

INLAND WATERWAYS ASSOCIATION RESTORATION COMMITTEE WATERWAY RESTORATION SCHEMES SURVEY 2002 ANALYSIS

1. Background

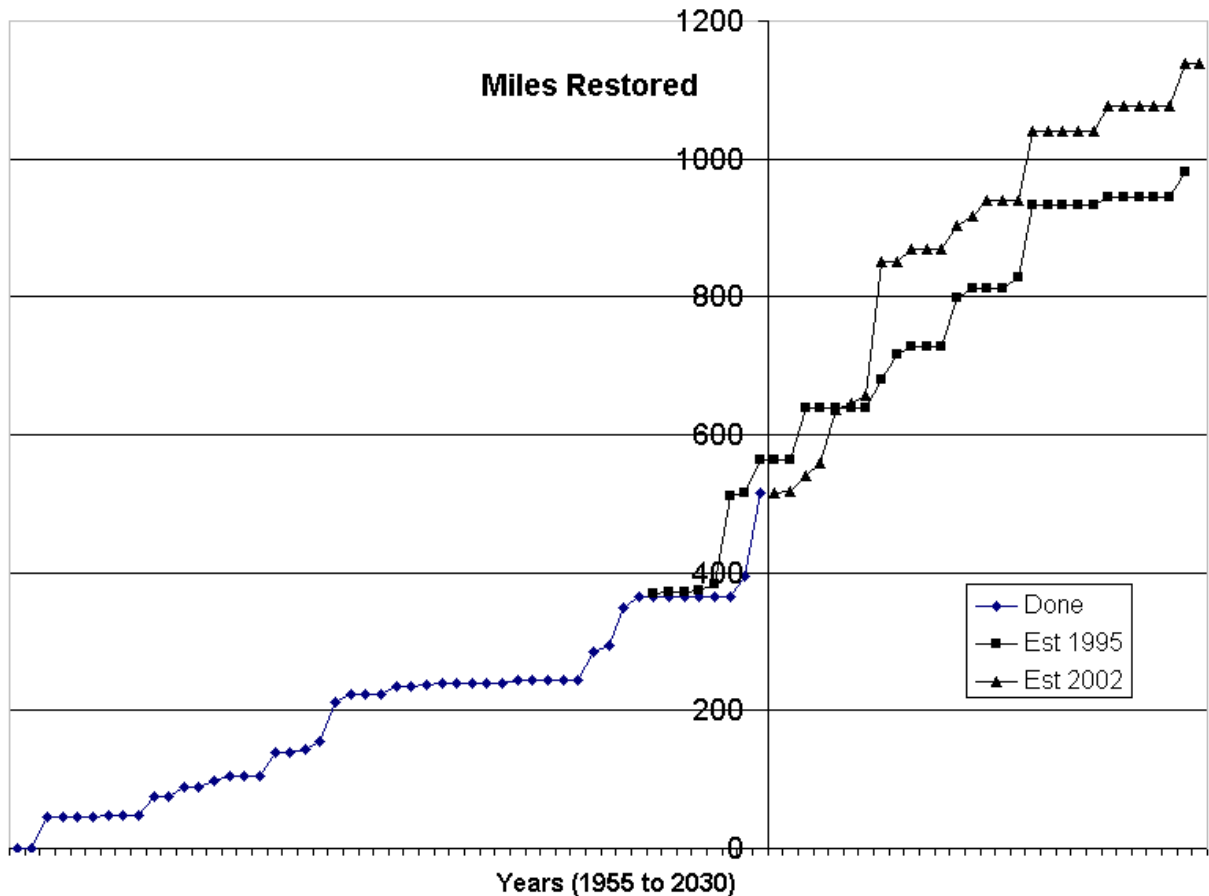
- 1.1. In March 2002 a survey questionnaire was sent to 60 bodies responsible for the restoration (or construction) of waterways. By the end of October 2002 53 bodies had responded; covering 60 navigations, with a total 584 miles remaining to be restored or built. Two further bodies were concluded to be no longer 'restorations' (having completed the task and become user/operating groups). Three further bodies (Rochdale CS, Caldon CS and Severn NRT) refused to respond. Two non-respondent bodies (considered marginal) were not 'chased'. One response, received at the end of October, has been entered in full; but is used only in the 'headline' figures of this analysis (which was substantially completed at that time).
- 1.2. Fifty-one of the fifty-three responding bodies were careful and thorough in their answers to the detailed and probing questionnaire; making a significant effort, which is much appreciated. Two bodies (who know who they are) made partial responses; but have not affected the robustness of the analysis.
- 1.3. The 2002 survey questionnaire is nearly identical to one distributed in 1995 to which 41 bodies responded. Since 1995 just one restoration body (Ripon Canal Society) has disbanded (on successful completion of its task) and (as noted above) two have changed role. So direct comparisons between the two surveys are valid. 1995 survey results are provided alongside comparable results for the 2002 survey, shown as [1995:Result]. Summed 2002 results for only those bodies that responded in both 1995 and 2002 are provided in some cases where they aid correlation, shown as [95+02:Result].
- 1.4. This analysis was undertaken using a spreadsheet into which all responses were entered. If a particular statistic or relationship that is of interest to you is not in this analysis, but can be derived from the 2002 responses, then we would be pleased to derive it for you. Please note that this will not extend to divulging information that will compromise the confidentiality of any of the responses received. Please send requests to ResCom Survey, Inland Waterways Association, PO Box 114, Rickmansworth, WD3 1ZY. Please do carefully define the relationship that you require (eg "A1+B2 vs C3-D4").
- 1.5. It is hoped that trends and strengths shown in this analysis will enable canal restoration bodies to focus on those opportunities that will best further their projects. This analysis is being distributed to everyone who returned a completed questionnaire (or their successor). You are most welcome to copy it to your Chairman, Committee and others who may have an interest.

