Canal & River Trust
Making life better by water

Glandŵr Cymru
Canal & River Trust in Wales

2025 Annual Boaters' Survey

Full report

Published July 2025

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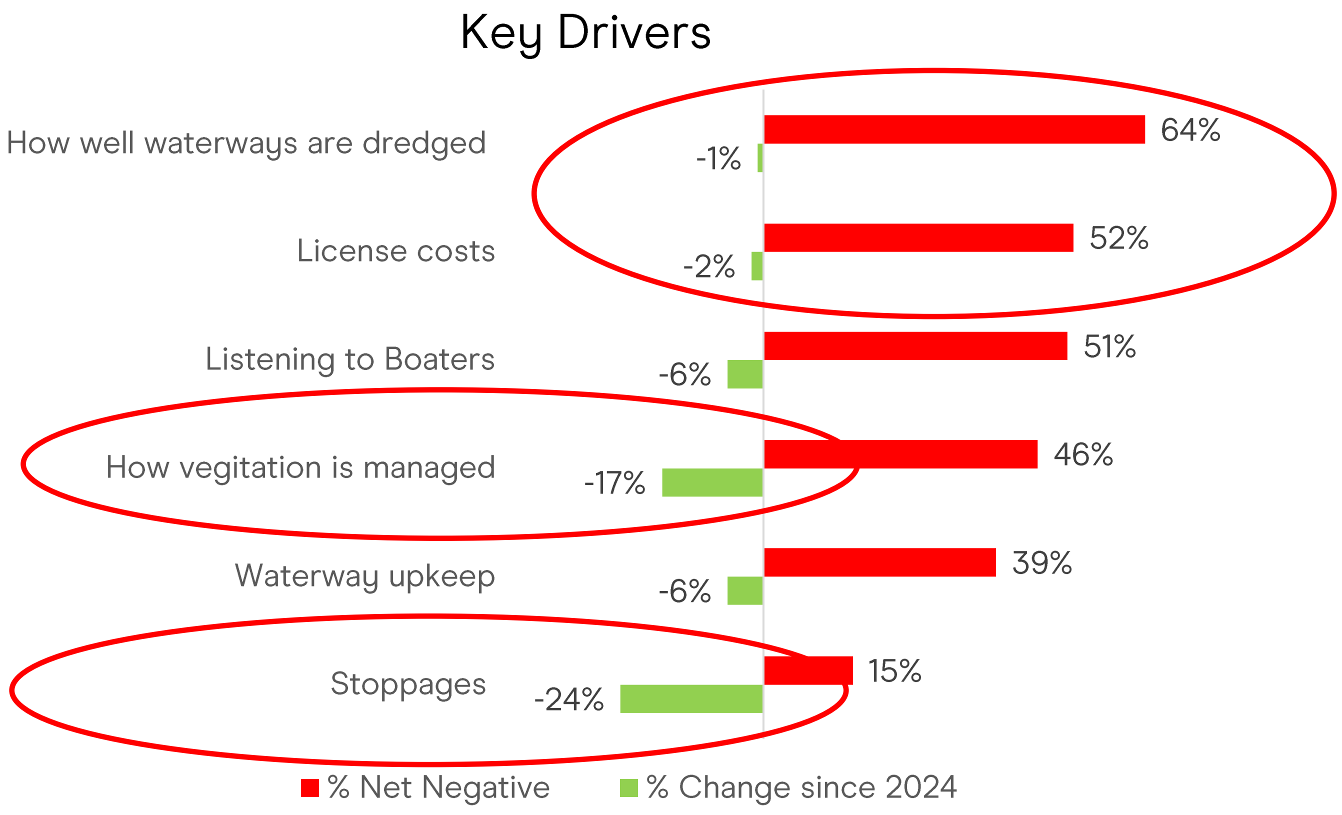
1. Summary

Summary

- Headline KPI of **overall satisfaction has seen a significant increase to 55%** *[+9%, 46% in 2024]*; now broadly in line with 2021-2023 results.
- The **main improvement since 2024 is among liveaboard boaters** (liveaboard continuous cruisers up from 40% to 53% and liveaboard with home mooring up from 35% to 47%). Satisfaction among leisure boaters is more positive overall but has seen little change from 2024 levels (c.59%)
- In terms of the key drivers underpinning the 2024 satisfaction nadir; lack of **dredging, boating costs and stoppages** continue to be relatively strong negative drivers in 2025.
- There are however many green shoots of recovery in sentiment compared with 2024, with a fall in negative views - general upkeep of waterways (-6%), vegetation management (-17%) and engagement with boaters (-6%) all showing significant improvement. While not registering as a particularly significant change, favourability, advocacy and trust are also moving in a positive direction.
- In short, while the results compared to 2024, at face value are positive; reflecting a significant improving picture – many of the key issues identified in 2024 continue to garner comparable levels of negativity, and many of the issues being addressed through the better boating remain key areas of priority.

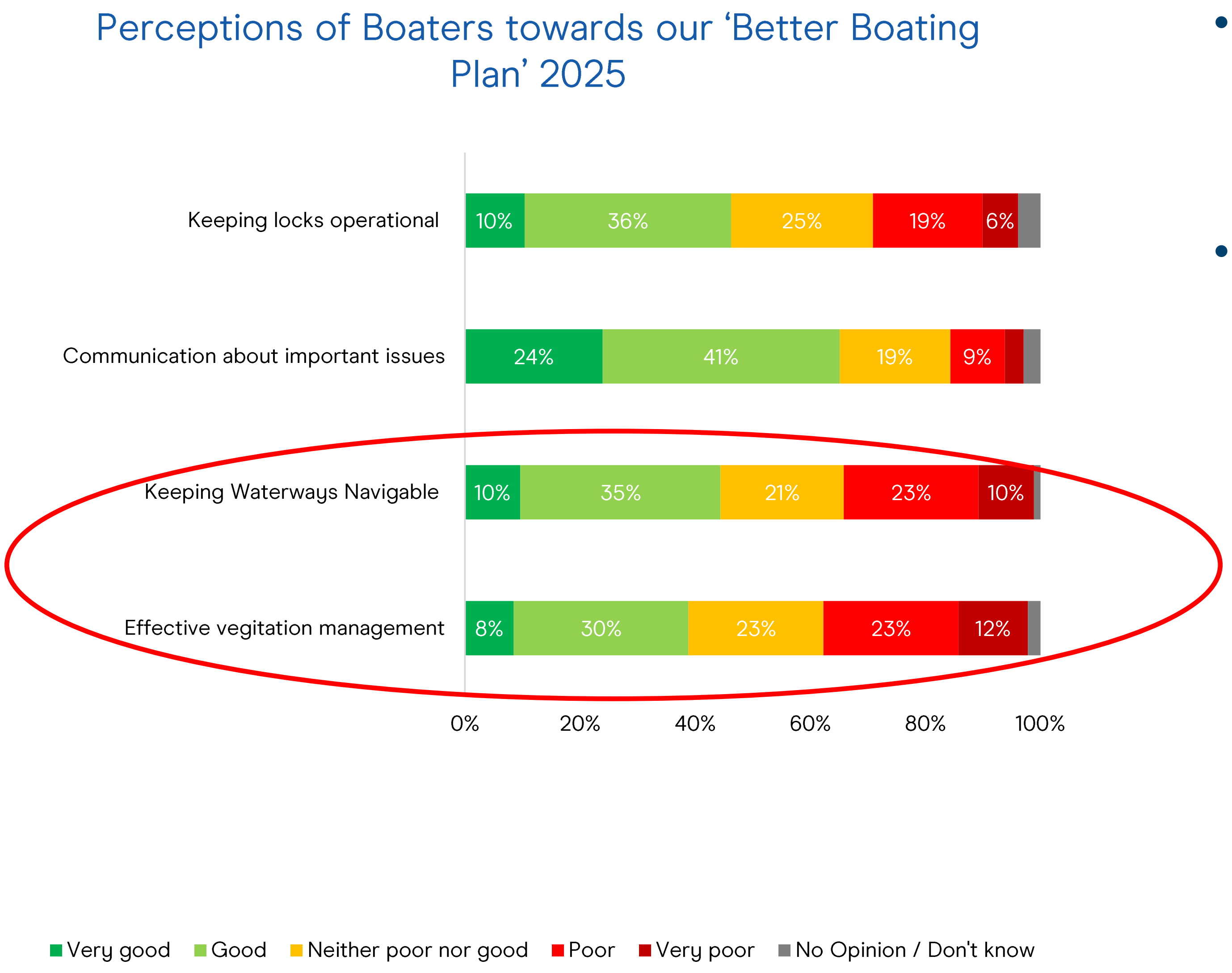
Summary: KPI & Drivers

The overall satisfaction KPI result for 2024 is:
55%
(+9% compared to 2024)



- How well waterways are dredged continue to be the main concern among boaters overall, with little improvement on 2024 unlike other metrics.
- How vegetation is managed and the number of stoppages have seen considerable improvement, though vegetation remains a key negative issue.

Summary: Better Boating Plan



- In 2025 we baselined perspectives among boaters on our performance against key areas of the action plan.
- Consistent with key issues, vegetation and navigation remain the least positive factors currently, though the vast majority believe our communication works well.

1. Methodology & Sample

Executive Summary: Methodology

Methodology

The sample size achieved was 1742, in line with the previous best performing sample for the survey (2018) and the strongest response rate we have seen at c.17%.

Comparable to the national boat count, the responses are broadly in line with the known split of continuous cruiser / home mooring licenses, which offers a more representative sample compared with 2024,

