



Canal &
River Trust
Making life better by water



Glandŵr Cymru
Canal & River Trust in Wales

2024 Annual Boaters' Survey

Full report



Analysis supported by DJS

Published June 2024



**Canal &
River Trust**

Making life better by water



Glandŵr Cymru
Canal & River Trust in Wales

1. Executive Summary



Research was conducted in-house by the Insight & Evidence Team based on a questionnaire devised by the Boating Team.

The survey was administered using an online questionnaire covering:

- User experience and satisfaction
- Trust experience and reputational and service measures

It is important to note that some changes were made in 2023 to the survey and thus some findings are not comparable over time, these include: Question (Q)16, Q17, Q18 and Q20.

The survey was distributed to random sample of approximately a third of all licence holders.

Those for whom the Trust held an email address were sent a link to the online survey through a personal email. The emails included a unique URL for each respondent.

Boaters for whom the Trust doesn't hold an email address were sent a link to the survey via Text message including link to online survey, if the Trust held a mobile number.

The returned survey response data was provided to the Trust's agency research partner, DJS, in order to independently analyse the findings and produce this full research report.

Response details

Year	Invitations sent	Response received	Duration
2018	17,977	1,760	
2019	Survey not conducted		
2020	9,255	961	
2021	14,209	1,179	27 th February to 4 th March
2022	8,193	936	7 th March to 4 th April
2023	8,060	1,407	28 th March to 30 th April
2024	11,578	1,167	1 st April to 17 th April

Executive Summary: Stated and Implicit Drivers of the KPI

Favorability scores appear to have experienced notable declines since the 2023 survey was conducted (-8% points) but there does appear to be disparity by region with those in London & South East, Wales & South West and North West all on average scoring the Canal & River Trust significantly less favourably in comparison to other regions.

Perceptions amongst boaters that the upkeep of the Canal & River Trust's waterways is 'poor' also significantly increased this year (+7% points from 2023). This is an important finding to consider as when we examine the Key Driver Analysis (see slides 42-45) upkeep of the waterways is the most influential factor driving overall satisfaction (relative importance score of 0.251). Therefore, it can be argued that improvements in this area would likely increase overall satisfaction amongst boaters.

An area that the Trust does perform particularly well in is with regards to its staff members and volunteers – both of which are scored very high by boaters in terms of their overall helpfulness and friendliness. An area of improvement for both staff and volunteers is however their availability to respond to queries – again this is a key driver of overall satisfaction, and improvements here would likely result in higher overall satisfaction scores.

The overall satisfaction KPI result for 2024 is:

46%
(-8% compared to 2023)

Overall satisfaction KPI:

1. Upkeep of the waterways is the most important driver of overall satisfaction.
2. Staff availability to respond to queries is also an important driver of overall satisfaction.
3. It is important to note that boater type was included in the analysis but was not found to be a key driver.

Stated influence regression:

1. Customer service is the biggest driver of the satisfaction KPI.
2. Dredging and vegetation management is the second most influential factor.



Canal &
River Trust

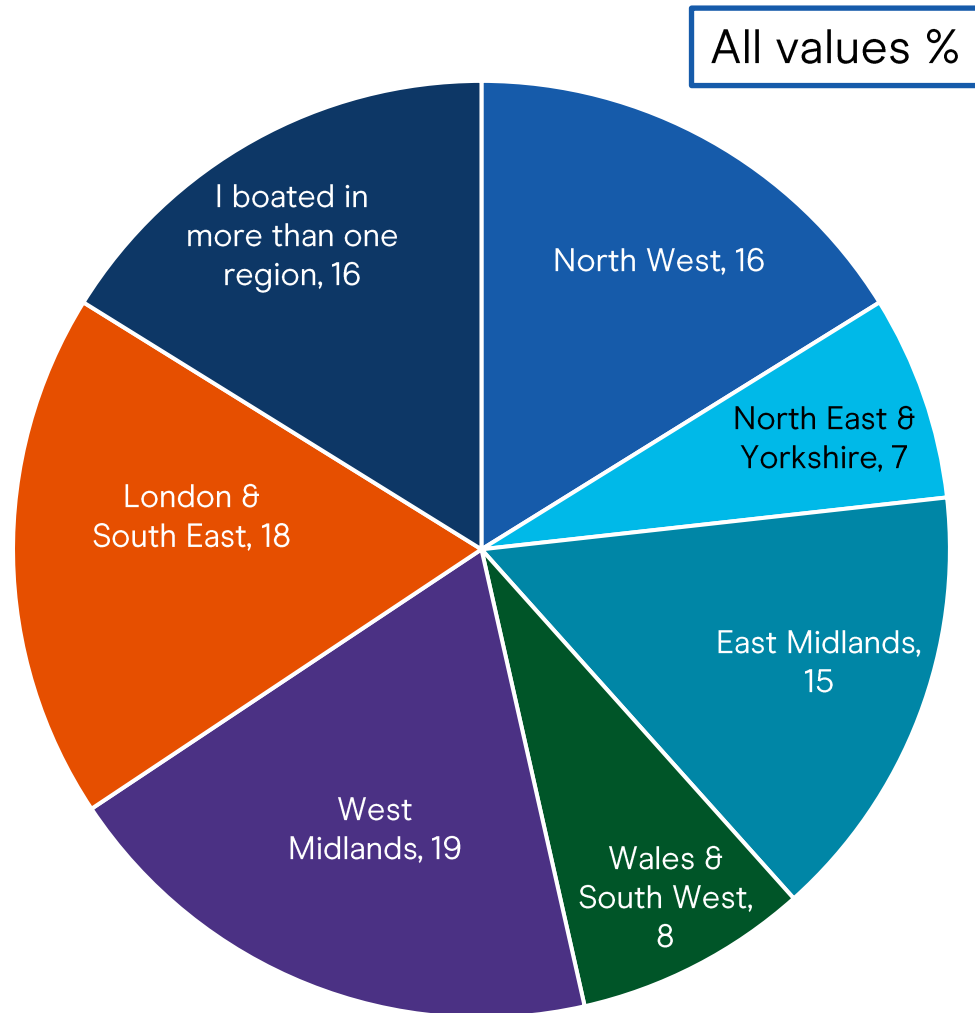
Making life better by water



Glandŵr Cymru
Canal & River Trust in Wales

2. Sample

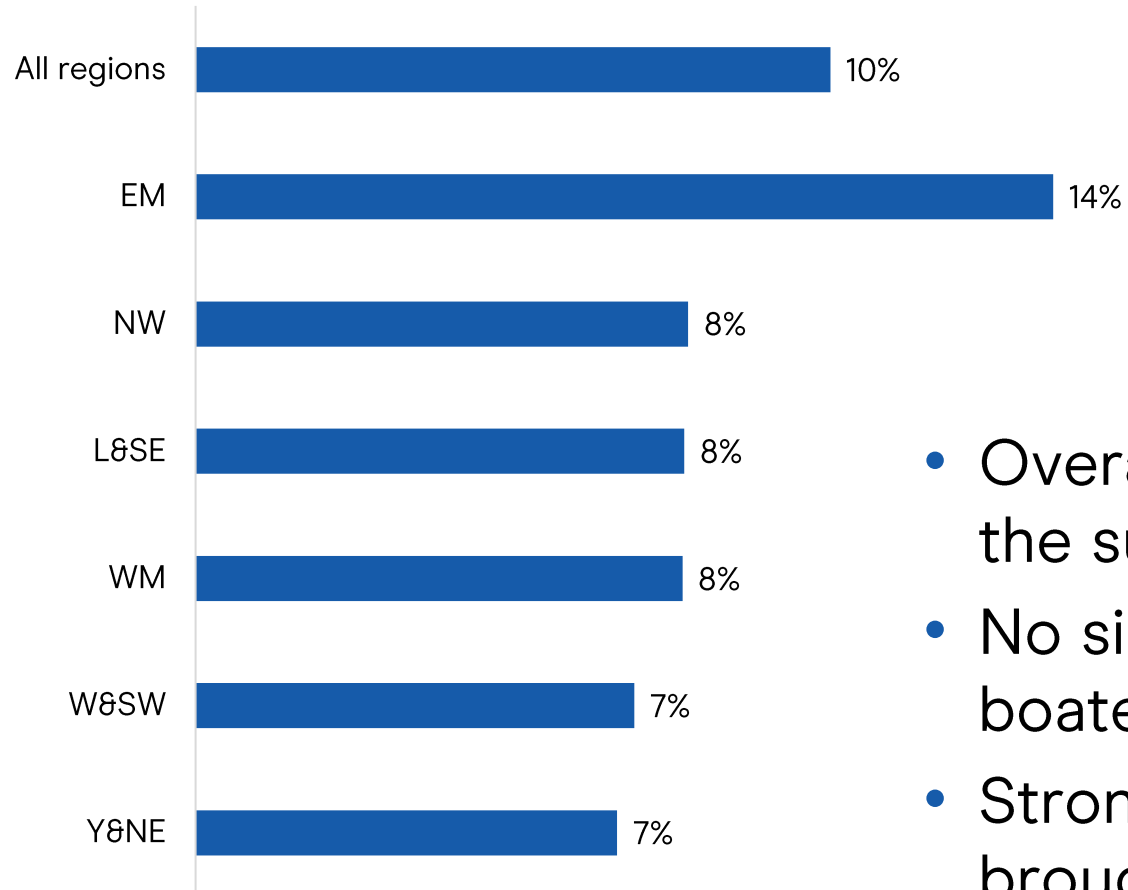




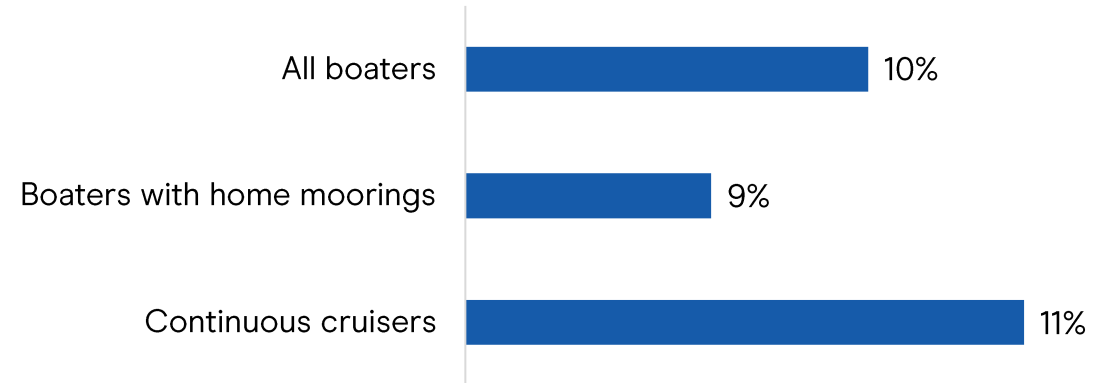
- The total of **1,167 responses** is lower than achieved in 2023 (1,407).
- Respondents who boated in more than one region has declined since 2023 (-5%).
- More respondents report remaining in London & SE (+2%), NW (+3%) and Y&NE (+2%) compared to 2023.

Survey response rate 2024

Survey response by region

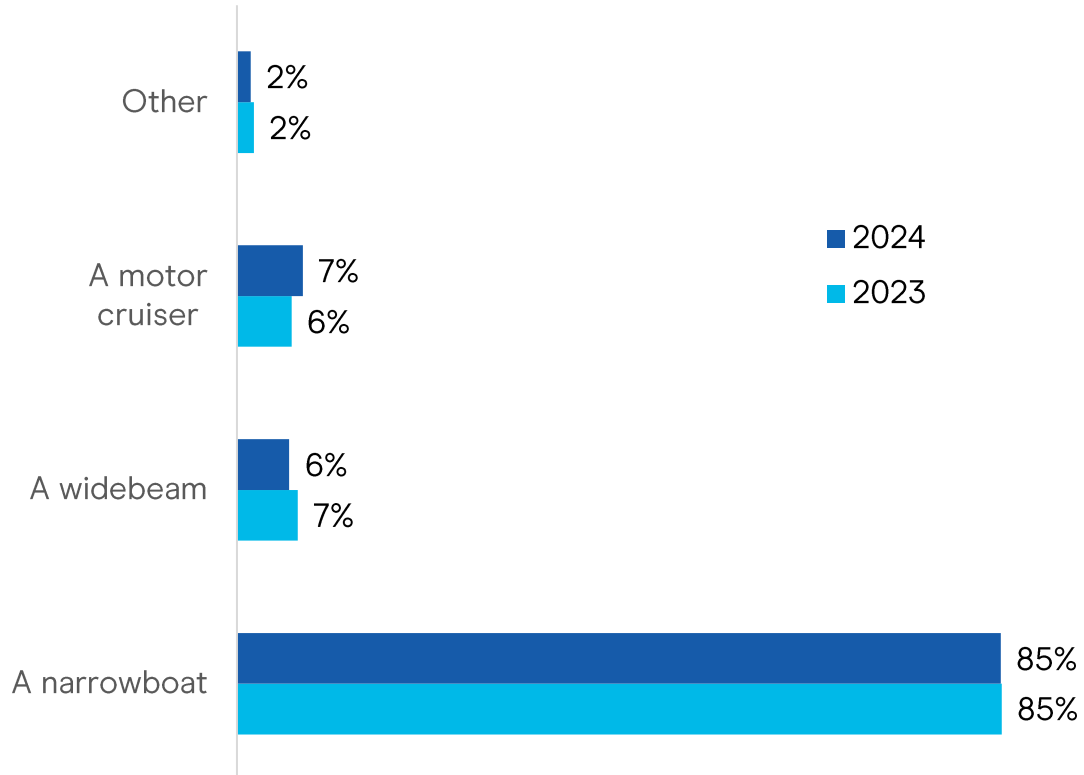


Survey response by boater type



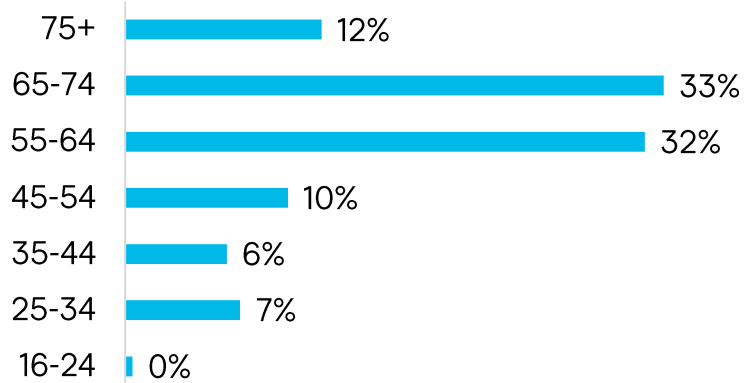
- Overall, circa 10% of those invited responded to the survey.
- No significant variation in response between boaters with and without a home mooring
- Strong response from the East Midlands has brought up the overall response rate

Type of Craft

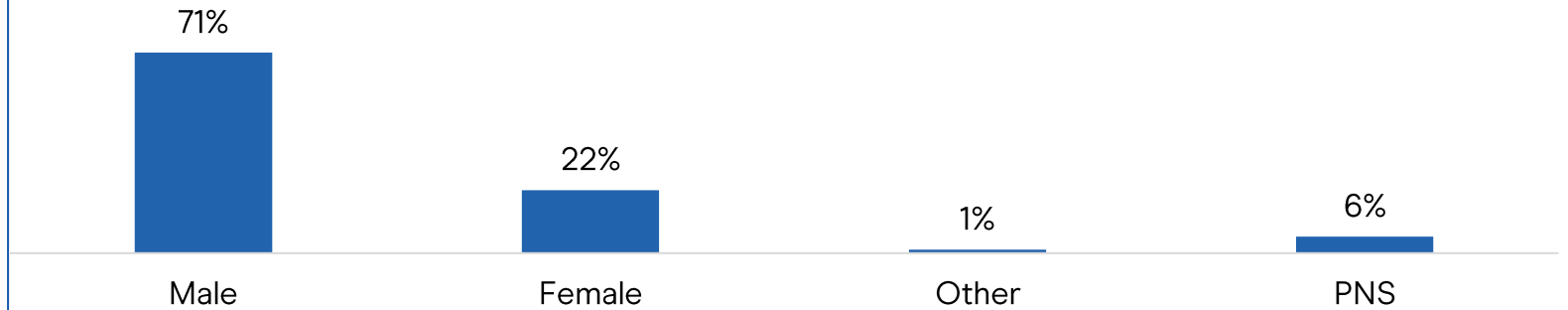


- As in previous years, the sample is dominated by respondents who own narrowboats.
- There has been a nominal increase in motor cruisers (+1%) and a nominal decrease in widebeams (-1%) but it is important to note that these minor fluctuations are non-significant.