2. Progress

2.1. The graph below shows the rate of completion of canal restoration projects in mainland Britain. Historical data (to 1995) is derived from Supplementary Paper 6 of “Britain’s Inland Waterways – An undervalued asset”, IWAAC, March 1996. Data for completions in the years 1995 to 2002 is from a combination of responses to the 1995 and 2002 surveys. Projected data (from 2002) is derived from responses to (A15) “best estimate of the year when you expect the waterway to be fully navigable over the entire length which you propose should be restored”, coupled with a mileage derived from (A13) “What length do you propose should become fully navigable?”, minus (A2) “What was the total original constructed length of the waterway?”, plus (A5) “What length has ever been closed to navigation?”.

167 miles, for eight projects unable to estimate their completion dates, are omitted.

The graph of estimates made in 1995 is placed alongside the present estimates for comparison.



2.2. Sums of Waterway Mileages given in survey:

		2002	1995	95+02
A2	“total originally constructed length”	1039	770	715
A5	“length ever closed to navigation”	931	651	
A8	“lengths over 0.25mile now fully navigable”	441	258	238
A12	“continuously navigable”	401	141	
A13	Proposed navigable length	1025	656	
A2-A8	Now unnavigable	598	513	
A5-A2+A8*	Now restored or built	333	139	196
(A5-A2+A8)/A13	Proportion restored or built	32%	21%	

* $A5-A2+A8 = A8-(A2-A5)$

2.3. Sums of Locks given in survey:

		2002	1995	95+02
A3	“originally constructed on the waterway”	955	674	685
A6	“have ever been closed to navigation”	931	669	
A9	“now fully operational”	330	129	170
A10	“only require regating”	82	51	
A14	Proposed “will become fully operational”	940	589	
A3-A9	Now unnavigable	625	545	
A6-A3+A9**	Now restored or built	306	124	167
(A6-A3+A9)/A14	Proportion restored or built	33%	21%	

** $A6-A3+A9 = A9-(A3-A6)$

2.4. Sums of Towpath Mileages given in survey:

		2002	1995	95+02
E7	“What length ever had a towpath”	974	766	692
E8	“length open when restoration started”	601	360	
E9	“towpath currently open to the public”	693	463	435
E10	“towpath re-opened in the last three years”	22	28	
E7-E9	Now unusable	281	303	
E9-E8	Now restored or built	92	102	86
(E9-E8)/(E7-E8)	Proportion restored or built	33%	25%	

3. **Progress**

- 3.1. The “estimated total cost of proposed restoration of the waterway were it all to be done by contractor” (B1A) has been modified for inflation since “the year in which the estimate was made” (B1B) using a 4% compound rate. This gives a mean 2002 estimated cost for each mile that is “proposed should become fully navigable” (A13) of £1,487,000 per mile based on a total of estimated costs (at 2002 rates) of £1170,000,000 to restore 787 miles. The 1995 figure was £907,000 per mile, which would be £1,193,000 per mile at 2002 rates.
- 3.2. Bodies were asked (B2) “Who made this estimate”. The mean estimates (based on the 2002 costs derived as described in 3.1) made by the different categories of advisor are:-

Advisor	Number of Projects		Mean Cost (£'000 per mile)	
	1995	2002	1995 *	2002
Local Authority/British Waterways	10	13	619 (814)	1228
Professional Firm	9	21	1049 (1380)	1509
Volunteer	10	11	1209 (1591)	2011
None	8	14	-----	-----

*Second column is 1995 costs updated to 2002 values.

