



Canal &
River Trust
Making life better by water



Glandŵr Cymru
Canal & River Trust in Wales

2026 Annual Boaters' Survey

Full report

Rhys James (Insights Specialist)

Brenda Dorpalen (Insights and
Capital Accounting Team
Manager)

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1. Summary



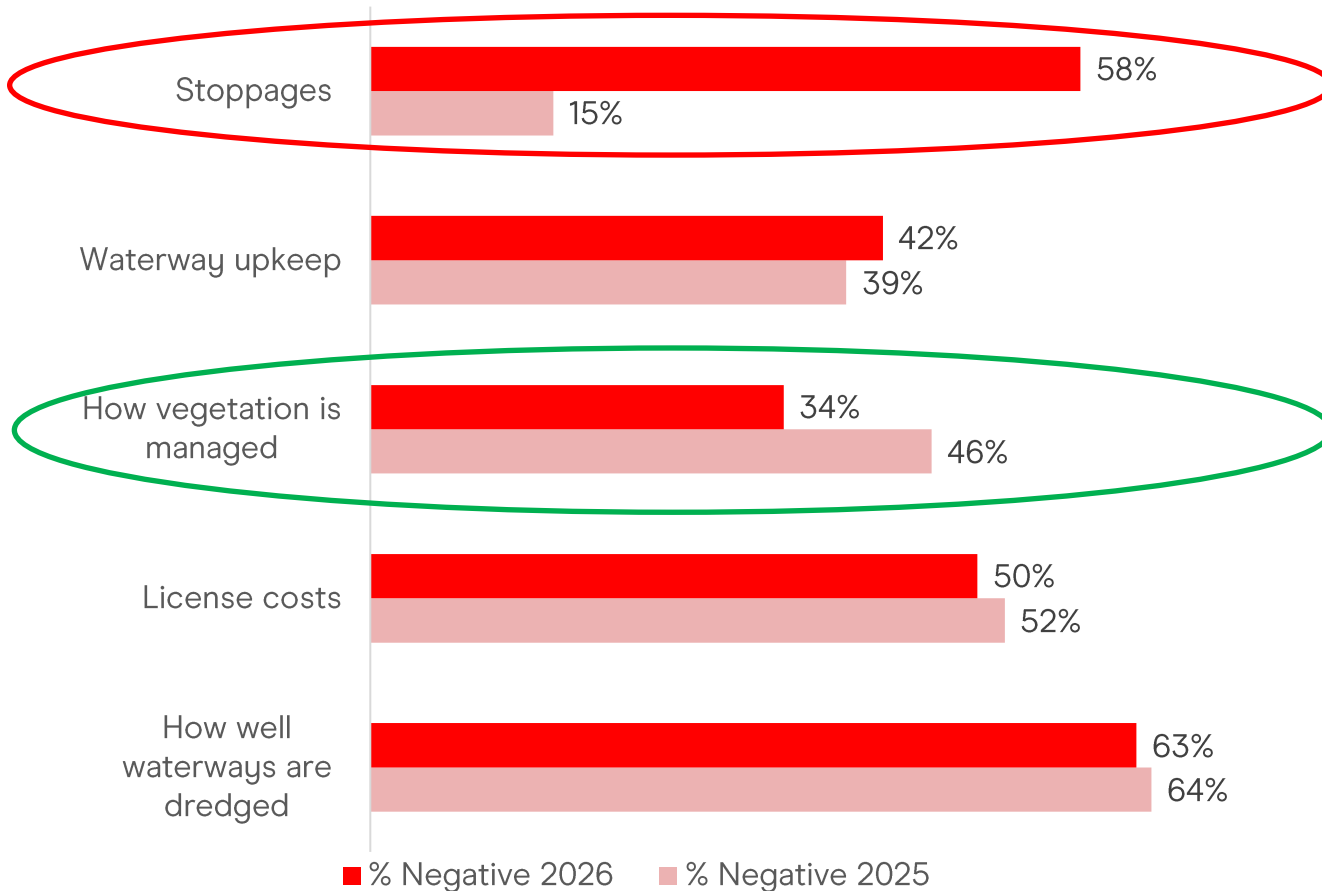
Purpose of the report

- This report analyses the key trends in Boaters' perceptions of the Canal & River Trust. The findings are drawn from the Annual Boaters' Survey, designed to track changes in boating experiences and attitudes toward the Trust across the reporting year. Fieldwork is conducted in two waves, in November and March.
- The survey includes the core boating KPI (Boater Satisfaction) and assesses progress against the Trust's strategic priorities set out in the Better Boating Plan. A few additional questions have been incorporated this year. However, since the survey design remains consistent with 2025, results are comparable year on year.
- The sample is sufficiently large to provide robust insights: around one-third of the total boating population is randomly selected, with 2,042 respondents from an estimated 33,000 licence holders. The profile of respondents, by licence type and demographic characteristics, aligns well with expectations

Overall boater satisfaction has declined to **50% in 2026**, from **55% in 2025**. The primary driver is the significant increase in navigation closures linked to the summer 2025 drought, during which 20% of the network was closed at peak. Despite this, satisfaction remains above the 2024 low point of 46%.

- Navigation issues, particularly **the impact of stoppages during 2025**, are the **key factors in declining experience** – with stoppages impacting negatively on satisfaction for 58% of boaters (up from 15% in 2025 and above the 2024 peak of 39%).
- **70% of boaters were unable to navigate as expected in 2026**, reflecting the scale of disruption. Boaters are split on the responsibility around this issue: 51% believe closures were outside the Trust's control (due to low rainfall). 32% believe the Trust could have done more.
- Despite the decline in satisfaction, **attitudes towards the Trust have not changed from last year**, with favourability and advocacy in line with 2025. The results show an improvement from 2024, but still negative perceptions predominate.
- In conclusion, navigation related performance has decreased, but broader sentiment and several operational metrics show recovery since 2024 – but were more positive a decade ago. Communication continues to be a relative strength, but these results reinforce the priorities of the better boating plan: particularly a need to support navigation and enhance facilities

Top factors influencing satisfaction - % Boaters negatively influenced

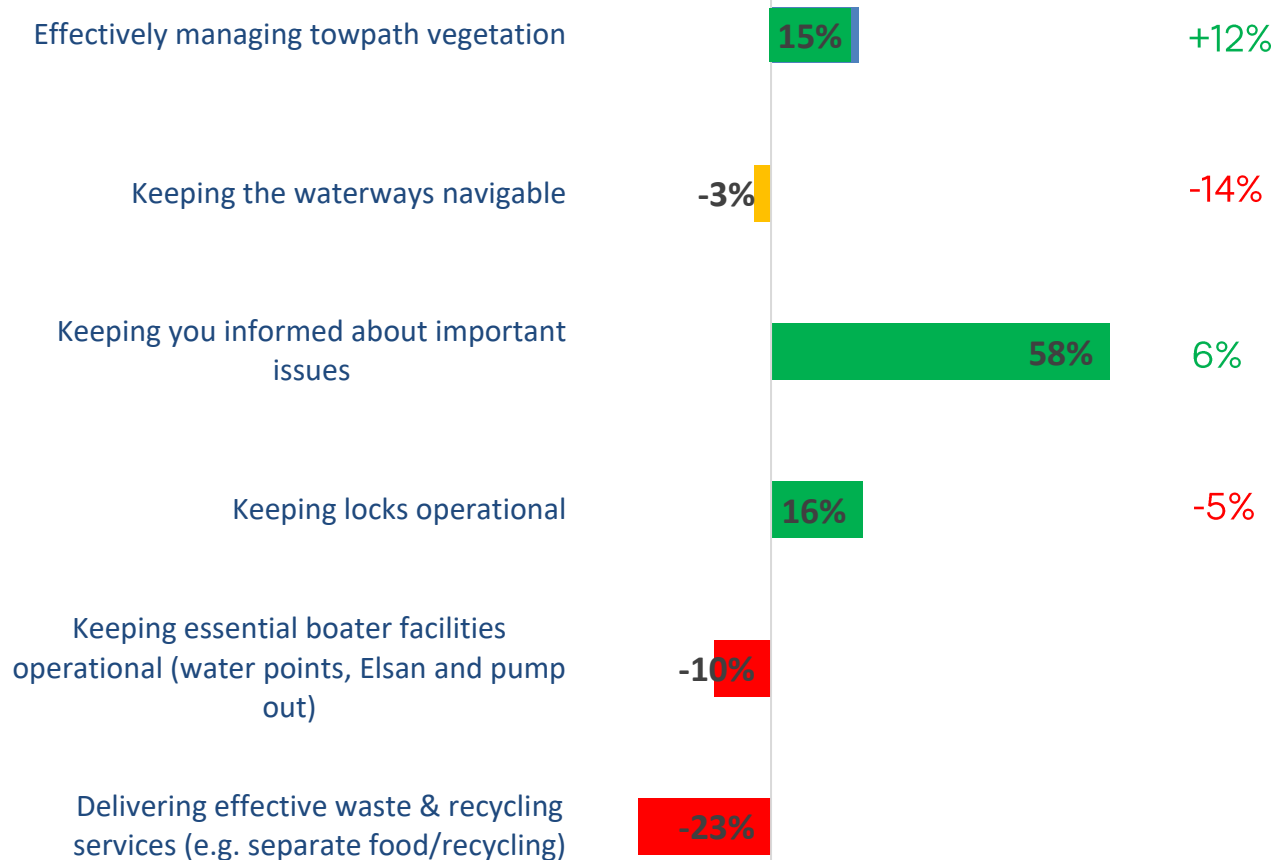


- Of the most influential factors on Boater Satisfaction, stoppages is the key difference compared to 2025: 58% stated that it negatively influenced satisfaction in relation to 15% in 2024.
- Waterway dredging remains the largest negative factor overall, though largely consistent with sentiment in 2025.
- There has been positive progress on vegetation management, with negative sentiment continuing to decline significantly for the second consecutive year.

Summary: Better Boating Plan

How well are we performing – Better Boating Plan [% net sentiment*]

YoY



In 2025, we included metrics to measure how well boaters rated the Trust's progress against the aims of the better Boating Plan.

- Communication remains the strongest area
- Towpath vegetation management improved since 2025
- Several navigation-related KPIs declined: Keeping waterways navigable, Keeping locks operational: 43% (46% in 2025)

In 2026, we introduced some new measures: Essential facilities operational and waste & recycling services, which are the weakest perceived areas overall.

*Net sentiment is calculated by the proportion who rate our performance as good / very good minus poor / very poor in response to 'how well are the Canal & River Trust performing against your expectations' for the following actions?