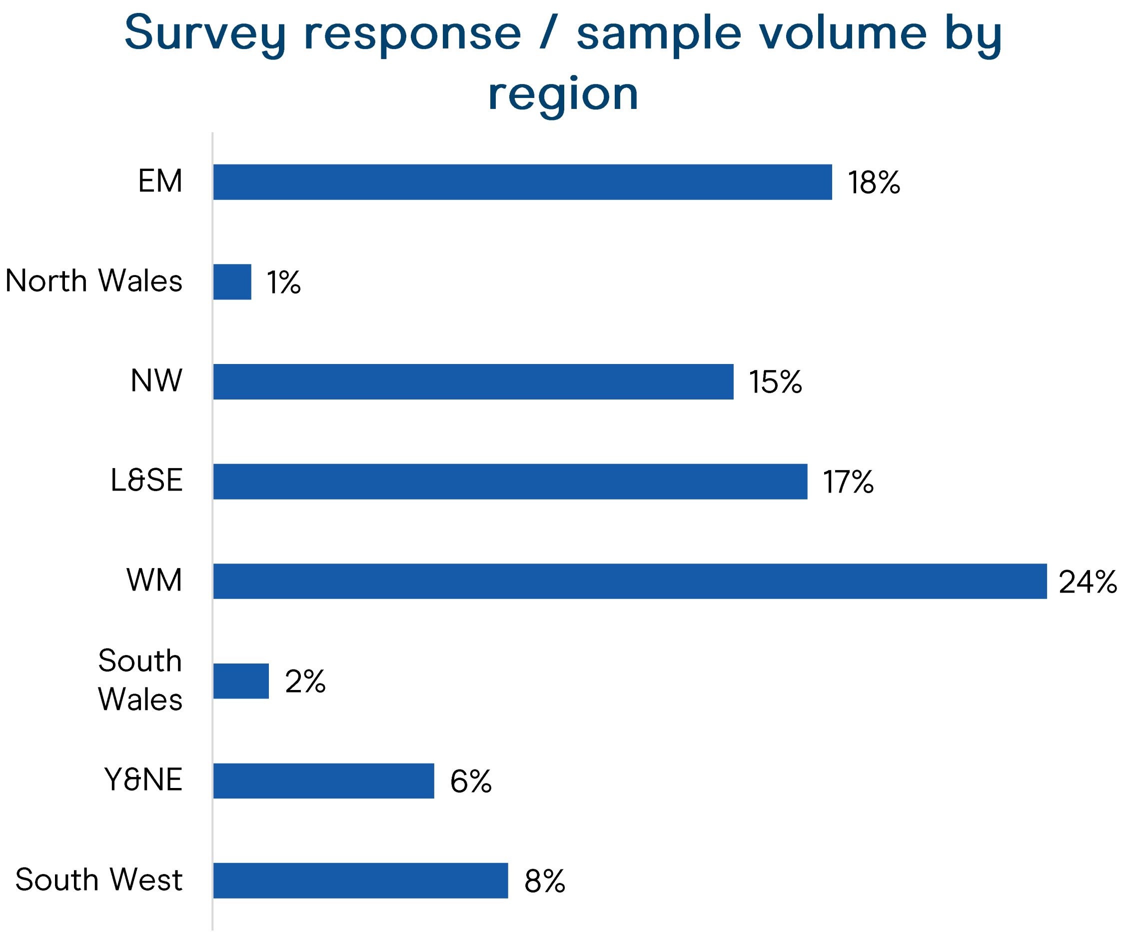
As with previous years controls are in place to ensure one response per license holder, with c.1/3 current license holder contacted to participate.

The open text question regarding general experience was moved from the beginning of the survey in 2025 to reduce negative framing. The impact of survey changes will have had a modest positive effect on the satisfaction score but cannot fully explain the change in satisfaction – which we can conclude are at least in part a result of positive actions taken by the Trust.

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	27th February to 4th March
2022	8,193	936	7th March to 4th April
2023	8,060	1,407	28th March to 30th April
2024	11,578	1,167	1st April to 17th April
2025	10,071	1,742	November 26th - March 14th (two waves)

Regional Participation



- A key differences in 2025 was to split Wales & South West into further regions, to provide further detail on the Welsh network.
- The response rate for South and North Wales is small, and results indicative only, but has been provided in the regional breakdown for completeness.

Sample: All (1742)

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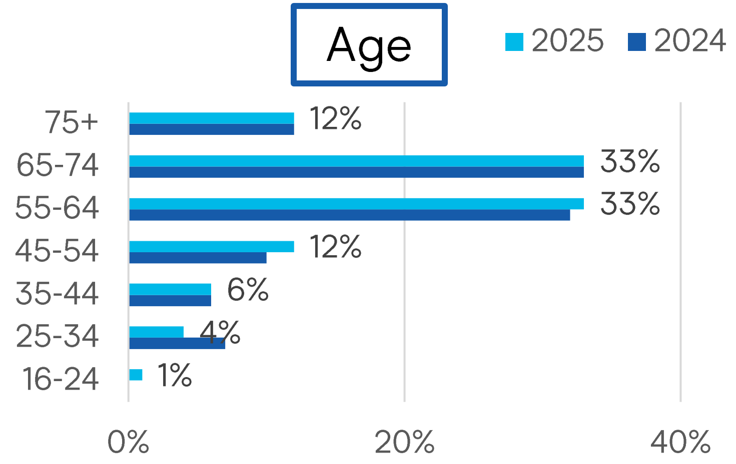
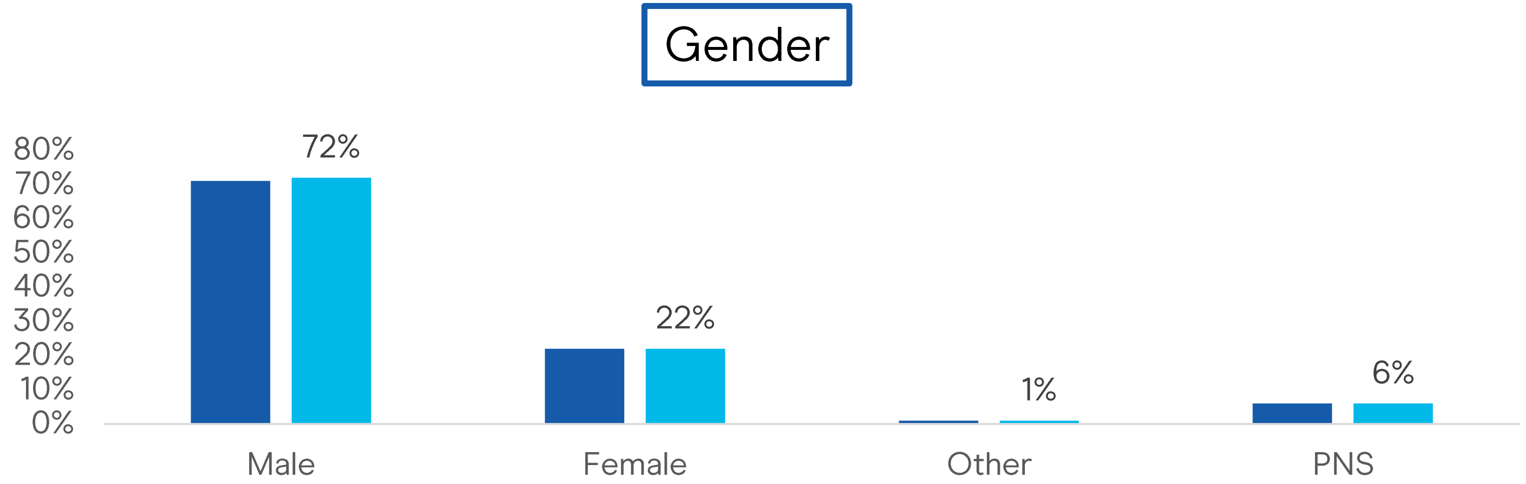
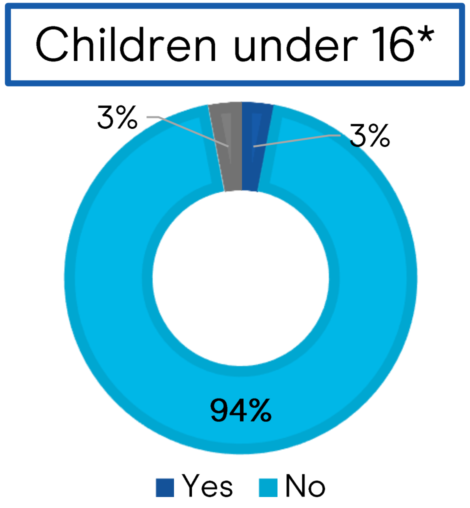
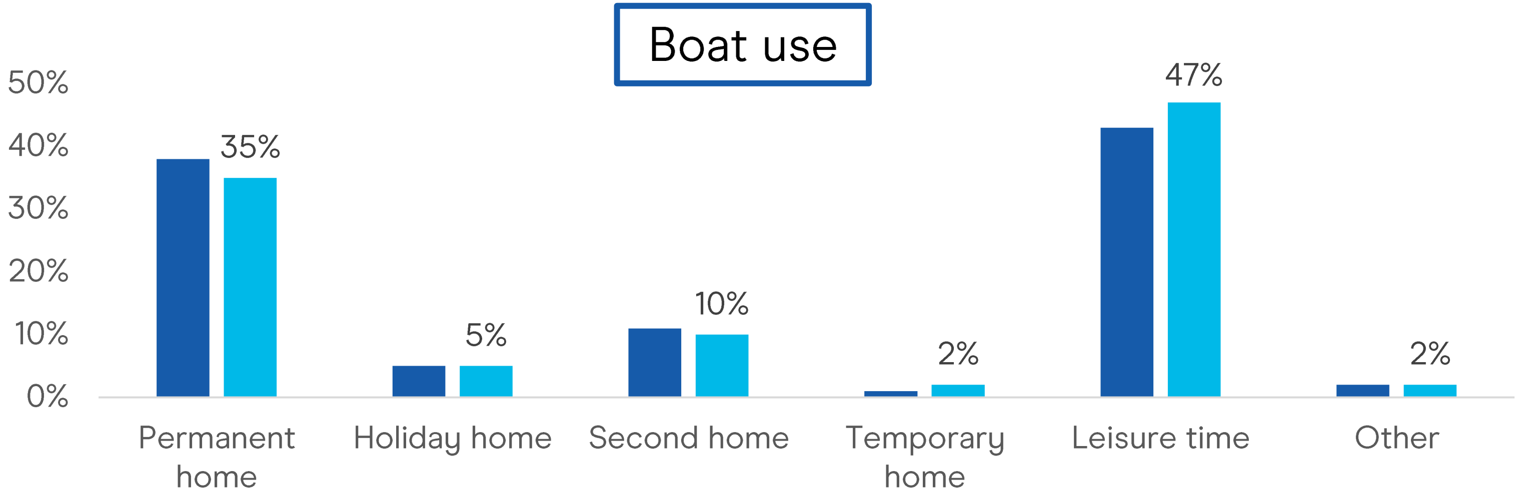
Sample Profile 2025









Sample: All (2025 1742) (2024 1167), *All who liveaboard with a home mooring or continuously cruise