4. **Contributions in last three years**

Sums of answers to the question “In very round figures, what is the value of restoration work funded in the last three years by....” are:-

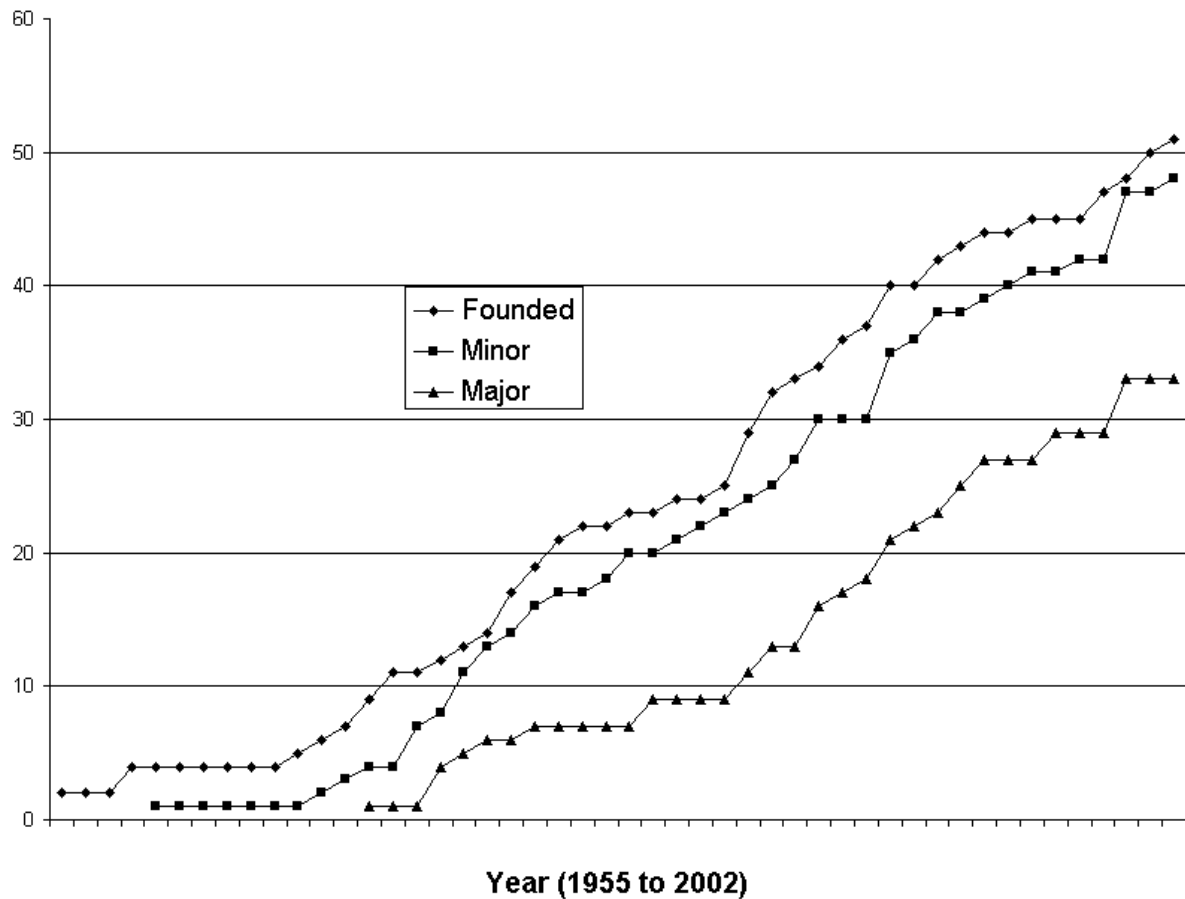
	1995 (£'000)	2002 (£'000)
(B7) Voluntary contributions and labour	1,888 (23%)	3,120 (5%)
(B8) Government/Local Authorities/HLF	6,111 (75%)	51,086 (86%)
(B9) Commercial sponsorship/development	110 (1%)	5,215 (9%)

5. **Demographics**

- 5.1. The total “approximate population living within 5 miles of the route of the waterway” is 20,800,000 (C1). [1995:10,200,000] [95+02:13,400,000]. There is a degree of ‘double-counting’ in these figures (where multiple schemes have submitted some of the same areas); so they should be treated with caution.
- 5.2. The total population (C1), combined with labour force proportions derived from “the average unemployment rate along the route of the waterway” gives the total unemployment within 5 miles of waterways being restored as 789,000. Again, there is a degree of ‘double-counting’.
- 5.3. Waterway “lengths that are navigable, or proposed to be that can be described by each of the following” are:-
- | | 2002 | | 1995 |
|--------------------------|------|-------|------|
| (C3) Derelict industrial | 23m | (2%) | 2% |
| (C4) Industrial | 31m | (3%) | 5% |
| (C5) Urban | 52m | (5%) | 4% |
| (C6) Suburban | 120m | (12%) | 10% |
| (C7) Rural | 786m | (78%) | 78% |
- 5.4. (C8) Schemes totalling 334 miles (33%) lie partly or wholly “within an area that has EU assisted status”. [1995:42%].

