



**Canal &
River Trust**

Making life better by water

2023 Annual Boater Survey



1. Executive summary
2. Overall satisfaction KPI
3. Maintenance
4. Relational measures
 - Familiarity
 - Favourability
 - Advocacy
5. Customer service
6. Attitudes to the Trust
7. Sample
8. Basics



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1. Executive Summary

Executive Summary: Methodology

- Research was conducted in-house by the Insight & Evidence Team based on a questionnaire devised by the Boating Team, with advice from the Navigation Advisory Group.
- Survey was administered using an online questionnaire covering:
 - User experience and satisfaction
 - Trust experience and reputational and service measures
 - For 2023 some changes were made
 - To include a link to the Trust's privacy policy
 - To simplify the response scales
 - To offer a single neutral answer option in all questions
- 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 either through a:
 - Text message including link to online survey, if the Trust held a mobile number
 - Letter including link to online survey but with the option of a paper version of the survey

The survey started
on 28th March 2023
and ran for 5 weeks

1,407 responses

(compared to
936 in 2022;
1,179 in 2021)

- The overall satisfaction KPI result for 2023 is 54%, this is a fall of 1% from 2022.

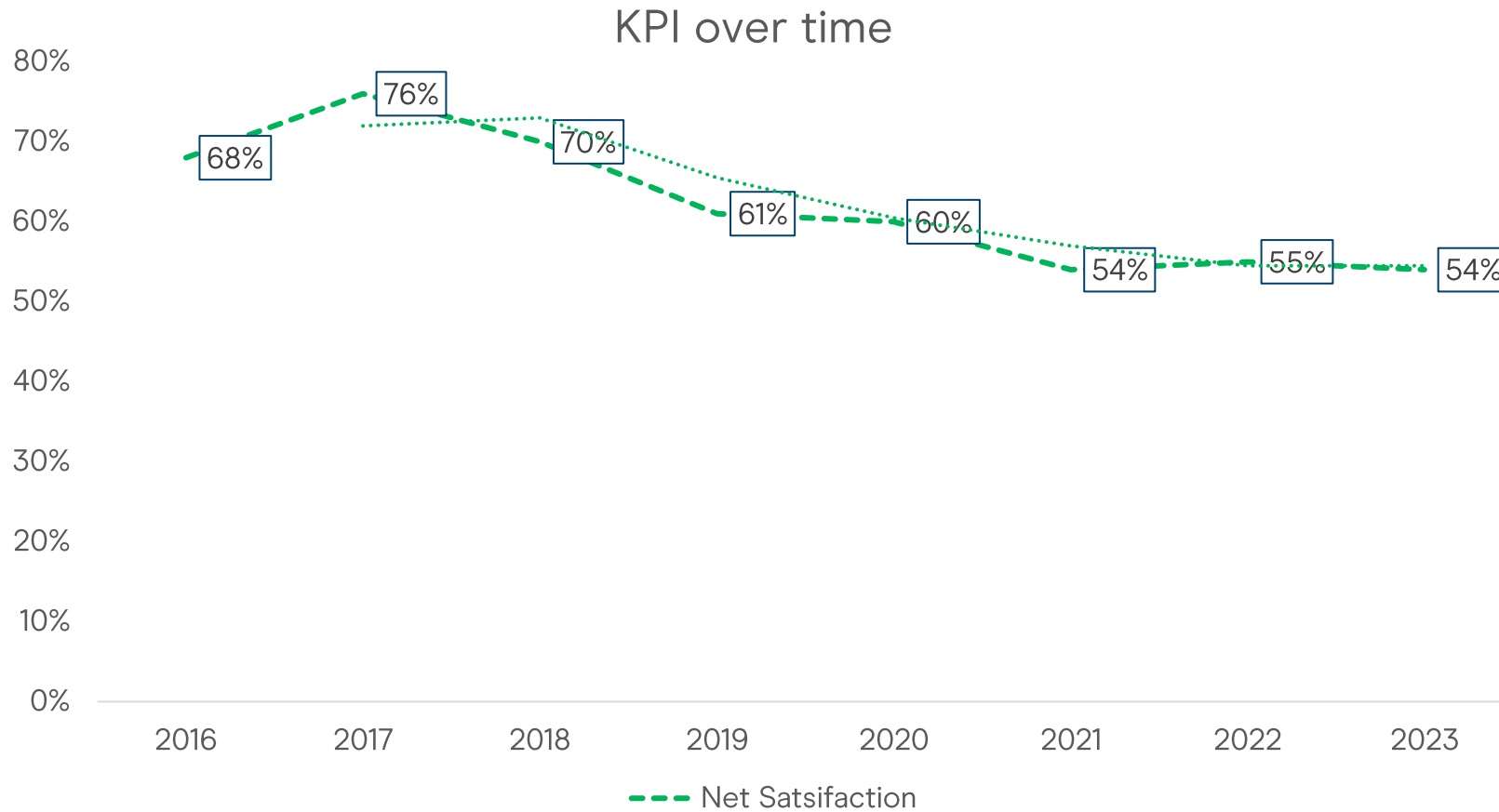


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2. Overall satisfaction KPI

Overview
Driver analysis

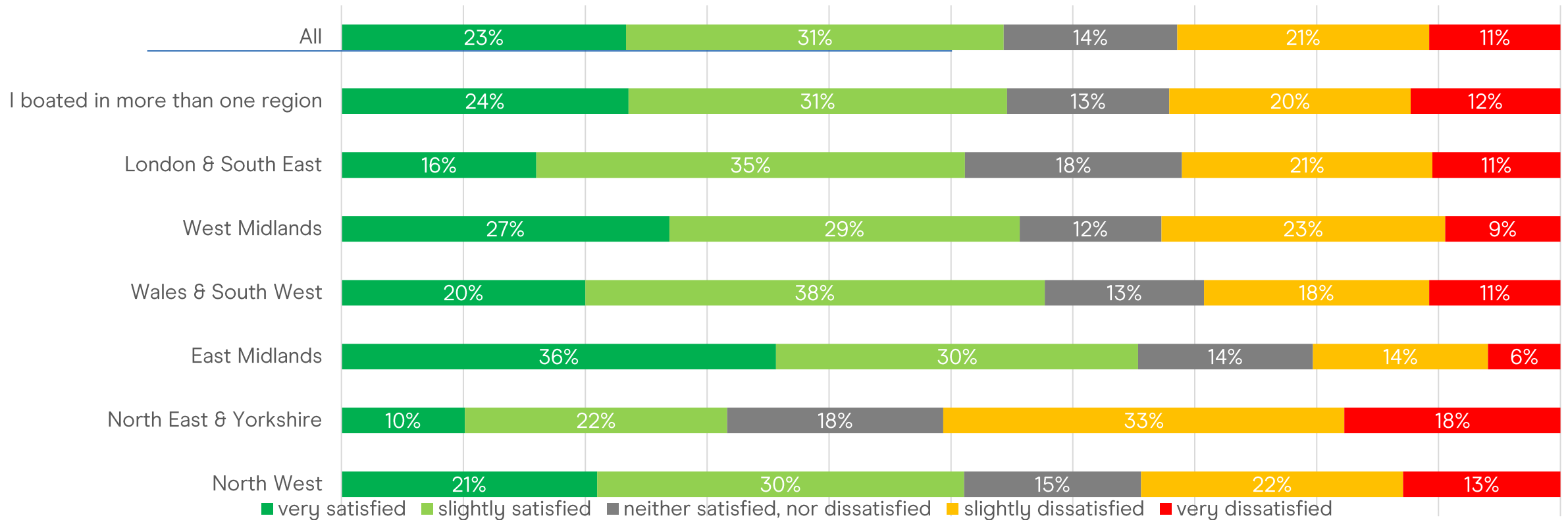
KPI Overall Satisfaction: Over time



- The KPI is now 54%
- There has been a reduction in the Overall Satisfaction KPI by 1%.
- This is not statistically significant.

KPI: 2023 by region

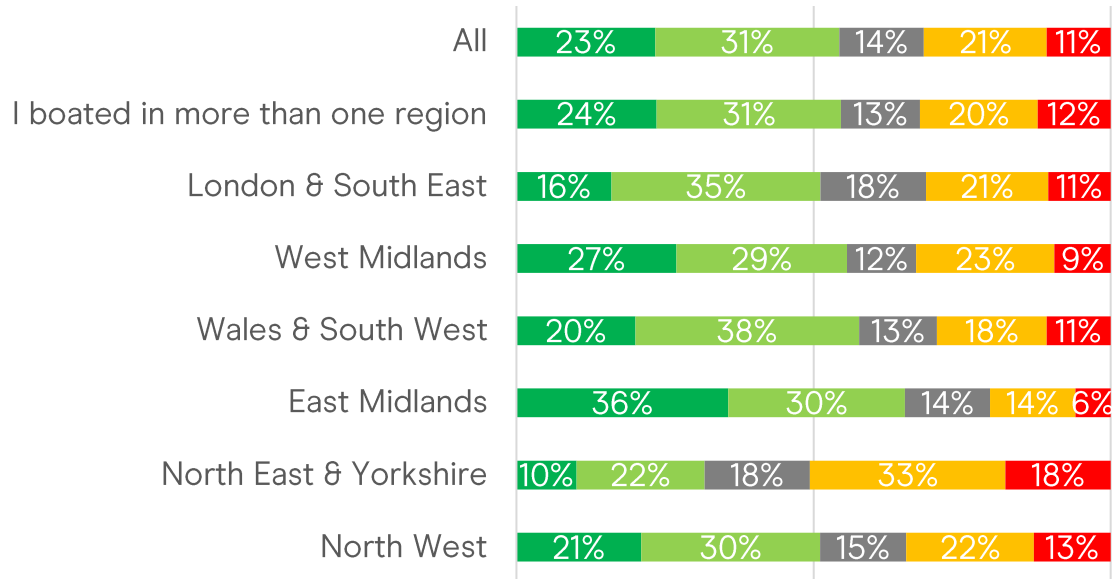
Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*



KPI: 2022-23 by region

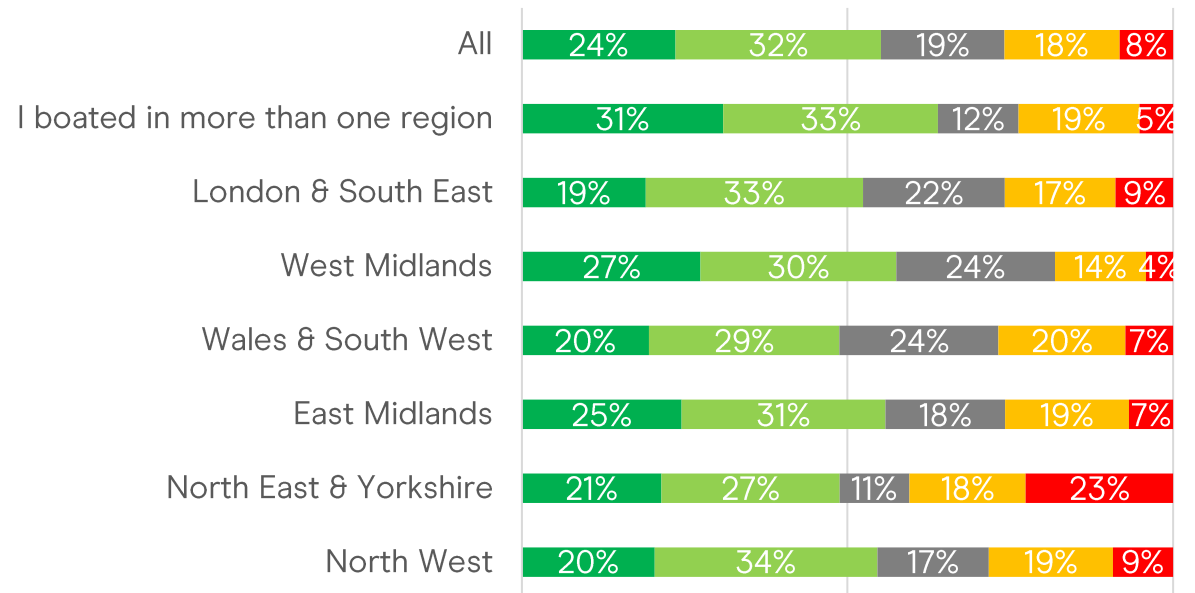
Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience? *Please select one answer only*