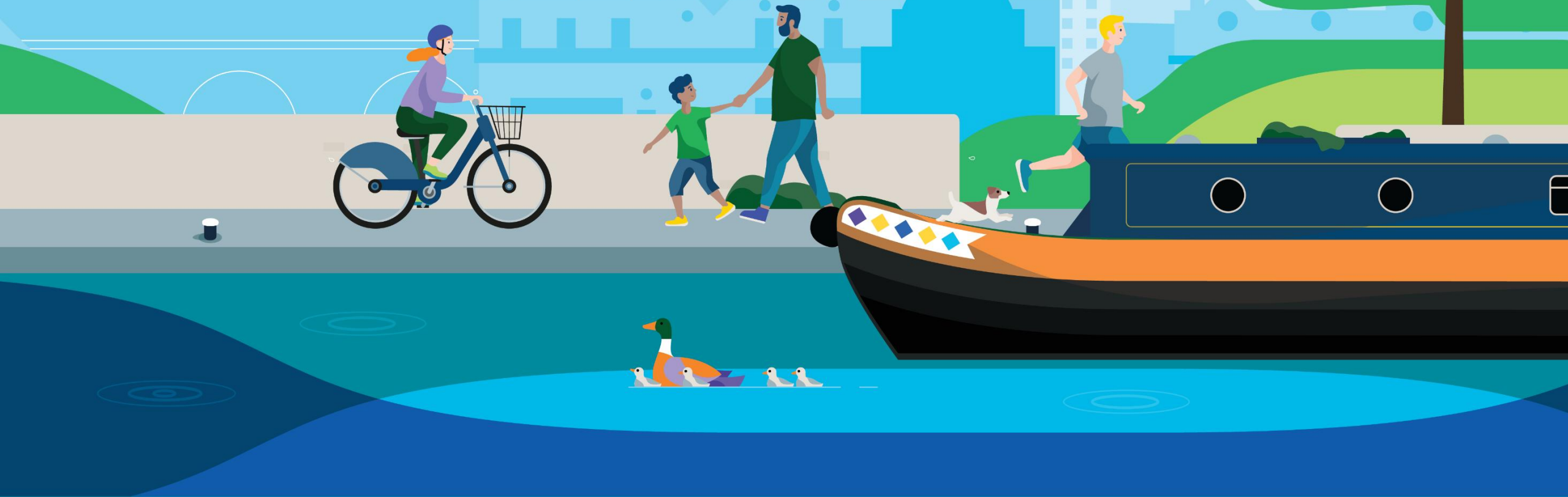
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1. Methodology & Sample



Executive Summary: Methodology

Methodology

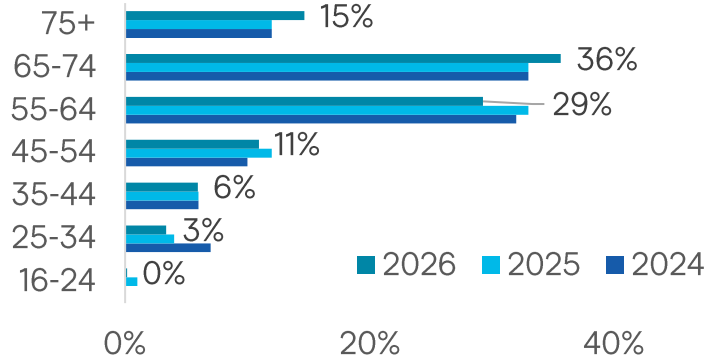
- The achieved sample is the largest on record, with 2,042 responses and a broadly even split across the two fieldwork waves: 1,056 in November (wave one) and 986 in March (wave two). Most wave-one responses were collected before the publication of the independent commission report into boating. There is no evidence that this announcement had any meaningful impact on satisfaction levels between the two waves or on the overall accuracy of the survey during this period.
- The profile of respondents closely reflects the known distribution of continuous-cruiser and home-mooring licences, providing a more representative sample than in 2024.
- As in previous years, controls were applied to ensure only one response per licence holder, with approximately one-third of current licence holders invited to participate. While most responses were collected online via email, a representative selection of boaters without email access were contacted through alternative methods to ensure full coverage.

Response details

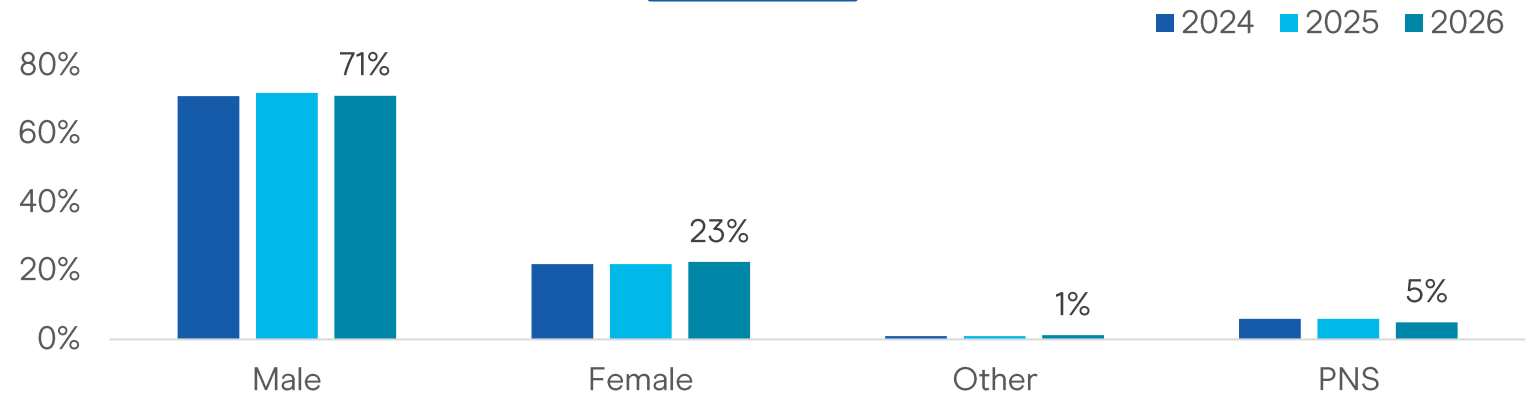
Year	Invitations sent	Response received	Duration
2018	17,977	1,760	
2019	Survey not conducted		
2020	9,255	961	
2021	14,209	1,179	27 th February to 4 th March
2022	8,193	936	7 th March to 4 th April
2023	8,060	1,407	28 th March to 30 th April
2024	11,578	1,167	1 st April to 17 th April
2025	10,071	1,742	November 26 th - March 14 th (two waves)
2026	12437	2042	November 7-23 and March 9-31 st .

Sample profile 2026

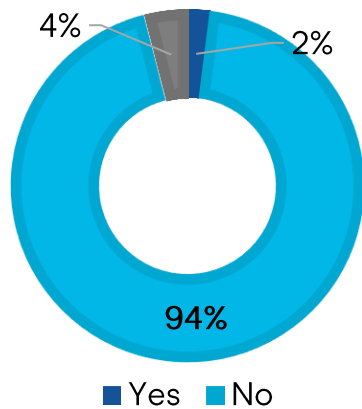
Age



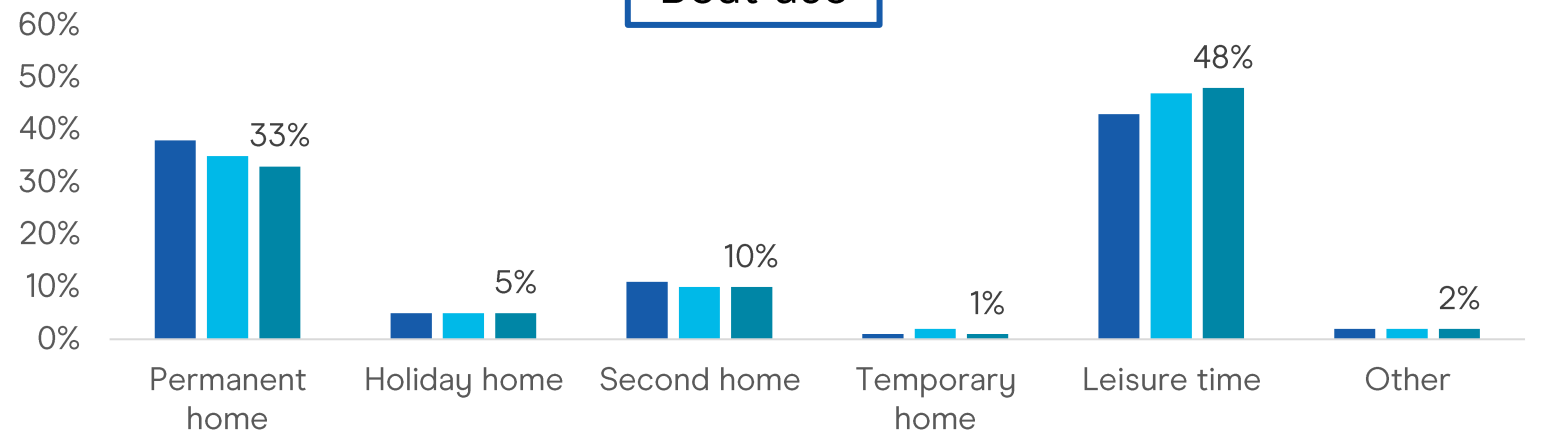
Gender



Children under 16*

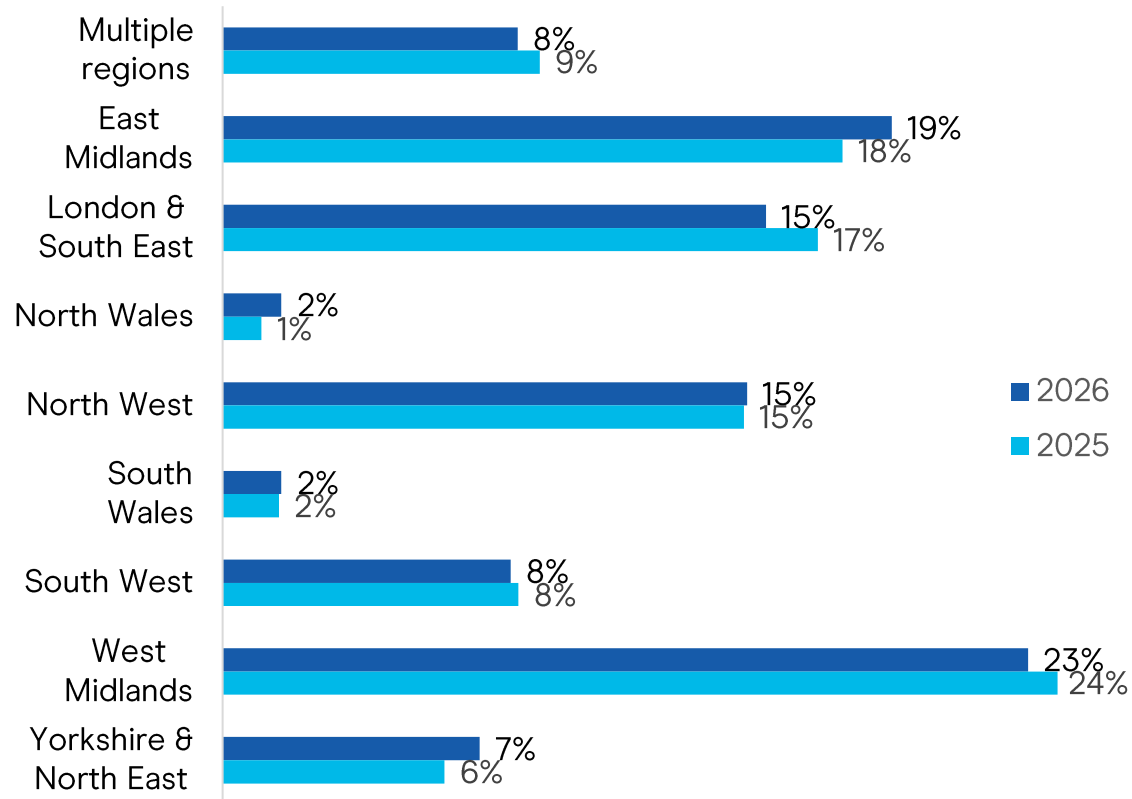


Boat use



Regional participation

Survey response / sample volume by region



- Participation in the survey is broadly comparable with 2025 from a regional perspective.
- The key difference is the lower response rate from London and the southeast, which has a much higher prevalence of liveaboard / permanent home use.
- Wales results are indicative, only due to low sample size.
- These effects will have limited impact on the overall results YoY, and do not affect for the purpose of comparability.