6. **Growth and Membership**

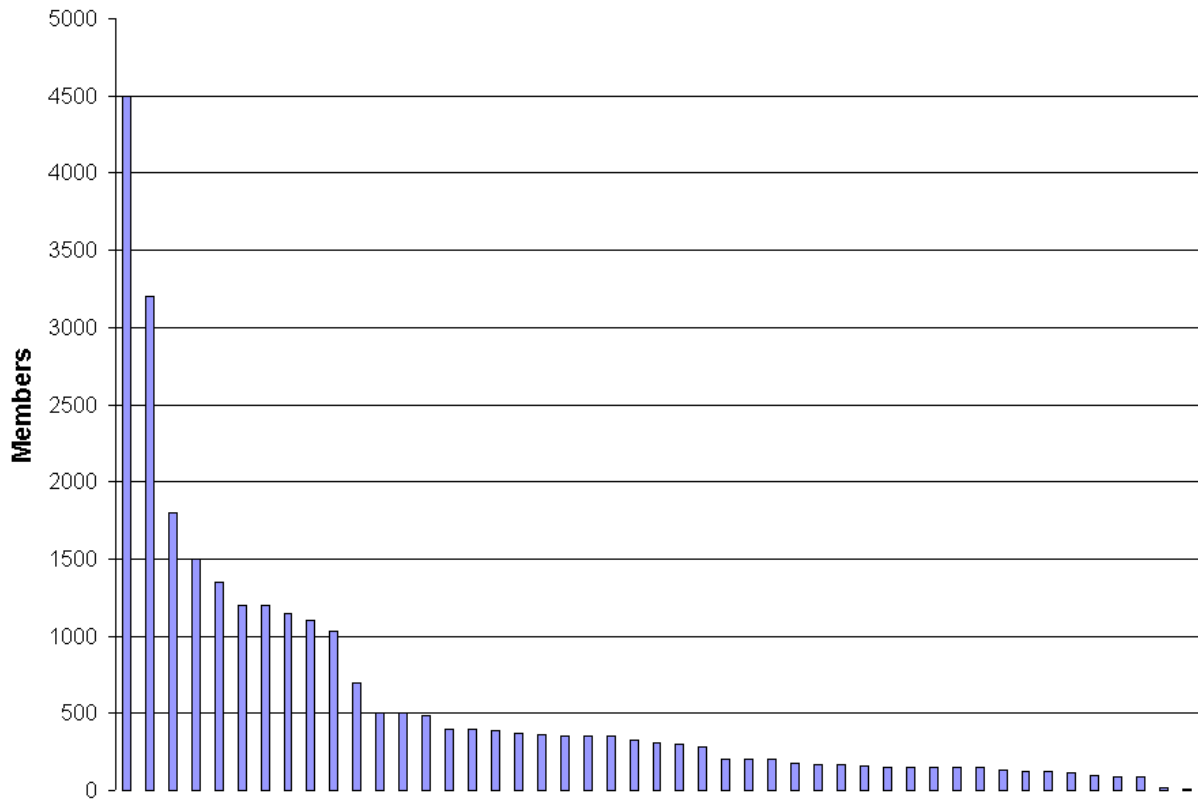
- 6.1. The graph below shows the total number of restoration bodies that were, in each year:
 (D1) in existence
 (D2) undertaking towpath clearance, reed pulling or minor repair
 (D3) undertaking major work leading to navigable standards



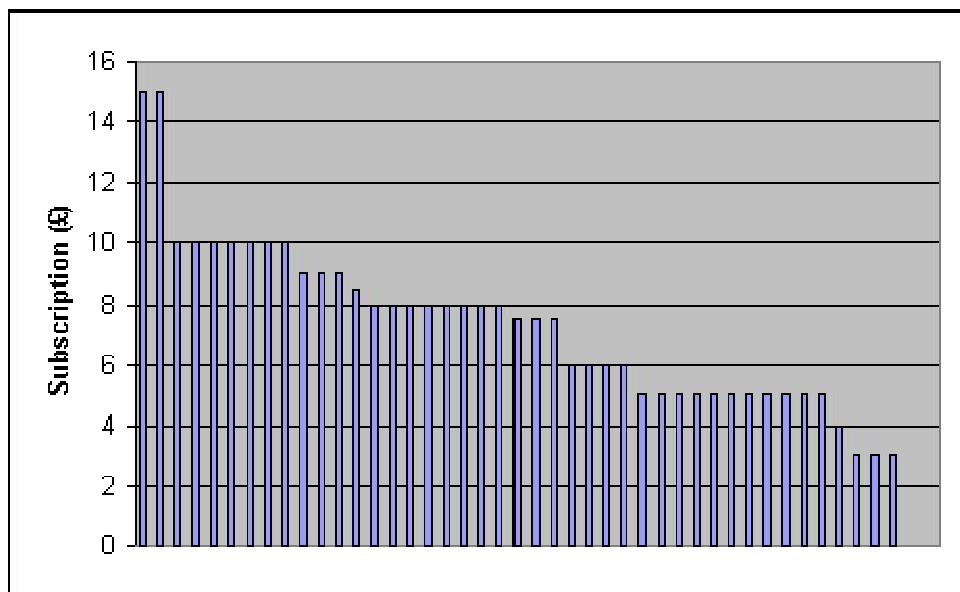
- 6.2. (D5) The total membership of restoration bodies responding to this survey is 27,400 (counting families as two and companies or societies as four). [1995:17,398].