2023



- very satisfied
- slightly satisfied
- neither satisfied, nor dissatisfied
- slightly dissatisfied
- very dissatisfied

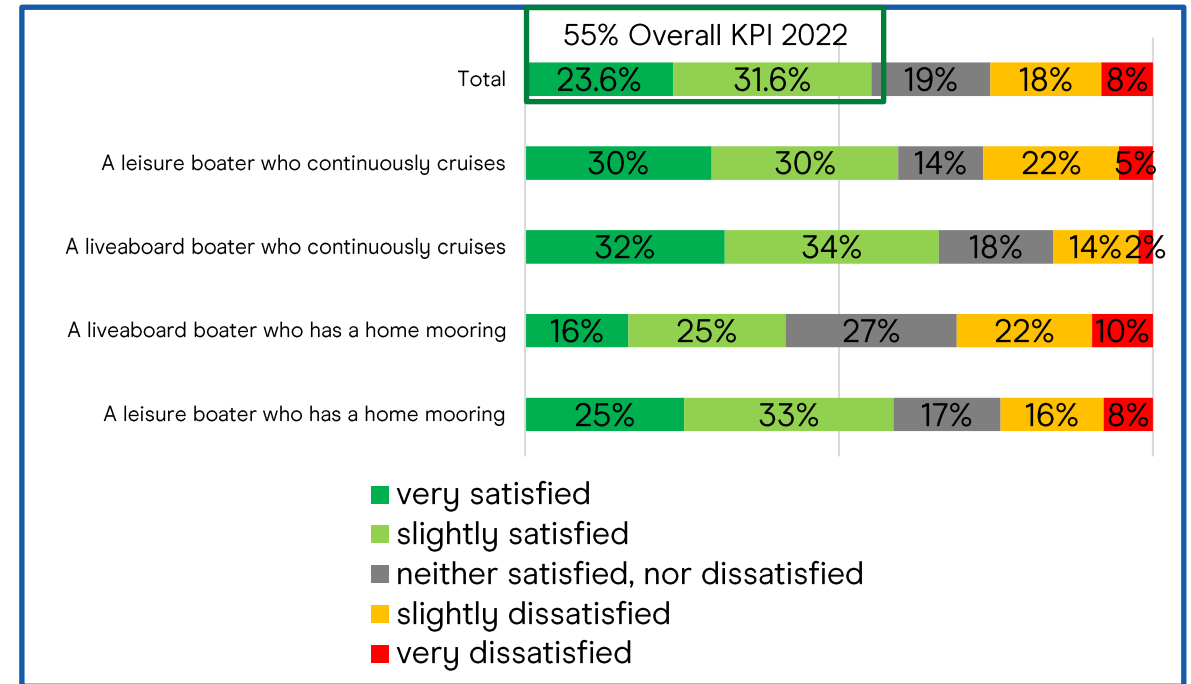
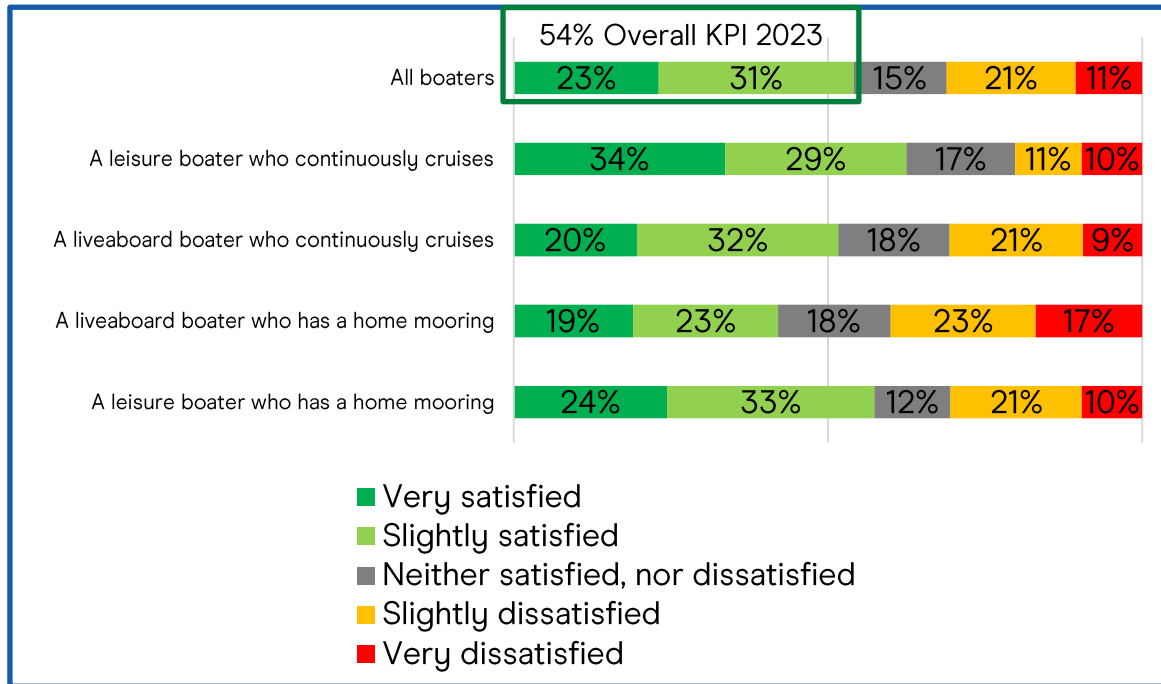
2022



- very satisfied
- slightly satisfied
- neither satisfied, nor dissatisfied
- slightly dissatisfied
- very dissatisfied

KPI: 2022-23 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*



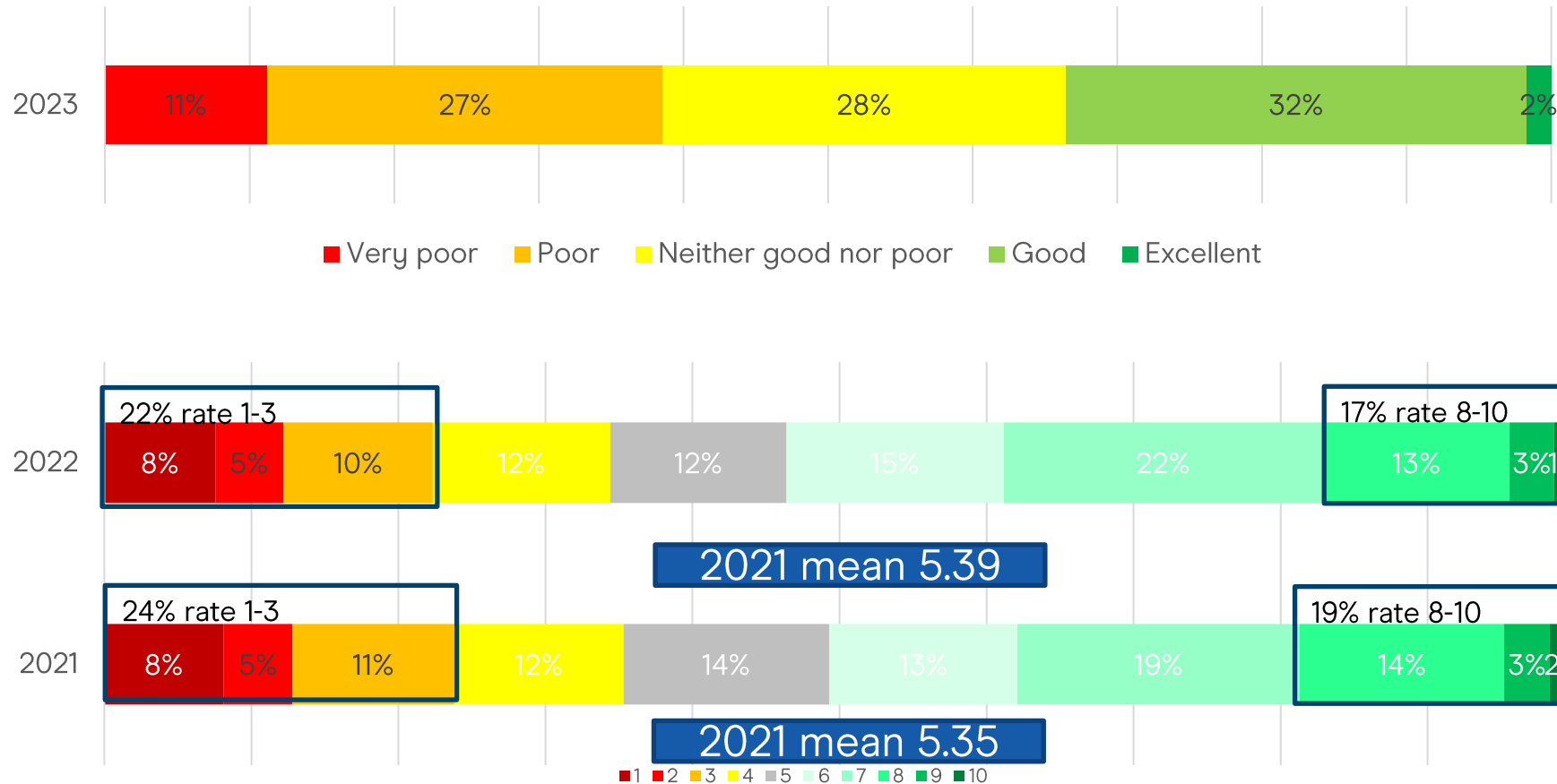


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3. Maintenance

Q13: 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 scale: Very poor, Poor, Neither, Good, Excellent, No Opinion

