about 20% of DBA boats.

Finding 16: While 17% of boats visit Belgium, most are in transit, with only 9% of these visits staying in Belgium for the entire season. By way of contrast, the Netherlands had 40% being internal cruising only, France had 66%, while England had 79%.

Finding 17: Shorter boats (less than 15m) are less likely to be listed on the Barge Register than longer boats. Middle-aged boats (built between 1940 and 1989) are less likely to be listed on the Barge Register than older or newer boats (Table 12).

Table 12 - DBA Barge Register Listing vs Boat Length and Age

	Boat Length			
	<15m	15->20m	20m+	TOTAL
% on Register 2019	70%	81%	80%	77%
	Boat Construction Era			
	pre-1940	1940-89	post-1989	TOTAL
% on Register 2019	82%	51%	79%	77%

Finding 18: The most expensive country for boat owners due to recurring costs is the UK, over 70% higher than the least expensive country - Belgium (Table 13). The main difference in cost was due to the cost of annual moorings, which was 140% higher in the UK than in Belgium.

Table 13 - Annual Expenditures by Country of Over-Winter Mooring

	Annual Expenditure in 2019 (euro)					
Over-Winter Country	Licences	Cruising Mooring	Non-Cruising Mooring	Repairs	Insurance	TOTAL
UK	838	1076	3302	2123	810	8150
France	543	530	1536	1640	929	5178
Belgium	416	568	1241	1543	950	4718
Netherlands	312	825	1788	2091	1147	6163
FOUR COUNTRIES	580	743	2045	1854	933	6155

Finding 19: Longer boats have higher annual costs, with the cost of operating a boat over 20m in length being 50% more than the cost of operating a boat of under 15m, and 10-30% more than the cost of operating a boat of 15-20m in length (Table 14). There is less effect on expenditure of the age of a boat, with middle-aged boats being about 25% less costly to operate than either older or younger boats.

Table 14 - Annual Expenditures by Mooring Region and Boat Size

		Annual Expenditure in 2019 (euro)					
Over-Winter Region	Length Group	Licences	Cruising Mooring	Non-Cruising Mooring	Repairs	Insurance	TOTAL
Europe	<15m	347	596	1463	1452	693	4551
	15-20m	429	595	1502	1596	1018	5141
	20m+	434	708	1824	2503	1465	6934
UK	<15m	565	1000	2552	1471	398	5986
	15-20m	822	1382	3516	2061	761	8542
	20m+	741	706	3635	2724	1247	9054

Finding 20: The Blue Flag and the Website are services that continue to be used by virtually all members and of the 15 services that were examined, nine were used by over half the members (Table 15).

Table 15 - Use of DBA Services by Member Type and Gender 2019

Member Type >>>	Primary			Second			Total			2019	2017
Gender >>>	Male	Female	Total	Male	Female	Total	Male	Female	Total	Rank	Rank
Blue Flag	96%	100%	96%	100%	100%	100%	96%	100%	97%	1	1
Website	96%	95%	96%	95%	90%	92%	96%	92%	95%	2	2
KnowledgeBase	91%	93%	91%	87%	86%	86%	91%	89%	90%	3	3
DBA Forum	82%	87%	83%	82%	77%	78%	82%	81%	82%	4	4
eNewsletter	78%	86%	79%	87%	80%	82%	79%	82%	80%	5	8
Classified Ads	77%	64%	76%	74%	84%	81%	77%	76%	77%	6	6
Waterways Guide	70%	59%	68%	83%	69%	73%	71%	65%	69%	7	5
DBA Library	58%	58%	58%	65%	56%	59%	59%	57%	58%	8	10
BargeRegister	56%	63%	57%	57%	61%	60%	56%	62%	57%	9	7
Blue Flag Back-copies	45%	42%	44%	39%	44%	42%	44%	43%	44%	10	11
MemberFinder	37%	47%	38%	35%	53%	47%	37%	51%	40%	11	--
DBA Shop	38%	46%	39%	60%	30%	40%	40%	37%	39%	12	9
FaceBook	31%	44%	33%	40%	59%	53%	32%	53%	37%	13	12
General Query Support	33%	28%	33%	40%	40%	40%	34%	35%	34%	14	15
Insurance Introduction	25%	24%	25%	22%	27%	25%	25%	26%	25%	15	14

Finding 21: Members were also asked to rate the DBA services on a 5-point scale (1 = Very Good, 5 = Very Poor). Overall, satisfaction with DBA services seems to be high and particularly notable is the DBA's Response to General Queries (which was relatively little used, but highly satisfactory). However, in terms of usage and approval rating, the DBA Shop, the Facebook Group and the Insurance Introduction service perhaps need consideration as to their future directions (Table 16).