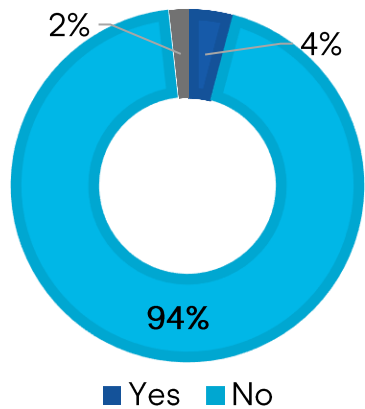
Age



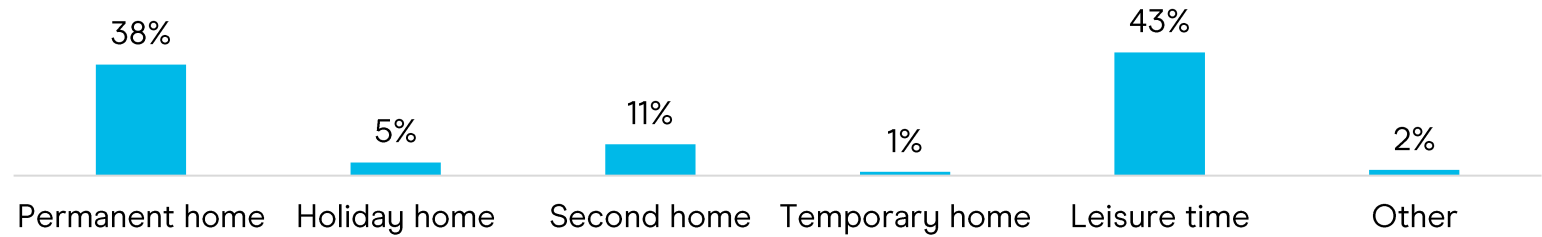
Gender



Children under 16*



Boat use





Canal &
River Trust
Making life better by water



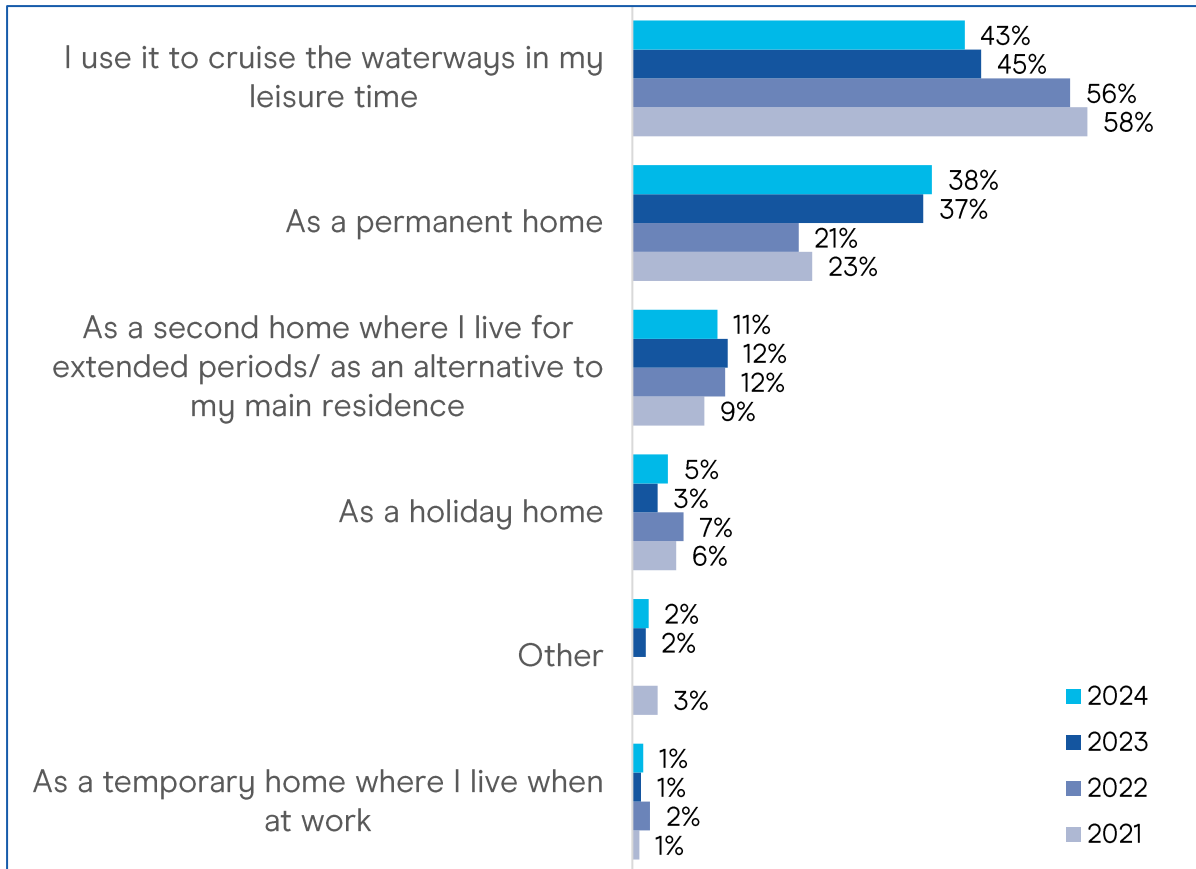
Glandŵr Cymru
Canal & River Trust in Wales

3. Boater Profiles

Boat use
Boat types

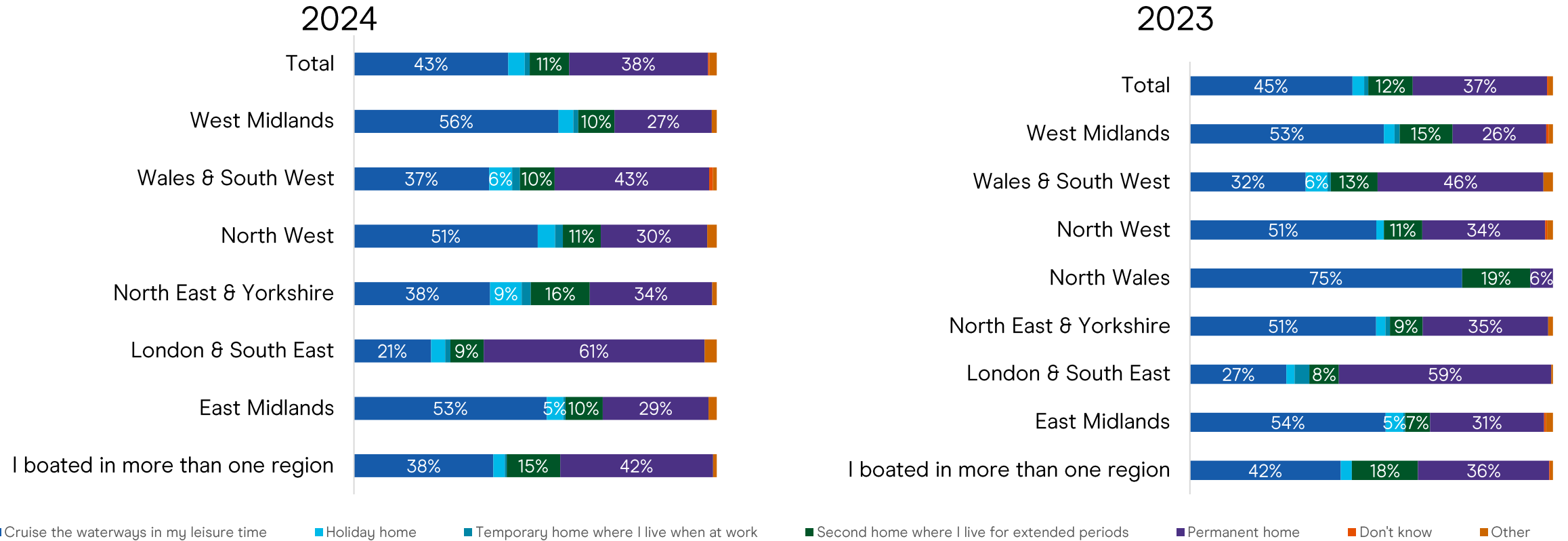


Q7: Which of the following options best describes how you use your boat most of the time?
Please select one answer only



- Findings this year appear to be consistent with those observed in 2023.
- The decline in responses from respondents who cruise the waterways in their leisure time continues (down a further -2% points from the -11% point decline observed in 2023).

Boat use by region

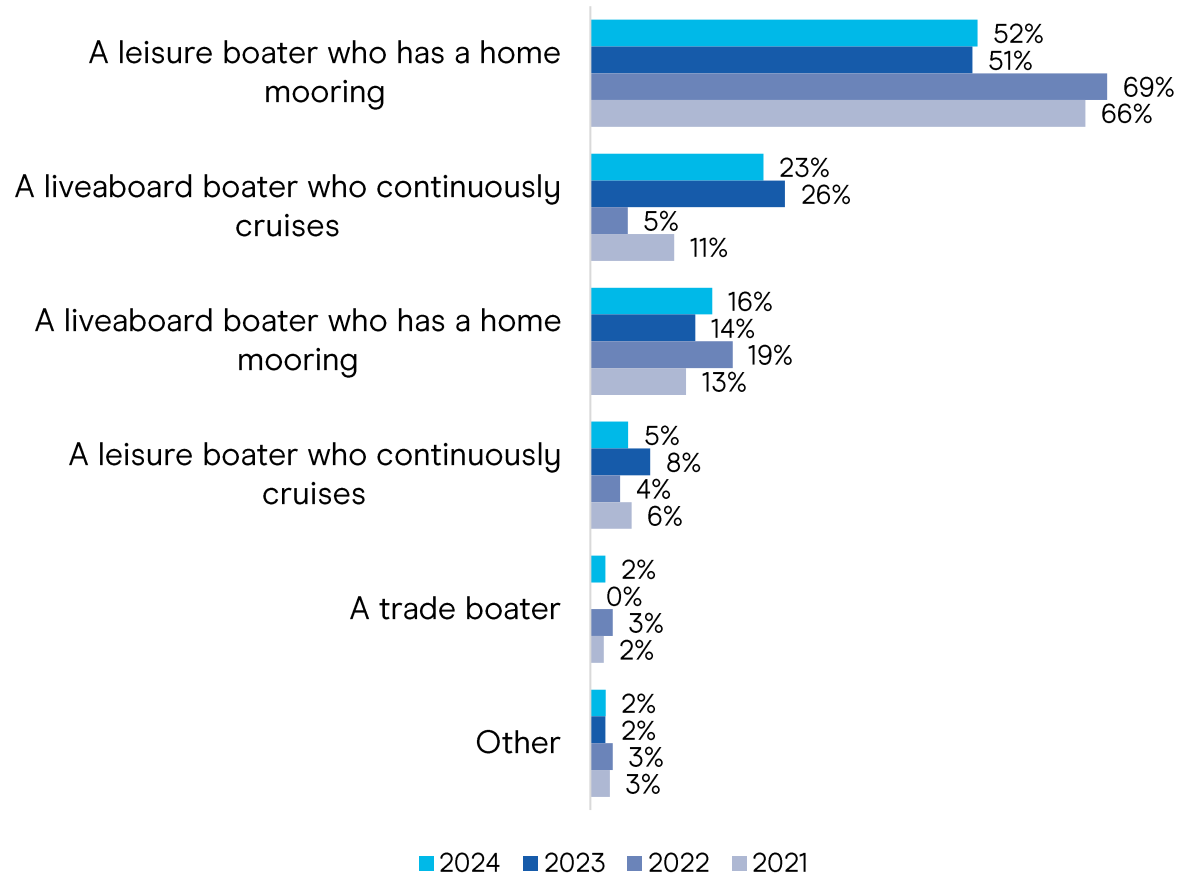


Cruising waterways in leisure time or as a permanent home continue to be the most frequent use of boats, with those in London & South East continuing to be more likely to use boats as permanent homes (up a further +2% points from 2023) in comparison to any other region.

Sample: All (1,167).

Boaters Usage type

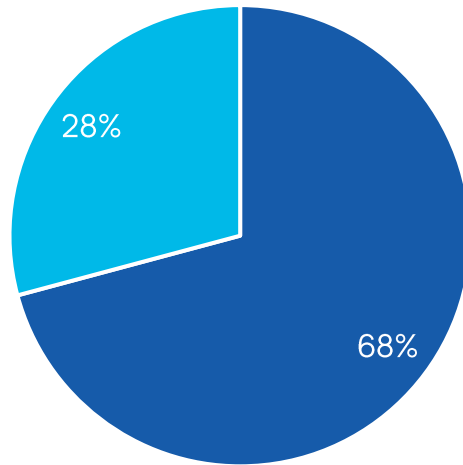
Q9: Please select which best describes you?
Please select one answer only



Sample: All (1,167 in 2024) (1,407 in 2023) (936 in 2022) (1,179 in 2021)

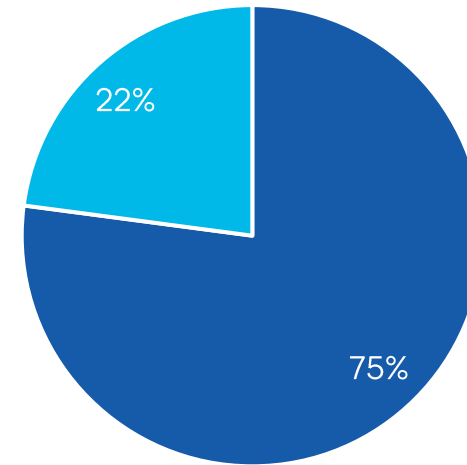
- As in previous years, a leisure boater with a home mooring continues to be the most selected by respondents (52%).
- Small decreases can be observed in the number of liveaboard boaters and leisure boaters who continuously cruise (-3% points respectively), whilst small increases can be observed in the number of liveaboard boaters with a home mooring and trade boaters (+2% respectively).

Annual Survey 2024



■ Home moorings ■ Continuous cruisers

National Boat Count 2024

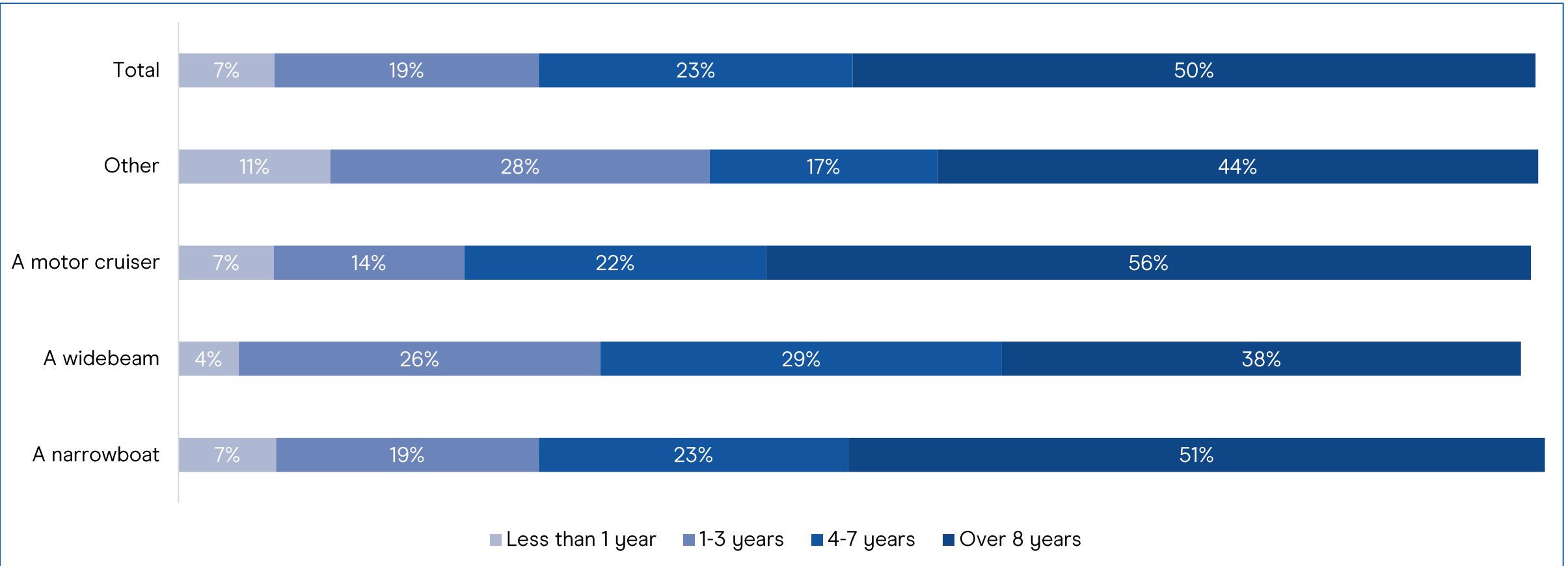


■ Home moorings ■ Continuous cruisers

- Compared to the National Boat Count, this survey received a higher number of responses from continuous cruisers as was the case in 2023.
- The National Boat Count does not include data on boat use (liveaboard or leisure)

Length and Type of Boat Ownership

Q15: Please tell us how long you have had a boat?
Please select one answer only



Sample: All (1,165 - excludes 'don't know').