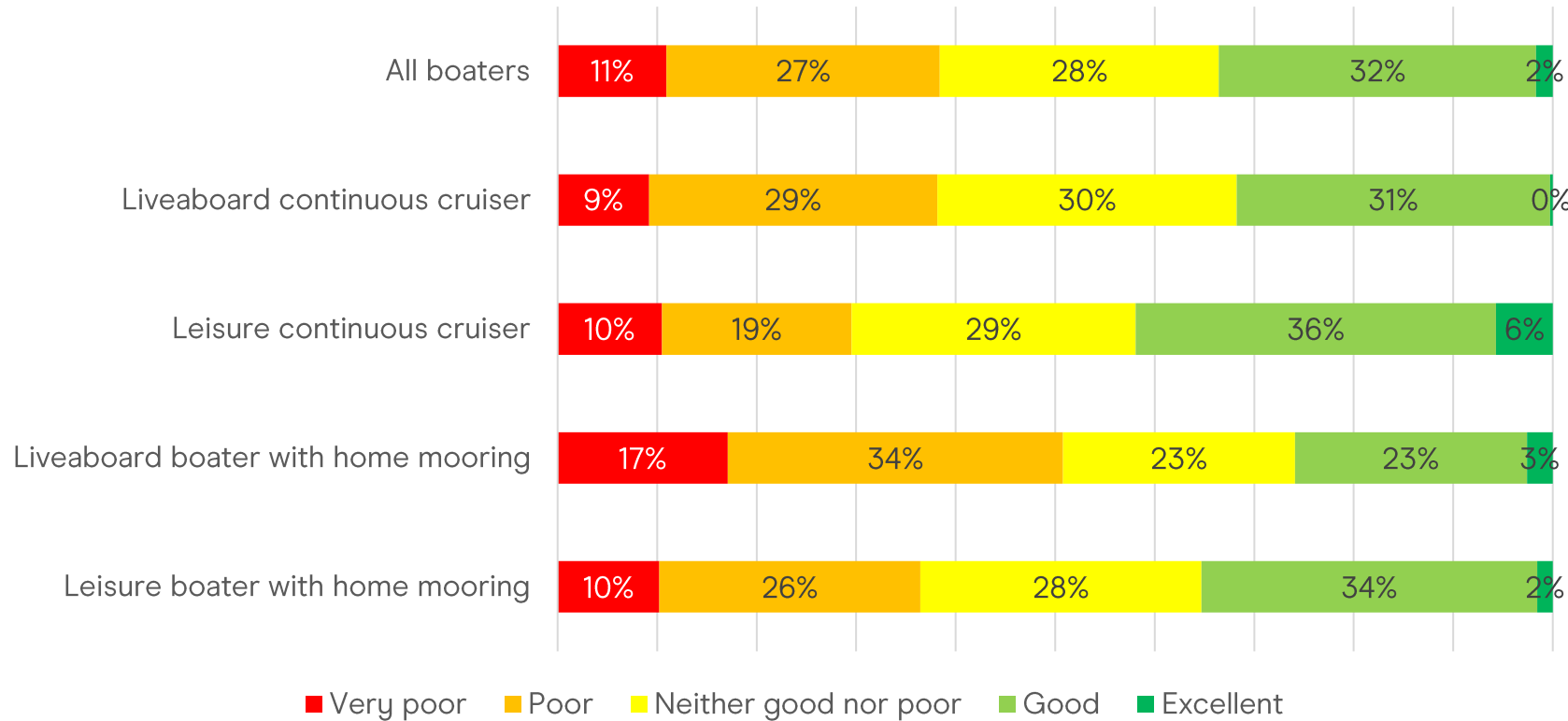


- The response options were simplified to a 5-point scale plus neutral in the survey's 2023 edition.

Sample: 2023 (1,362); 2022 (927); 2021 (1,168).

Upkeep 2022 Boater Type

Q13: Please indicate how you would rate the overall upkeep of the Canal & River Trust's waterways
Very poor, Poor, Neither, Good, Excellent, No Opinion



The lowest scores are associated with being a leisure boater who continuously cruises, but this is also the smallest group in the sample.

Sample: 1,362 (excludes Other boater types and No opinion).
Liveaboard CC = 193; Leisure CC = 105; Liveaboard HM = 193; Leisure HM = 705



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4. Relational measures

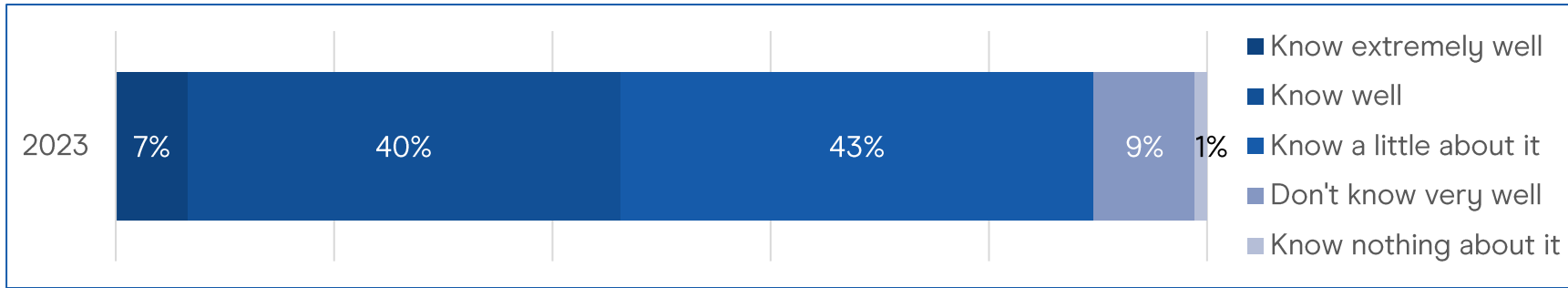
Familiarity

Favourability

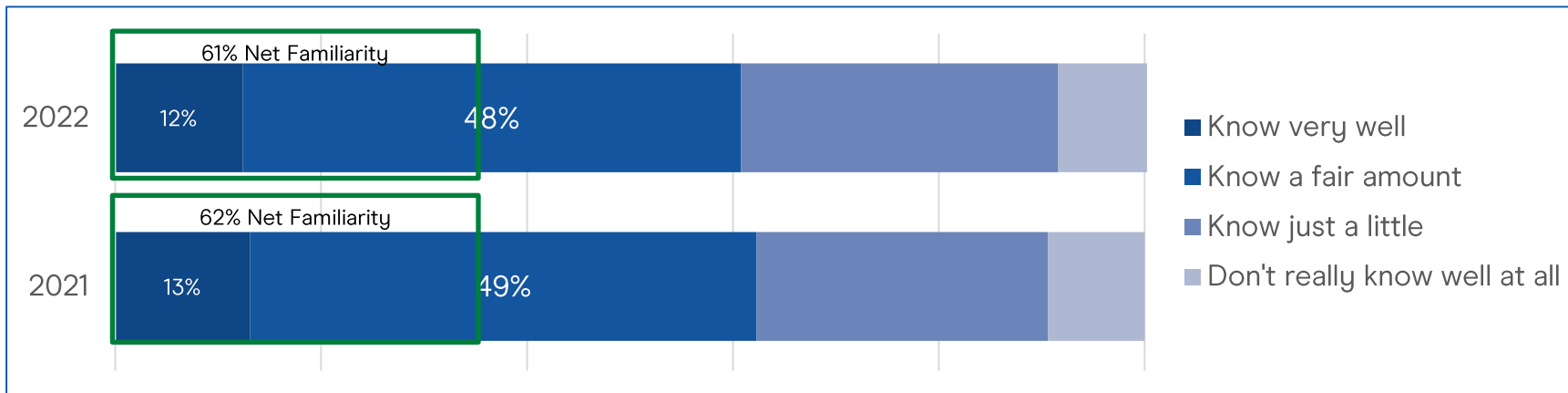
Advocacy of the Trust

Advocacy of the waterways

Q8: 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



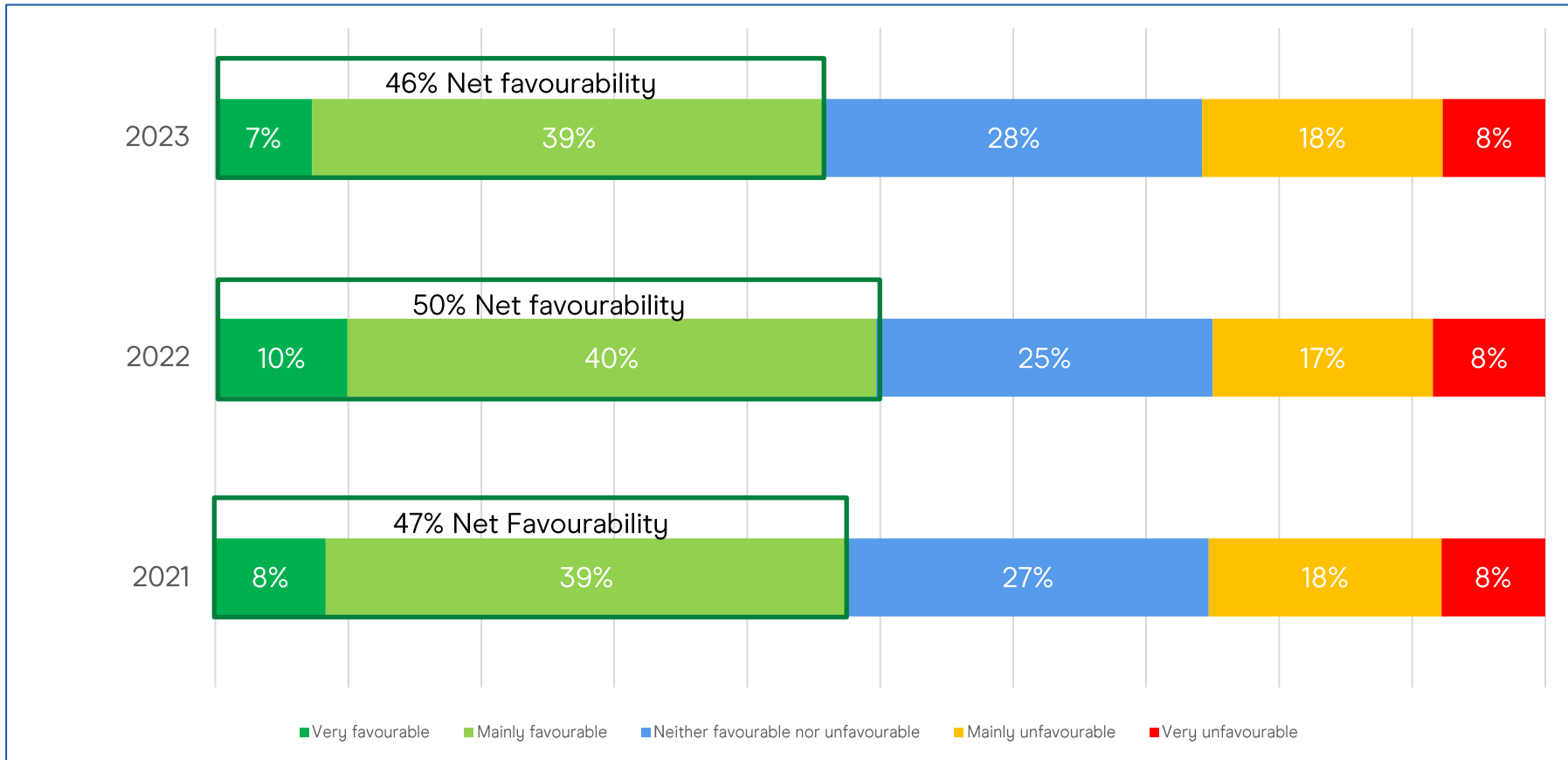
- In 2023 the response options used a 5-point scale, instead of the 4-point scale used in previous years.