Table 16 - Average Rating of DBA Services by Member Type and Gender

Member Type >>>	Primary			Second			Total			Rating	Usage
Gender >>>	Male	Female	Total	Male	Female	Total	Male	Female	Total	Rank	Rank
Blue Flag	1.5	1.5	1.5	1.9	1.3	1.5	1.5	1.3	1.50	1	1
General Query Support	1.6	1.7	1.6	1.5	1.5	1.5	1.6	1.6	1.58	2	14
KnowledgeBase	1.6	1.6	1.6	1.8	1.6	1.7	1.6	1.6	1.65	3	3
Waterways Guide	1.7	1.8	1.7	1.4	1.6	1.5	1.7	1.7	1.67	4	7
Blue Flag Back-copies	1.7	1.9	1.7	1.7	1.6	1.6	1.7	1.7	1.70	5	10
Website	1.7	2.0	1.8	2.1	1.7	1.8	1.8	1.8	1.77	6	2
DBA Forum	1.8	2.1	1.8	2.0	1.7	1.8	1.8	1.9	1.81	7	4
BargeRegister	1.9	1.9	1.9	2.1	1.4	1.6	1.9	1.6	1.81	8	9
eNewsletter	1.9	1.9	1.9	1.7	1.5	1.6	1.9	1.7	1.84	9	5
MemberFinder	2.0	2.0	2.0	1.9	1.6	1.6	2.0	1.7	1.90	10	11
DBA Library	1.9	2.1	1.9	2.1	2.2	2.2	1.9	2.2	1.97	11	8
Classified Ads	2.0	2.1	2.0	2.5	1.8	2.0	2.0	1.9	2.01	12	6
Insurance Introduction	2.0	1.9	2.0	2.2	2.2	2.2	2.0	2.1	2.05	13	15
FaceBook Group	2.1	2.3	2.2	2.4	2.1	2.2	2.2	2.2	2.17	14	13
DBA Shop	2.3	2.3	2.3	2.6	2.2	2.4	2.3	2.2	2.30	15	12

Finding 22: Seeking Information/Advice and wanting to join a Community of Similar Interests are the main reasons for joining DBA across most of the member groups, while Buying a Barge and seeking Access to DBA Services are important backup reasons (Table 17).

Table 17 - Reasons for Joining DBA by Member Type and Gender 2019

	Primary Member			Second Member			All Members		
Reason for Joining	Male	Female	Total	Male	Female	Total	Male	Female	Total
Information, Advice	45%	37%	44%	48%	46%	47%	46%	42%	45%
Community of Interest	30%	33%	30%	12%	31%	25%	28%	31%	29%
Buying a Barge	13%	12%	13%	25%	6%	12%	14%	8%	12%
Access to DBA Services	6%	12%	7%	9%	11%	11%	6%	11%	8%
Recommended	4%	5%	4%	0%	4%	3%	4%	4%	4%
Insurance Discount	1%	2%	1%	0%	3%	2%	1%	2%	1%
Rallies & Events	1%	2%	1%	6%	0%	1%	1%	1%	1%

Finding 23: Internet searches and referrals from friends and other DBA members were the major sources of information about joining DBA. Males were more likely to have used the Internet, while females tended to follow leads from friends and other DBA members (Table 18).

Table 18 - Sources of Info about DBA by Member Type and Gender 2019

	Primary Member			Second Member			All Members		
Sources of Info	Male	Female	Total	Male	Female	Total	Male	Female	Total
Internet	38%	31%	37%	43%	22%	27%	38%	25%	35%
Friends	28%	23%	28%	42%	22%	28%	29%	23%	28%
Other DBA Members	14%	16%	14%	0%	39%	29%	13%	31%	17%
Can't remember	6%	14%	7%	9%	10%	10%	6%	11%	8%
Company Referral (e.g. Insurance)	5%	4%	5%	5%	7%	6%	5%	6%	6%
Rally/Event	5%	10%	6%	0%	0%	0%	5%	4%	4%
Magazine/Book	3%	2%	3%	0%	0%	0%	3%	1%	3%

Finding 24: When asked, 85% of DBA members said they had no unmet expectations from DBA (Table 19), with individual issues each being mentioned by less than 2% pf respondents.

Table 19 - Unmet DBA Expectations by Member Type and Gender 2019

	Primary Member			Second Member			All Members		
Unmet Expectations	Male	Female	Total	Male	Female	Total	Male	Female	Total
No Unmet Expectations	87%	90%	88%	74%	73%	73%	86%	80%	85%
DBA Purpose	2%	2%	2%	0%	2%	2%	2%	2%	1.9%
Route Planning	1%	0%	1%	9%	0%	3%	1%	0%	1.0%
Insurance Help	1%	0%	1%	0%	0%	0%	1%	0%	0.8%
Marinas	1%	0%	1%	0%	2%	1%	1%	1%	0.7%
Facebook Rules	0%	0%	0%	9%	0%	3%	1%	0%	0.6%
Planning to Leave	0%	2%	0%	0%	0%	0%	0%	1%	0.4%
Cruiser Issues	0%	0%	0%	0%	0%	0%	0%	0%	0.3%
Other issues	7%	6%	7%	9%	23%	18%	7%	16%	9.3%

The survey was conducted and compiled by Tony Richardson (with thanks to Ian McCauley for help in creating the list of Findings).

Taking it forward

The Board Meeting in September included a comprehensive discussion of the 2019 Member Survey to begin the process of developing actions based on the key points which you will have read above. The Board is particularly grateful to Tony Richardson for conducting the research and to all who filled in and returned their responses.

It has been another comprehensive survey at a very important moment in the history of both DBA and of the pleasure, leisure, life cruising cycle of boaters and members. The Board sees it as, perhaps, the first point in what may be a fulcrum moment for all of us in the future of our barging and boating lifestyle.

Feedback from members is particularly welcome so do please take the opportunity to not only read this summary but also delve into the full report www.barges.org/survey2019 (you will need to be logged in). The Board will review all of the information and comments in advance of the January Board Meeting when it will create proposals for action.

So please take this chance to provide your observations and suggestions. E-mails please to be sent to chair@barges.org by 31st October.

Thank you!