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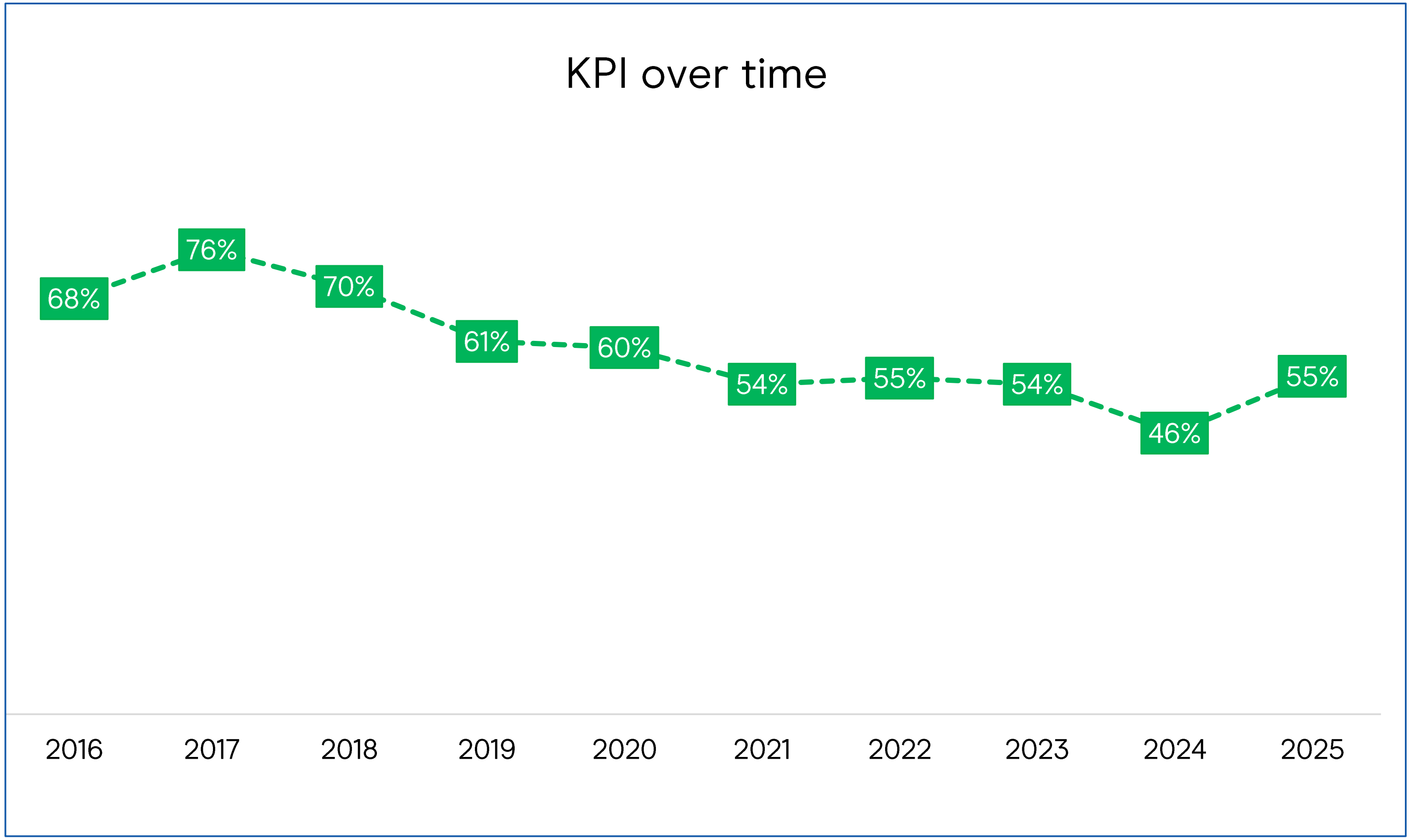
2. Overall satisfaction KPI

KPI Overall Satisfaction: Over time

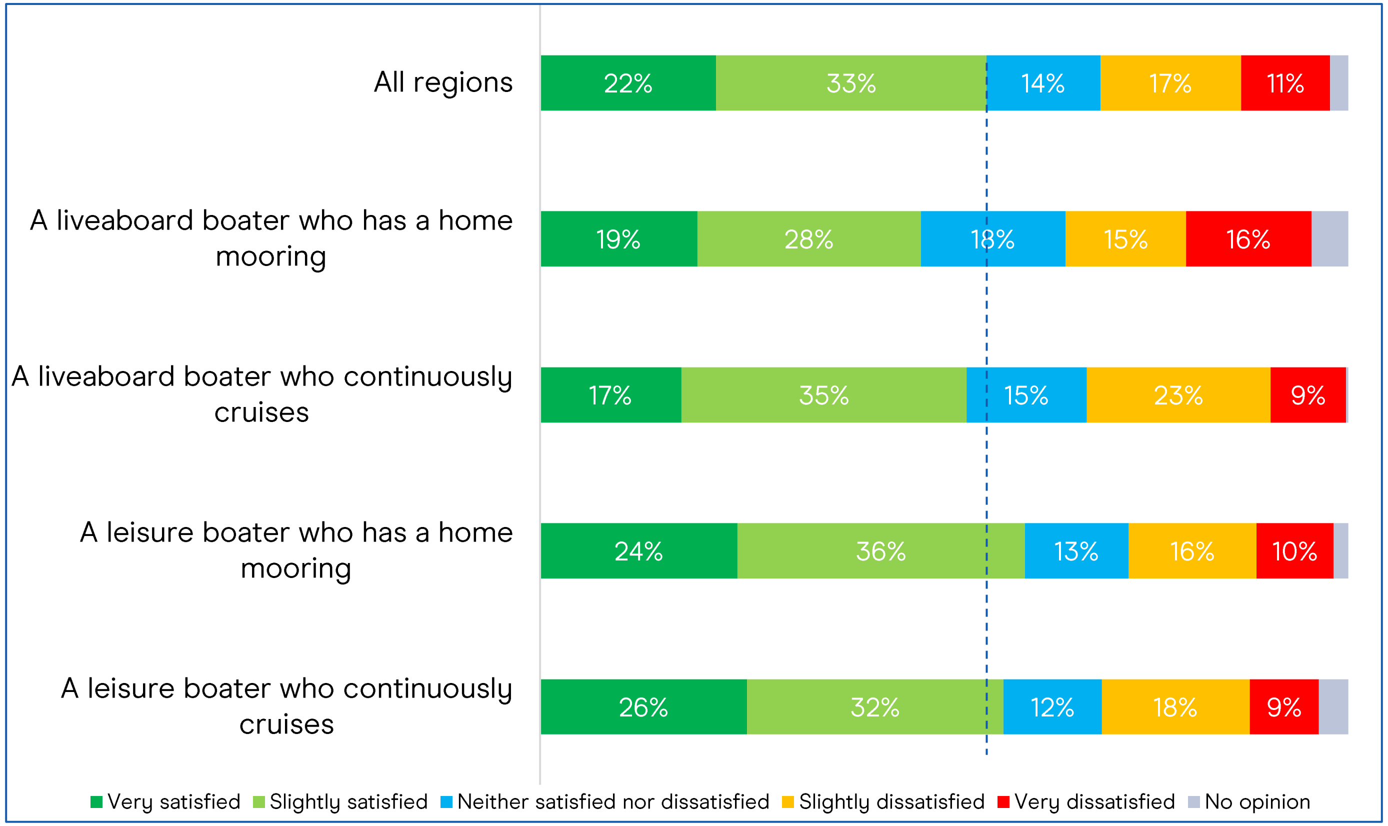


- Overall satisfaction has returned to 21-23 levels following a dip in 2024.

KPI: 2025 by boater 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*

55% 2025 Satisfaction



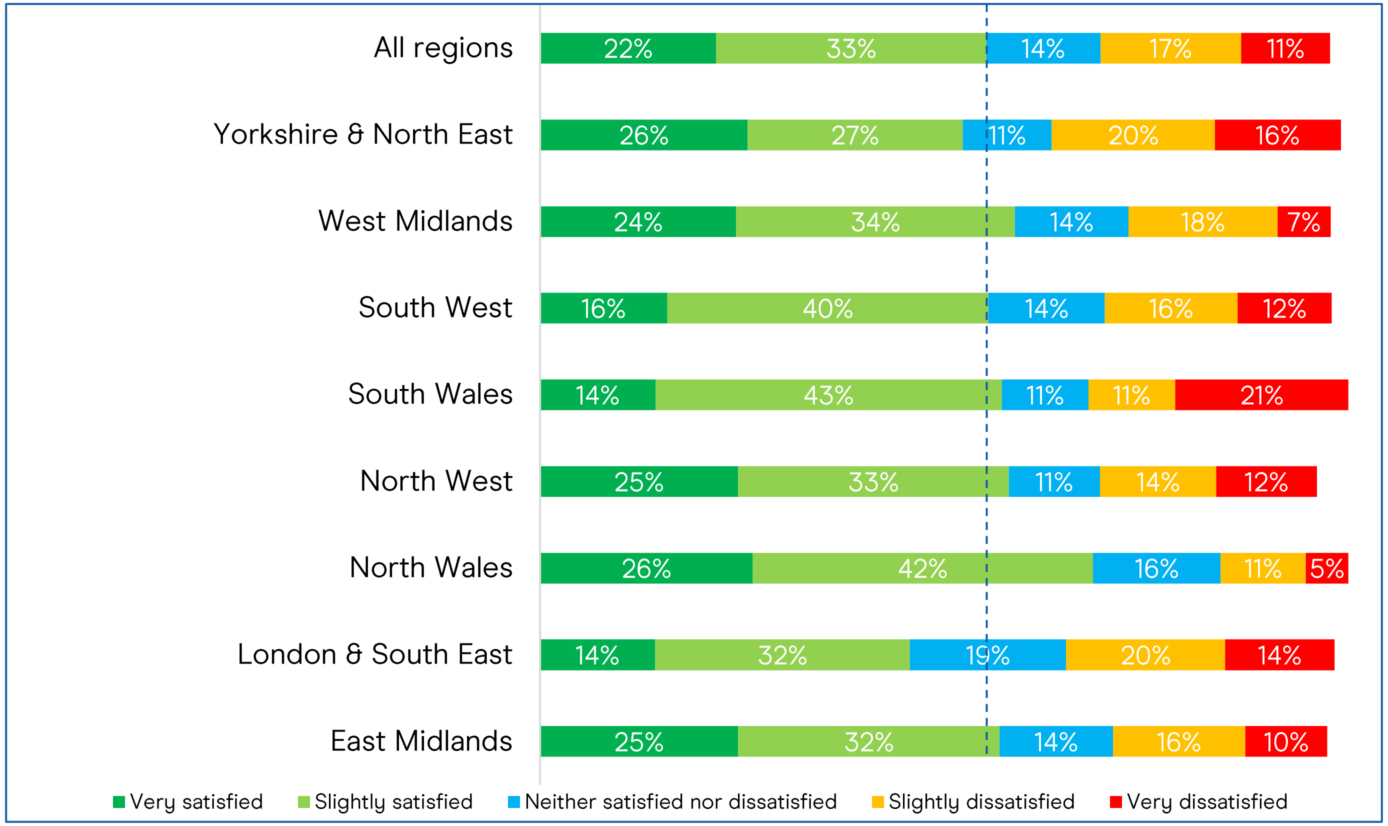
- While liveaboard boaters typically remain less favourable than leisure, they have shown most positive change since 2023.
- Liveaboard continuous cruisers up from 40% to 53% and liveaboard with home mooring up from 35% to 47%). Satisfaction among leisure boaters is more positive overall but has seen little change from 2024 levels (c.59%).

Sample: All (1,742). *Only data labels 5%+ are displayed in the chart. Note North & South Wales are indicative only, small sample.

KPI: 2025 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*

55% 2025 Satisfaction



- Apart from London and South East all regions have a majority of satisfied boaters. Following similar trends highlighted in attitudes towards the Trust, London and South East are least satisfied – though comparably have much higher levels of liveaboard boaters within the sample, who are typically less satisfied than leisure boaters overall.

Sample: All (1,742). *Only data labels 5%+ are displayed in the chart. Note North & South Wales are indicative only, small sample.