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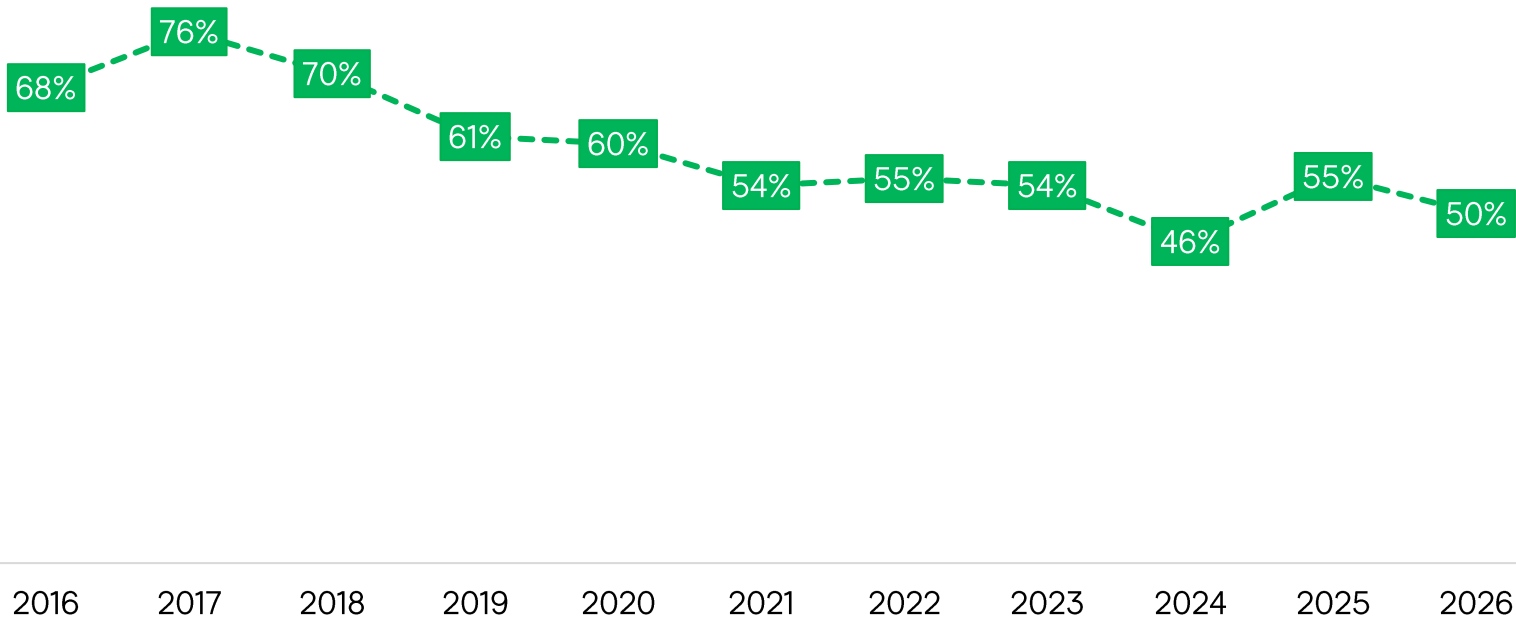
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2. Overall satisfaction KPI & Better Boating Plan Measures



KPI overall satisfaction: over time

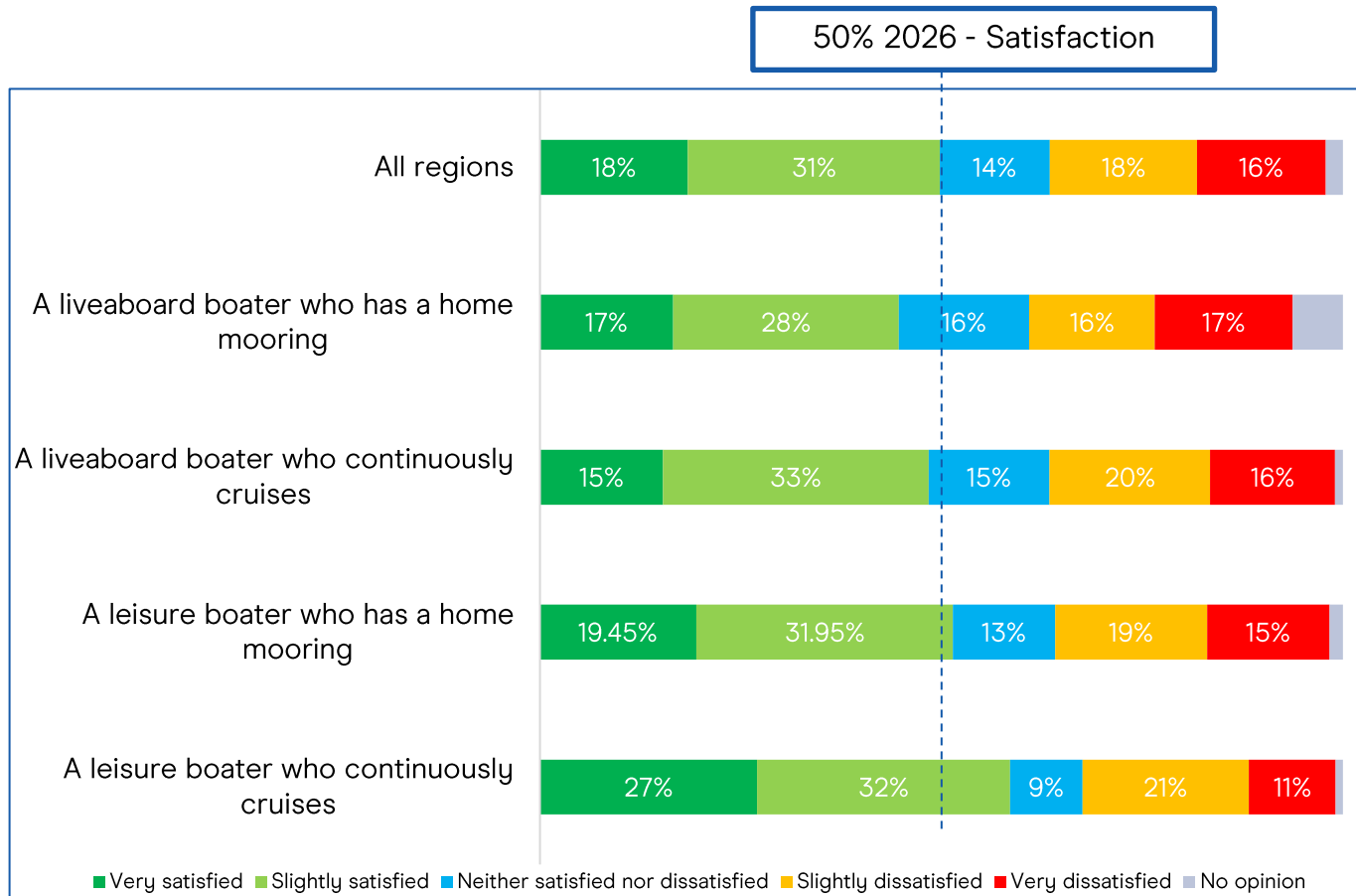
KPI over time



- Overall satisfaction has fallen -5% in 2026, following the positive gain made in 2025.
- While the decline is significant, it remains ahead of the low point in 2024 which was the lowest satisfaction score in a decade.

KPI: 2026 by Boater type

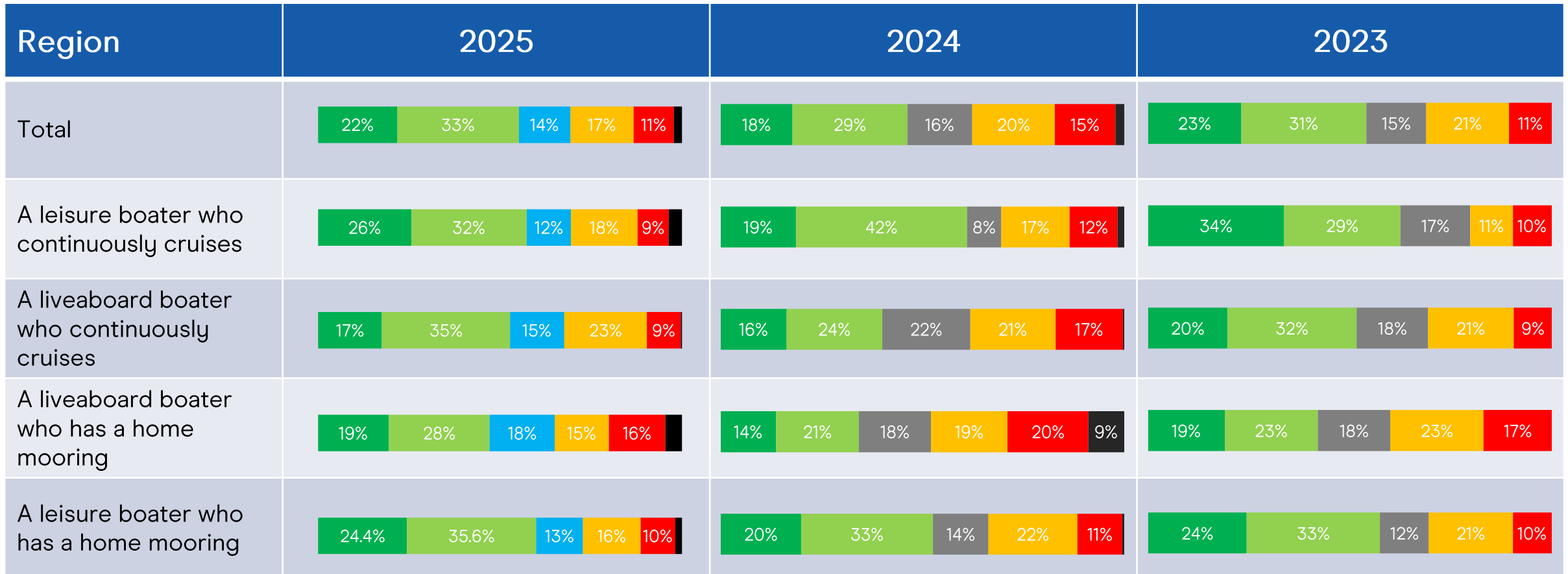
Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*



- Liveaboard boaters typically remain less favourable than leisure boaters – though the gap has narrowed in 2026, with leisure boaters with a home mooring having the biggest decline in satisfaction since 2025 (-9% YoY). The latter is reflected in the following historic tables on slide 14.

KPI: 2023-25 historic data by type

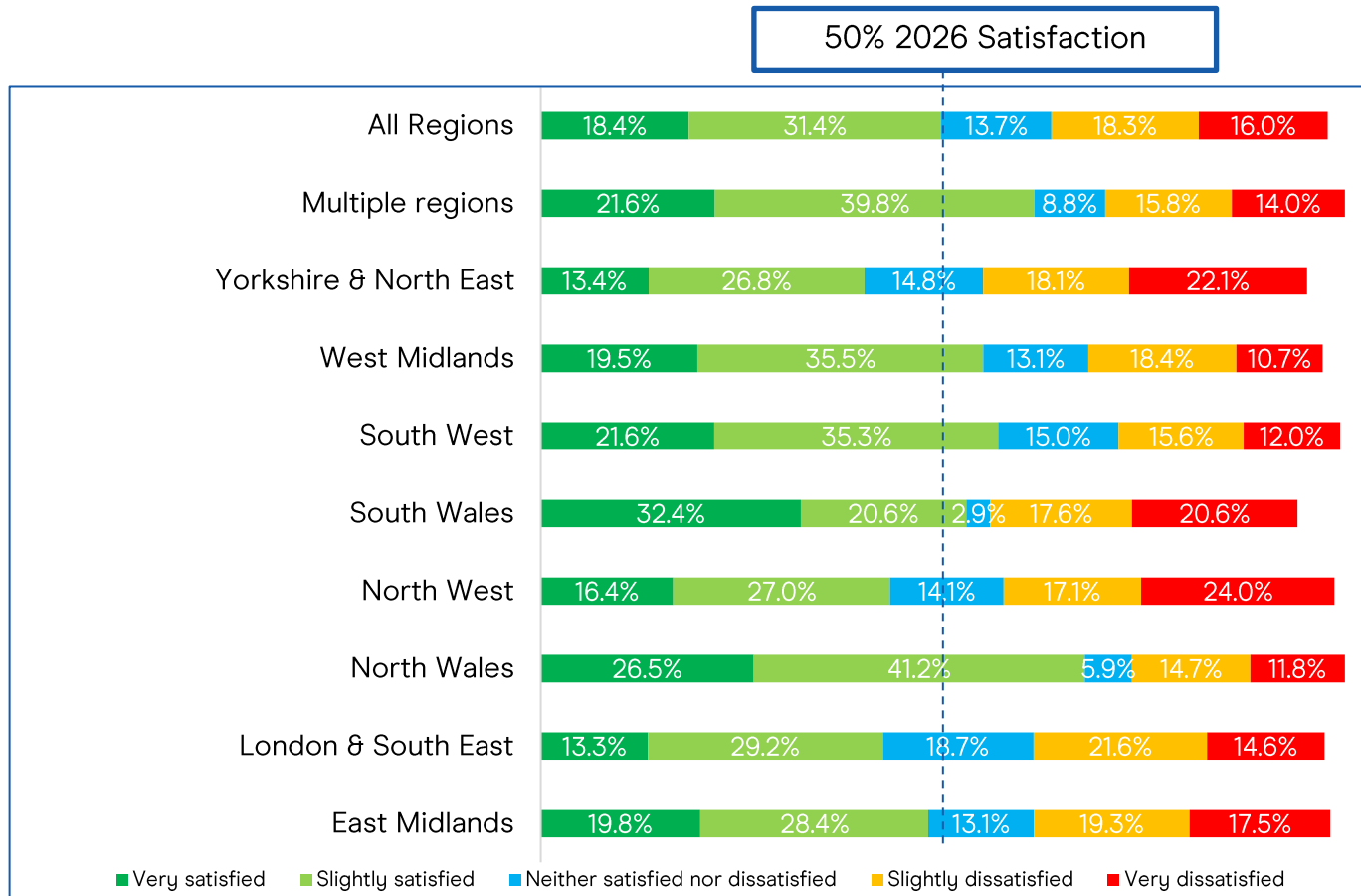
Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*



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

Sample: 2026 (2042), 2025 (1742) 2024 (1,167); 2023 (1,407); 2022 (979). *Only data labels 5%+ are displayed in the chart.