Canal &
River Trust
Making life better by water



Glandŵr Cymru
Canal & River Trust in Wales

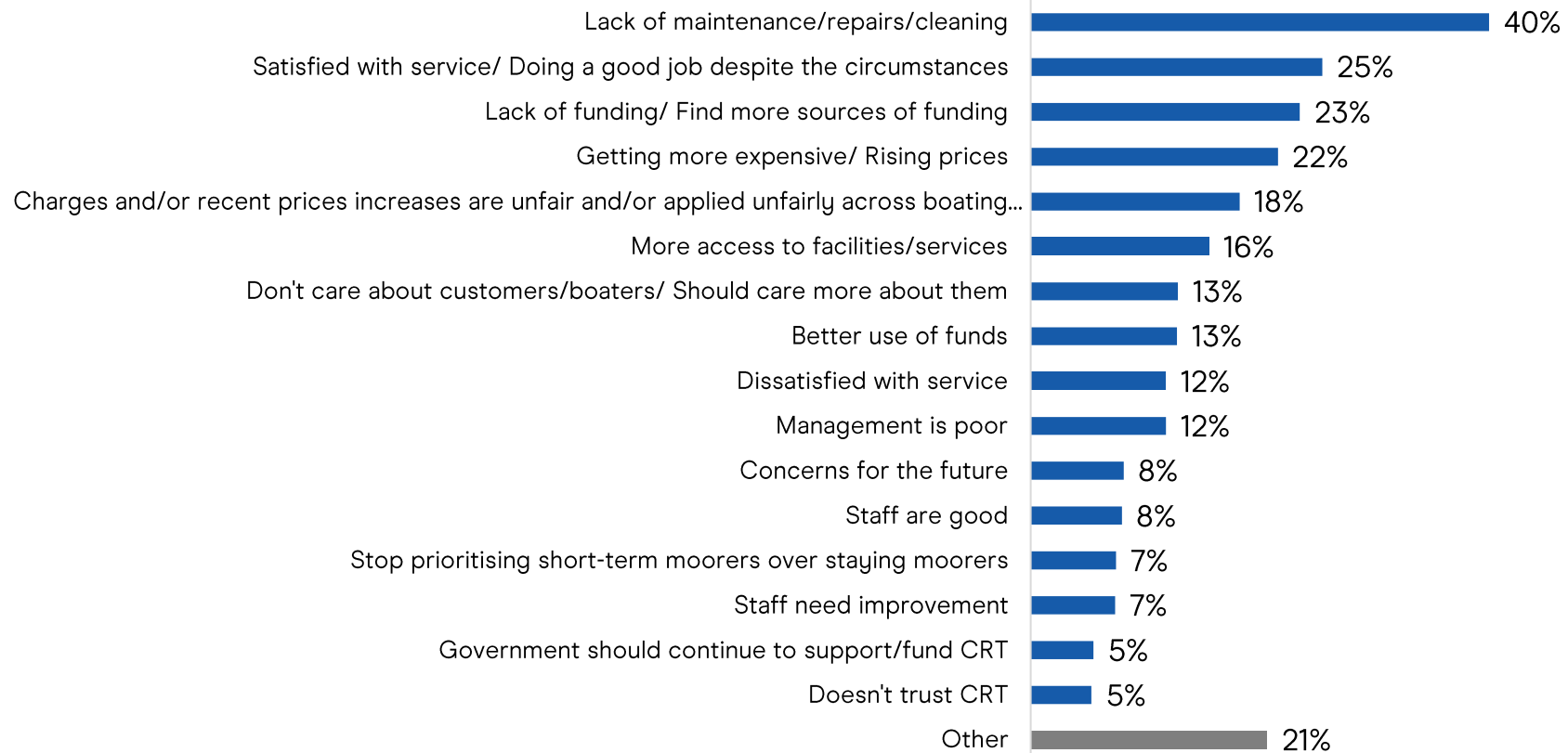
4. Relational Measures

Familiarity
Favourability
Advocacy of the Trust
Advocacy of the waterways

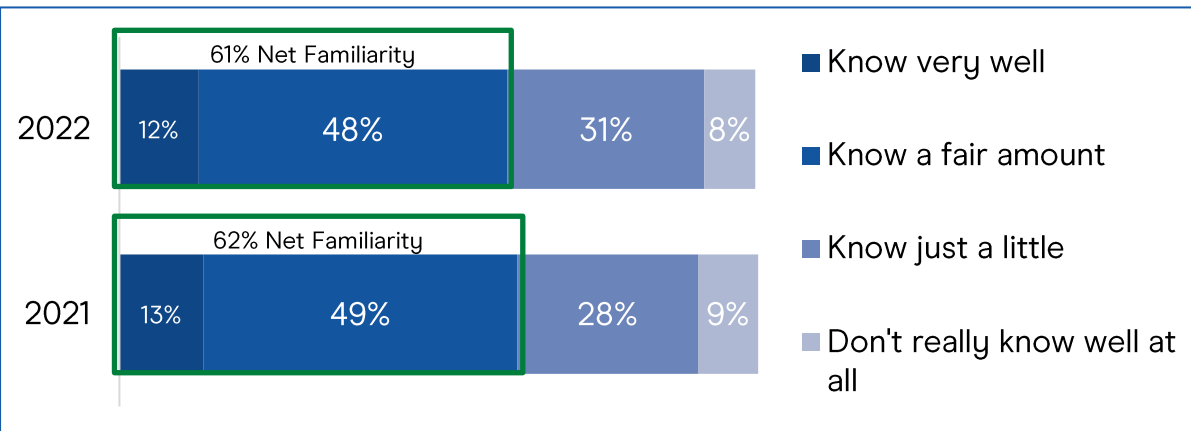
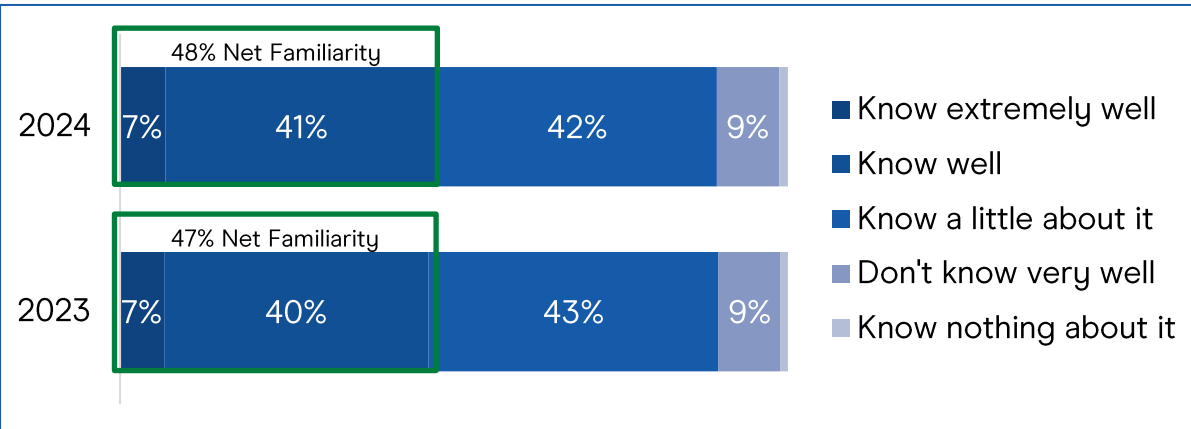


Feelings about the Trust 2024

Q3: Can you tell us in your own words how you feel about the Canal & River Trust at the moment and what makes you feel this way?
Please give as much detail as possible.



Q16: How well do you feel you know the Canal & River Trust as an organisation i.e. the charity itself, not the waterways?
Please select one answer only



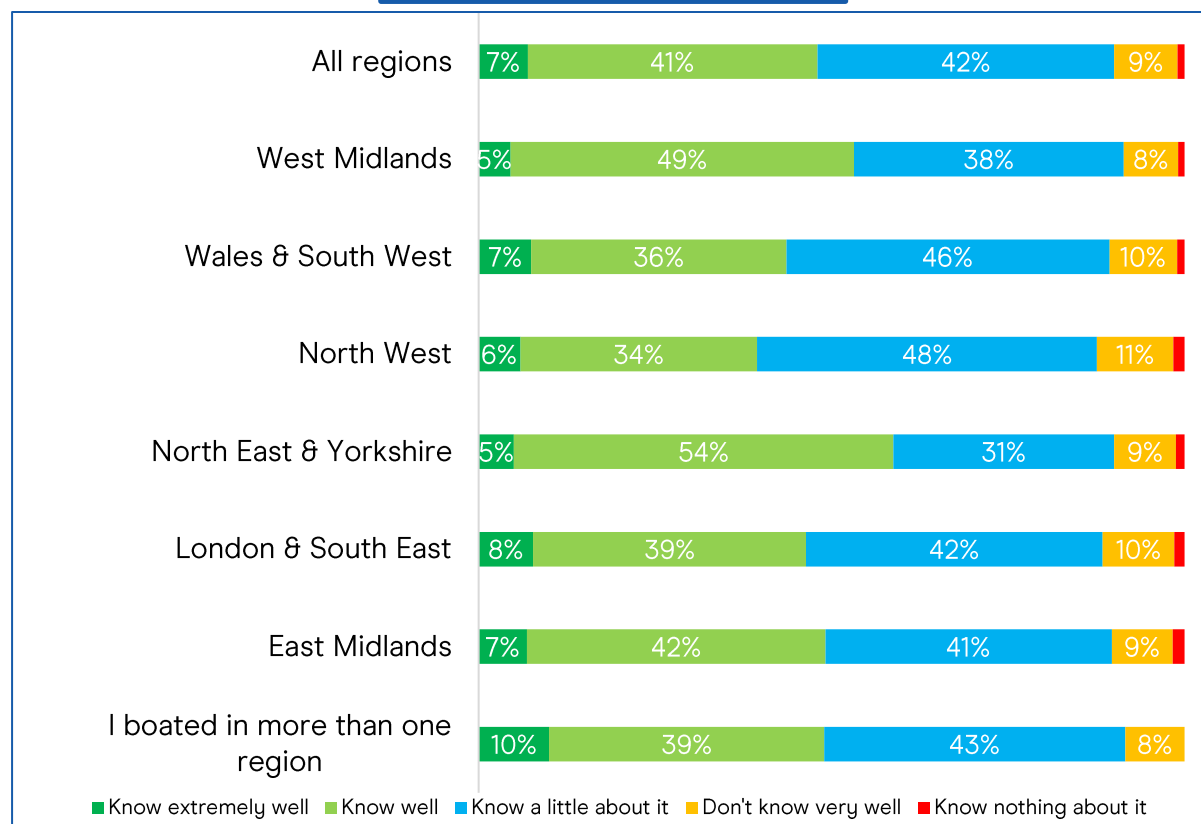
- It is important to note that in 2023 the response options were changed to a 5-point scale, rather than a 4-point scale which was used in previous years.
- NET familiarity with the Canal & River Trust as an organisation (extremely well and well) has remained consistent with 2023 levels at 48%.

Familiarity 2024 by regions

Q16: How well do you feel you know the Canal & River Trust as an organisation i.e. the charity itself, not the waterways?

Please select one answer only

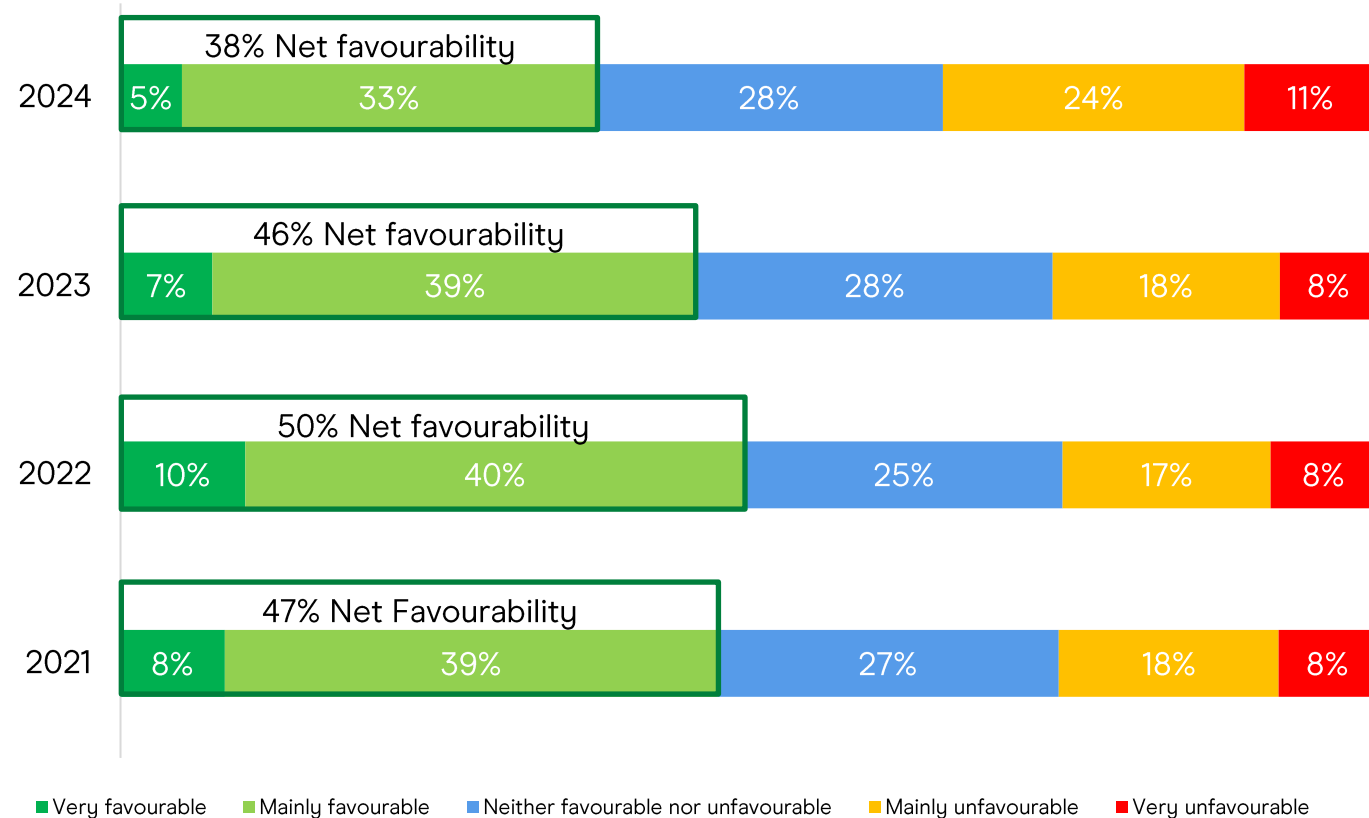
48% 2024 Net Familiarity



- Boaters in Yorkshire & North East and West Midlands are **significantly more likely** to say that they know the Canal & River Trust 'extremely well' or 'well'.
- Boaters in North West and Wales & South West are **significantly less likely** to say that they know the Canal & River Trust 'extremely well' or 'well'.