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KPI: Historic Data 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*

Region	2024	2023	2022
All	18% 29% 16% 20% 15%	23% 31% 14% 21% 11%	24% 32% 19% 18% 8%
More than one region	17% 32% 13% 26% 12%	24% 31% 13% 20% 12%	31% 33% 12% 19%
London & South East	12% 26% 19% 18% 23%	16% 35% 18% 21% 11%	19% 33% 22% 17% 9%
West Midlands	23% 34% 15% 14% 11%	27% 29% 12% 23% 9%	27% 30% 24% 14%
Wales & South West	13% 26% 18% 24% 17%	20% 38% 13% 18% 11%	20% 29% 24% 20% 7%
East Midlands	26% 28% 14% 20% 10%	36% 30% 14% 14% 6%	25% 31% 18% 19% 7%
North East & Yorkshire	18% 21% 21% 20% 18%	10% 22% 18% 33% 18%	21% 27% 11% 18% 23%
North West	15% 28% 15% 24% 17%	21% 30% 15% 22% 13%	20% 34% 17% 19% 9%

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 historic data by 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*

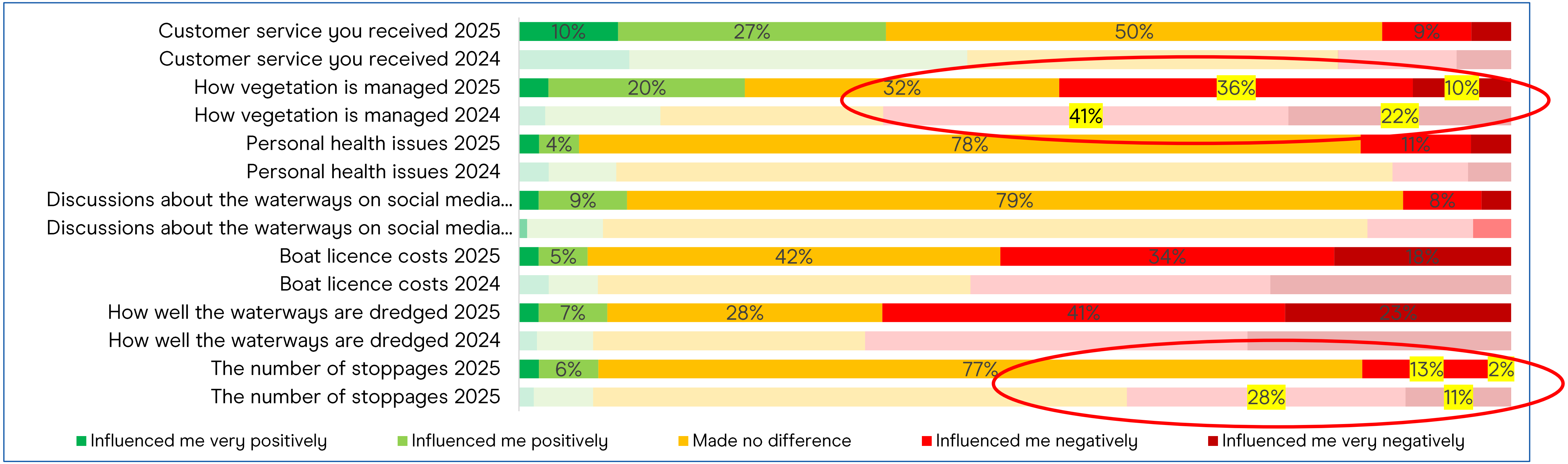
Region	2024	2023	2022
Total	18% 29% 16% 20% 15%	23% 31% 15% 21% 11%	23.6% 31.6% 19% 18% 8%
A leisure boater who continuously cruises	19% 42% 8% 17% 12%	34% 29% 17% 11% 10%	30% 30% 14% 22% 5%
A liveaboard boater who continuously cruises	16% 24% 22% 21% 17%	20% 32% 18% 21% 9%	32% 34% 18% 14%
A liveaboard boater who has a home mooring	14% 21% 18% 19% 20% 9%	19% 23% 18% 23% 17%	16% 25% 27% 22% 10%
A leisure boater who has a home mooring	20% 33% 14% 22% 11%	24% 33% 12% 21% 10%	25% 33% 17% 16% 8%

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.

2025 vs. 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'. How vegetation is managed and stoppages have seen significant improvement vs 2024.

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

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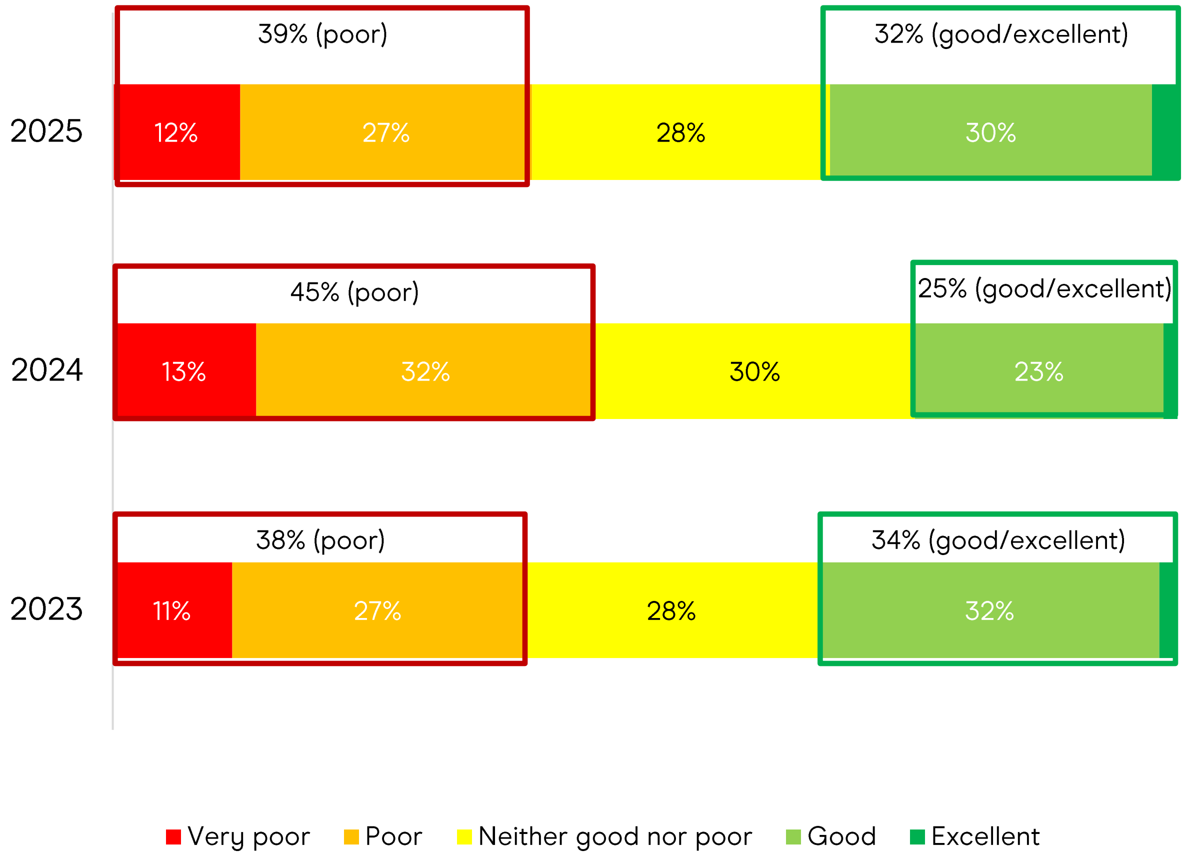
3. Maintenance

Upkeep 2023-25

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

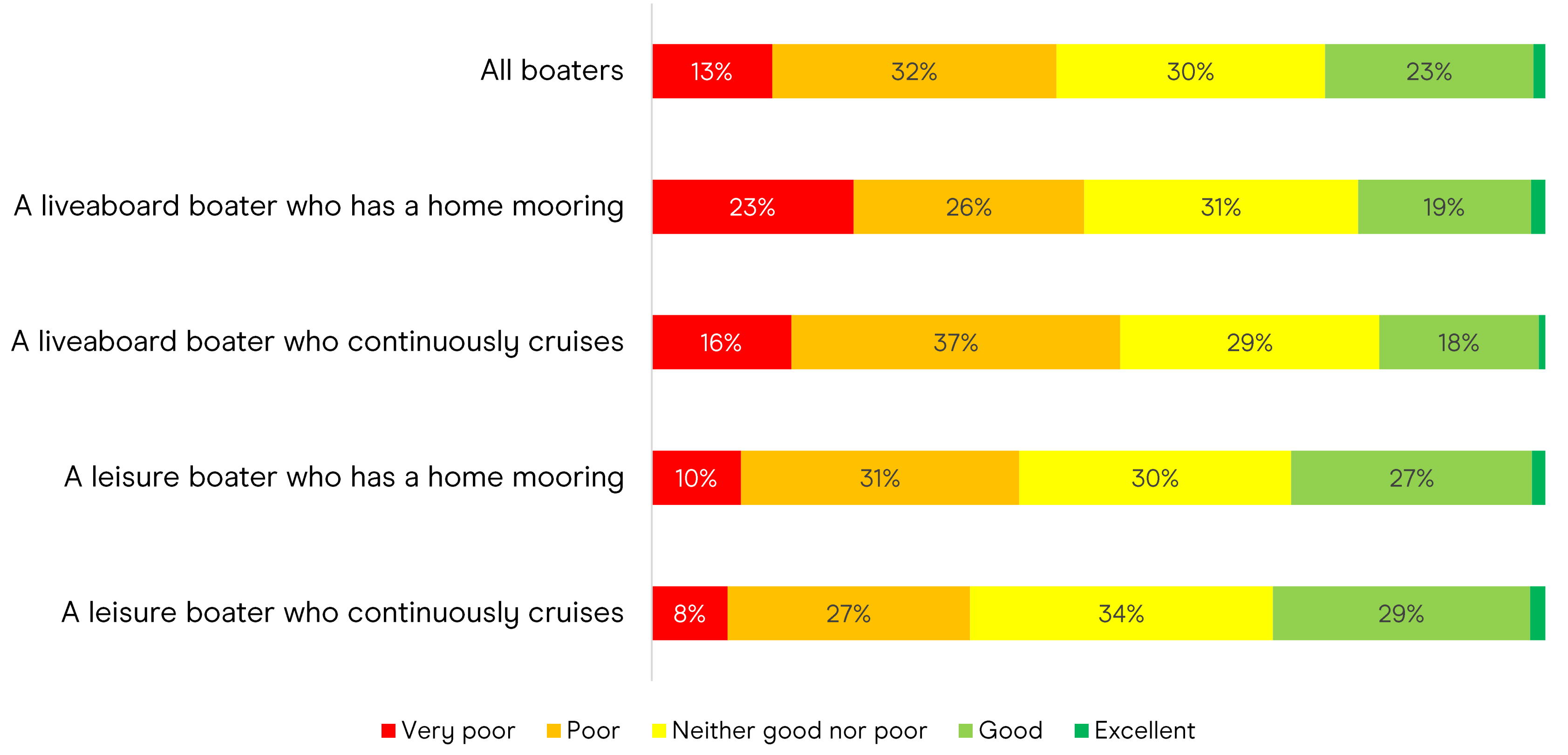


- Perceptions that upkeep of the Canal & River Trust's waterways is 'poor' has fallen - 6%, broadly in line with 2023 levels.

Sample: 2025 (1742), 2024 (1,135); 2023 (1,362);. Excluding other boater types and No opinion. *Only data labels 5%+ are displayed in the chart.