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*










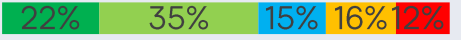















- Yorkshire & North East has overtaken London and South East (L&SE) for the lowest overall satisfaction levels compared to 2025 results. Please, see the next slide for the comparison.
- The Northwest and the East Midlands are also regions in which most boaters are not satisfied.

Sample: All (2042). *Only data labels 5%+ are displayed in the chart. Note North & South Wales are indicative only, small sample.

KPI: Historic data 2023-2025 by region

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*

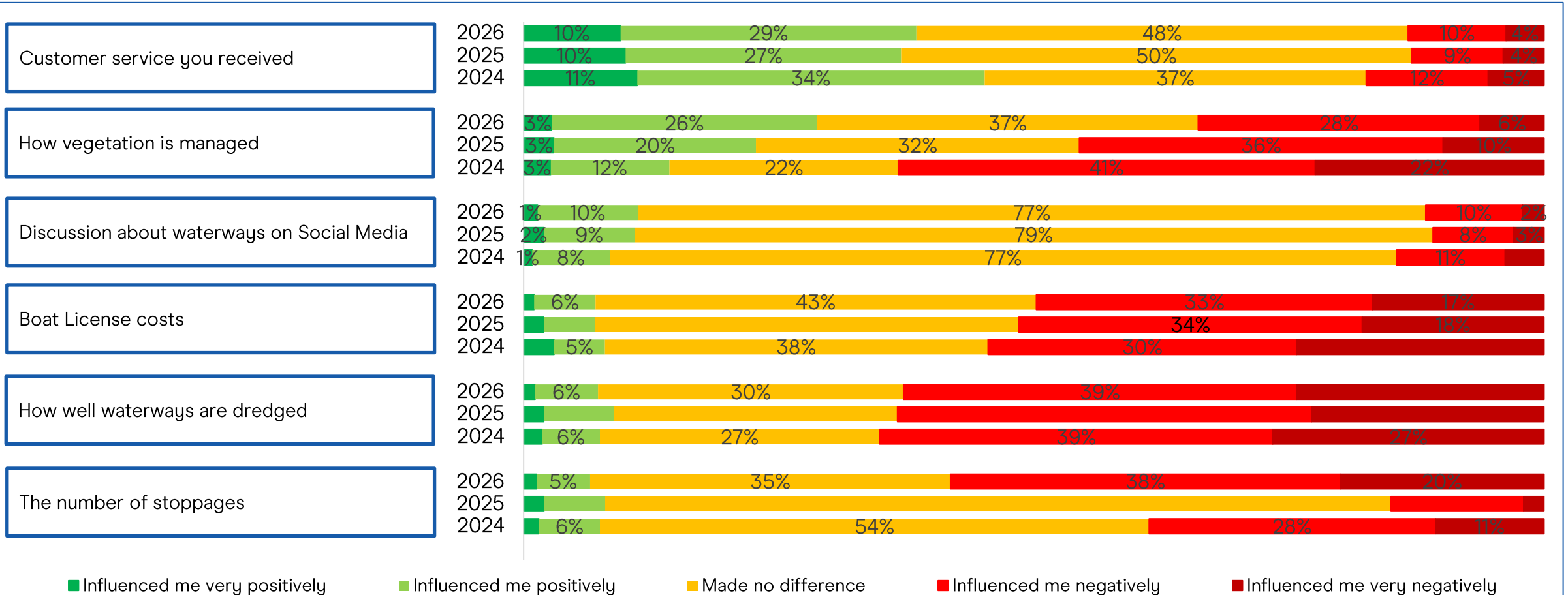
Region	2025* (Regions changed)	Region	2024	2023
All		All		
London & South East		London & South East		
West Midlands		West Midlands		
South West		Wales & South West		
South Wales		East Midlands		
North Wales		North East & Yorkshire		
East Midlands		North West		
North East & Yorkshire				
North West				

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

Sample: 2025 (2042) 2024 (1,167); 2023 (1,407); *Only data labels 5%+ are displayed in the chart.

2024 – 2026 - Stated Influence

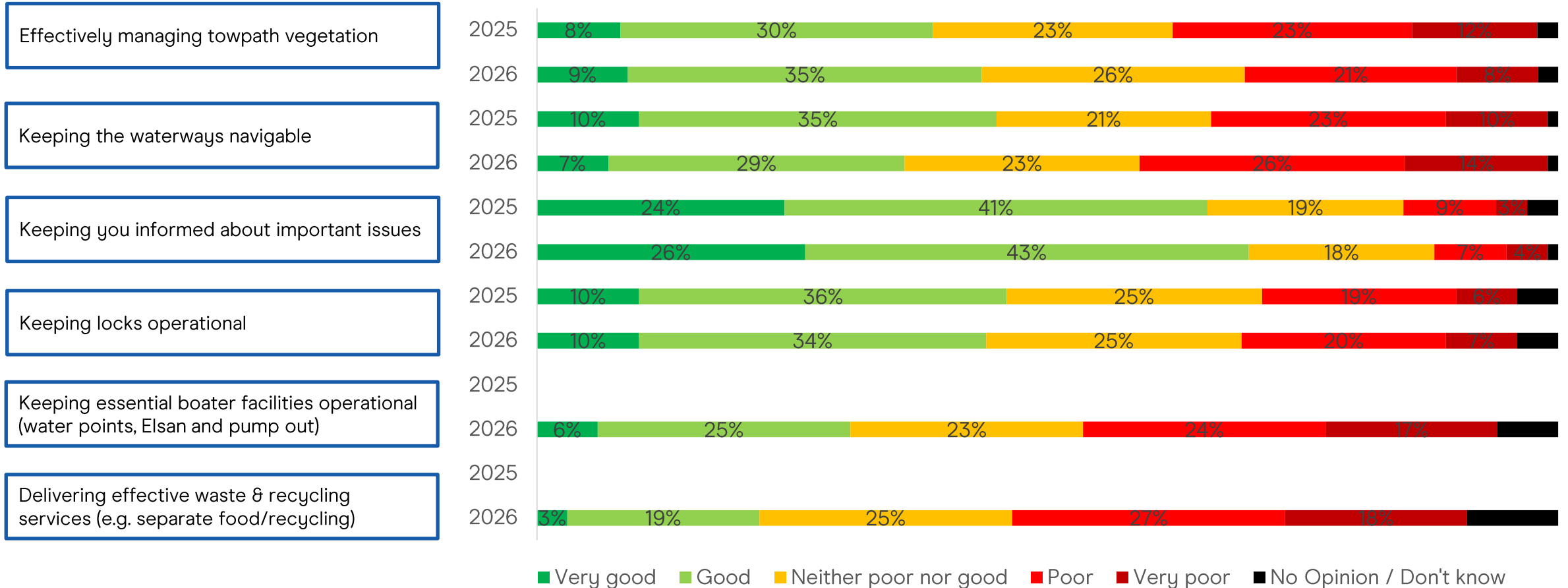
Earlier you rated your overall experience of boating over the last year as {Q13a response}. Looking at the following different factors, to what extent, if any, have these influenced you? *Please select one answer only for each*



Sample: All (2026, 2,042) (2025, 1,742) (2024, 1,167). *Only data labels 5%+ are displayed in the chart.

Better Boating Plan measures

The Canal & River Trust launched its Better Boating Plan in 2025. Based on your recent boating experiences, how well are the Canal & River Trust performing against your expectations overall for this? [Insert Factor]



Sample: All (2026, 2,042) (2025, 1,742) (2024, 1,167). *Only data labels 5%+ are displayed in the chart.



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3. Maintenance



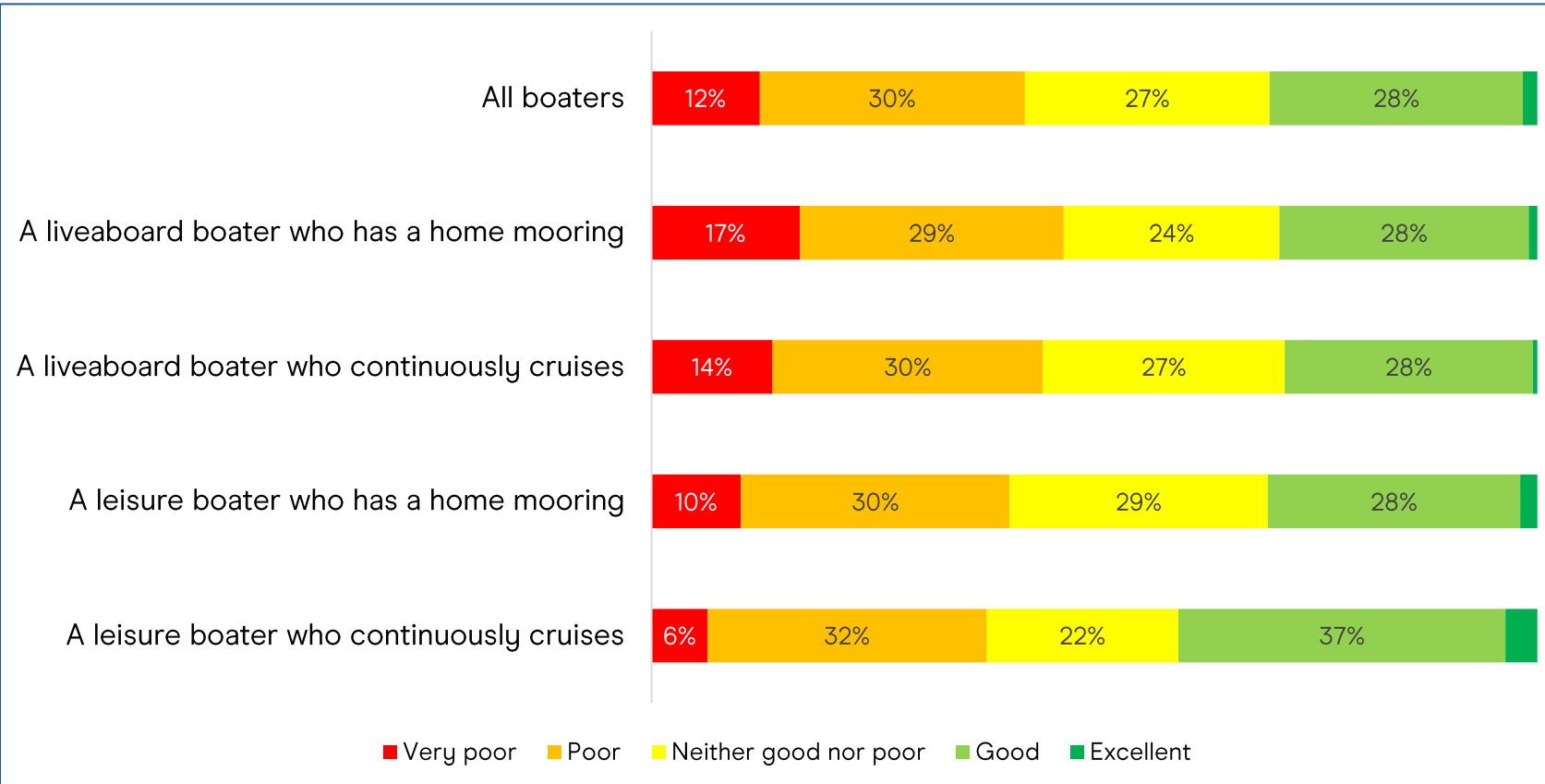
Please indicate how you would rate the overall upkeep of the Canal & River Trust's waterways.
2023-26 scale: Very poor, Poor, Neither, Good, Excellent, No Opinion



- Negative perceptions of upkeep increased from 39% to 42% since 2025, though they are lower in relation to 2024.