Sample: All (1,167). *Only data labels 5%+ are displayed in the chart.

2022 Q17: How favourable or unfavourable is your overall opinion or impression of the Canal & River Trust? *Please select one answer only*
 2023-2024 Q17: What is your opinion of the Canal & River Trust? *Please select one answer only*



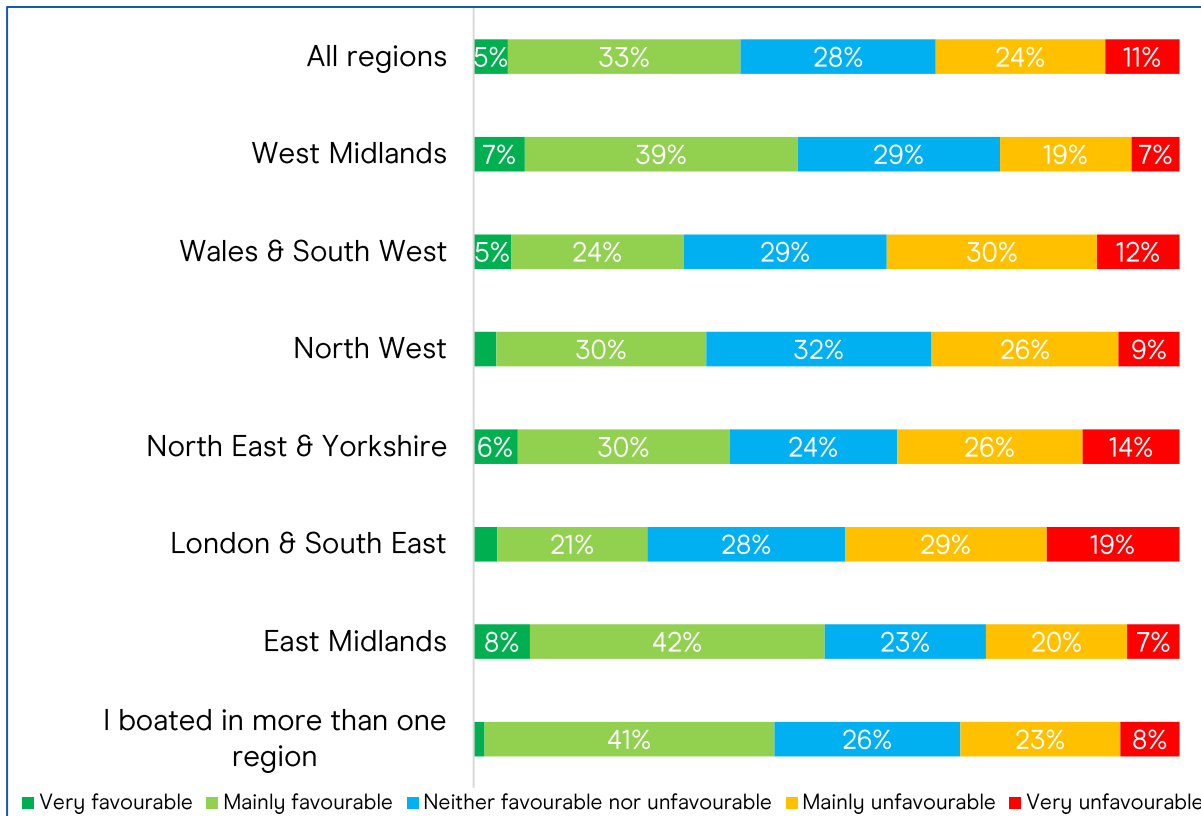
Sample: All (1,167 in 2024) (1,407 in 2023) (936 in 2022) (1,179 in 2021).

- It is important to note that in 2023 the wording of this question was simplified (see above) but the scale remained the same. For this reason, 2024 findings are only directly comparable to 2023 findings.
- Since 2023 there has been a significant decline in terms of NET favourability (-8% points). This appears to be as a result of an increase in 'mainly unfavourable' and 'very unfavourable' responses.

Favourability 2024 by regions

Q17: What is your opinion of the Canal & River Trust?
Please select one answer only

38% 2024 Net Favourability



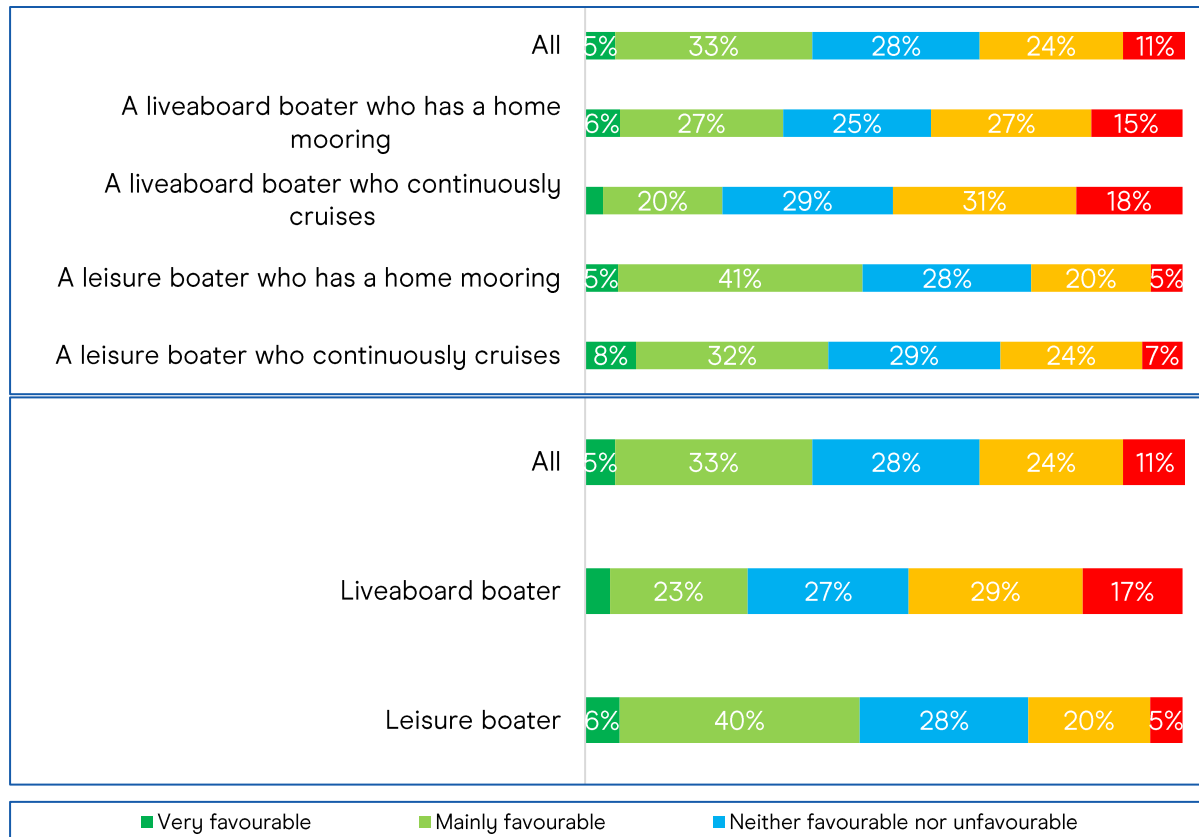
- Boaters in East Midlands, West Midlands and more than one region score the Canal & River Trust significantly **more favourably**.
- However, boaters in London & South East, Wales & South West and North West score the Canal & River Trust significantly **less favourably**.

Sample: All (1,167). *Only data labels 5%+ are displayed in the chart.

Favourability 2024 by boater usage type

Q17: What is your opinion of the Canal & River Trust?
Please select one answer only

38% 2024 Net Favourability

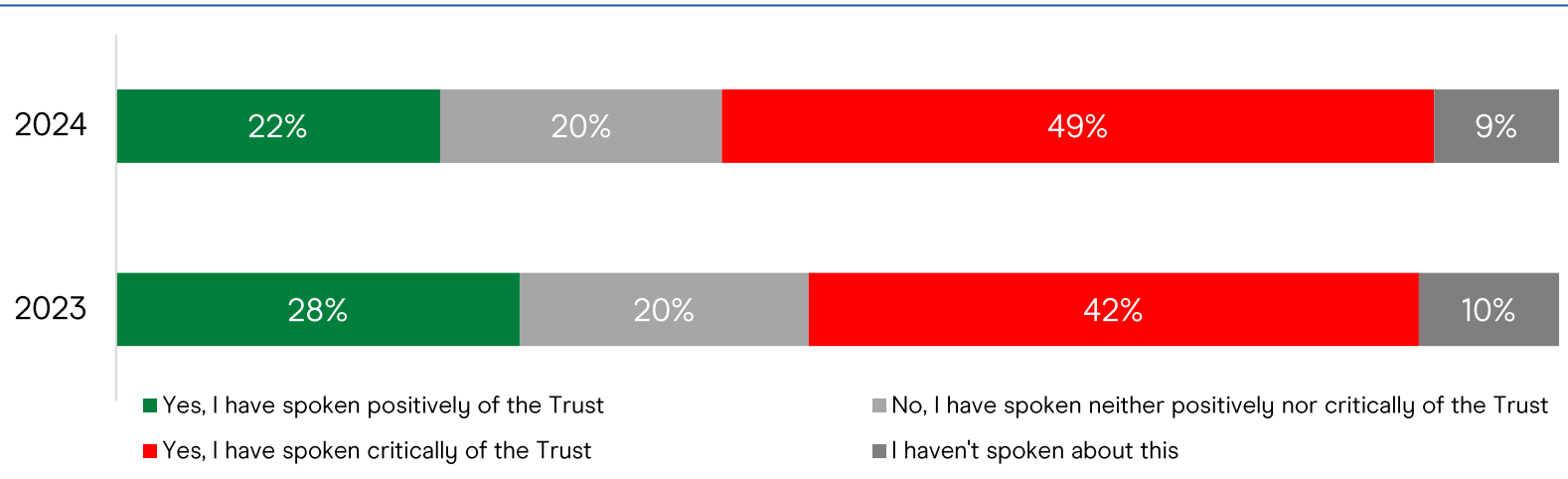


- Leisure boaters with home moorings and leisure boaters who continuously cruise score the Canal & River Trust significantly **more favourably** whilst liveaboard boaters who continuously cruise and liveaboard boaters with home moorings score the Canal & River Trust significantly **less favourably**.

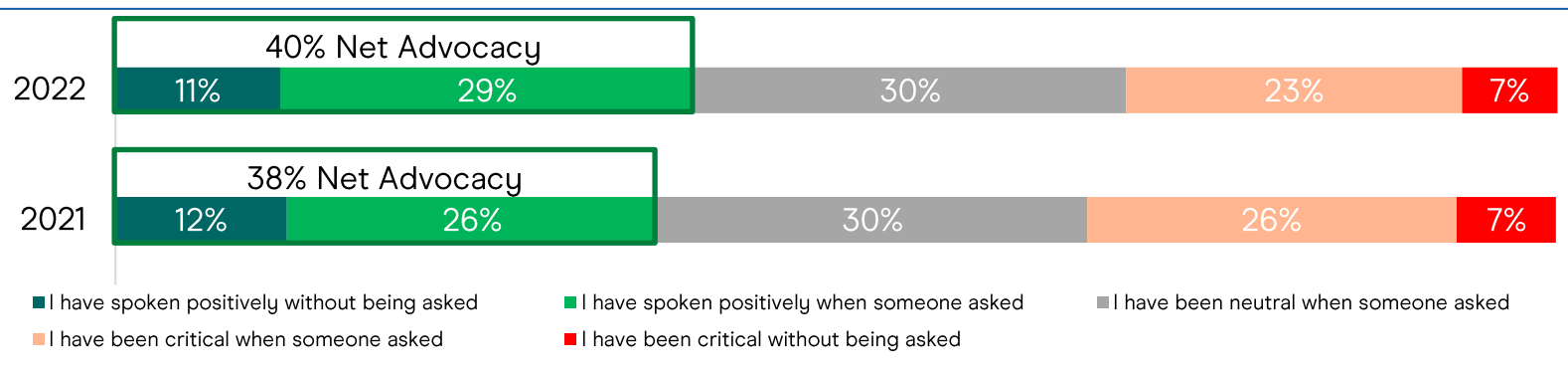
Sample: All 1,167 (chart doesn't show Other, Don't Know and Trade due to small sample sizes). *Only data labels 5%+ are displayed in the chart.

Advocacy of the Trust 2021-24

2022 Q10: To what extent have you spoken positively or critically about the Canal & River Trust? *Please select one answer only*
 2023-24 Q18: Generally, have you ever spoken positively or critically about the Canal & River Trust to friends or family? *Please select one answer only*



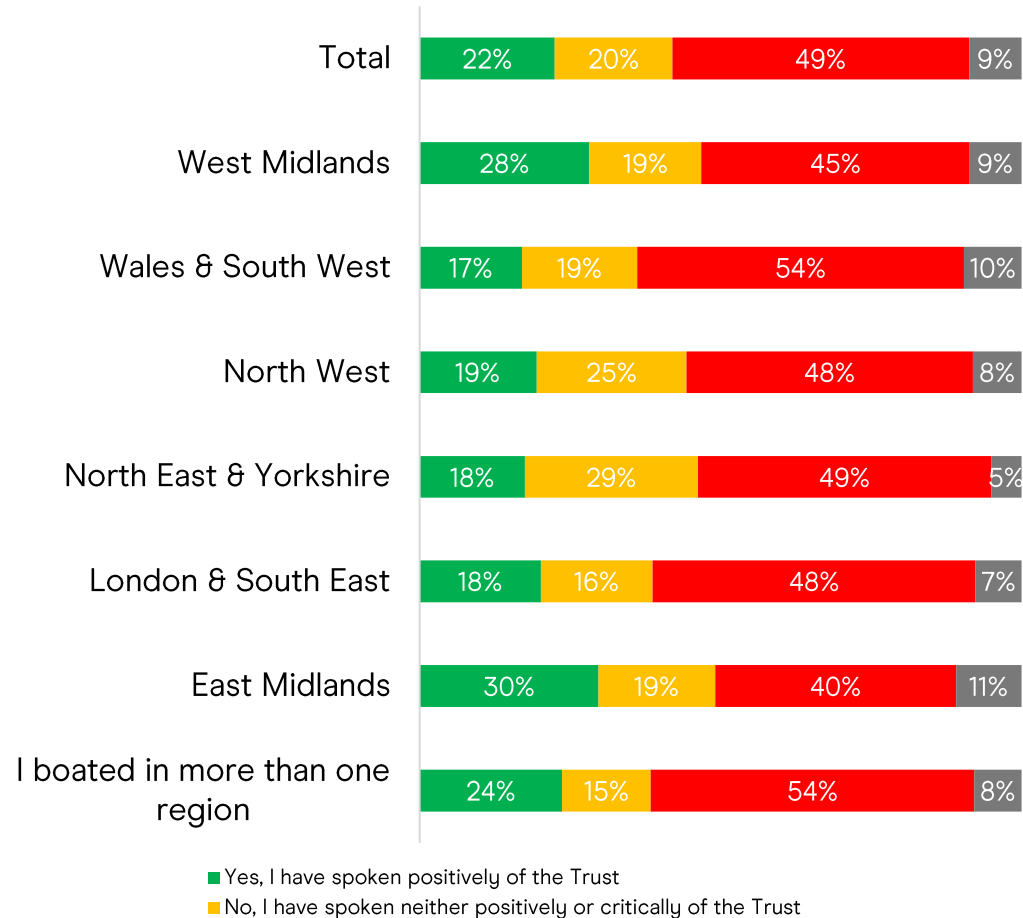
- It is important to note that in 2023 the response options for this question were changed. For this reason, 2024 findings are only directly comparable to 2023 findings.
- Since 2023 advocacy for the Canal & River Trust has experienced further decline (-6% points). This seems to be due to boaters being more likely to speak critically of the Trust.



Sample: All (2024 1,167) (2023 1,407) (2022 936) (2021 (1,179).