Upkeep 2025 by Boater 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 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 1742 (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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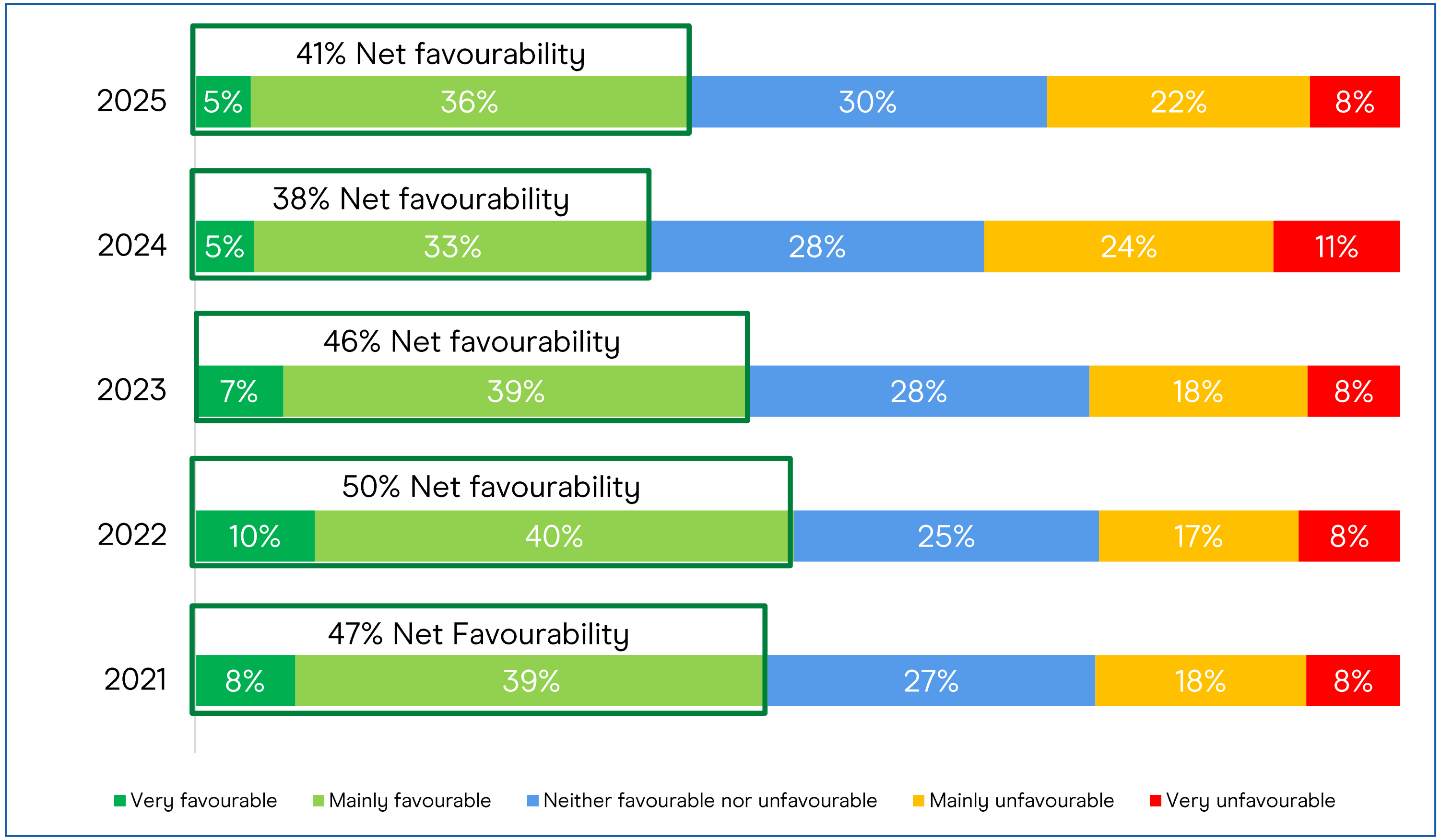
4. Relational Measures

Favourability 2021-25

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*



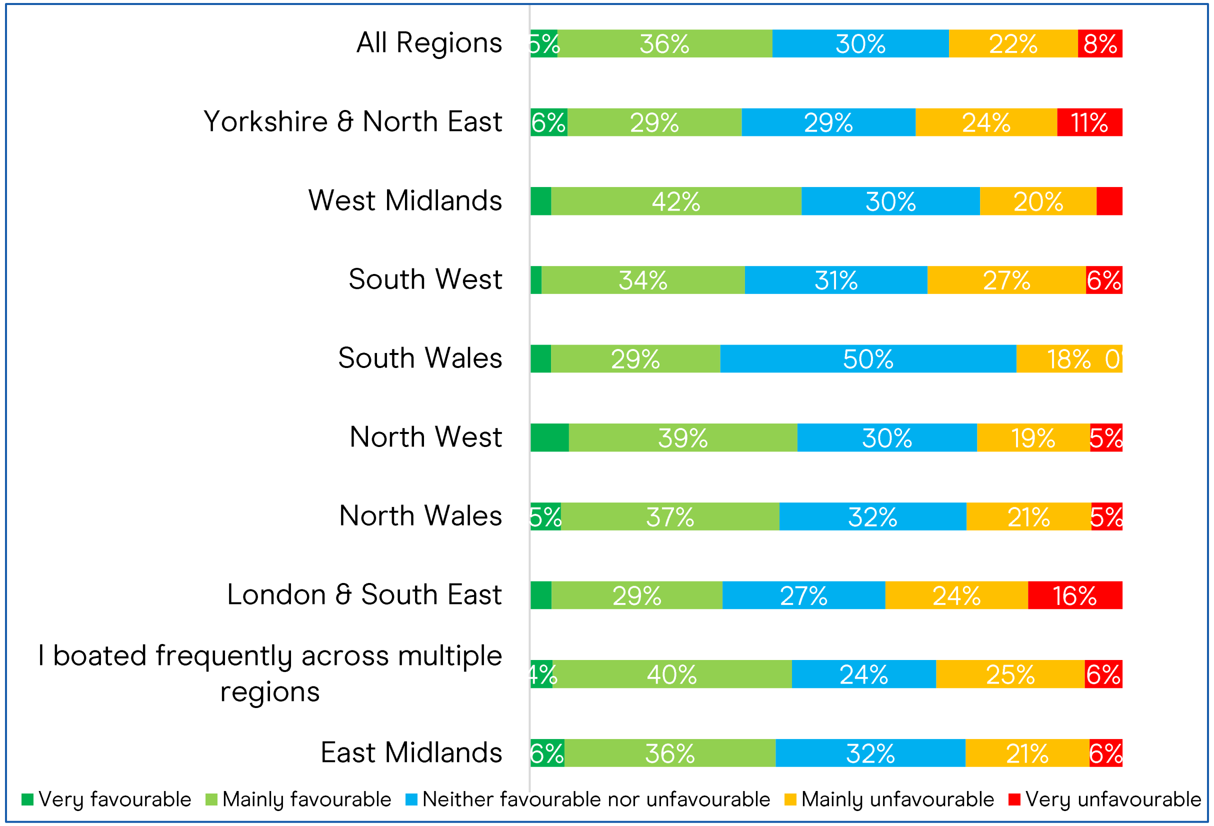
Sample: All 1742 in 2025 (1,167 in 2024) (1,407 in 2023) (936 in 2022) (1,179 in 2021).

- A common theme for attitudinal results for the Trust is that the rebound (+9%) in satisfaction has not extended to attitudes for the Trust.
- While favourability has improved modestly since 2024, it remains below 21-23 results – unlike satisfaction which has returned to these levels.
- Very unfavourable views have however returned to 21-23 levels.

Favourability 2025 by regions

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

41% 2025 Net Favourability



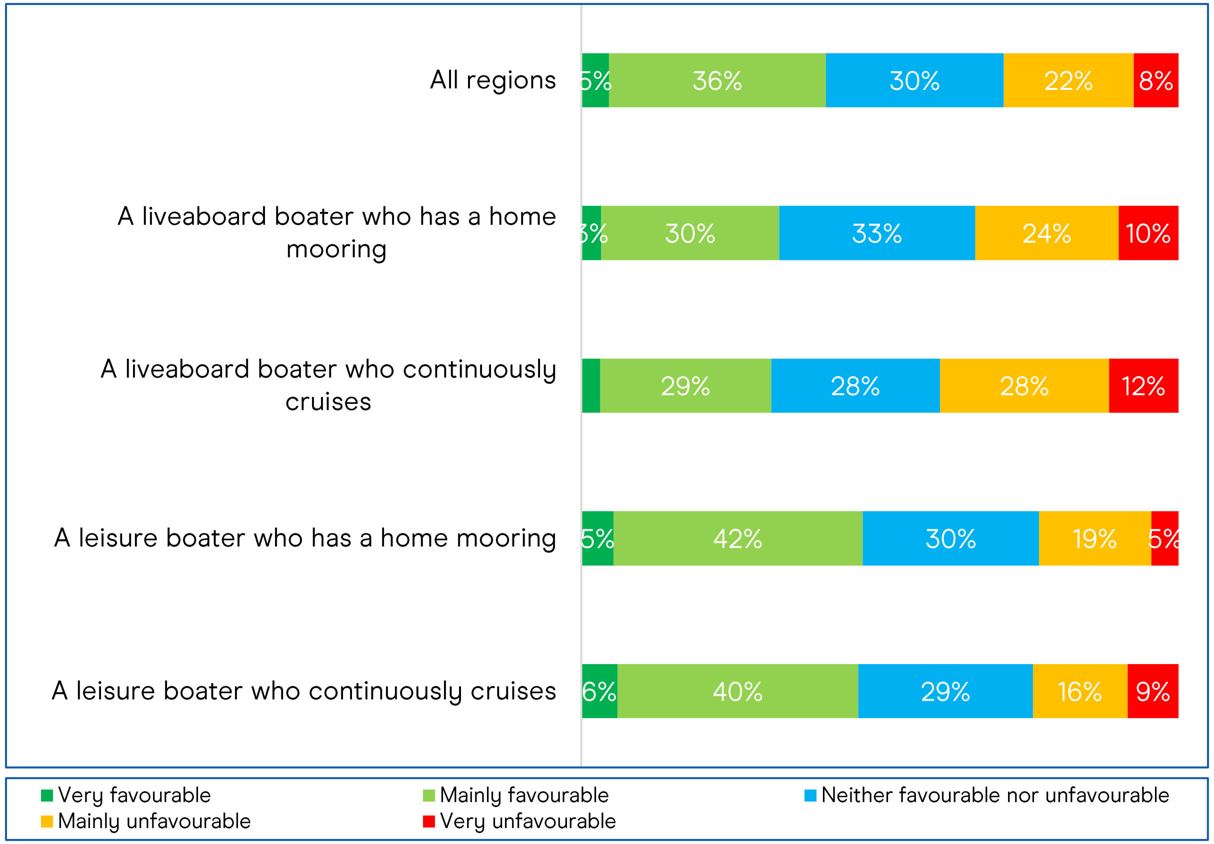
- Boaters in the West Midlands, North West and those boating in multiple regions are most favourable.
- Wales & the South West, London and South East are least favourable, though L&SE has improved significantly, +8%, since 2024.
- The North West is most improved in 2023, +10% net favourability.

Sample: All (1,742). *Only data labels 5%+ are displayed in the chart. Note North & South Wales are indicative only, small sample.