Upkeep 2026 by Boater Type

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 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 2026 (2042) (chart doesn't show Other, Don't Know and Trade due to small sample sizes). *Only data labels 5%+ are displayed in the chart.



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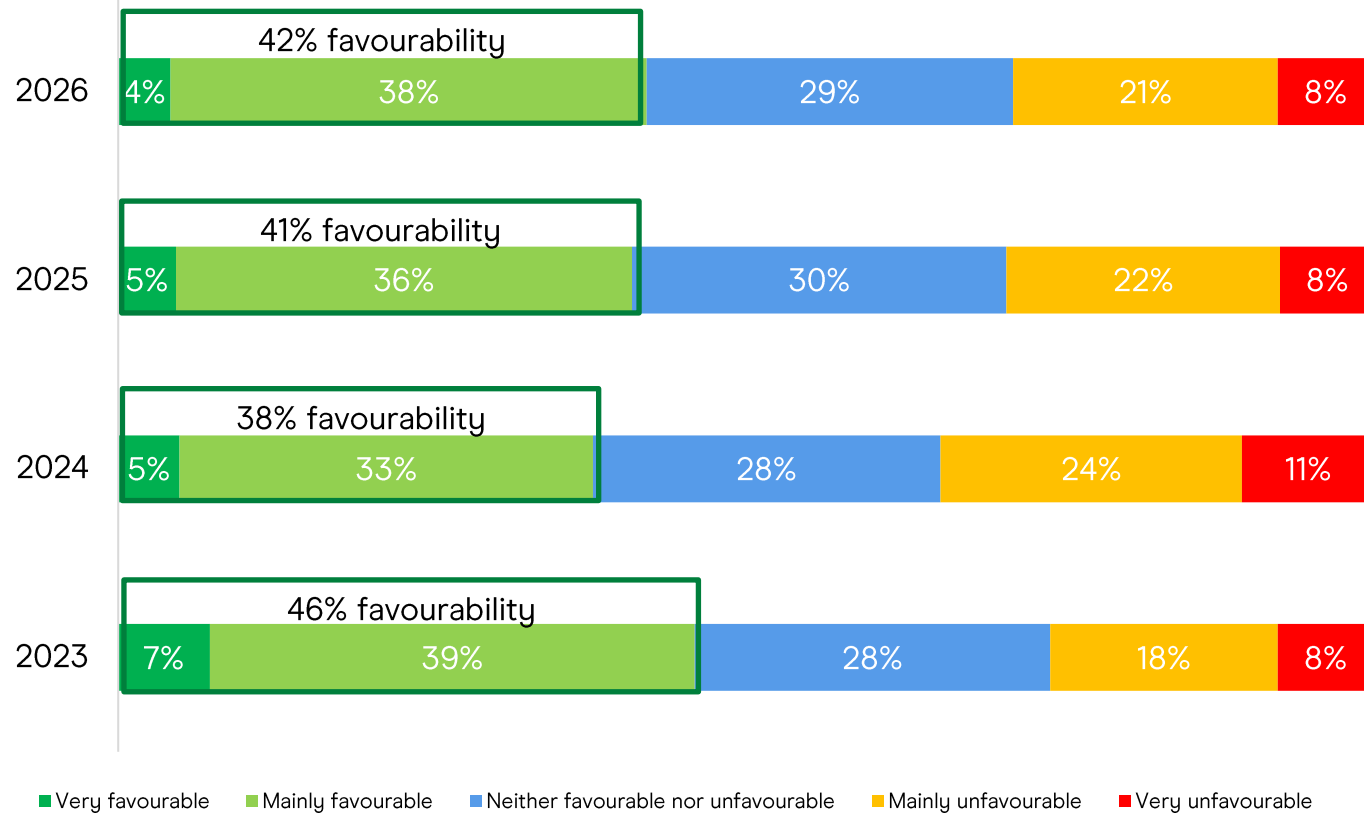


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4. Relational Measures



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



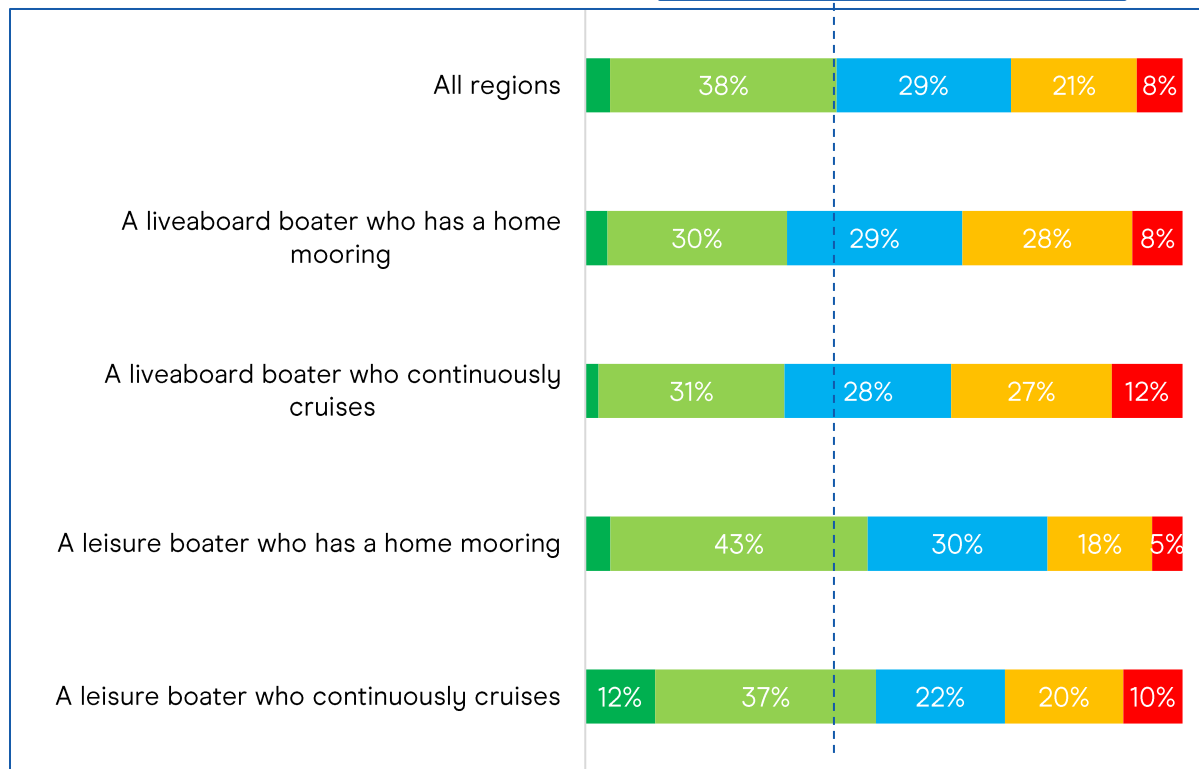
- Overall favourability is broadly in line with 2025.
- It remains +4% ahead of 2024, but it is still lower than in 2023.

Sample: All 2042 in 2026, (1742 in 2025) (1,167 in 2024) (1,407 in 2023).

Favourability 2026 by boater usage type

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

42% 2025 Net Favourability



■ Very favourable
 ■ Mainly favourable
 ■ Neither favourable nor unfavourable
■ Mainly unfavourable
 ■ Very unfavourable

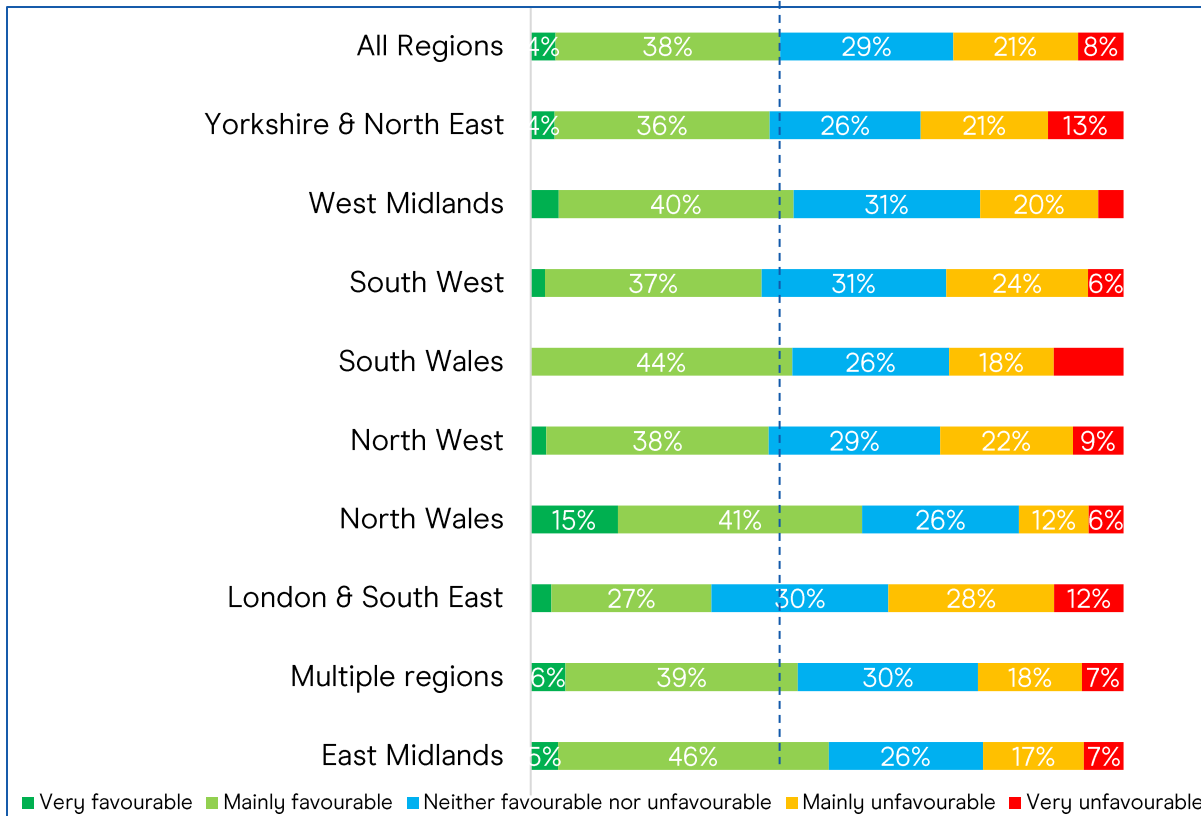
- Consistent with previous years, leisure boaters with home moorings and, leisure boaters who continuously cruise, score the Canal & River Trust significantly more favourably in relation to liveaboard boaters who continuously cruise and liveaboard boaters with home moorings.

Sample: All 2,042 (chart doesn't show Other, Don't Know and Trade due to small sample sizes). *Only data labels 5%+ are displayed in the chart.