Advocacy of the Trust 2024 by region

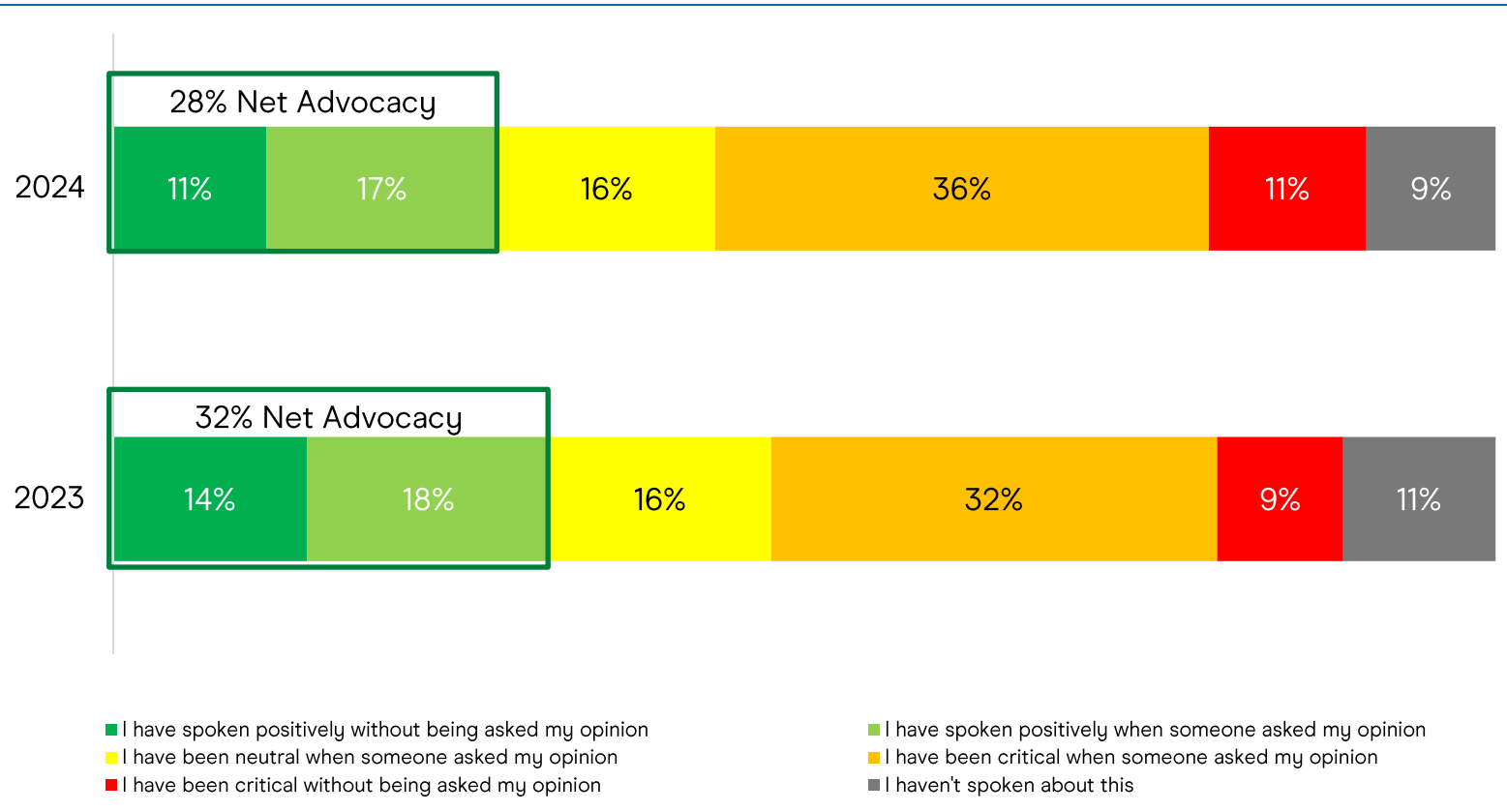
Q18: Generally, have you ever spoken positively or critically about the Canal & River Trust to friends or family?
Please select one answer only



- Advocacy, like favourability, does appear to vary across the regions.
- Boaters in London & South East and those who boat in more than one region are **significantly more likely** to say that they have **spoken critically** about the Canal & River Trust.
- On the other hand, boaters in the East Midlands and West Midlands are **significantly more likely** to say that they have **spoken positively** about the Canal & River Trust.

Advocacy of the waterways

Q19: Finally in this section, to what extent have you spoken positively or critically about the waterways looked after by the Canal & River Trust? *Please select one answer only*



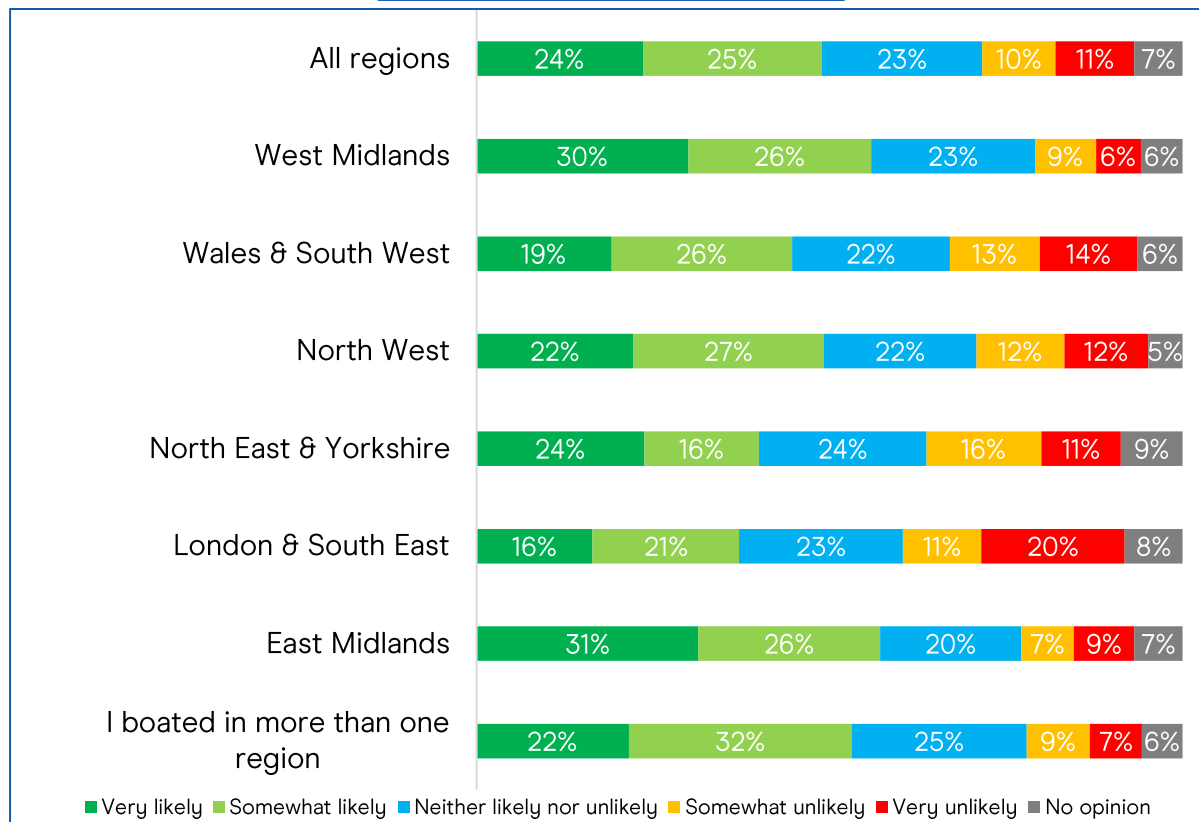
- Just under three in ten (28%) say they have spoken positively about the Canal & River Trust either without being asked (11%) or after being asked (17%). This is a decrease since 2023 (-4% points).

Sample: All (2024 1,167) (2023 1,407).

Likelihood to recommend 2024 by regions

Q22: How likely are you to recommend the Canal & River Trust's waterways to other boaters?
Please select one answer only

49% 2024 Net Likely



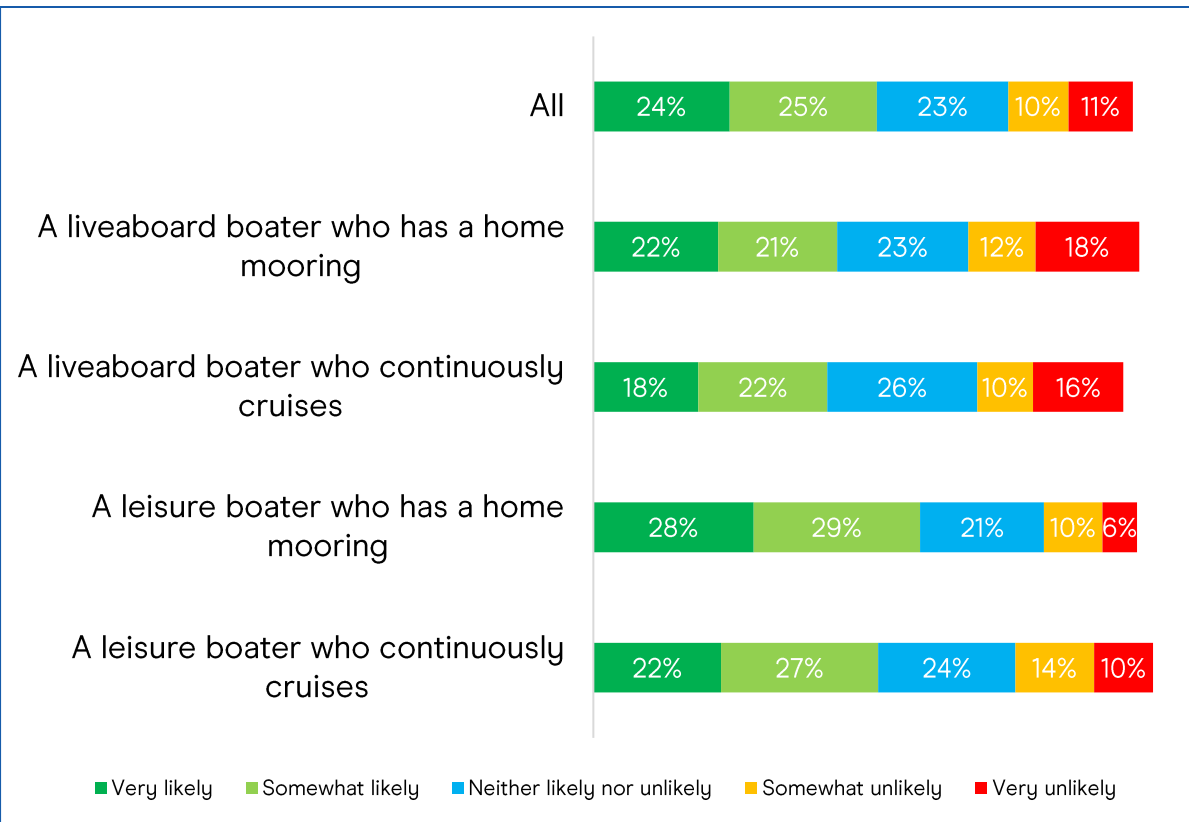
- Boaters in the East Midlands, West Midlands and more than one region say that they are significantly more likely to recommend the Canal & River Trust's waterways.
- However, boaters in London & South East and Yorkshire & North East are significantly less likely to recommend the Canal & River Trust's waterways.

Sample: All (1,167). *Only data labels 5%+ are displayed in the chart.

Likelihood to recommend by boater usage type

Q22: How likely are you to recommend the Canal & River Trust's waterways to other boaters?
Please select one answer only

49% 2024 Net Likely



- Leisure boaters with home moorings are significantly more likely to say that they would recommend the Canal & River Trust's waterways to other boaters in comparison to liveaboard boaters who continuously cruise and liveaboard boaters who have a home mooring.

Sample: All 1,167 (chart doesn't show Other, Don't Know and Trade due to small sample sizes).



Canal &
River Trust

Making life better by water

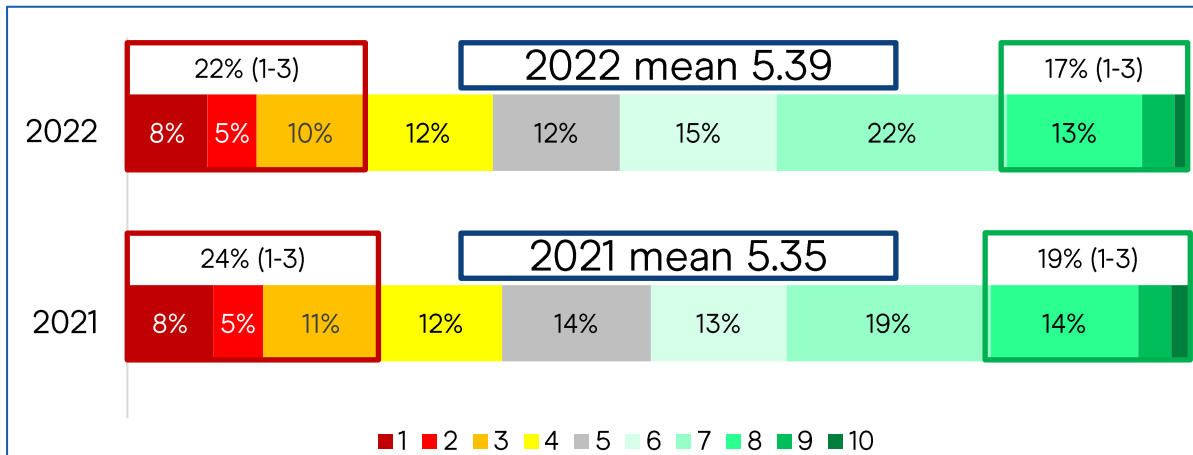
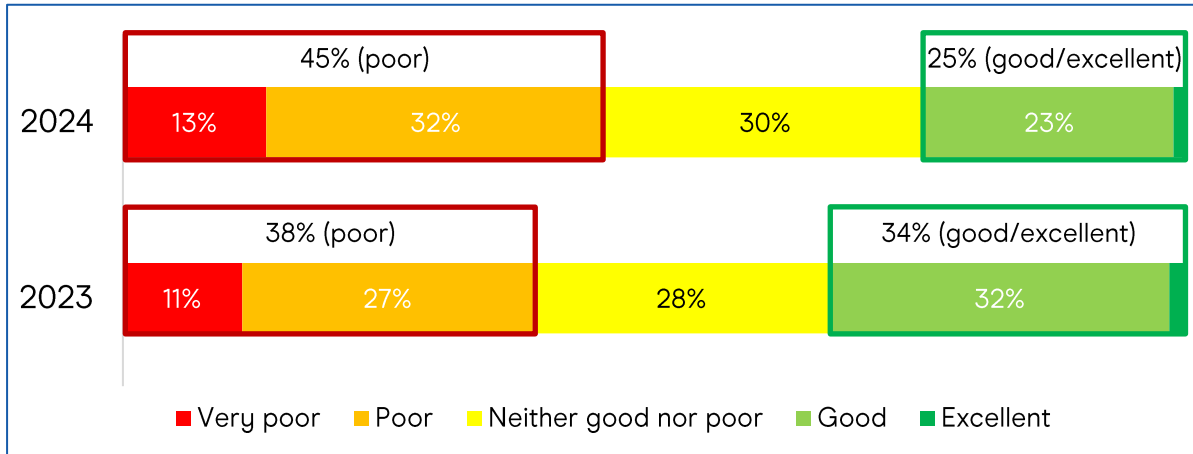