Favourability 2025 by boater usage type

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

41% 2025 Net Favourability

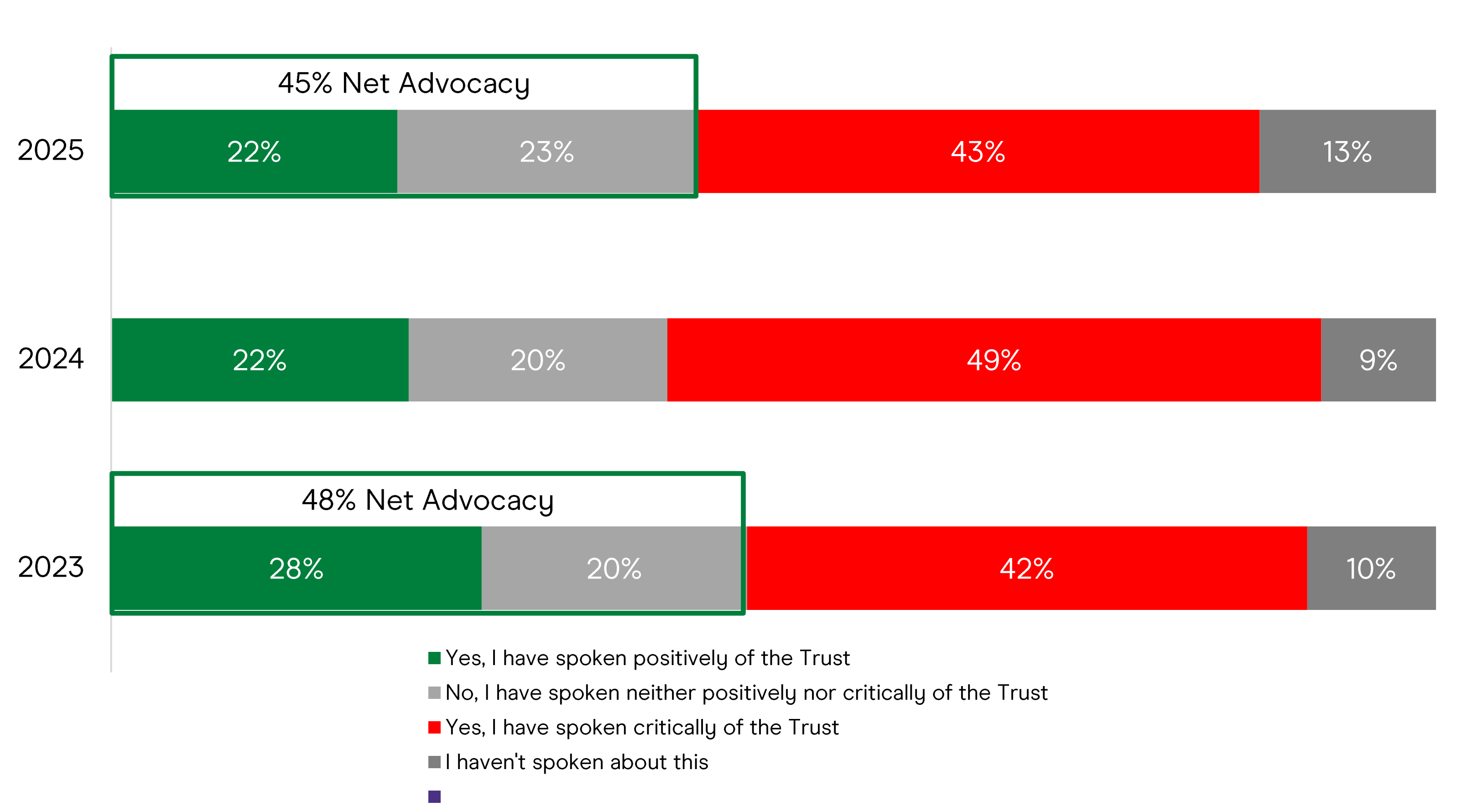


- Consistent with 2024, leisure boaters with home moorings and leisure boaters who continuously cruise score the Canal & River Trust significantly more favourably whilst liveaboard boaters who continuously cruise and liveaboard boaters with home moorings score the Canal & River Trust significantly less favourably.

Sample: All 1,742 (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 2023-25

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*

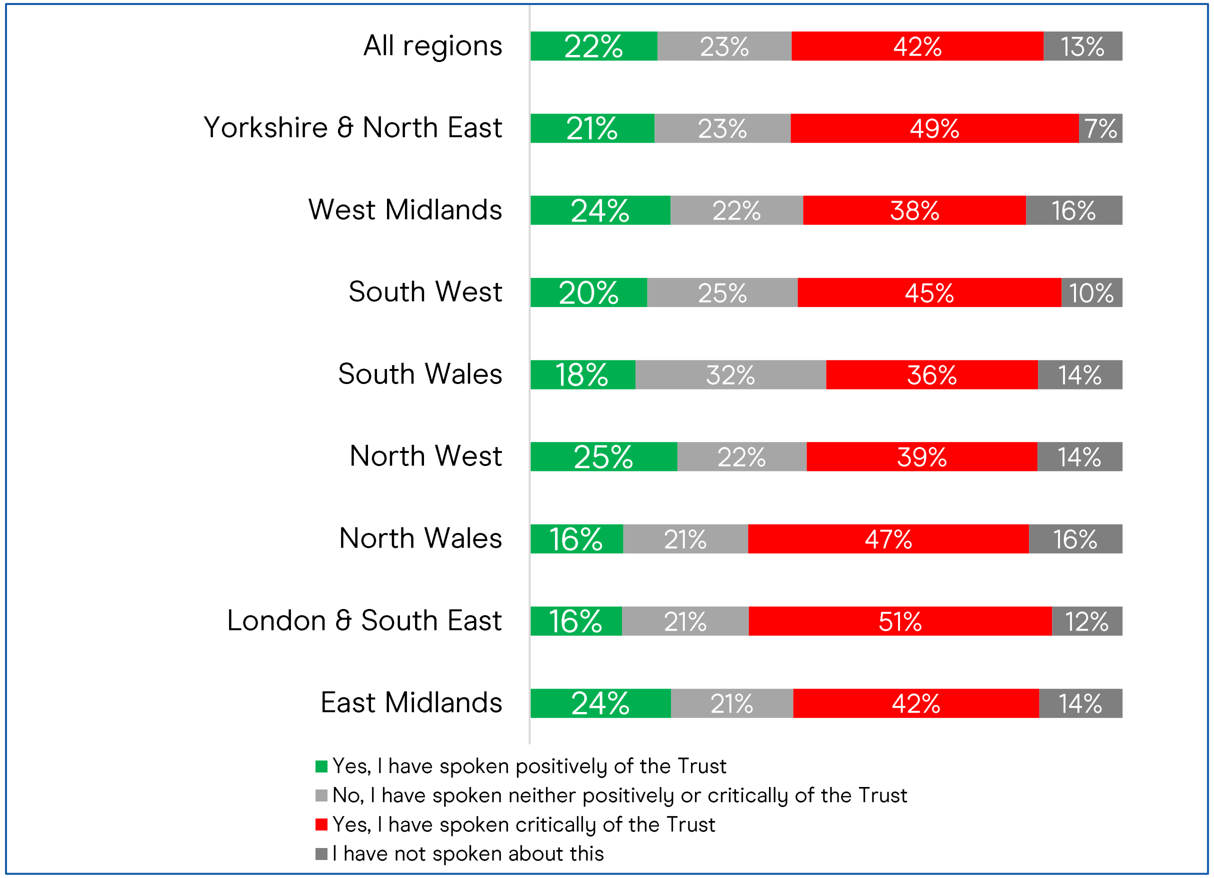


- Net advocacy +3% since 2023, but as with other attitudinal metrics has not returned to 2023 levels despite overall satisfaction returning to similar historic levels. Attitudes towards the Trust trail the improvements in satisfaction.

Sample: All (2025, 1742) (2024 1,167) (2023 1,407) (2022 936) (2021 (1,179).

Advocacy of the Trust 2025 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

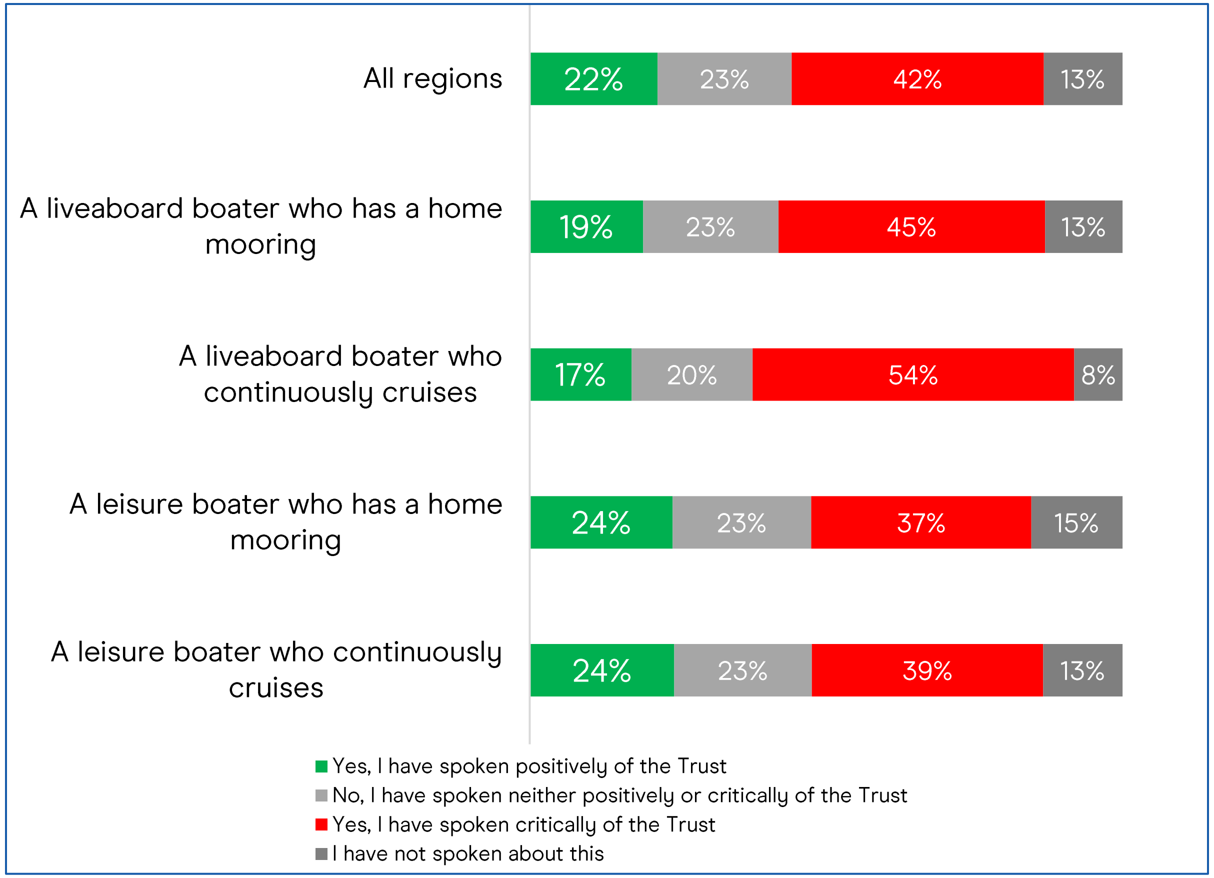


- Boaters in London & South East and North Wales are more likely to say that they have spoken critically about the Canal & River Trust.
- The West Midlands, East Midlands and the North West are the strongest advocates, however all regions are in net negative territory (more detractors than advocates overall).