Favourability 2026 by regions

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

42% 2026 Net Favourability

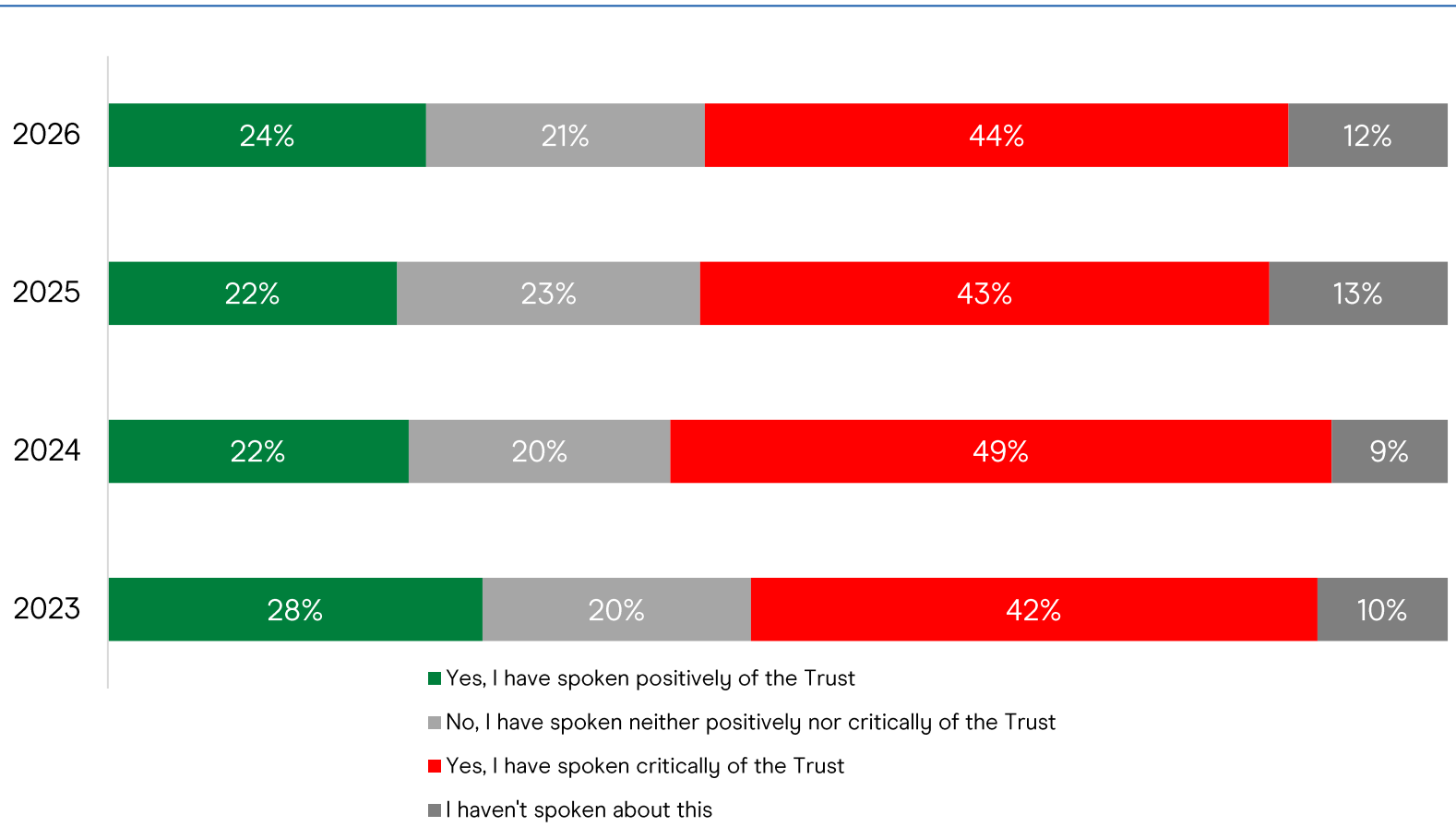


- London and Southeast remains the region with least favourability – though this will be impacted by the greater number of liveaboard boaters in the region who typically are less likely to be favourable.

Sample: All (2,042). *Only data labels 5%+ are displayed in the chart. Note North & South Wales are indicative only, small sample.

Advocacy of the Trust 2023-26

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

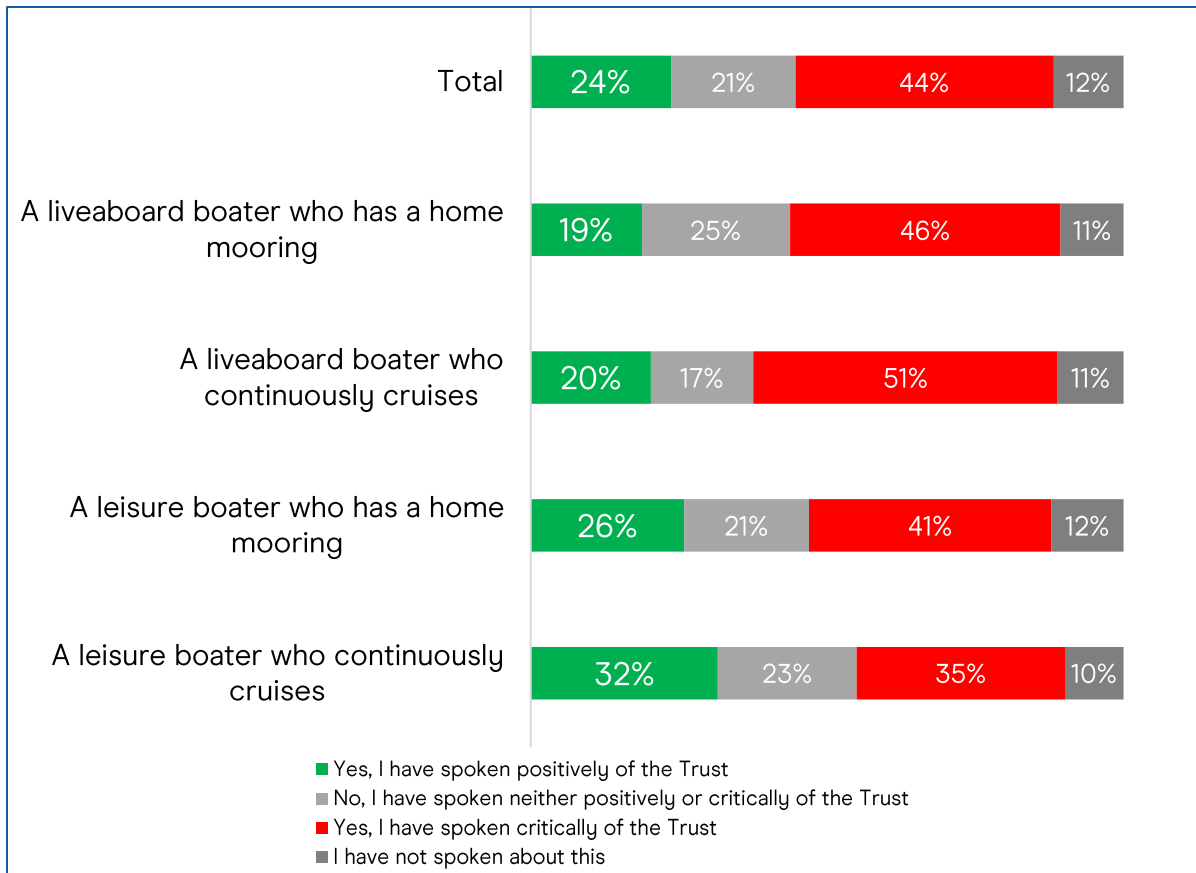


- Overall, there has been no significant change in Advocacy levels, despite the fall in satisfaction.
- Results were broadly in line with 2025, with 44% (vs 43%) speaking critically of the Trust.
- Net Advocacy (Positive – Critical) is at -20%, similarly to the prior year (-21%).

Sample: All (2026, 2042) (2025, 1742) (2024 1,167) (2023 1,407)

Advocacy of the Trust 2026 by region

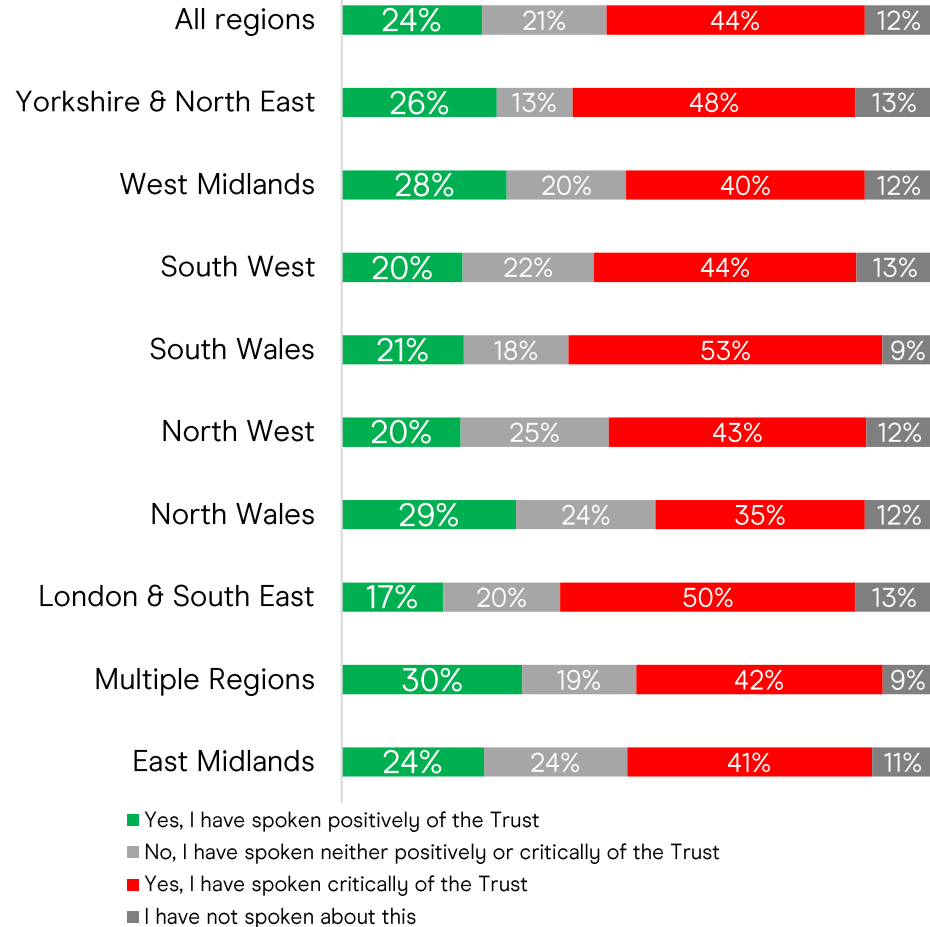
Generally, have you ever spoken positively or critically about the Canal & River Trust to friends or family?
Please select one answer only



- Liveaboard boaters are the most likely to speak negatively about the Trust, which aligns with the broader attitudinal picture. Leisure boaters who continuously cruise tend to be more positive overall. However, across all groups, negative views still outweigh positive ones.