Glandŵr Cymru
Canal & River Trust in Wales

5. Maintenance



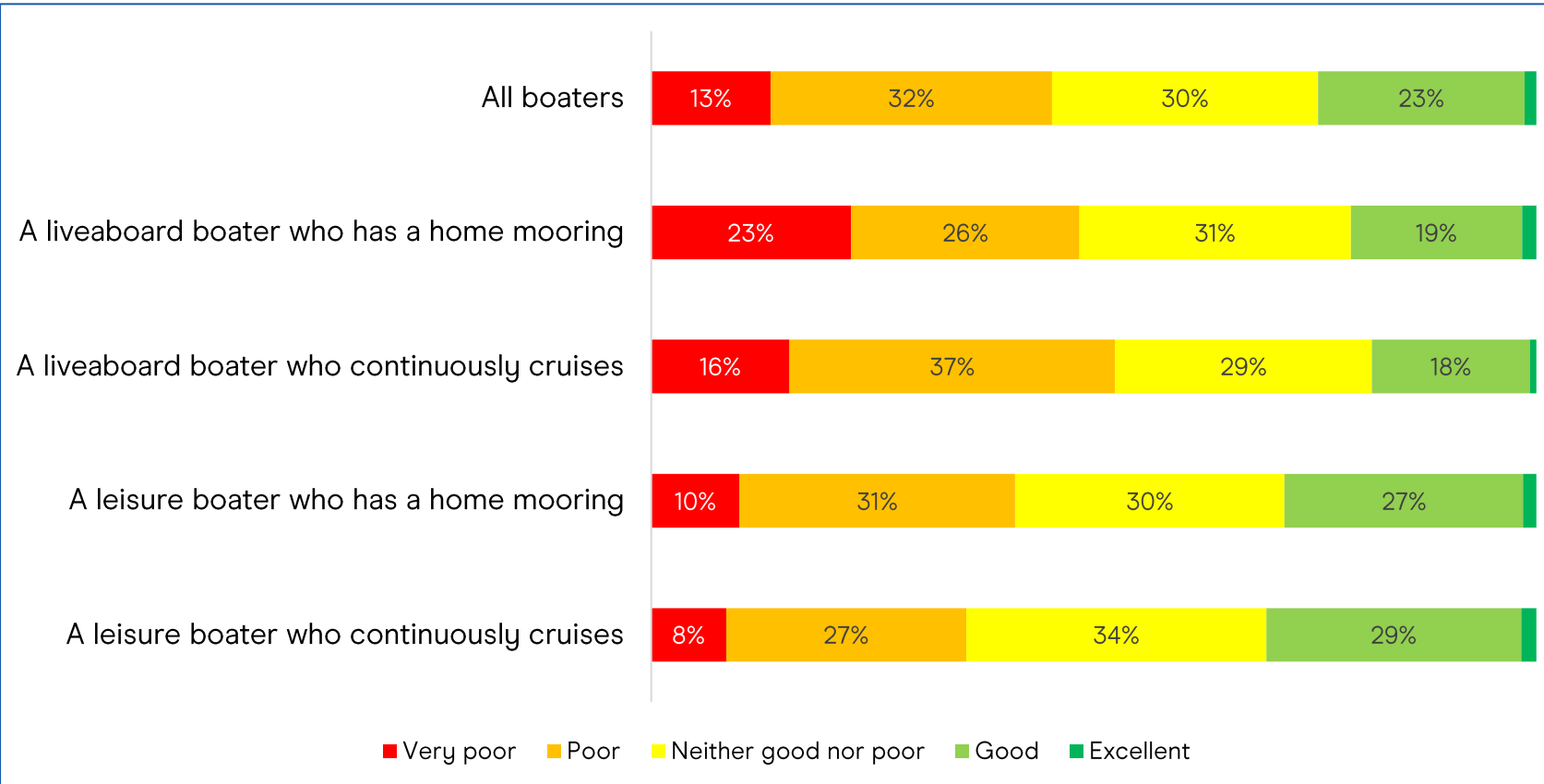
Q20: Please indicate how you would rate the overall upkeep of the Canal & River Trust's waterways.
 2021-22 scale: 1=Very Poor, 10=Excellent
 2023-24 scale: Very poor, Poor, Neither, Good, Excellent, No Opinion



- It is important to note that in 2023 the response options for this question were changed from what was used in previous years. For this reason, 2024 findings are only directly comparable to 2023 findings.
- Perceptions that upkeep of the Canal & River Trust's waterways is 'poor' have significantly increased this year (+7% points).

Upkeep 2024 by Boater Usage Type

Q20: Please indicate how you would rate the overall upkeep of the Canal & River Trust's waterways.
Very poor, Poor, Neither, Good, Excellent, No Opinion



- Liveaboard boaters who continuously cruise are **significantly less likely** to rate the Canal & River Trust's waterways as 'excellent' or 'good' in comparison to leisure boaters who continuously cruise or have a home mooring.

Sample: All 1,167 (chart doesn't show Other, Don't Know and Trade due to small sample sizes). *Only data labels 5%+ are displayed in the chart.



**Canal &
River Trust**
Making life better by water



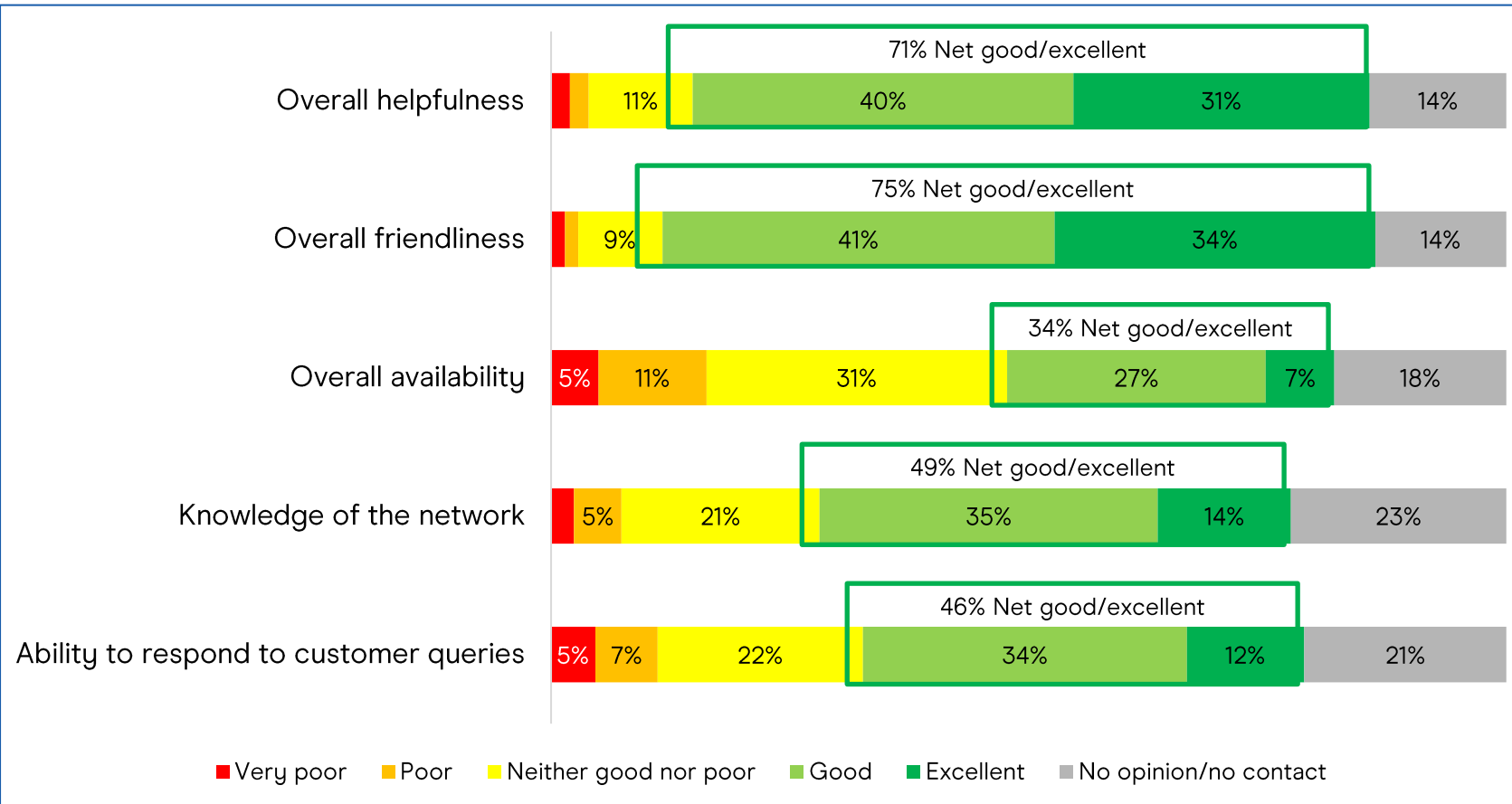
Glandŵr Cymru
Canal & River Trust in Wales

6. Customer Service

Customer service
Volunteer service

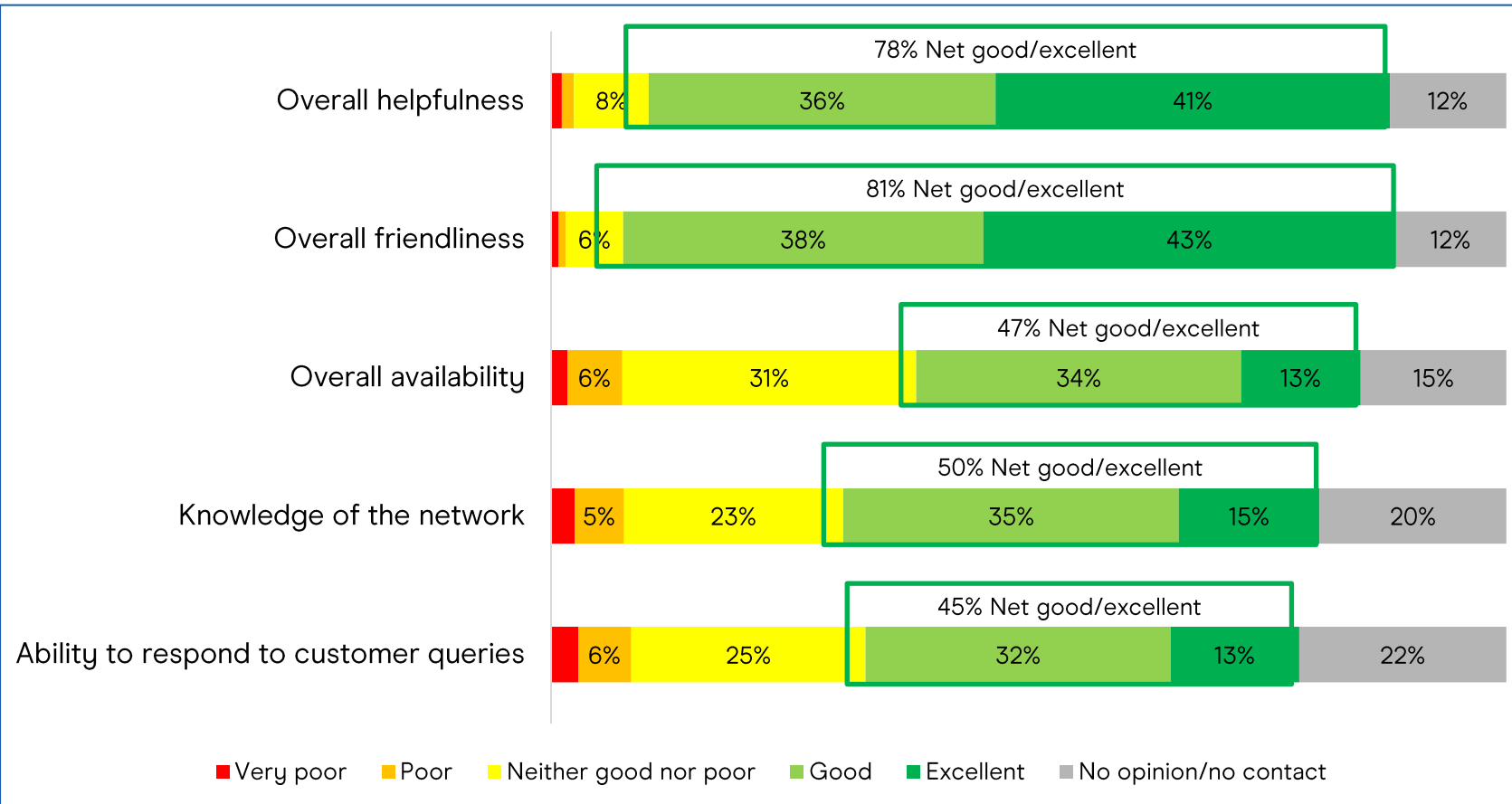


Q23: Thinking about Canal & River Trust staff you saw out and about on the waterways, how do you rate them for...?
Please select one answer per row



- The Canal & River Trust staff receive high praise from boaters when it comes to their overall friendliness (75%) and overall helpfulness (71%). They do however receive less praise when it comes to their overall availability (34%).

Q24: Thinking about Canal & River Trust volunteers you saw out and about on the waterways, how do you rate them for...?
Please select one answer per row



- The Canal & River Trust volunteers receive high praise from boaters when it comes to their overall friendliness (81%) and overall helpfulness (78%). They also score more highly in terms of availability in comparison to staff members (47%).



Canal &
River Trust
Making life better by water



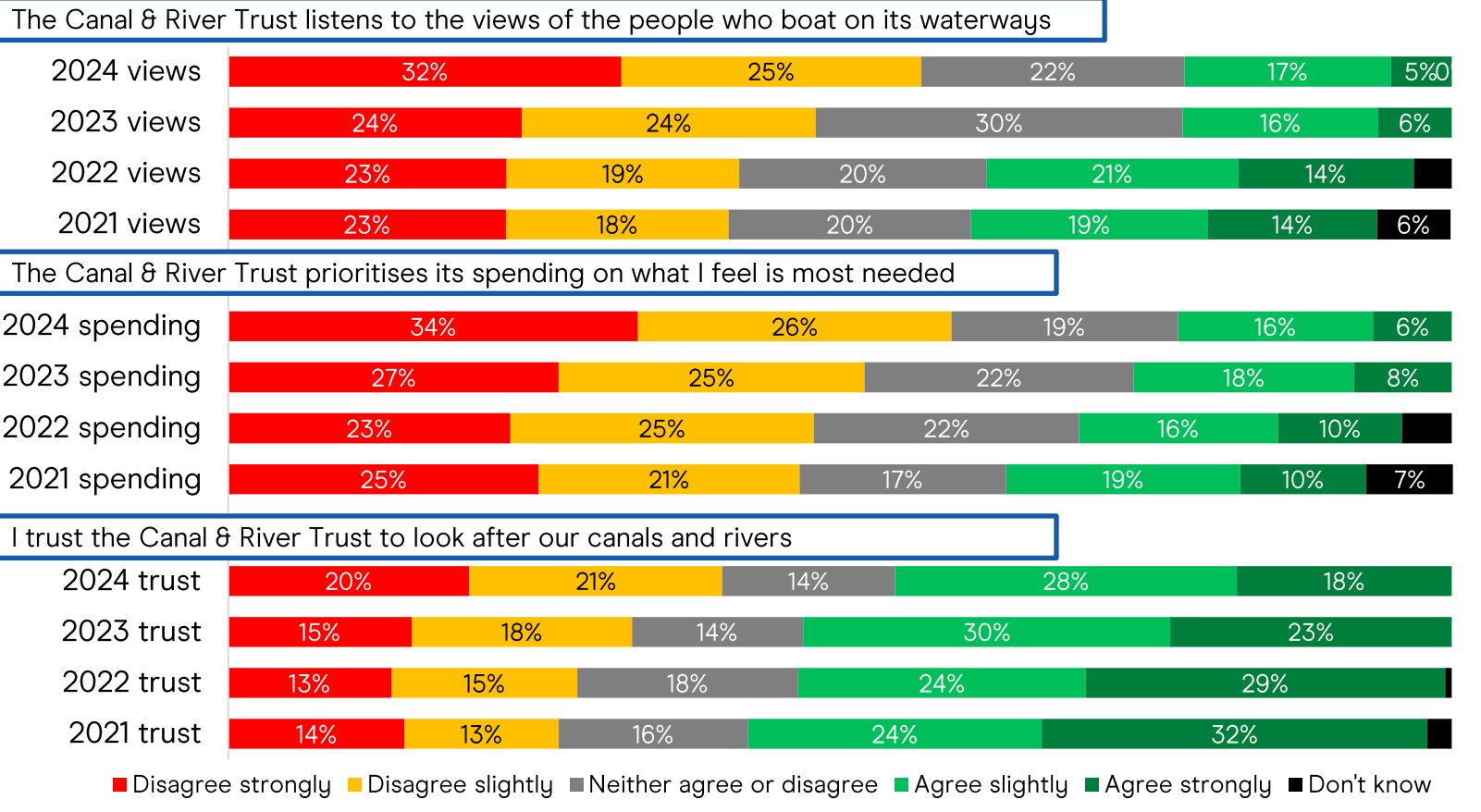
Glandŵr Cymru
Canal & River Trust in Wales