Sample: All (1,742). *Only data labels 5%+ are displayed in the chart. Note North & South Wales are indicative only, small sample

Advocacy of the Trust 2025 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

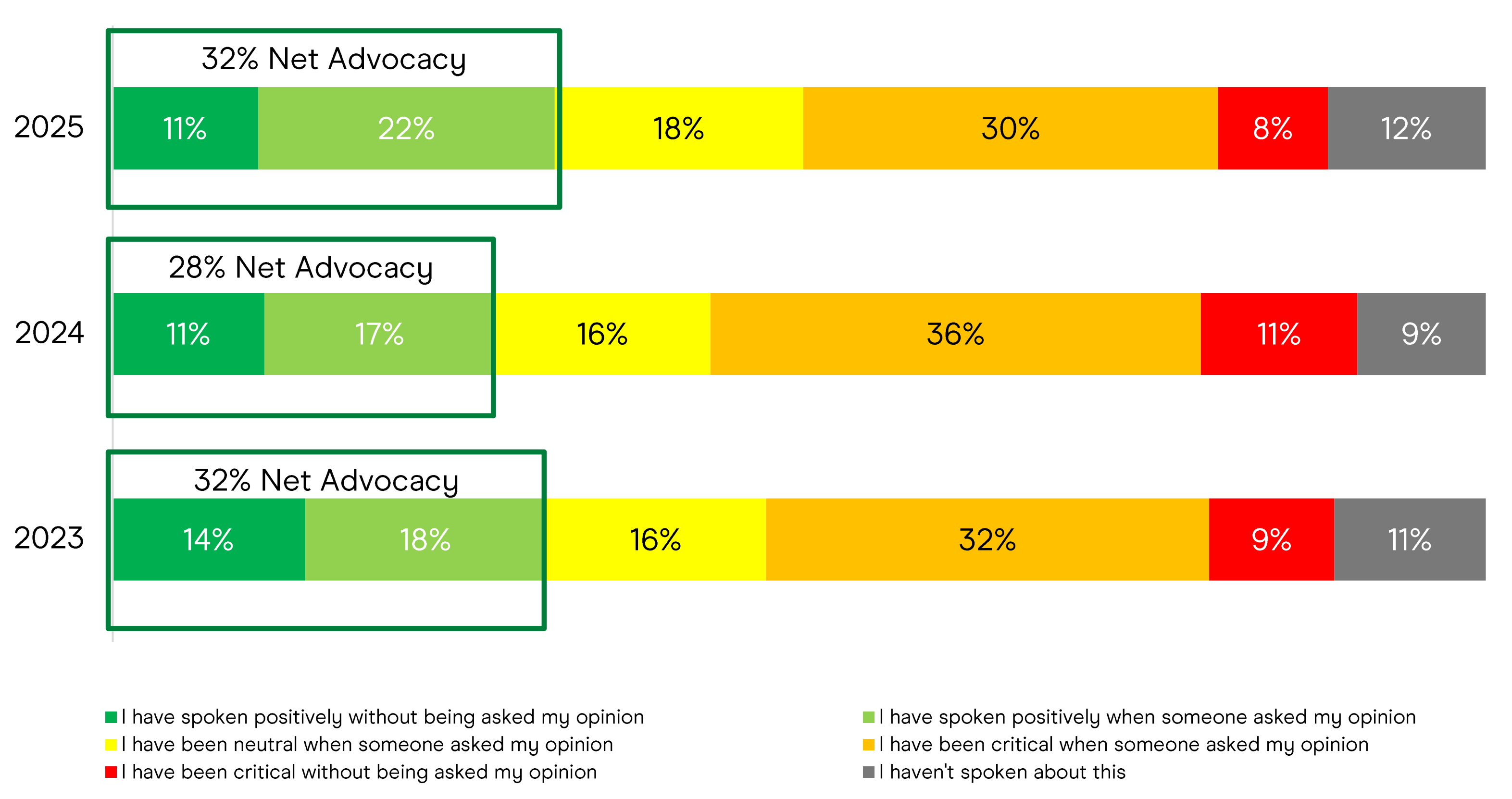


- Liveaboard boaters are most likely to speak negatively of the Trust, consistent with the wider attitudinal picture, leisure boaters are typically more positive towards the Trust overall.

Sample: All (2025 1742) (2024 1,167) (2023 1,407) (2022 936) (2021 (1,179).

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*

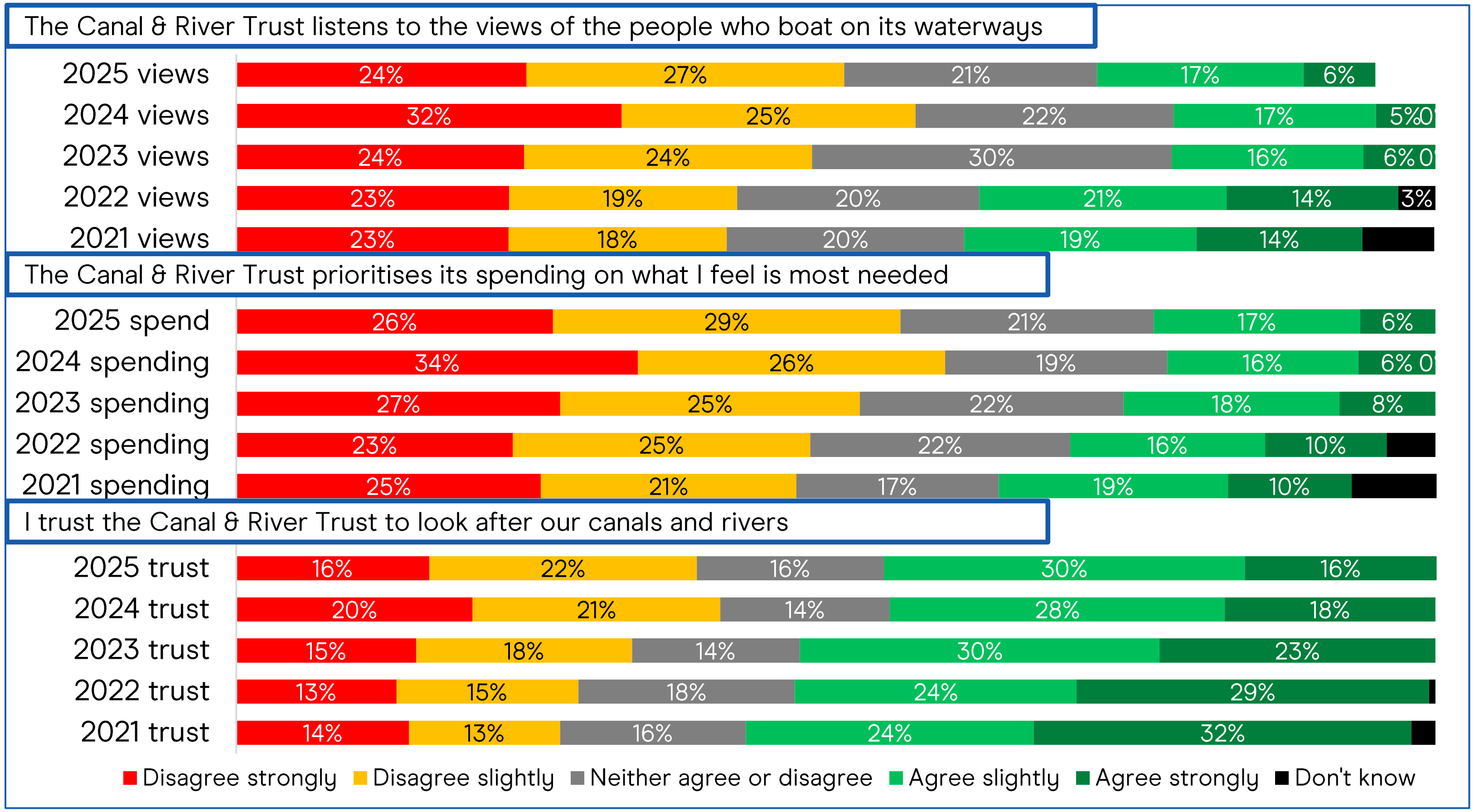


- At +4% advocacy of the waterways has seen similar attitudinal gains as other core metrics, returning to 2023 levels.

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

Attitudinal (I) 2021-25

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



- There has been significant positive movement in all metrics, with Trust, prioritisation of spending and boater communication – but remain ahead of 2021-23 benchmarks.
- Encouragingly, strongly held negative views have fallen to comparable levels to 21-23. listening to boaters has improved the most on 2024.

Sample: All (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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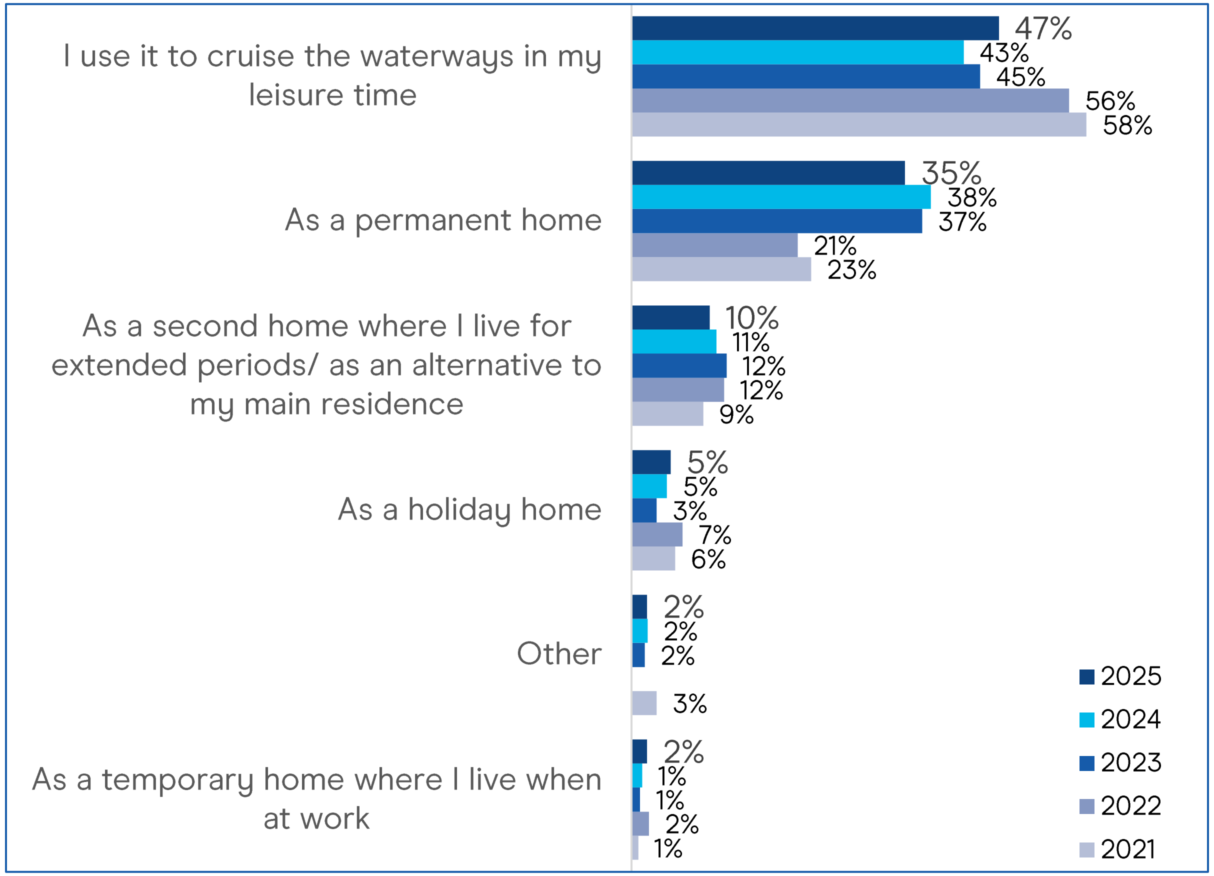
6. Boater Profiles