Sample: 2023 All (1407); 2022 All (936); 2021 All (1179)

Favourability 2021-23

2022 Q9: How favourable or unfavourable is your overall opinion or impression of the Canal & River Trust? *Please select one answer only*
 2023 Q9: What is your opinion of the Canal & River Trust? *Please select one answer only*

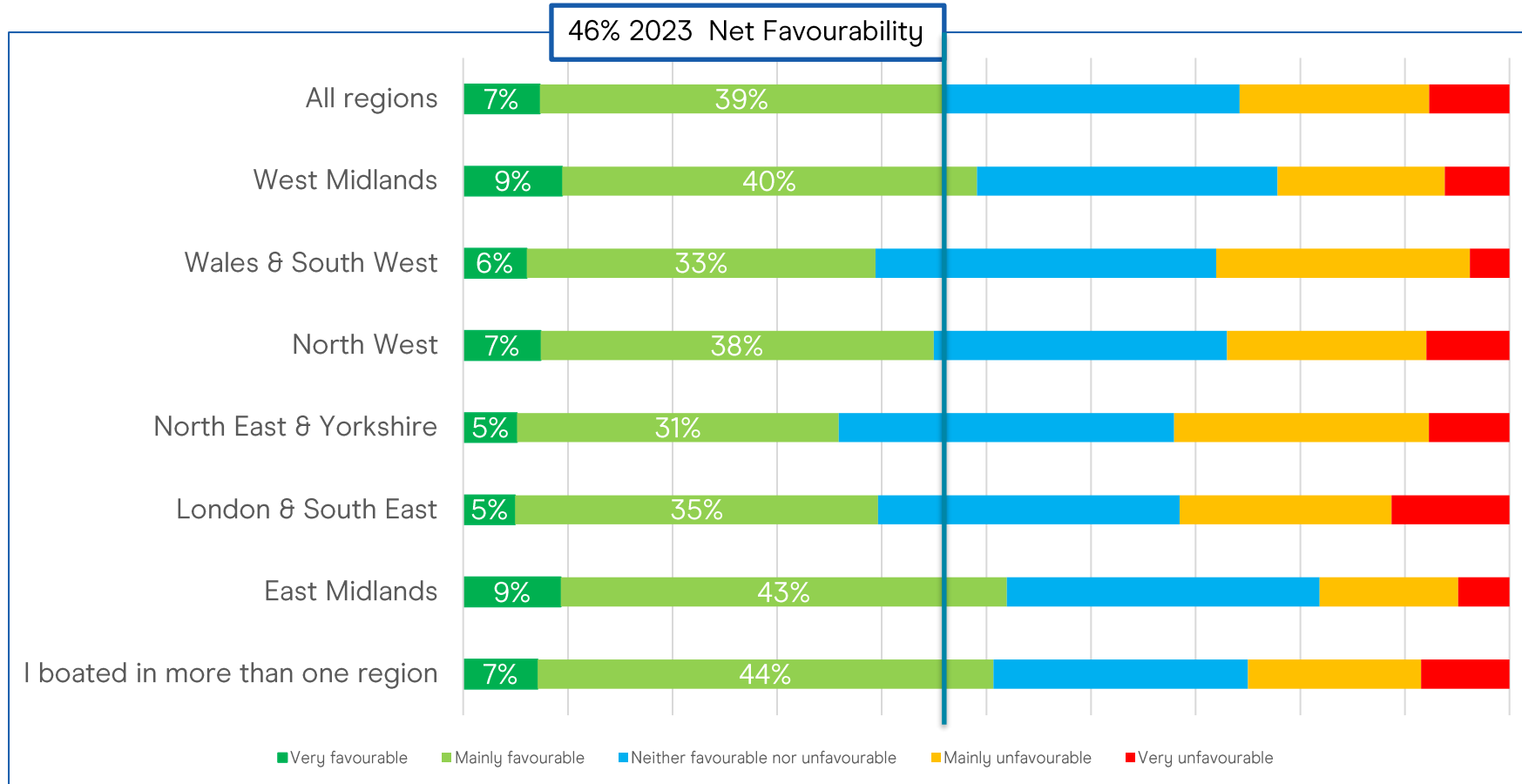


- For 2023 the wording of the question was simplified, but the answer scale remained the same
- Although not directly comparable due to the wording change, the results show an increase in neutral opinions and a slight decline in favourable opinions

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

Favourability 2023 by regions

Q9: What is your opinion of the Canal & River Trust?
Please select one answer only

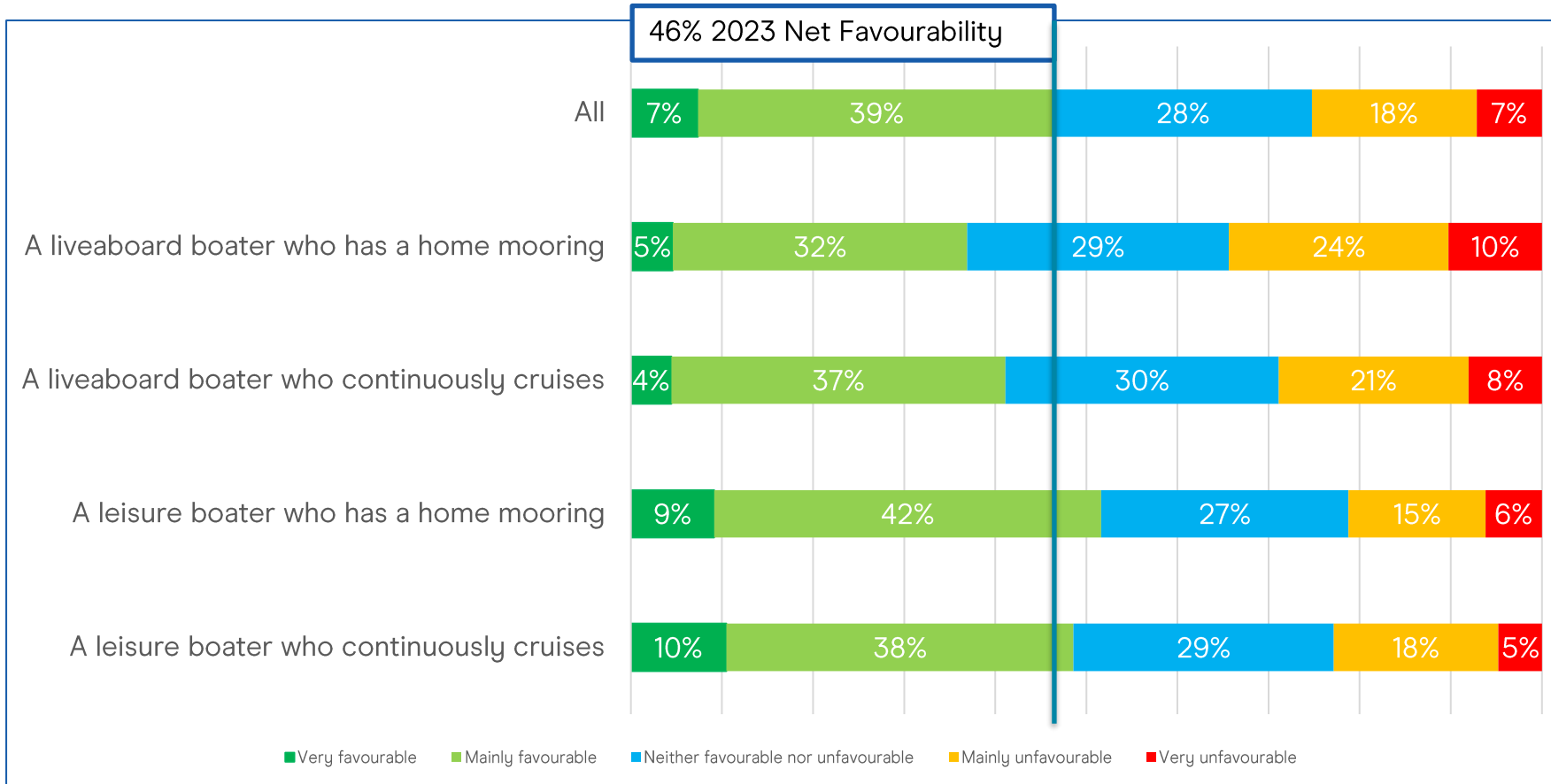


- West Midlands, East Midlands and boating across more than one region were scored slightly more favourably
- Yorkshire & North East, Wales & South West and London & South East were scored slightly less favourably

Sample: All (1,407)

Favourability 2023 by boater type

Q9: How favourable or unfavourable is your overall opinion or impression of the Canal & River Trust?
Please select one answer only

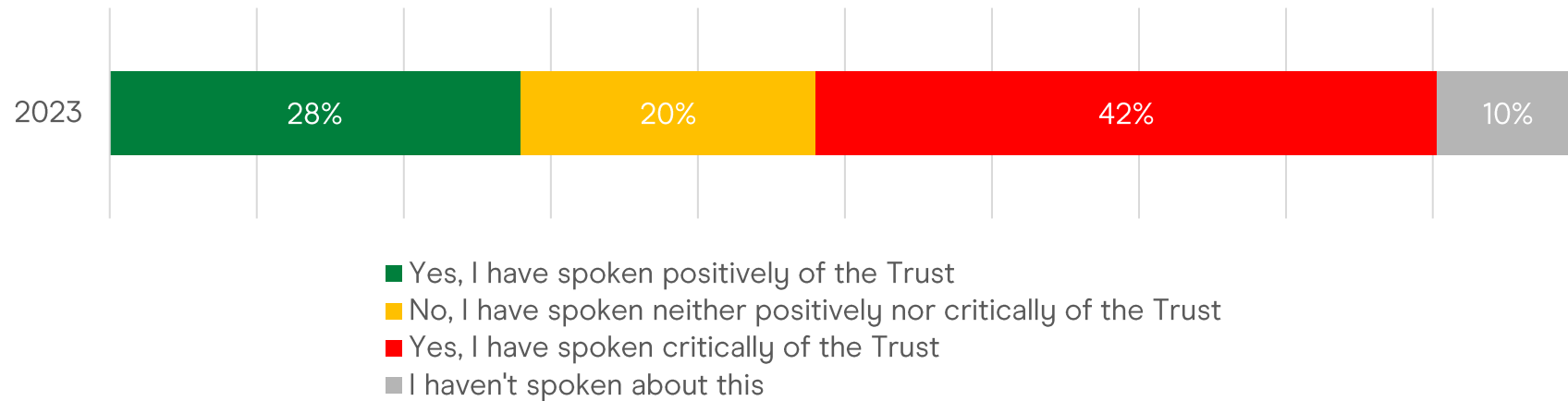


- Liveaboard boaters with a home mooring have the least favourable attitudes towards the Trust – the same as in 2022.
- Leisure boaters with a home mooring have the most favourable attitudes.

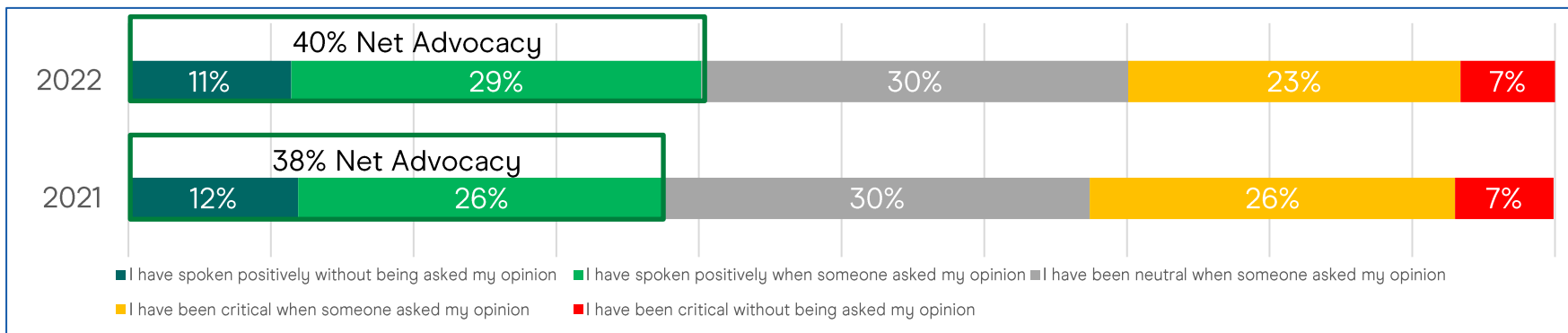
Sample: 1,371 (excludes Other, Don't Know and Trade due to small sample sizes)