It should be noted that this figure does not include the membership of the many waterway societies whose main purpose is not waterway restoration. Nor does it include the Inland Waterways Association or waterway recovery group.

6.3. Number of members (D5) of every restoration body:-

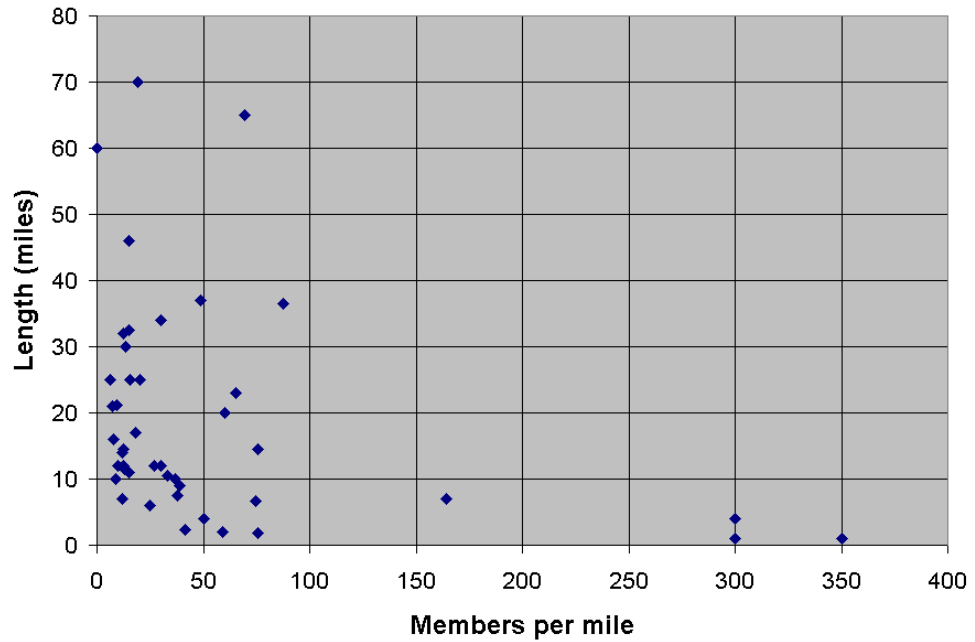


6.4. The “individual annual subscriptions” (D7) of each restoration body:-

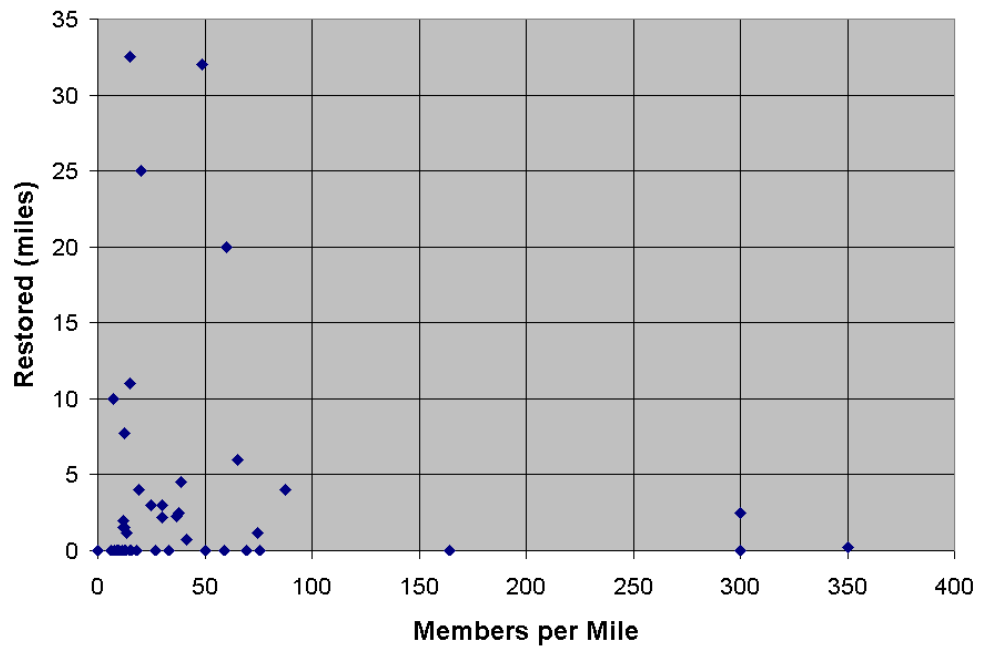


6.5. Total subscription income of all societies is (D7 * D5) is £239,000. [1995:£117,000*] [95+02:£150,000].
 *This would be £154,000 in 2002, given 4% inflation.