Boat use 2021-25

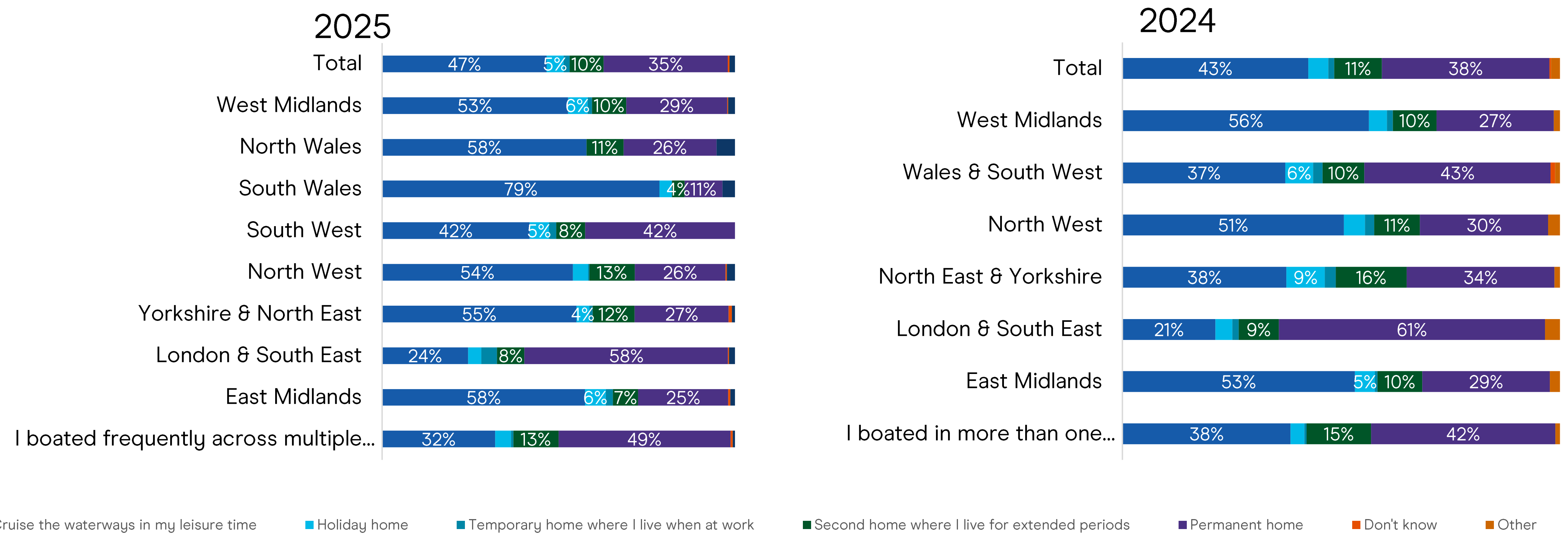
Q7: Which of the following options best describes how you use your boat most of the time?
Please select one answer only



- The longer-term trend suggests that our Waterways have increasingly become a primary dwelling over places primarily of leisure, though leisure remains the main activity for the majority of boaters.
- However the sample for 2025 includes marginally more leisure boaters than in 2024.

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

Boat use by region

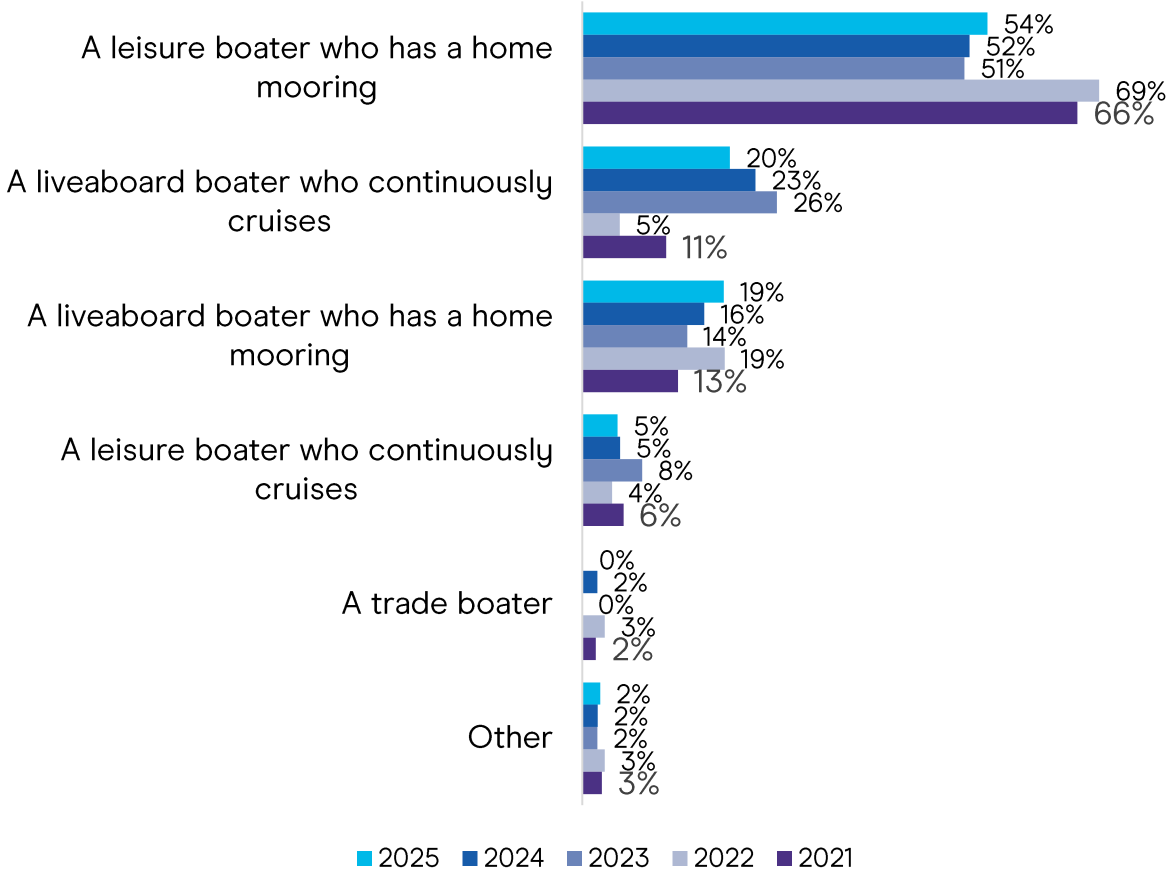


Cruising waterways in leisure time or as a permanent home continue to be the most frequent use of boats, with those in London & South East continuing to be more likely to use boats as permanent homes.

Sample: All (2005 1742) (2004 1,167).

Boater types

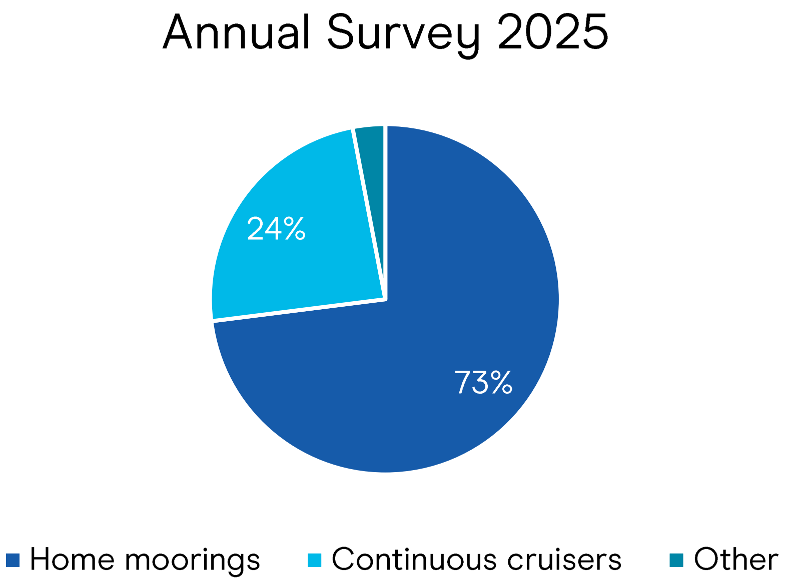
Q9: Please select which best describes you?
Please select one answer only

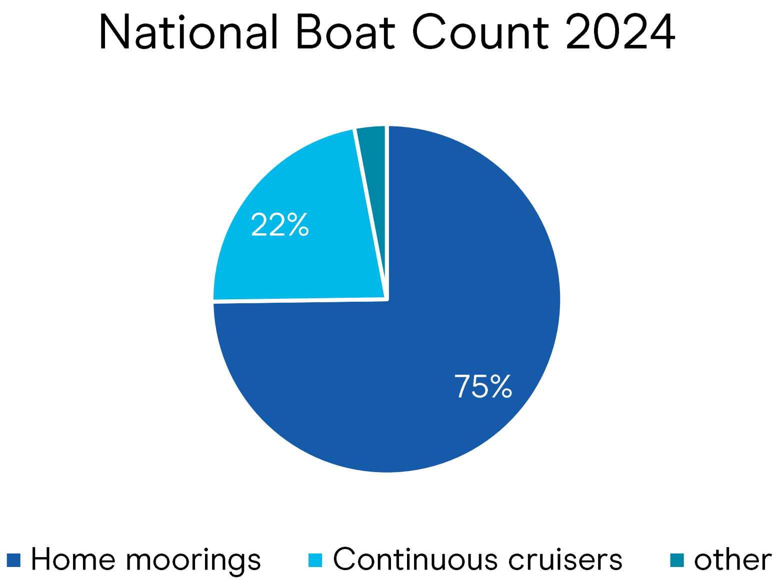


Sample: All (1742 in 225) (1,167 in 2024) (1,407 in 2023) (936 in 2022) (1,179 in 2021)

- As in previous years, a leisure boater with a home mooring continues to be the most selected by respondents (54%).
- The longer-term trend suggest a shift in liveaboard boaters who continuously cruise towards having a home mooring.

Boater use types





- Compared to the National Boat Count, the current survey achieves comparable mix of license types, and more representative than 2024 ('24, 28% / 68% split).
- Given the differences in satisfaction across groups, the current survey can be viewed as a more representative picture than in 2024.

Sample: Annual Survey (1,742); National Boat Count (35,223).