Advocacy of the Trust 2021-23

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



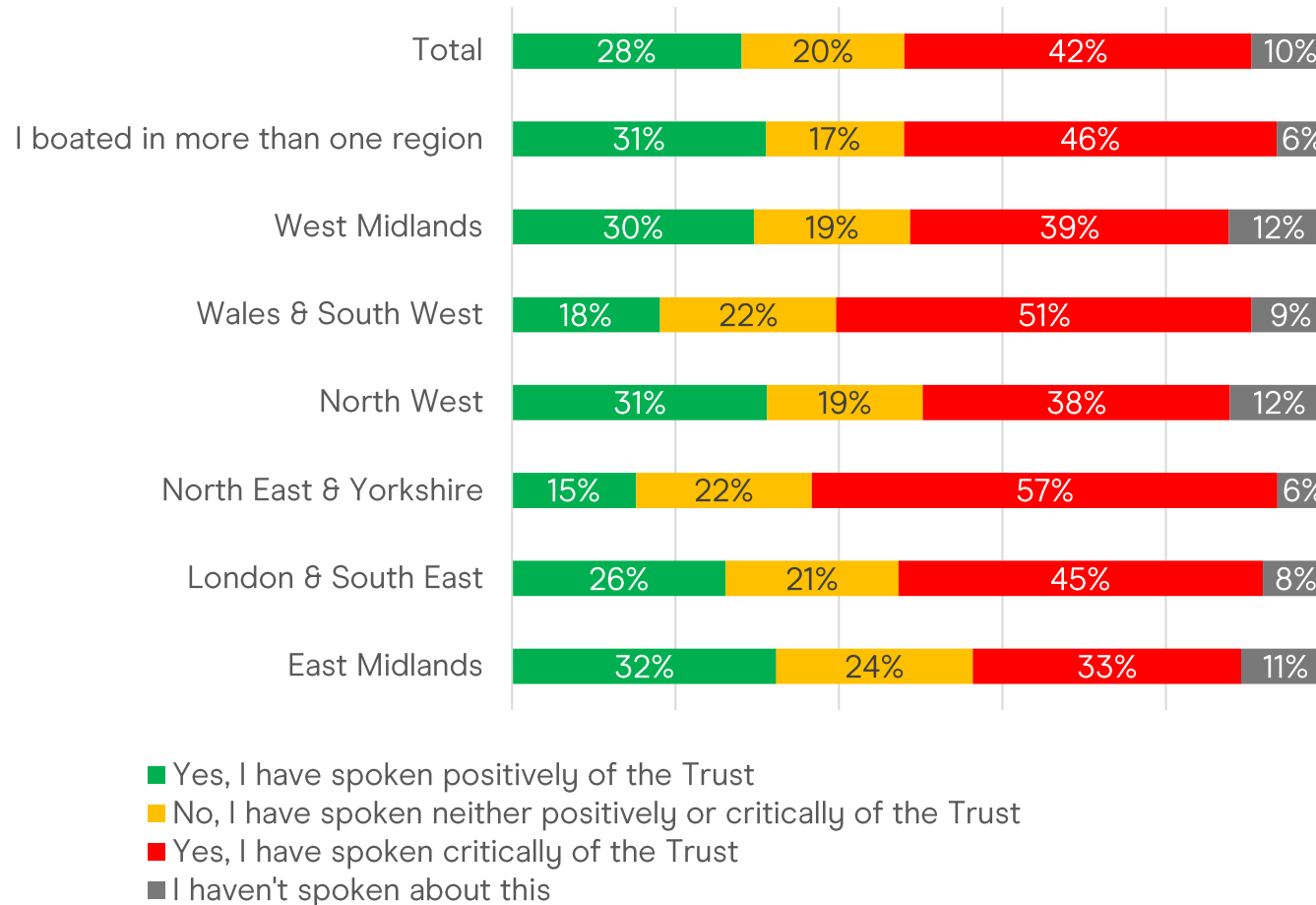
- The wording of the question and answers was simplified for 2023
- Although not directly comparable due to the changed wording, net advocacy appears to have declined, neutrality is similar, and negativity has grown



Sample: 2023 (1,407); 2022 (936); 2021 (1179).

Advocacy of the Trust 2023 by region

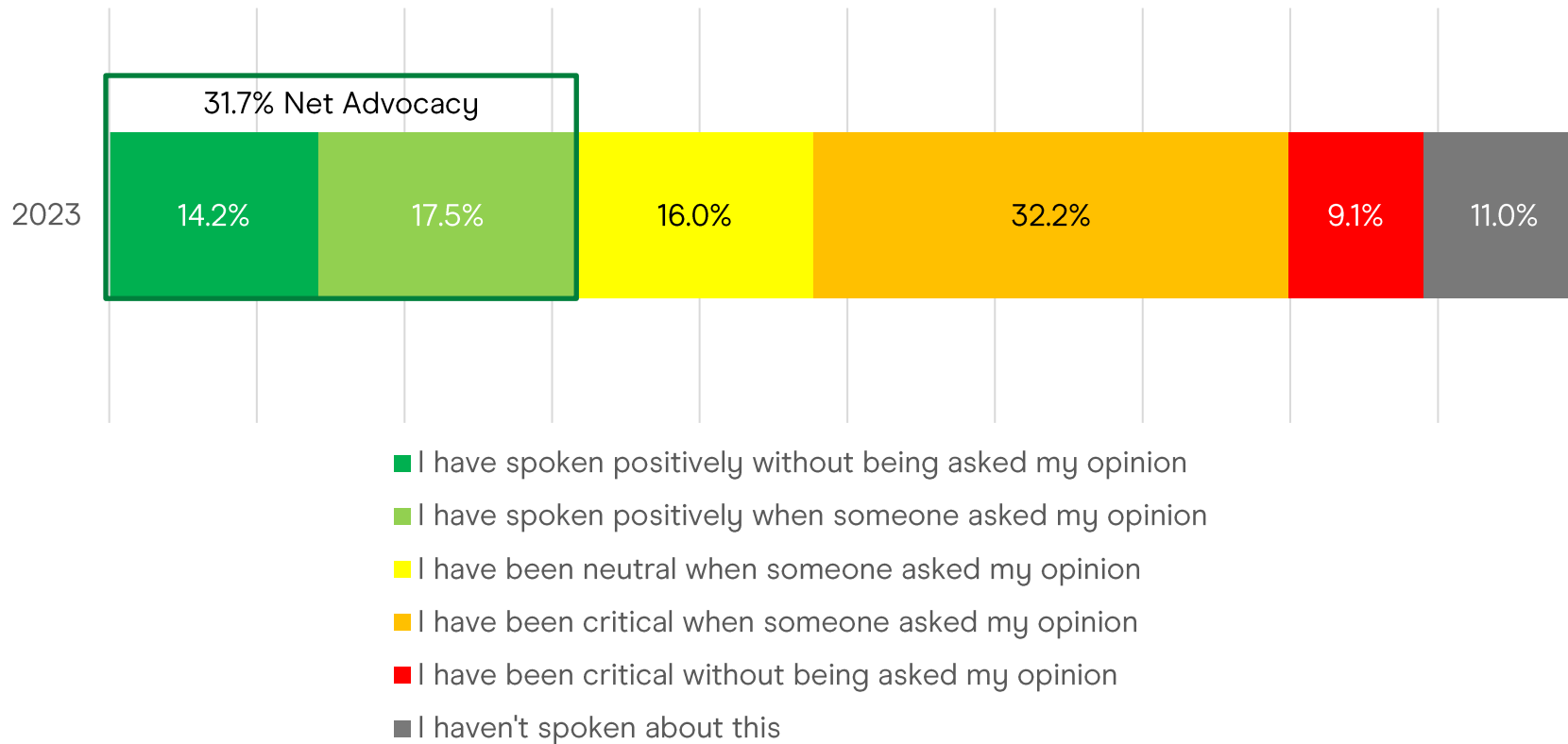
Q10: Generally, have you ever spoken positively or critically about the Canal & River Trust to friends or family?
Please select one answer only



- Advocacy, like favourability, does appear to vary across the regions.
- However, the sample sizes vary considerably, so even large differences may not be statistically significant.
- Boaters in the West Midlands, East Midlands and North West spoke more positively about the Trust
- Those in Wales & South West, Yorkshire & North East and London & South East spoke more critically

Advocacy of the waterways

Q11: 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*



Sample: 2023 (1,404).

- Net advocacy of the waterways themselves is only slightly higher than net advocacy of the Trust (28%).



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5. Customer service

Customer service
Volunteer service

Q16 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*



Volunteer service 2023

Q16 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*



Sample: 2023 n=1,408

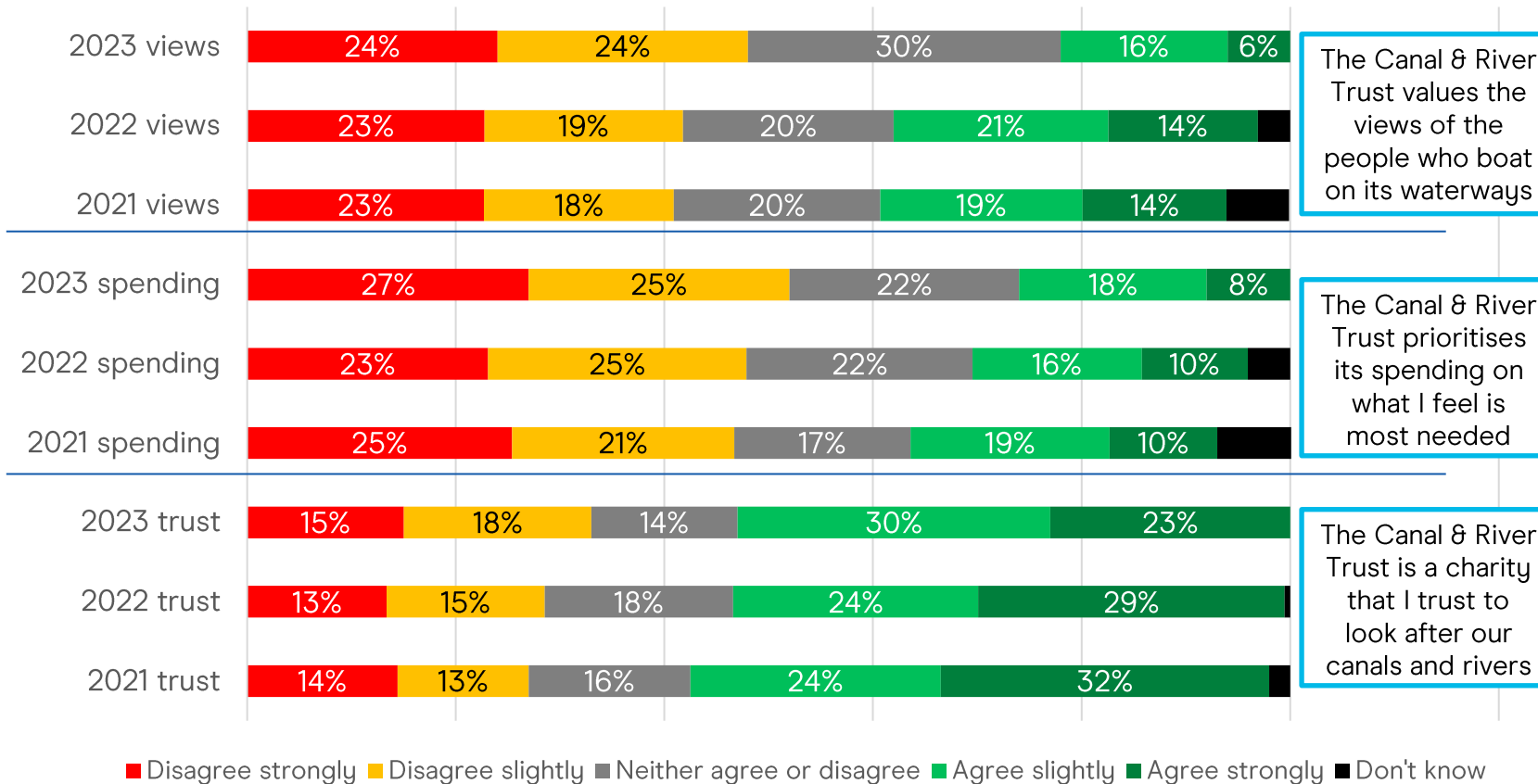


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6. Attitudes to the Trust

Q21: 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



- For 2023 the 'Don't know' option was removed as it was too similar to 'Neither agree nor disagree'.
- In general the 2023 results follow the existing trend of worsening attitudes towards the Trust over time (increase in 'disagree' answers across all 3 statements).
- The number of respondents who agree that the Trust values boaters' views has dropped from 35% to 22% since last year, and there is a larger neutral response.
- However, 'agree' responses to the 'spending' and 'trust' statements have remained the same since 2022, with a reduction in neutral responses.