7. Attitudes to the trust

Customer service
Volunteer service



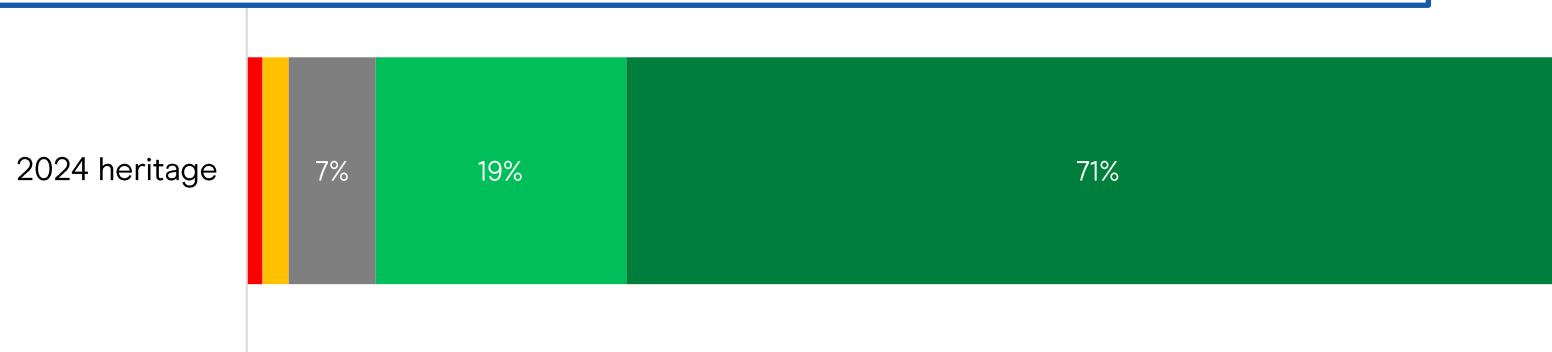
Q30: To what extent do you agree or disagree with each of these statements about the Canal & River Trust?
Please select one box for each row



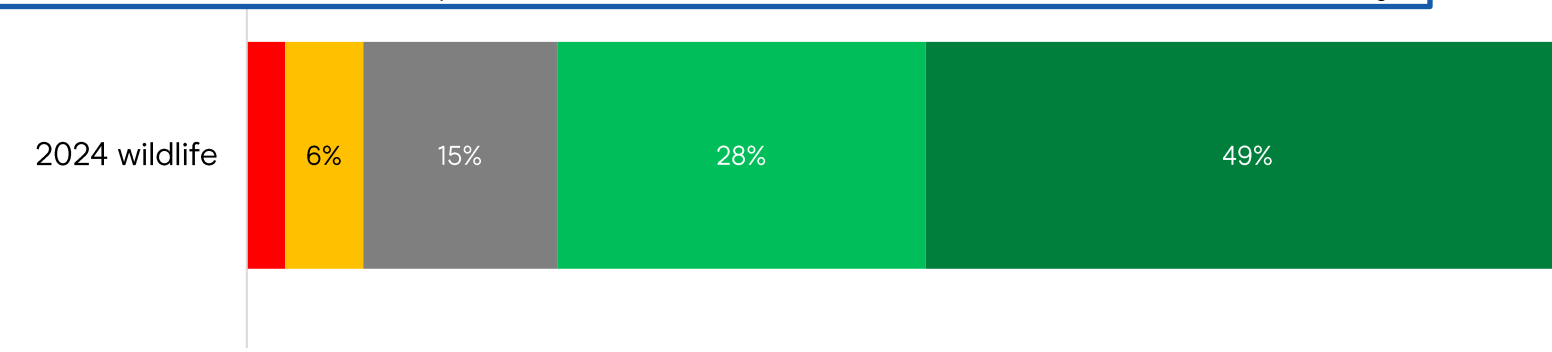
- Agreement levels across all three statements have experienced declines. Indeed, views that the Canal & River Trust listens to the views of people who boat on the waterways has experienced a 9% point increase in Net disagree scores this year.

Q30: To what extent do you agree or disagree with each of these statements about the Canal & River Trust?
Please select one box for each row

The Trust should do all it can to protect and conserve waterway heritage



The Trust should do all it can to protect and enhance the nature and wildlife that relies on our waterways



■ Disagree strongly ■ Disagree slightly ■ Neither agree or disagree ■ Agree slightly ■ Agree strongly ■ Don't know

- Agreement that the Canal & River Trust should do all it can to protect and conserve both wildlife and waterway heritage is high (Net agree 77% for nature / wildlife and 90% for waterway heritage).



**Canal &
River Trust**
Making life better by water



Glandŵr Cymru
Canal & River Trust in Wales

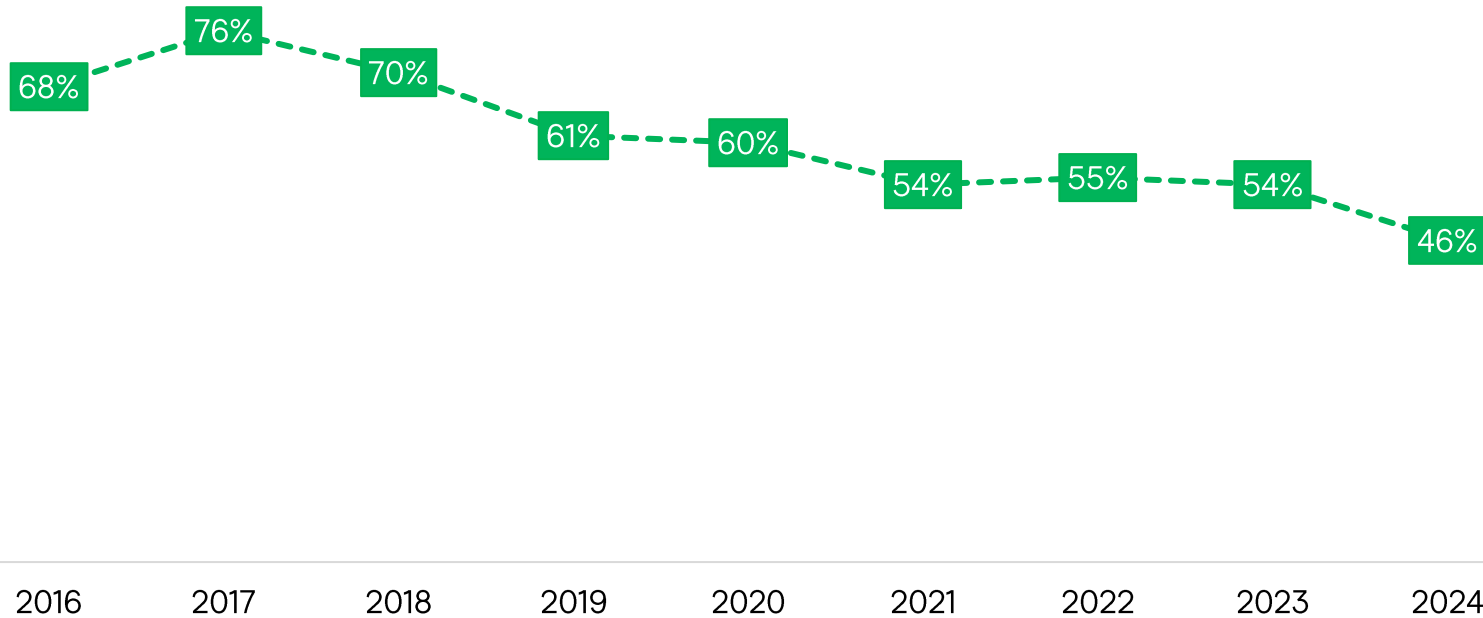
8. Overall satisfaction KPI

Overview
Driver analysis



KPI Overall Satisfaction: Over time

KPI over time



- The KPI is now 46%.
- Therefore, overall satisfaction has significantly declined by -8% points since 2023.

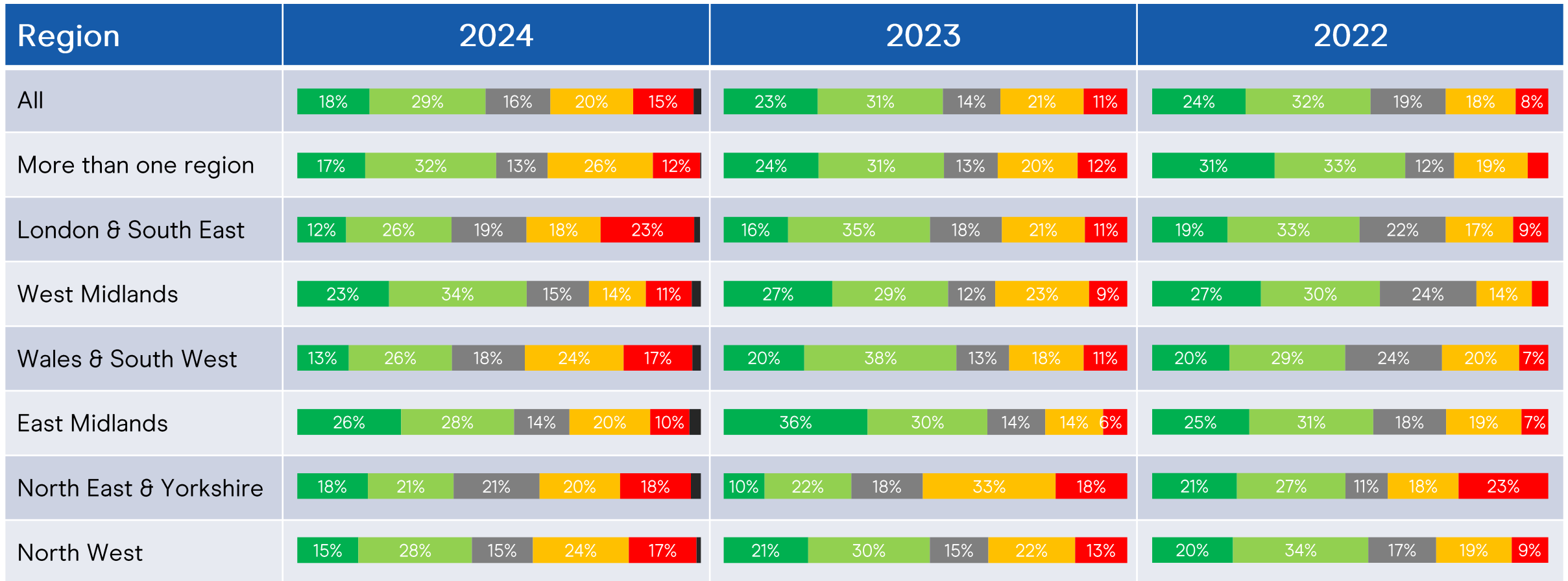
Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*



- Boaters in the East Midlands and West Midlands are both on average **significantly more likely** to say that they are satisfied with their experience.
- However, boaters in London & South East and Yorkshire & North East are both **significantly less likely** to say that they are satisfied with their experience.

KPI: 2022-24 by region

Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*

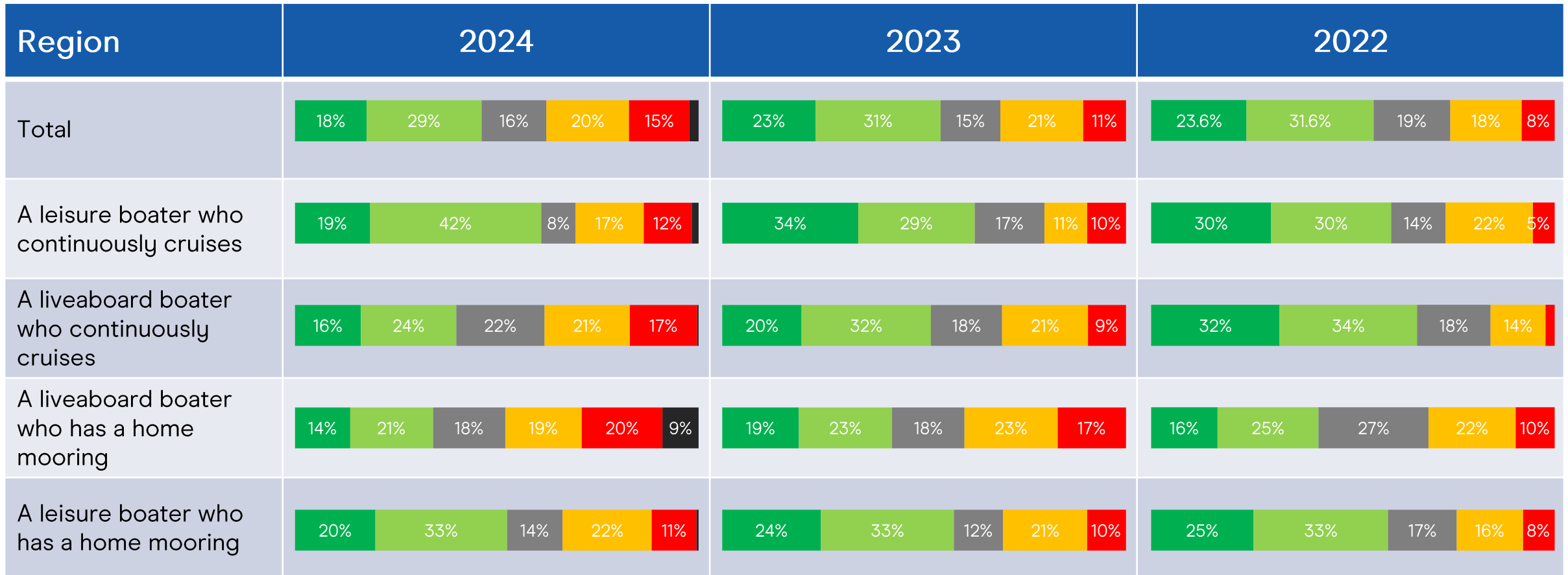


■ very satisfied
 ■ slightly satisfied
 ■ Neither
 ■ slightly dissatisfied
 ■ very dissatisfied
 ■ No opinion

Sample: 2024 (1,167); 2023 (1,407); 2022 (979). *Only data labels 5%+ are displayed in the chart.

KPI: 2022-24 by boater usage type

Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*



■ very satisfied
 ■ slightly satisfied
 ■ Neither
 ■ slightly dissatisfied
 ■ very dissatisfied
 ■ No opinion

Sample: 2024 (1,167); 2023 (1,407); 2022 (979). *Only data labels 5%+ are displayed in the chart.

Key Driver Analysis 2024 (I)

Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*

The overall goodness of fit of this model is strong with R-square=0.607, which means that the 10 key drivers listed below together explain 60.7% of the variance in satisfaction ratings. The most influential factor is 'upkeep rating'. People who give a high rating for the Trust's upkeep of the waterways also tend to report high satisfaction with the Trust.

Rank	Question	Driver	Relative Importance
1 st	Q20	How you would rate the overall upkeep of the Canal & River Trust's waterways	0.251
2 nd	Q23	Trust staff - Ability to respond to queries	0.188
3 rd	Q30	The Canal & River Trust listens views of boaters	0.116
4 th	Q29	Influence - Customer service you received	0.106
5 th	Q29	Influence - How vegetation is managed	0.084
6 th	Q23	Influence - The weather	0.070
7 th	Q29	I trust the Canal & River Trust to look after our canals and rivers	0.062
8 th	Q30	The value for money of your water supply	0.053
9 th	Q29	Influence - The number of stoppages	0.049
10 th	Q29	Influence – Discussions about the waterways on social media	0.031

*It is important to note that boater type was included in the above analysis but was not found to be a key driver.

Key Driver Analysis (KDA):

The purpose of this analysis is to identify which of the questions asked throughout the survey have a significant influence over ratings of satisfaction (Q21) and to assess the relative importance that each of these key drivers has satisfaction ratings.

Potential drivers:

We take the list of potential from the different themes across the questionnaire;

- Attitudes towards the Trust aims (Q30)
- Interactions with the Trust staff (Q23)
- Influences on boating experience (Q29)
- Ratings of the Trust (ratings of upkeep, advocacy)

We do not include questions which are only asked of a small number of people such as interactions with Trust Volunteers or Volunteer Lock Keepers.