6.6. Number of members per mile (D5/A13) relative to waterway length proposed to be restored or built (A13):-

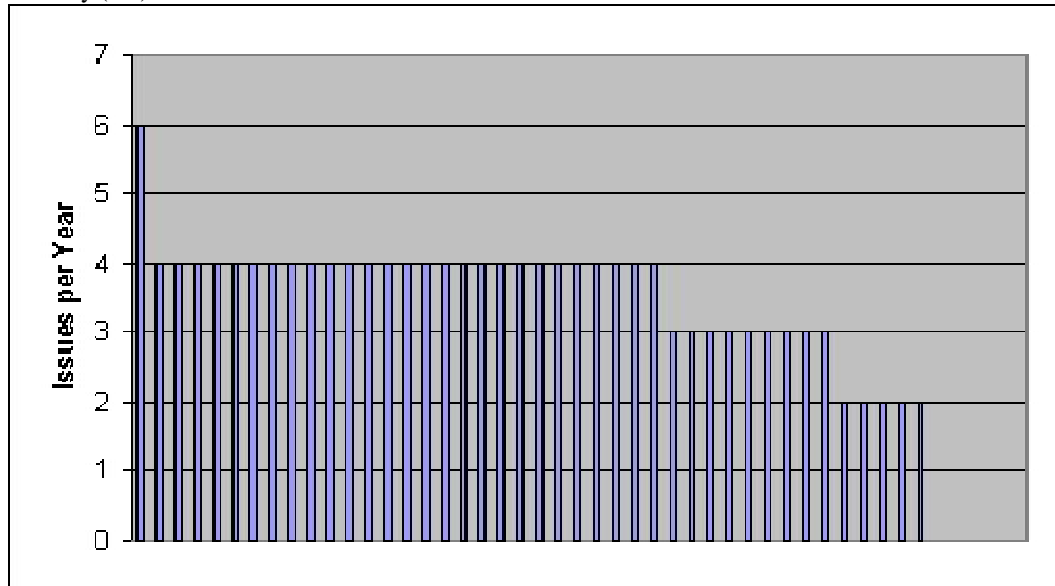


6.7. Number of members per mile (D5/A13) relative to waterway length restored or built (A5-A2+A8):-



7. Activity and Publicity

7.1. Number of “issues per year” (D9) of “a magazine distributed free of charge to all members” of each restoration body (D8):-



7.2. (D11) 20 society magazines “take paid ads other than small ads”. [1995:14]
 (D12) Five magazines have “one or more pages in full colour” in “every issue”. [1995:One]
 (D10) Magazines range from 1 to 52 “pages in a typical issue”.
 (D10 * D9) The total number of different pages created per year is 3200. [1995:2400].

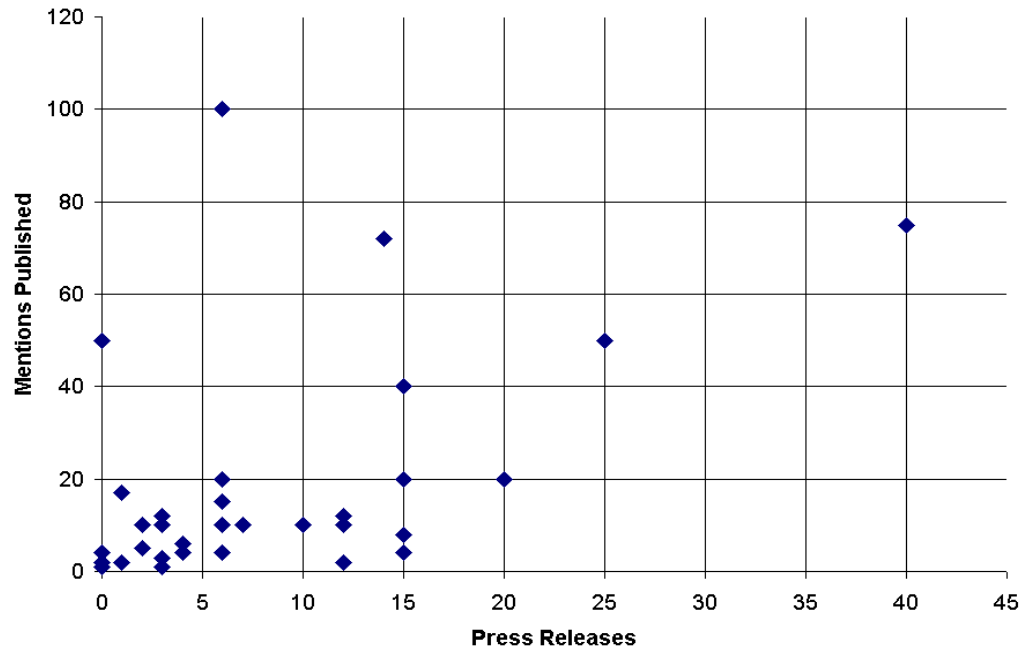
7.3. (D13) 13 “full-time equivalent staff are employed by” responding bodies “or their subsidiary companies”. [1995:20]
 (D14) 17 bodies “have a business plan”. [1995:11].
 (D15) 29 bodies “have an organisational structure”. [1995:17].