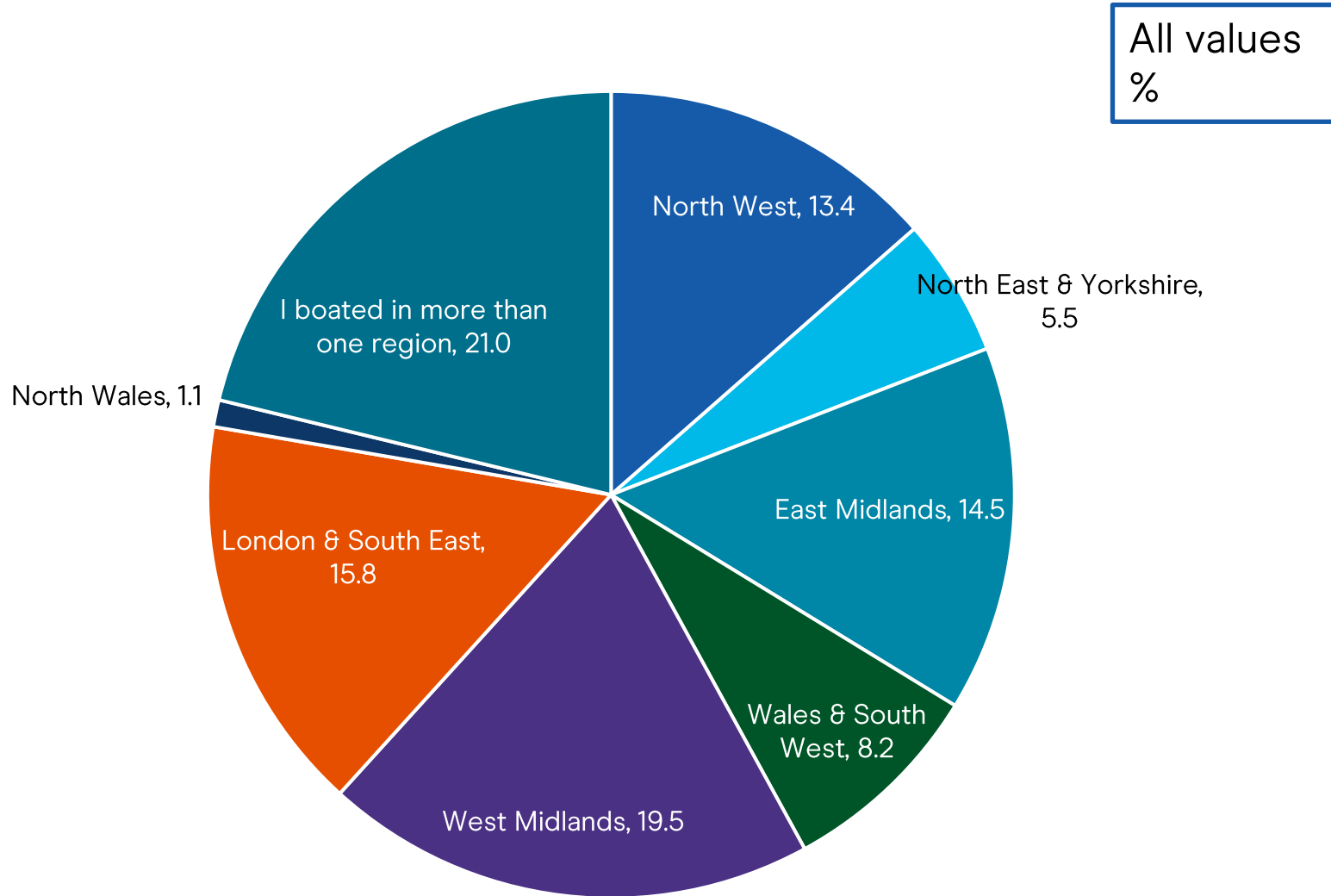
Sample: 2023 (1,407); 2022 (979)



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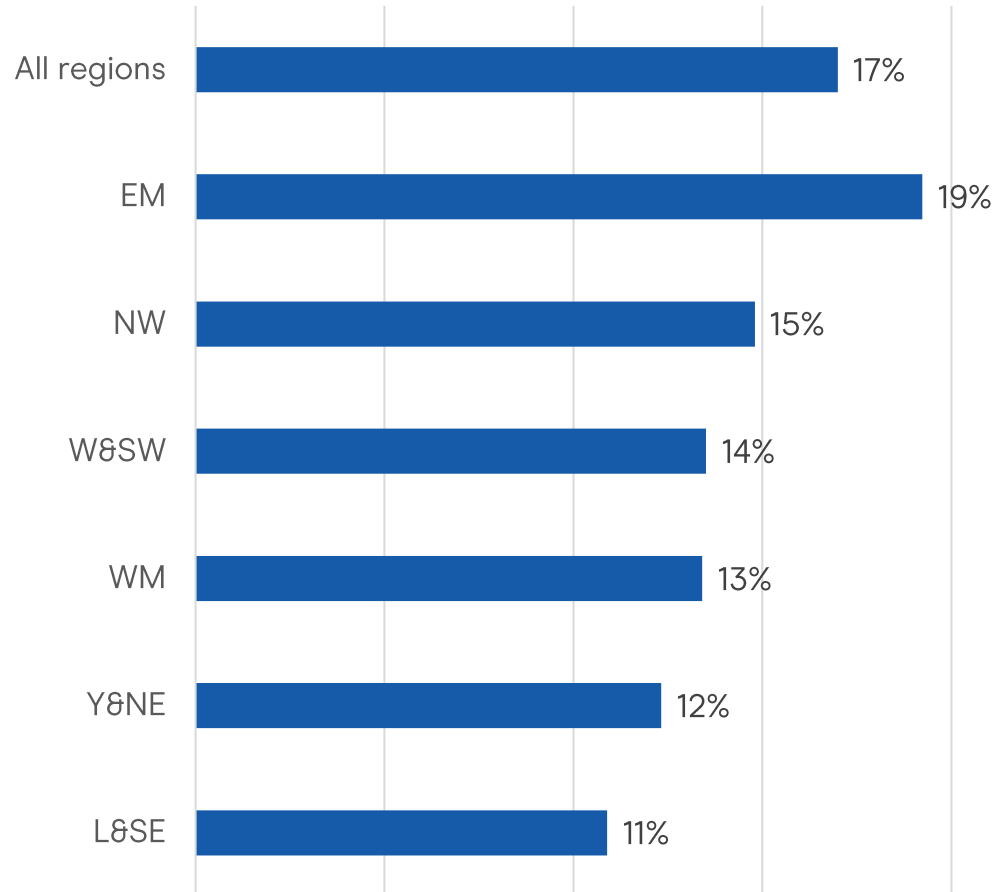
7. Sample



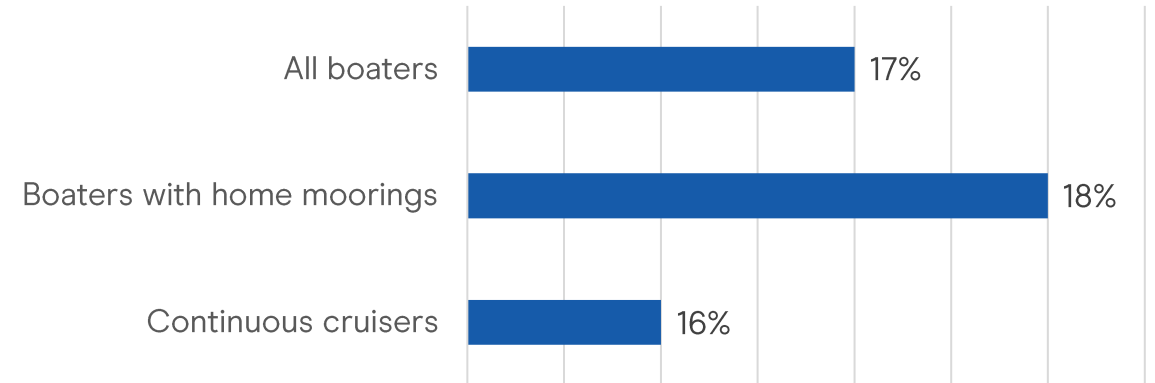
Sample: All (1,407)

- The total of 1,407 responses is higher than previous years (936 in 2022 and 1,179 in 2021)
- Respondents who boated in more than one region have doubled since 2022 (10.5%)
- Fewer respondents report remaining in Y&NE, NW and EM compared to 2022
- The proportion for WM, W&SW and L&SE are largely the same as in 2022