Key Driver Analysis 2024 (II)

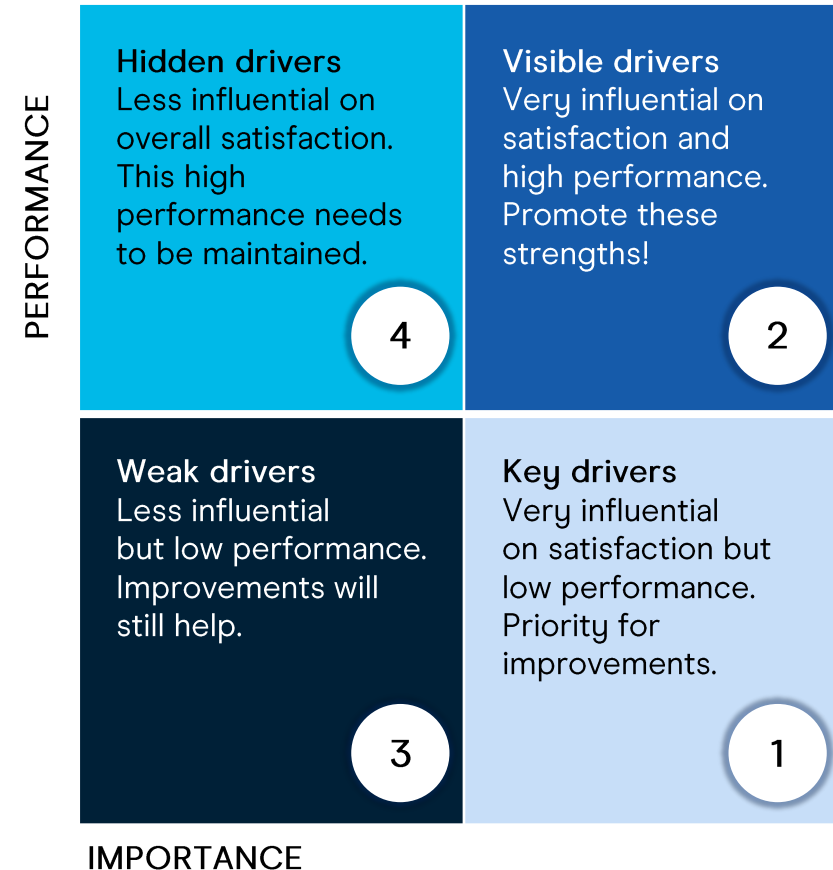
Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*

Once we have identified our key drivers, we can also cross reference the relative importance score (how much influence they have on overall satisfaction) with their performance score (the percentage score from the survey for this measure).

We can classify each of the key drivers into one of the four groups outlined in the Driver Map to the right.

Priority drivers

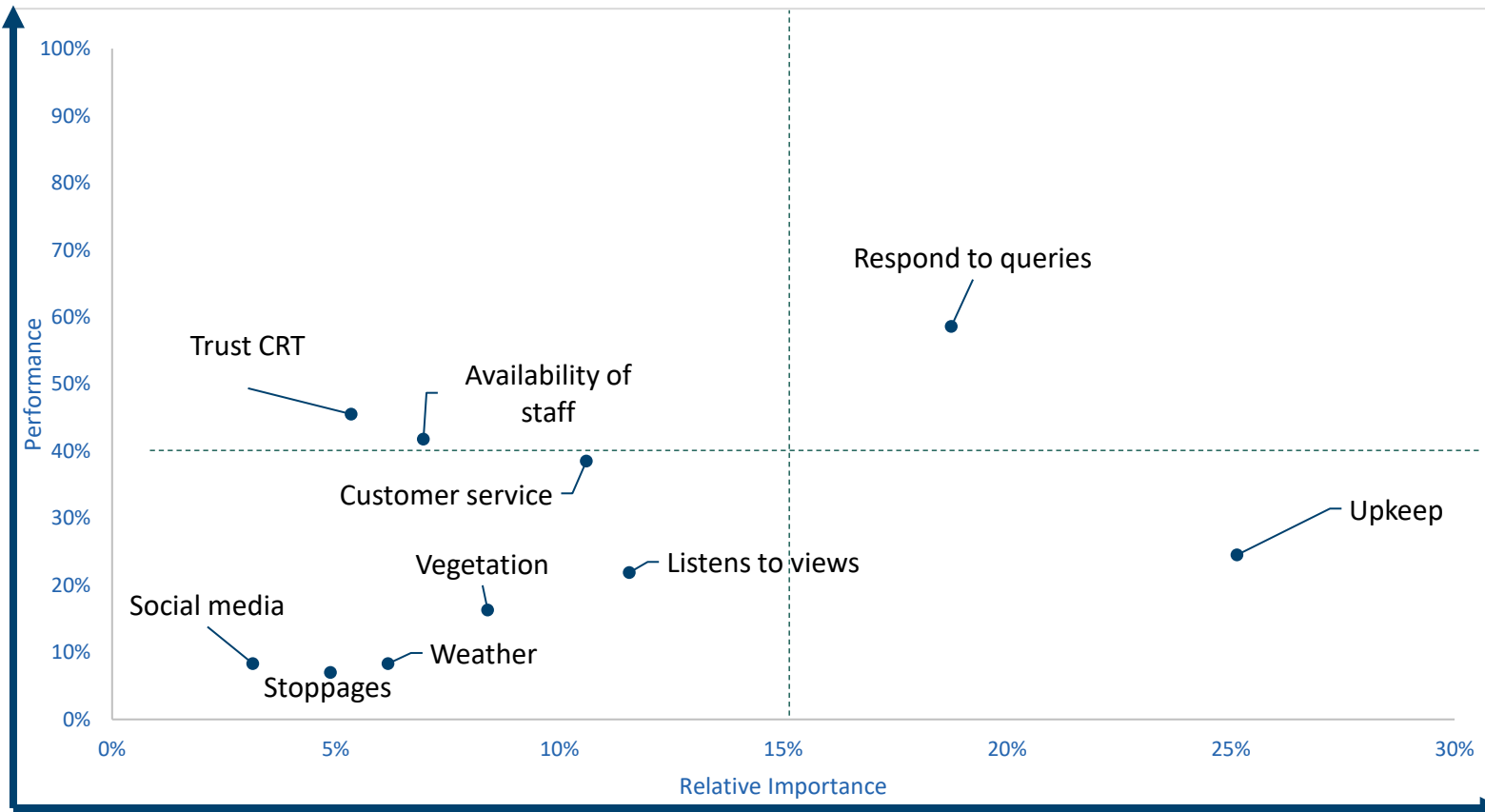
Priority should be given to the most influential drivers and drivers which currently have a low performance score (quadrants 2 and 1 in the Driver Map); improvements here would see the greatest positive influence on the KPI overall satisfaction.



Key Driver Analysis 2024 (III)

Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*

Mapping the top ten drivers of overall satisfaction against their performance, the most important driver is upkeep of waterways, which the Canal & River Trust may wish to improve its performance in order to increase satisfaction and ensure those boaters who are satisfied continue to be satisfied.



PERFORMANCE	Hidden drivers (Maintenance) <ul style="list-style-type: none"> Trust CRT Availability of staff 	Visible drivers (Promote) <ul style="list-style-type: none"> Respond to queries
	Weak drivers (Monitor) <ul style="list-style-type: none"> Customer service Listens to views Vegetation Weather Social media Stoppages 	Key drivers (Action) <ul style="list-style-type: none"> Upkeep
	IMPORTANCE	

Key Driver Analysis 2024 (V)

Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*

We also examined the top drivers amongst each of the boater types to identify if there are differences in which factors have the greatest influence on boater satisfaction by boater type. In all groups, upkeep is the most important factor – but there are differences in what is important to different groups.

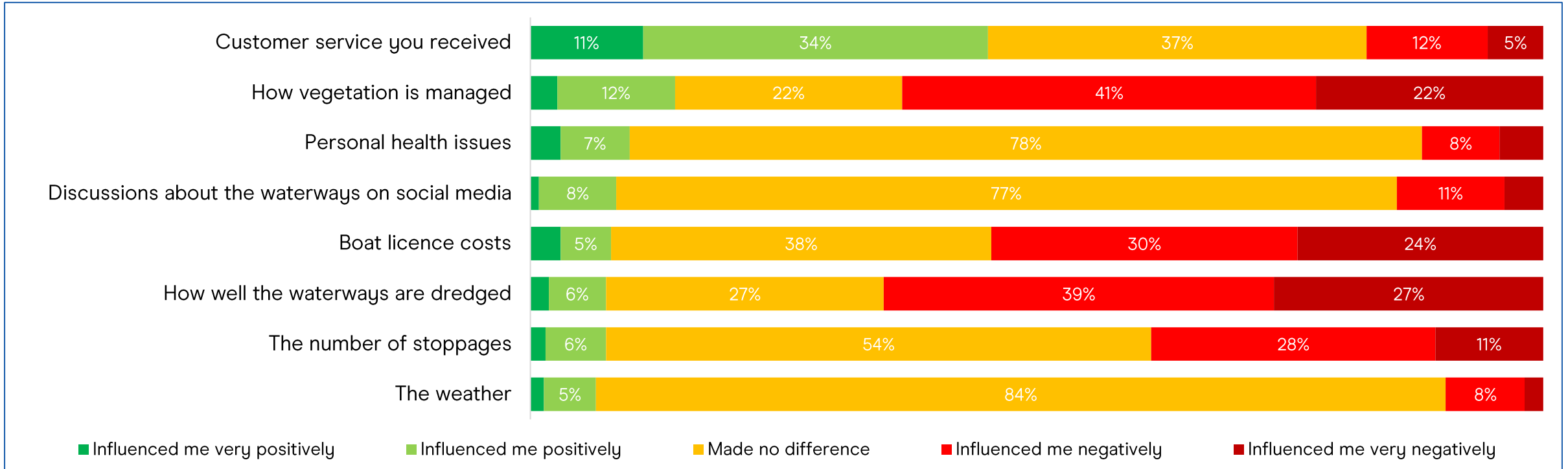
Rank	A leisure boater who continuously cruises	A leisure boater who has a home mooring	A liveaboard boater who continuously cruises	A liveaboard boater who has a home mooring
1	Q20. The overall upkeep of the Canal & River Trust's waterways	Q20. The overall upkeep of the Canal & River Trust's waterways	Q20. The overall upkeep of the Canal & River Trust's waterways	Q20. The overall upkeep of the Canal & River Trust's waterways
2	Q23. Overall helpfulness	Q23. Ability to respond to customer queries	Q30. The Canal & River Trust listens to the views of boaters	Q23. Ability to respond to customer queries
3	Q29. How vegetation is managed	Q30. The Canal & River Trust listens to the views of boaters	Q29. Customer service you received	Q30. The Canal & River Trust prioritises its spending
4	Q23. Overall availability	Q29. How vegetation is managed	Q29. Discussions about the waterways on social media	Q23. Overall friendliness
5	Q29. Discussions about the waterways on social media	Q23. Overall availability	Q29. How vegetation is managed	Q29. The number of stoppages
6	Q16. How well do you feel you know the Canal & River Trust as an organisation?	Q29. The weather	Q29. How well the waterways are dredged	Q30. The Trust should do all it can to protect and enhance nature / wildlife

Key differences:

For both home mooring groups, we see that the Trust staff ability to respond to customer queries is the second most important – but for the liveaboard continuous cruisers it is 'the Trust listening to views' that is second. Dredging is an influential factor for liveaboard continuous cruisers, but this isn't in the list of key drivers seen in the whole sample analysis above.

2024 Stated Influence

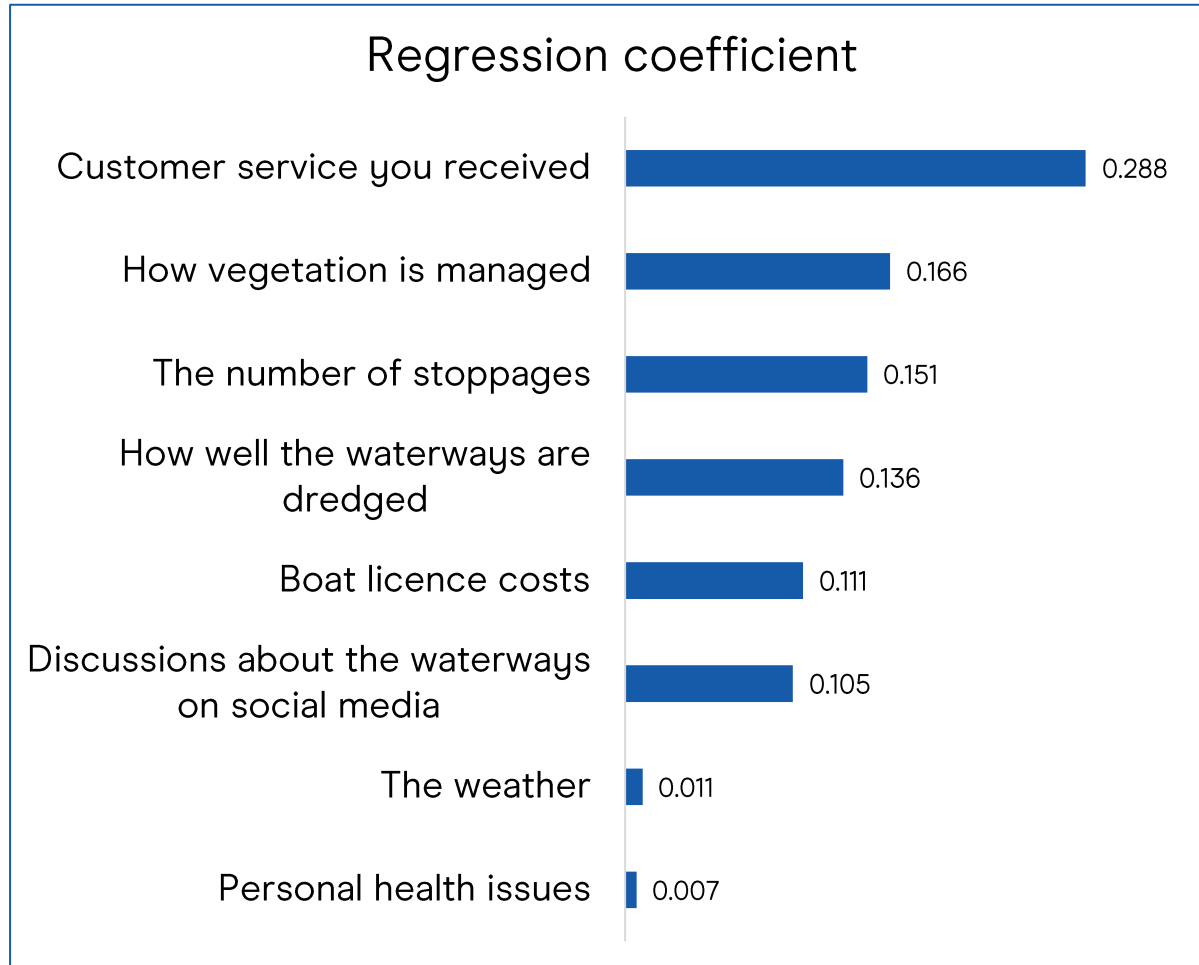
Q29: Earlier you rated your overall experience of boating over the last year as [Q13a response]. Looking at the following different factors, to what extent, if any, have these influenced you? *Please select one answer only for each*



This graph shows what people believe is influencing their satisfaction scores. On the whole, the majority specified each to have 'made no difference'. Most negatively = dredging & boat licence costs. Most positively = customer service.

Linear Regression on Stated Influences

This linear regression analysis is based only on the stated influences in the previous slide as the predictor variables, and the satisfaction KPI value as the outcome variable. This aims to look at the actual influence of the possible choices on their given satisfaction score.



- Customer service is the biggest driver of the satisfaction KPI – this matches the finding in 2023.
- Vegetation management is the second most influential factor whilst stoppages (ranked second in 2023) moves down into 3rd place.
- The positive coefficients highlight that for every 1 unit increase in a predictor, the KPI satisfaction score will increase by the value of the coefficient. For example, if the customer satisfaction score increased by 1 point, then overall satisfaction would increase by 0.288 points.
- All of the predictor variables, except weather and health issues, are statistically significant at the 99.9% confidence level. Social media discussions are also not significant.
- The model explains 37.1% of the variance in the KPI satisfaction score.