Advocacy of the Trust 2026 by region

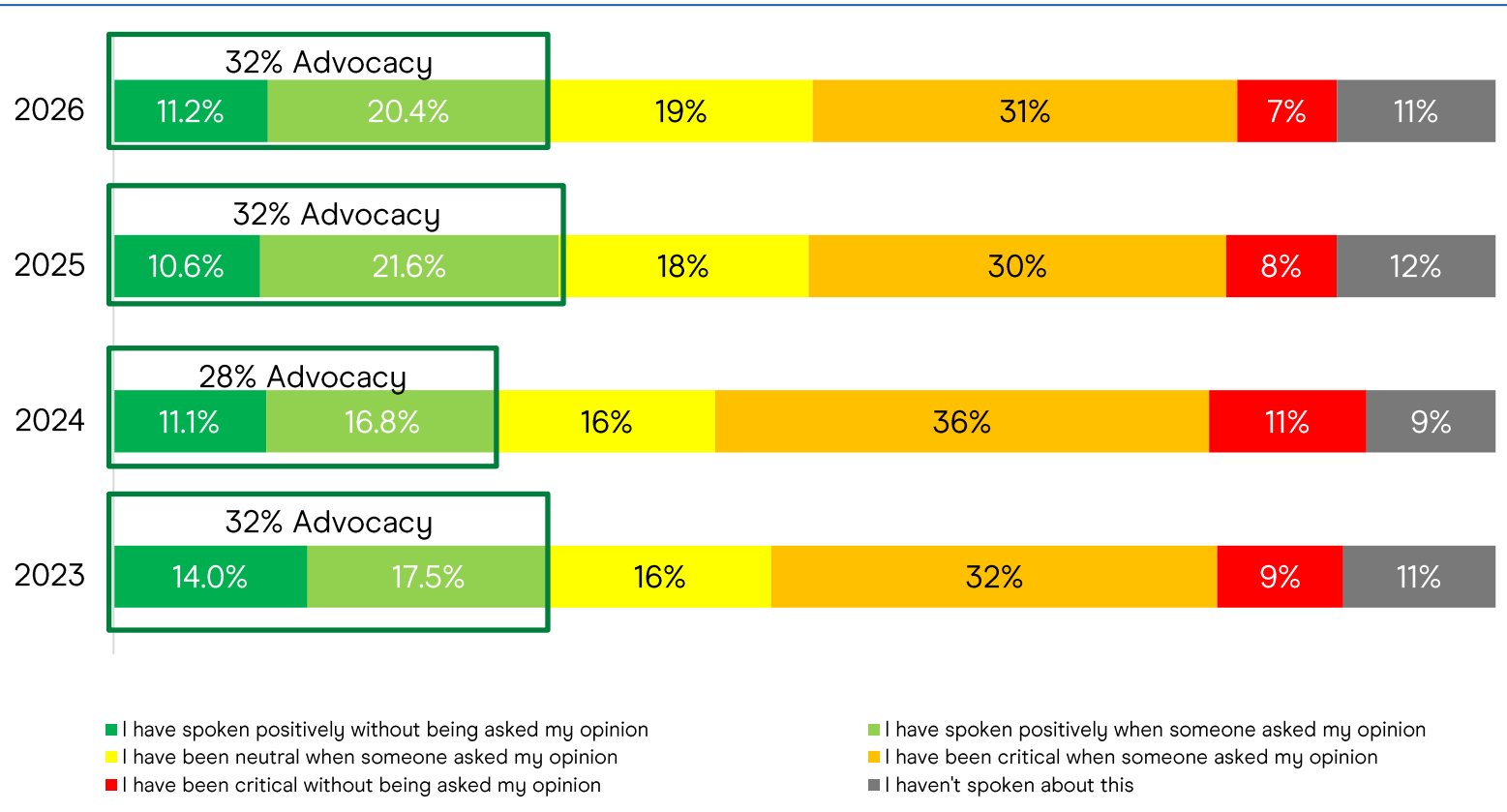
Q18: Generally, have you ever spoken positively or critically about the Canal & River Trust to friends or family?
Please select one answer only



- Beyond South Wales, with a low sample size, boaters in London & South East and Yorkshire & North East are more likely to say that they have spoken critically about the Canal & River Trust.

Advocacy of the waterways

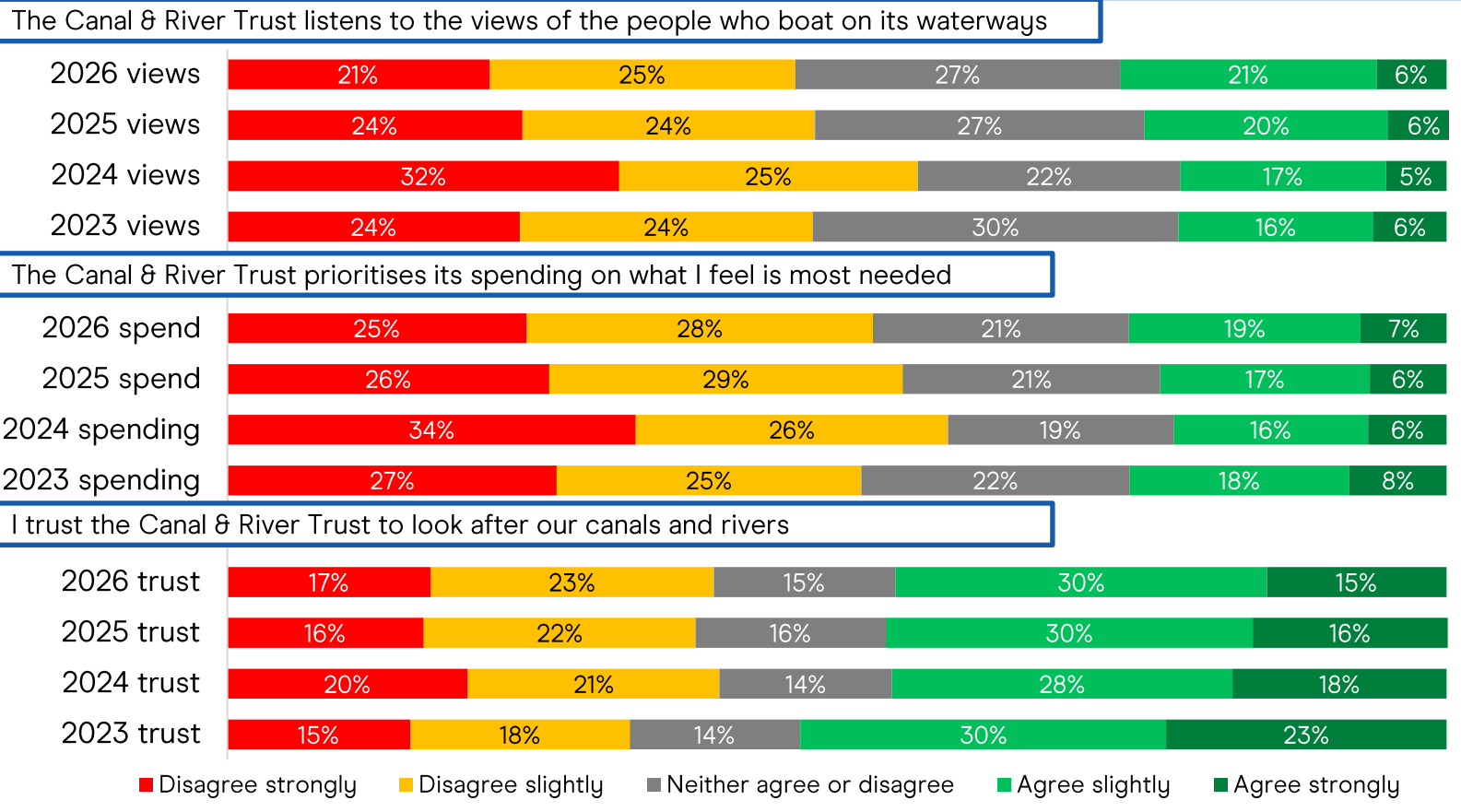
To what extent have you spoken positively or critically about the waterways looked after by the Canal & River Trust? *Please select one answer only*



- Advocacy remains stable compared to 2025, holding to the 4% improvement that that followed the 2024 decline.
- Despite this, overall net advocacy (critical minus positive) remains negative at -6%, meaning people are still more likely to be critical of waterways than supportive.

Sample: All (2026, 2,042)(2025, 1,742) (2024, 1,167) (2023, 1,407).

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



- All metrics have marginally improved since the 2024 low point.
- However, most boaters still hold negative perceptions of the Trust overall.

Sample: All (2026, 2,042)(2025 1742) (2024 1,167) (2023 1,407) (2022 936) (2021 (1,179)). *Only data labels 5%+ are displayed in the chart.



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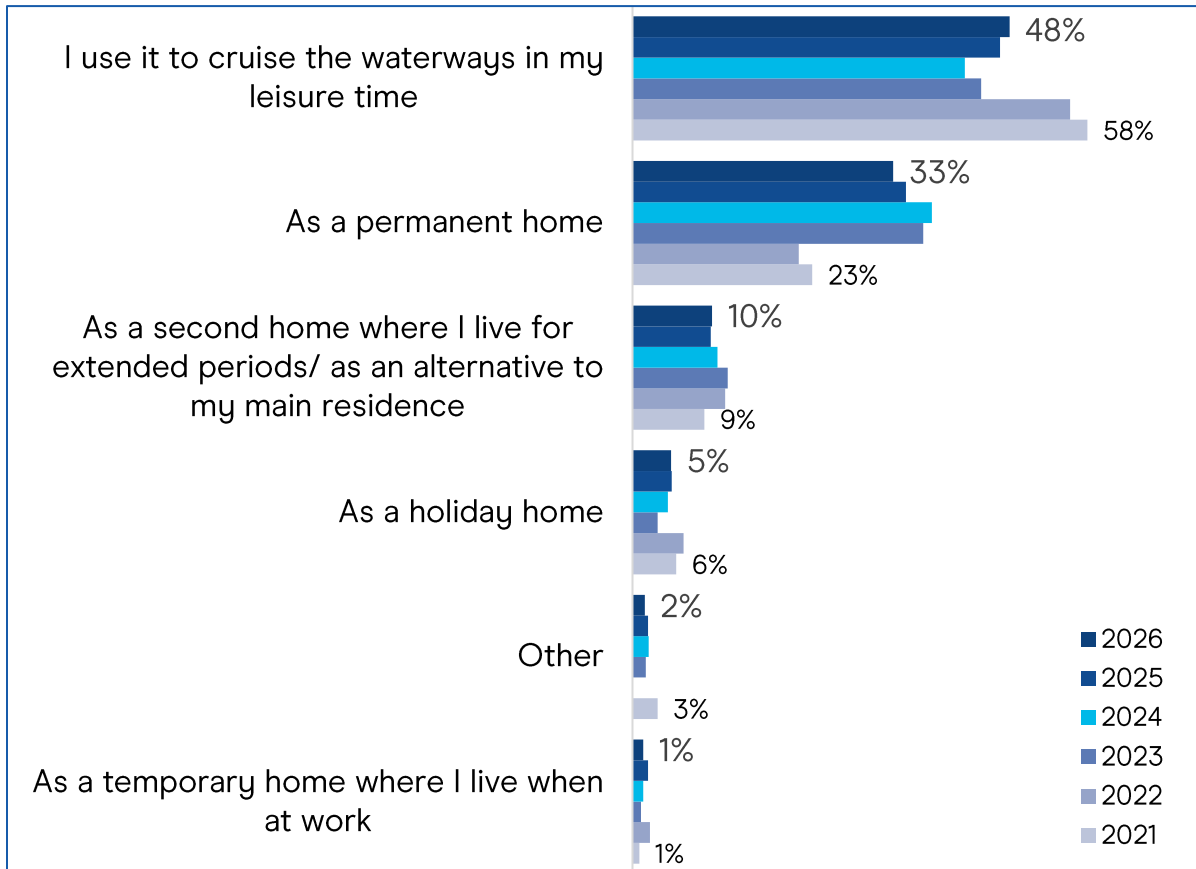