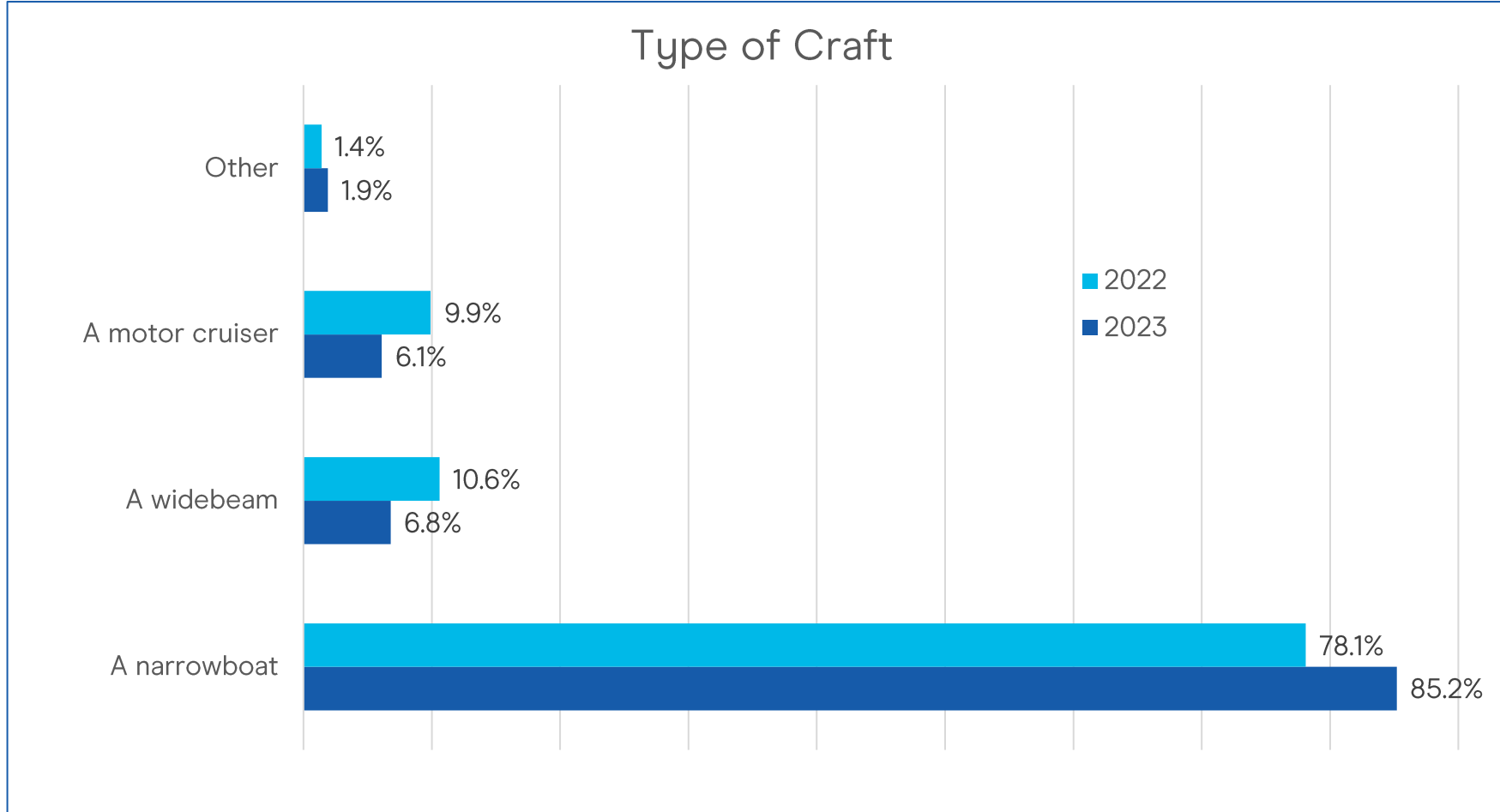
Response by region



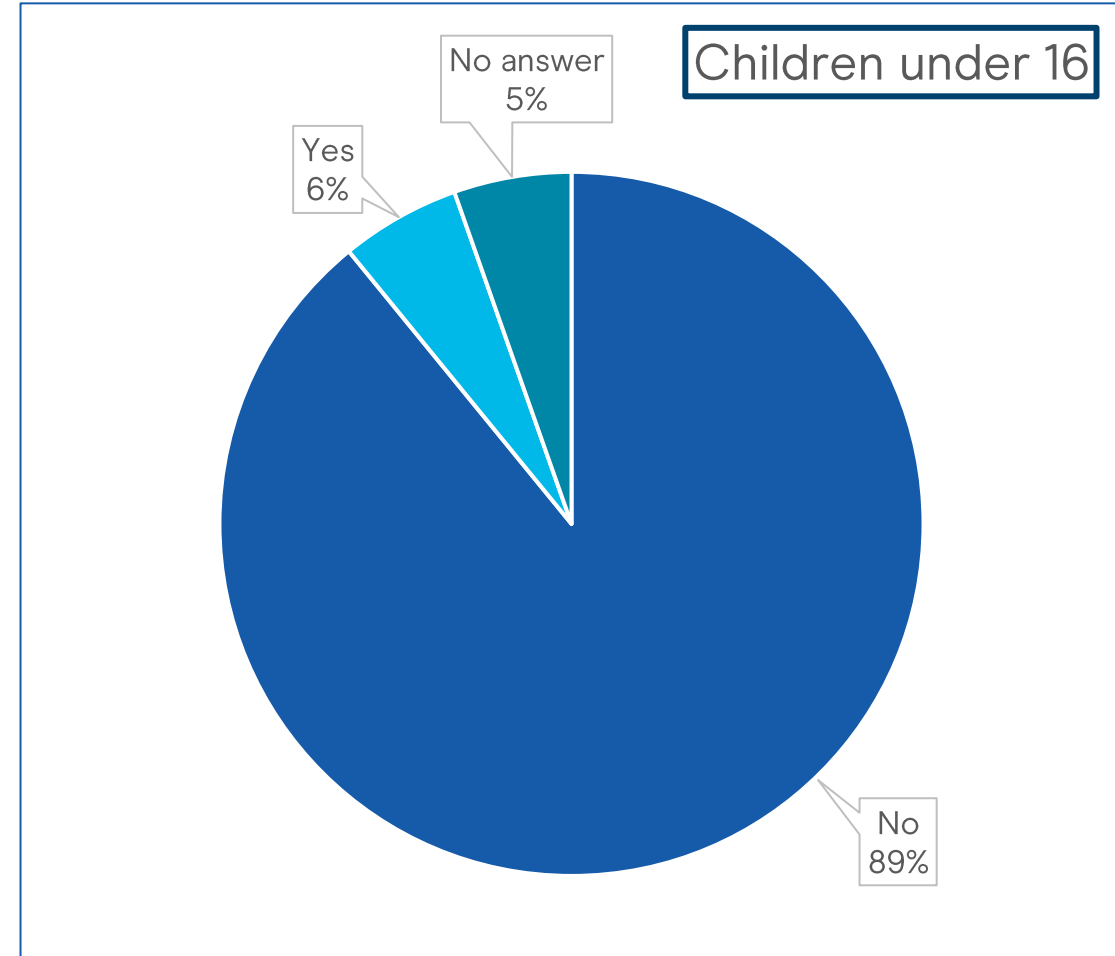
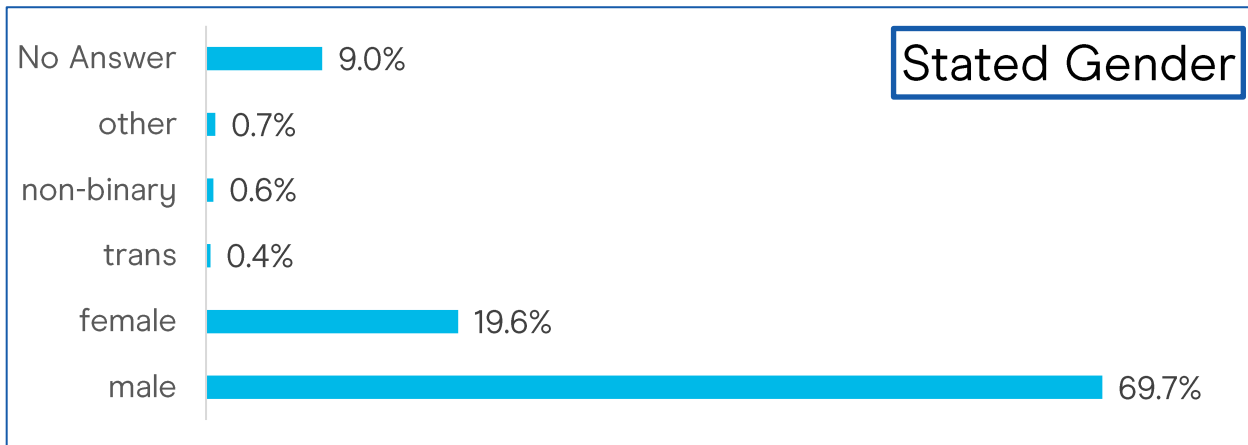
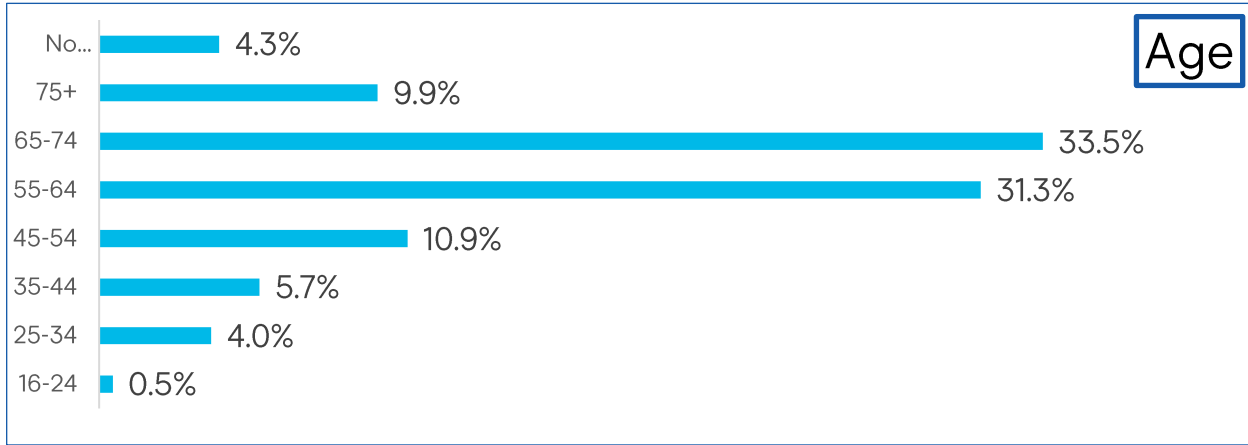
Response by boater type



- 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



- As in previous years, the sample is dominated by respondents who own narrowboats.
- The 2022 results appeared to show an increase in motor cruisers but this is not a trend that continues into 2023



Sample: All (1,407)



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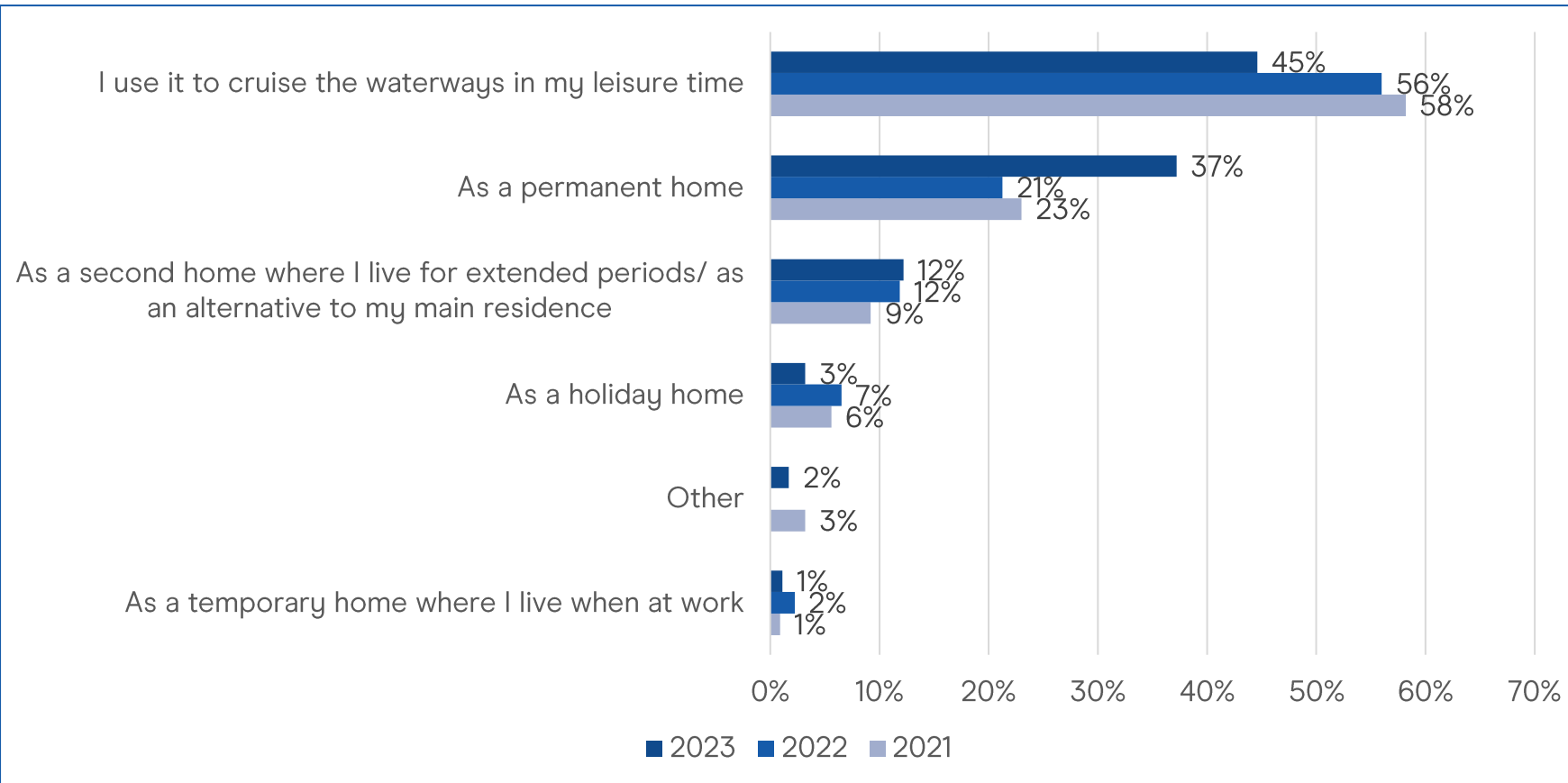
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8. Basics