7.4. (D16) “Most restoration work is done by”:-
 3% a subsidiary limited company
 26% a formal partnership or restoration trust comprising LAs, BW, EA, others
 6% local authorities alone
 5% navigation authority or company of proprietors
 44% “your organisation”
 15% others

Those restorations in which ‘The Waterways Trust’ was a leading partner have all included it in ‘a formal partnership or restoration trust’. In hindsight, identifying TWT as a separate category in the questionnaire was incorrect and it is not thus identified in this analysis.

7.5. (E1) 195 public meetings have been “arranged and advertised in the last three years”. [1995:130]
 (E2) 133 “information/interpretation boards have been erected in the last three years”. [1995:71]

7.6. The graph below relates the number of “different press releases sent to local papers in the past year” (E3) to “how many issues of local newspapers have mentioned the restoration in the past year (excluding adverts)” (E4).



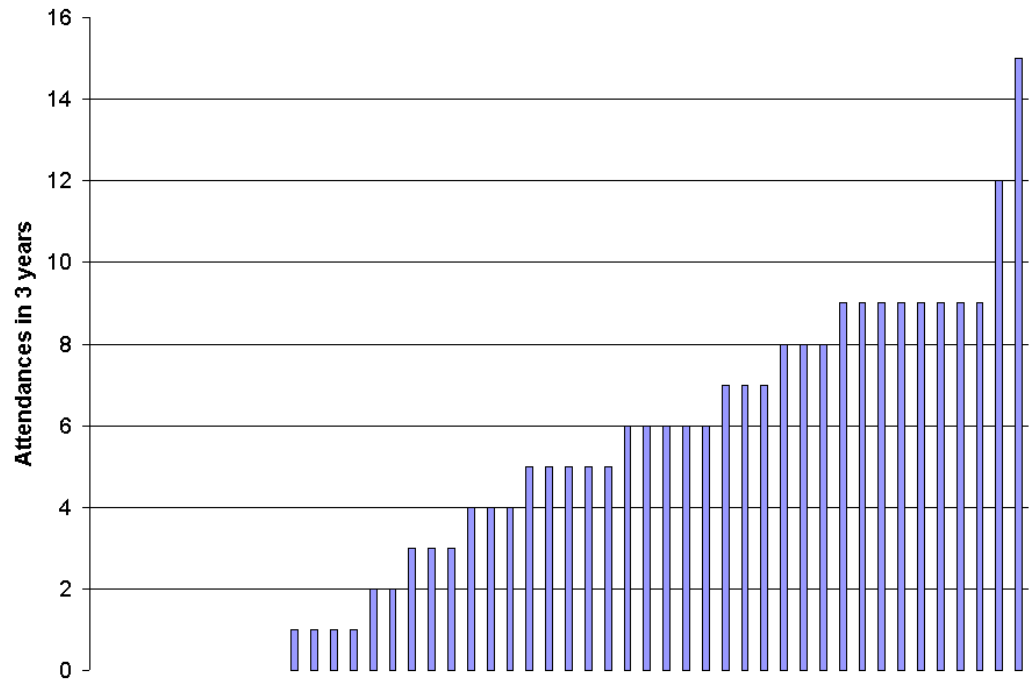
7.7. (E5) 24 “trip boats are operated at advertised times on at least twelve weekends per year”. [1995:20]

- 01905 458352 Droitwich Canals Trust
- 01243 670786 Chichester Canal Society
- 01246 271923 Chesterfield Canal Trust
- 01285 713148 Cotswolds Canal
- 01380 721279 Kennet & Avon Canal Trust
- 01403 752403 Wey & Arun Canal Trust
- 01506 843194 Edinburgh & Glasgow Union Canal
- 01524 781489 Lancaster Canal Northern Reaches
- 0161 339 1332 Huddersfield Canal Society
- 01787 372602 River Stour Trust (Essex)
- 01792 772776 Neath & Tennant Canal Preservation Society
- 01962 713564 Basingstoke Canal