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6. Boater Profiles



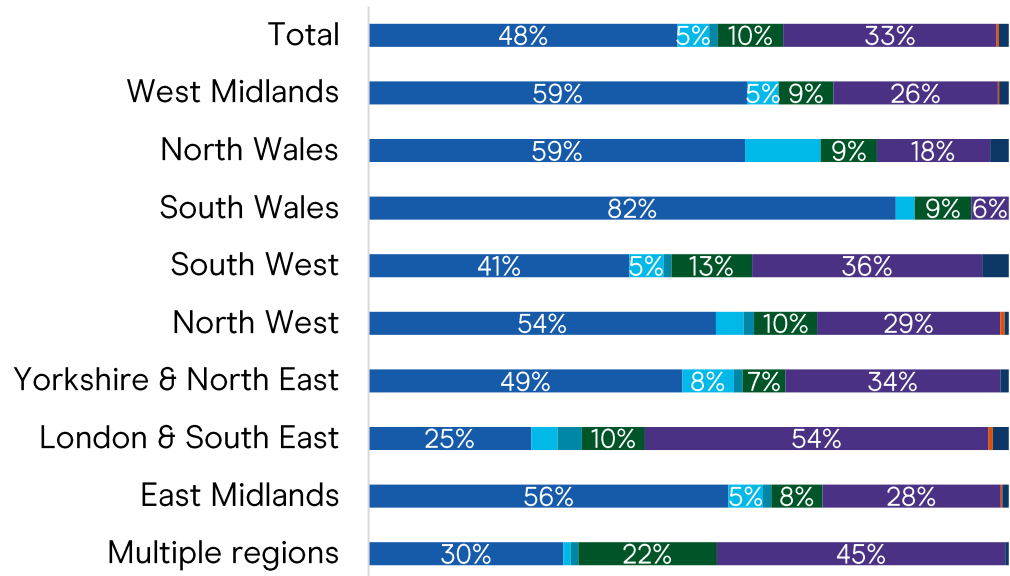
Which of the following options best describes how you use your boat most of the time?
Please select one answer only



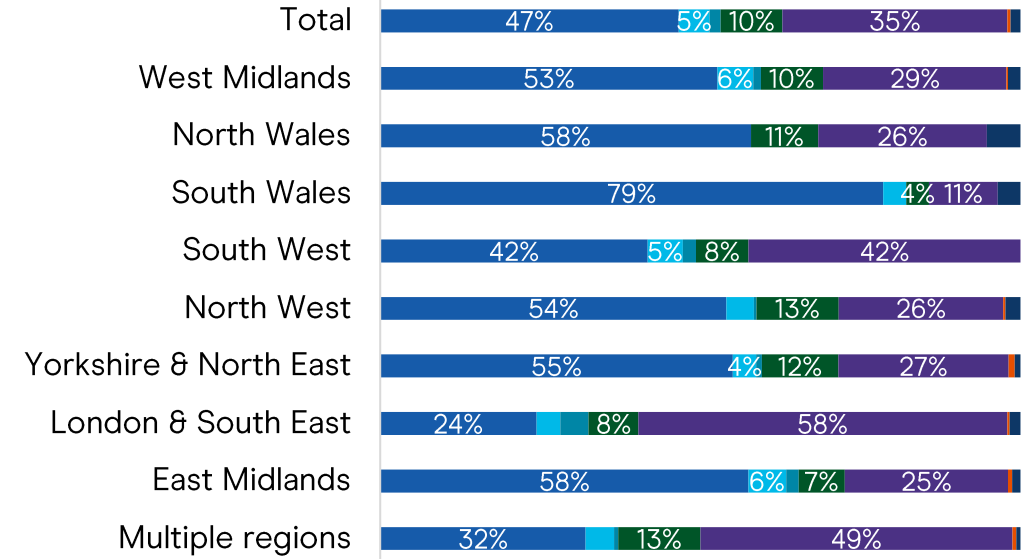
- Since the post-Covid period, the longer-term trend suggests that the Trust's waterways have increasingly become places of dwelling, though leisure remains the primary activity for most boaters.
- The 2026 sample is broadly consistent with patterns of boat use observed in the previous year.

Sample: All (2026, 2,042) (2025, 1,742) (1,167 in 2024) (1,407 in 2023) (936 in 2022) (1,179 in 2021)

2026 Boat use by region



2025 Boat use by region

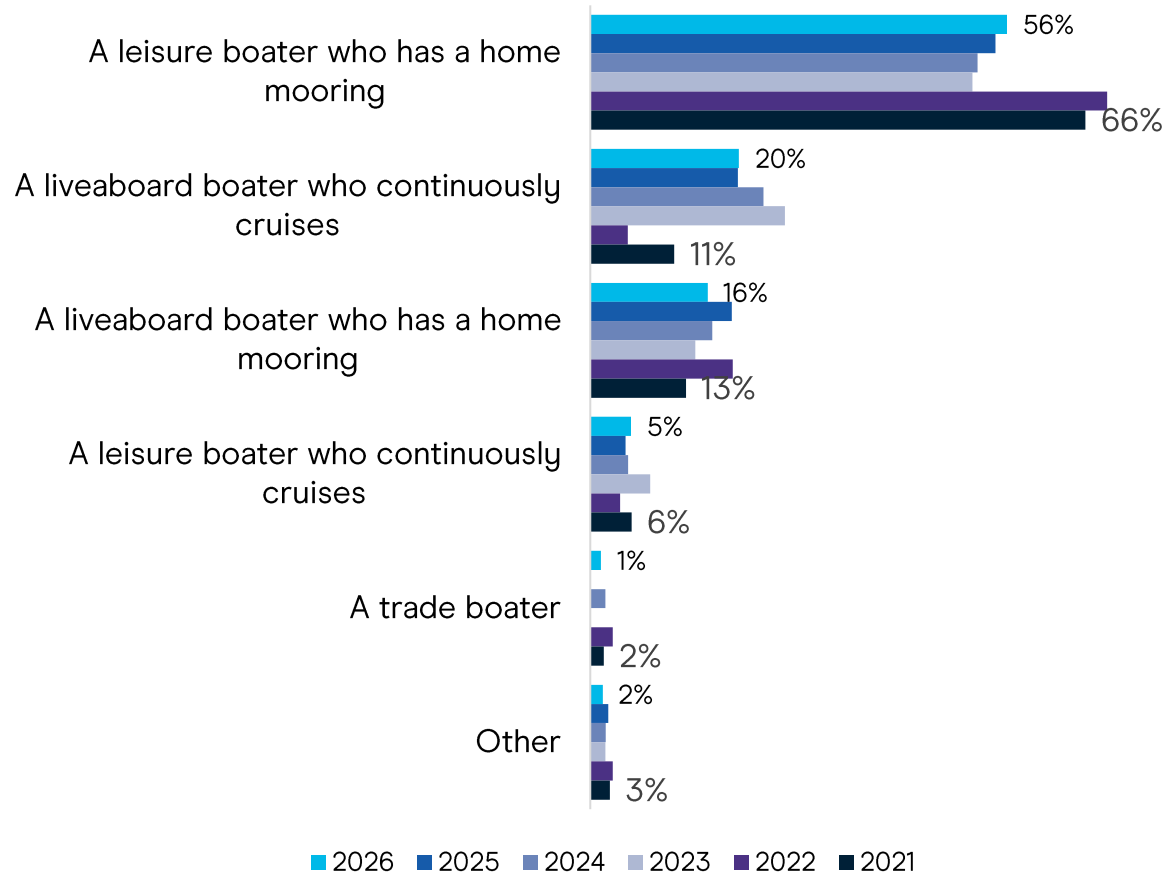


■ Cruise the waterways in my leisure time
 ■ Holiday home
 ■ Temporary home where I live when at work
 ■ Second home where I live for extended periods
 ■ Permanent home
 ■ Don't know
 ■ Other

London and southeast continues to be the only region where the majority of boaters live aboard as a permanent home. Wales has the highest proportion of use as holiday home, with 82% in South Wales. However, low samples ensure this is indicative for the latter.

Sample: All (2026, 2,042) (2025 1742) (2024 1,167). Results for South and North Wales indicative only due to low sample size.

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



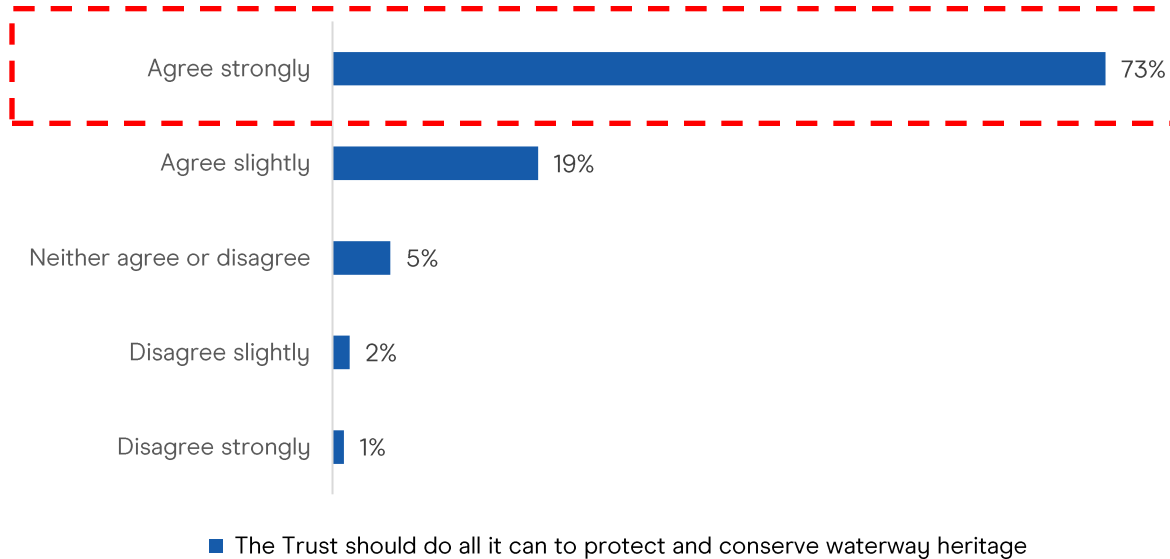
- As in previous years, a leisure boater with a home mooring continues to be the most selected by respondents (56%).
- The final response profile aligns with previous years and reflects the typical boat-count distribution, making it representative of the split between continuous cruisers and home-mooring licence holders.

Sample: All (2026 2,042) (1742 in 2025) (1,167 in 2024) (1,407 in 2023) (936 in 2022) (1,179 in 2021)

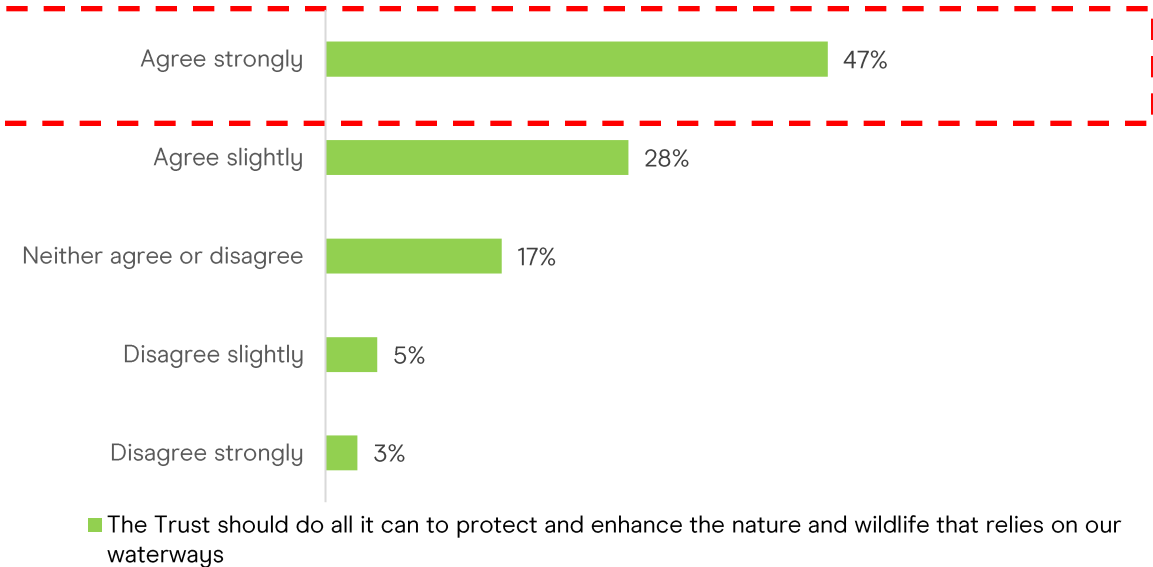
Further Boater perceptions

To what extent do you agree or disagree with each of these statements about the Canal & River Trust?

Boater sentiment towards Heritage



Boater sentiment towards Nature



Heritage protection is a priority for over 90% of boaters, with strong support from 70%. Support for nature and wildlife is also high, though slightly lower.