Boat use

Boat types

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

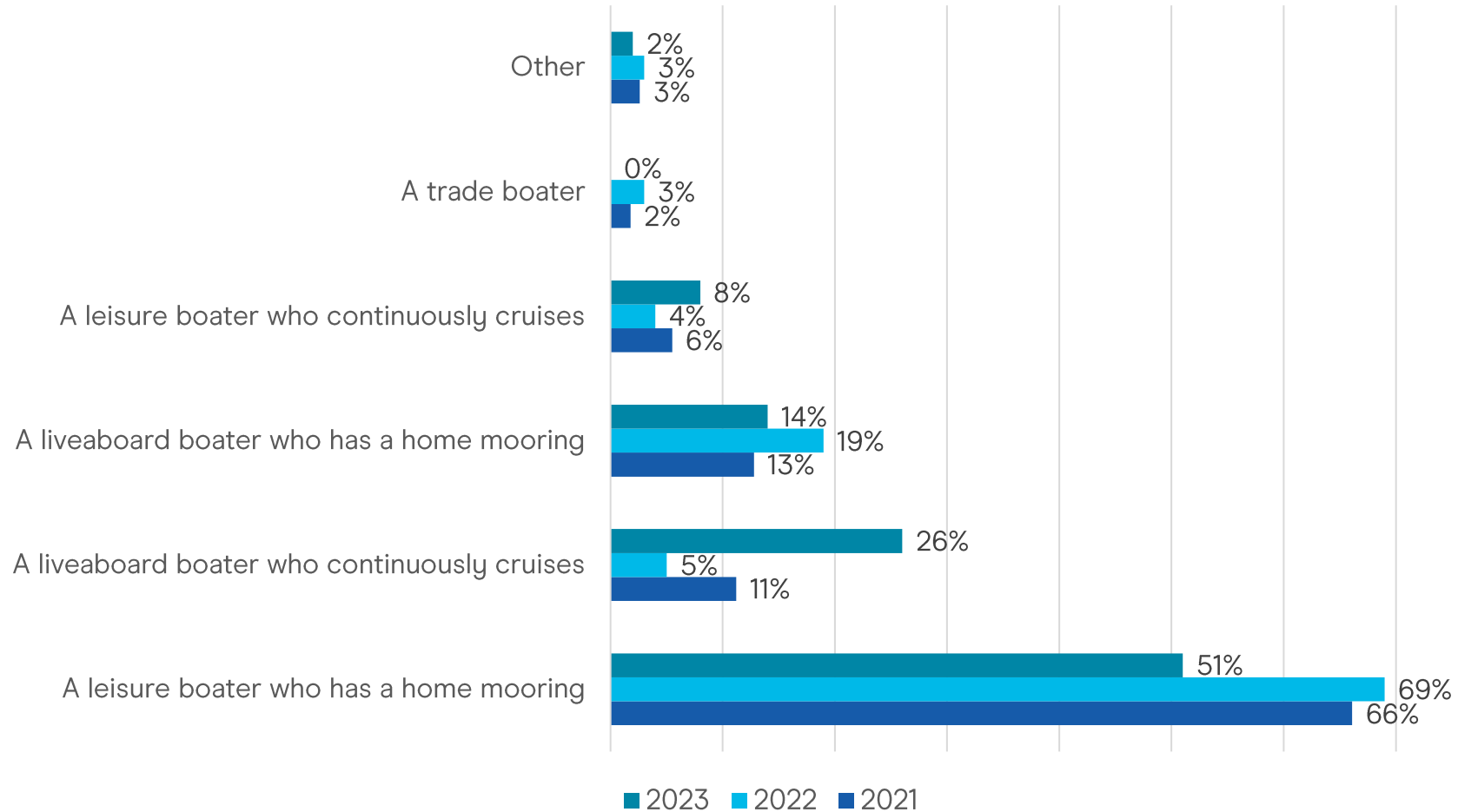


- There was a significant increase in responses from people living permanently on their boats.
- There are large regional differences in boat use.

Sample: All (1407 in 2023) (936 in 2022) (1179 in 2021)

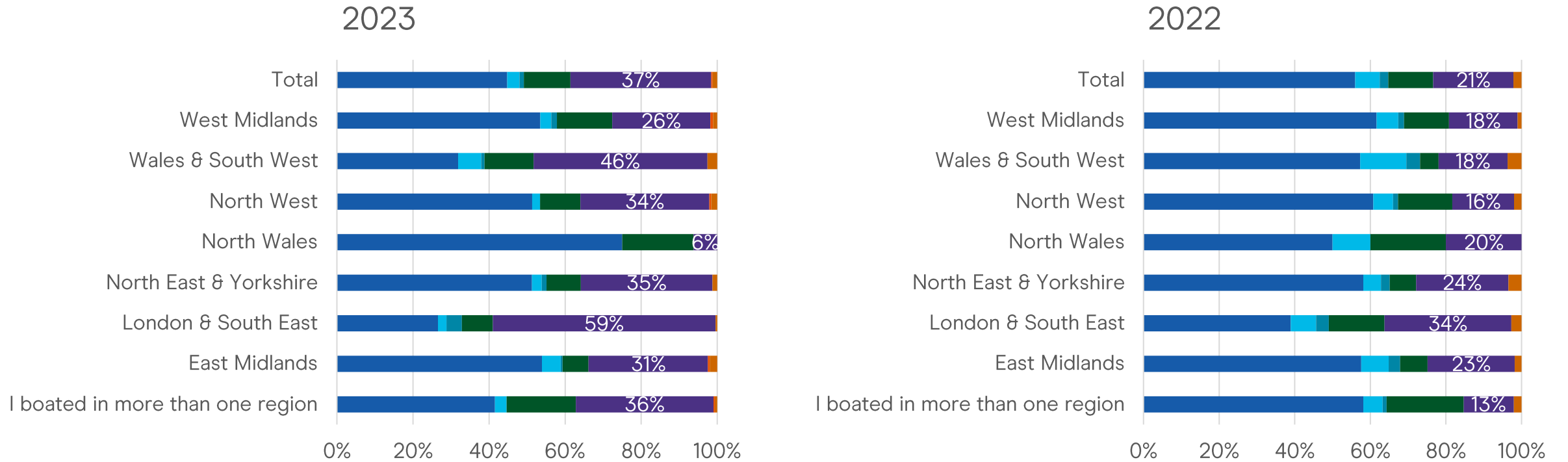
Type of boater

Q5: Please select which best describes you?
Please select one answer only



- There is a significant increase in responses from boaters who continuously cruise, both leisure and liveaboard
- This year reverses the 2020-22 trend that saw a steady increase in responses from leisure boaters with home moorings
- This may reflect the self-selecting sample of respondents and/or a change in how people use their boats

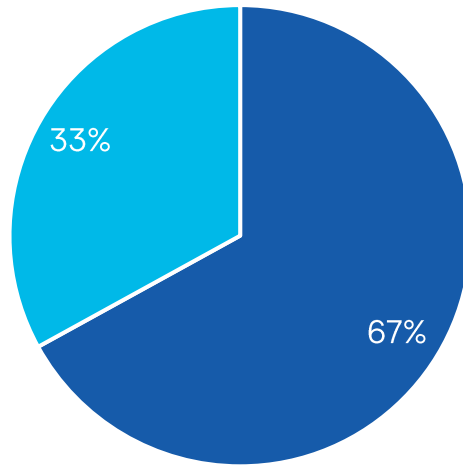
Boat use by region



- I use it to cruise the waterways in my leisure time
- As a holiday home
- As a temporary home where I live when at work
- As a second home where I live for extended periods/ as an alternative to my main residence
- As a permanent home
- I don't know

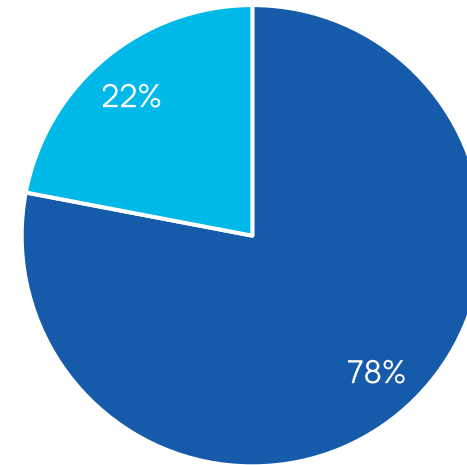
- All regions except North Wales show an increase in the use of boats as permanent homes.
- The greatest increases are in the two Southern regions.
- The London & South East results are likely to be influenced by a vigorous campaign by London Boaters to take part in the survey this year.

Annual Survey 2023



■ Home moorings ■ Continuous cruisers

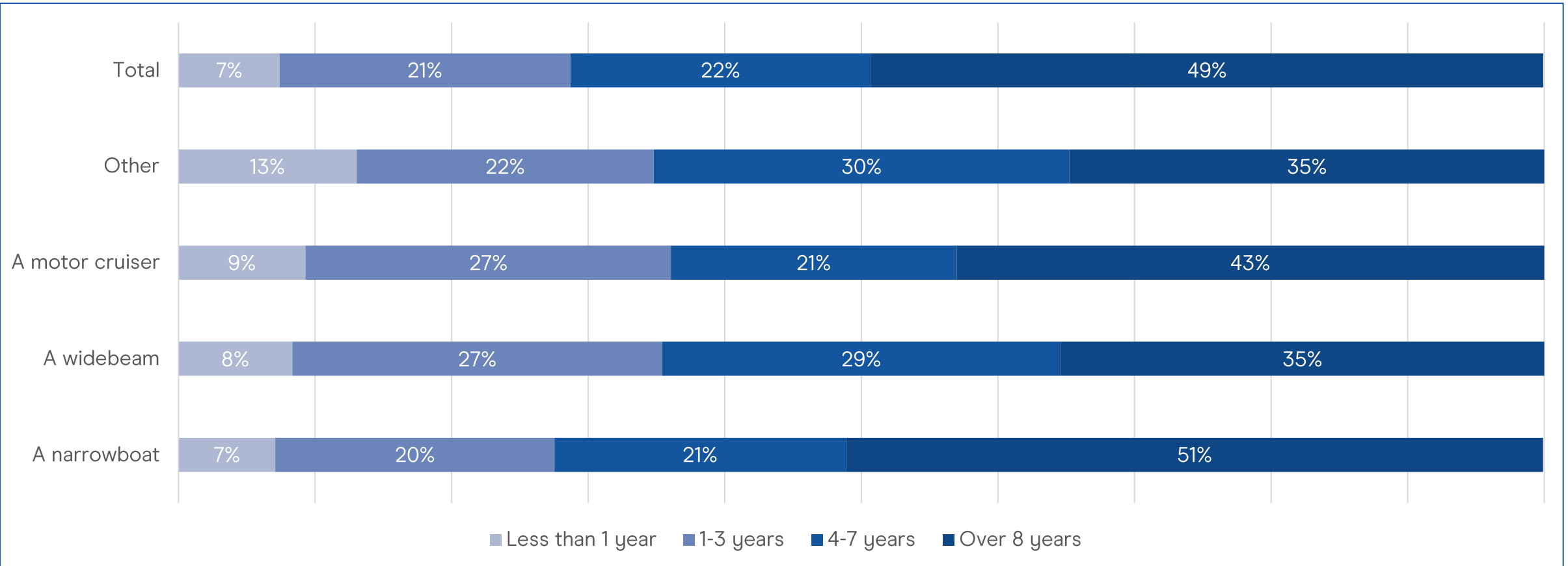
National Boat Count 2023



■ Home moorings ■ Continuous cruisers

- Compared to the National Boat Count, this survey received a disproportionately high number of responses from boaters without a home mooring
- The National Boat Count does not include data on boat use (liveaboard or leisure)

Q6: Please tell us how long you have had a boat?



Sample: All 1,404 (excludes 'don't know')