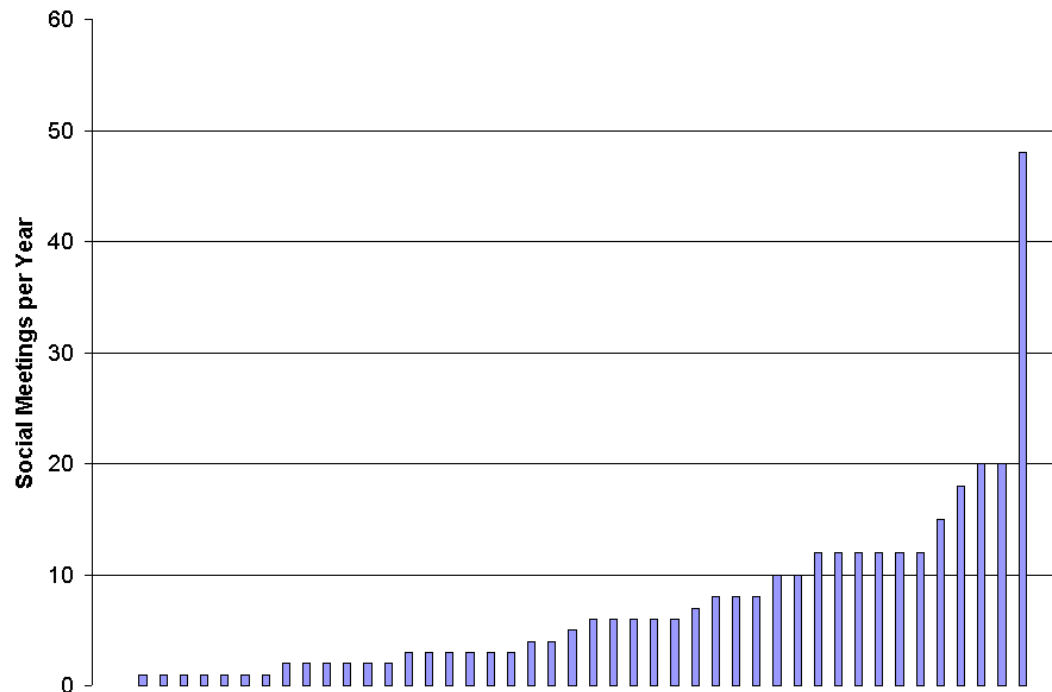
(E6) 12 societies “run a trip boat advertised for private party hire”. [1995:13]

7.8. (E14) 42 societies “have a standard publicity/membership application leaflet”. [1995:37]

7.9. “‘Southern Canals’ or ‘Northern Canals’ meetings that representatives have attended in the past three years” (one bar per body). (F4) Those indicating more than 9 attend both organisations.



7.10. The “number of social meetings for members held per year”(D6). (One bar per body).
One organisation (holding 120 socials per year) is omitted since it would distort the other results.



8. **Restoration Activity and Publicity**

8.1. The following bodies have been contacted (letter, phone or meeting) by officers of the number of restoration groups indicated (at local level) in the past three years:-

E13	Organisation	2002		1995	
		No	%	No	%
a	Government Departments: DEFRA/DLTR/Former DETR	34	65	31	76
b	English Partnerships	13	25	18	44
c	Regional Development Agency	27	52	14	34
d	Country Land and Business Association (CLA)	14	27	9	22
e	National Farmers Union	11	21	10	24
f	English Nature	18	35	19	46
g	Countryside Agency	15	29	21	51
h	Regional Tourist Board	20	38	24	59
i	Regional Council for Sport & Recreation	5	10	13	32
j	Ramblers Association	13	25	17	41
k	Local Boat Clubs	24	46	21	51
l	Cyclists Touring Club/SUSTRANS (or local equivalent)	11	19	9	22
m	British Canoe Union (or local equivalent)	8	15	21	51
n	Heritage Lottery Fund	26	50		
o	ENTRUST	21	40		
F3	Environment Agency	44	84	28	68

8.2. 39 bodies (75%) know “the names and addresses of the owners of all land on their route”. [1995:23 (56%)]

26 bodies (50%) “have plans/details of all the main services crossing the” waterway. [1995:14 (34%)]

8.3. “Benefits studies of the total restoration” (G1) originate from:-

	2002	1995
Volunteers	3	3
Consultants	15	13
BW/LA’s	18	8
None	21	18

8.4. Where a benefits study had been carried out then bodies were asked to define the annual financial benefit arising from specific areas. Such breakdown was provided by only eight respondents (to whom we are very grateful, since it at least allows a comparison by percentages). Eighteen respondents listed their estimated order of importance of benefits.

Benefit Source	% of total additional local income		Overall order of estimated importance	
	2002	1995	2002	1995
(G2) Boating	30	14	1	1
(G3) Fishing	10	10	4	4
(G4) Cycling	8	9	5	6
(G5) Walking	8	20	3	3
(G6) Informal	39	28	2	2
(G7) Other	4	19	6	5

Total financial benefits of £58,900,000 per year were reported by 18 respondents whose schemes totalled 240 miles, giving an average annual benefit per mile of £245,000.

8.5. 30 schemes reported the total “expected number of riparian developments created since restoration started” (to the end of the restoration) as:-

		2002	1995
G8	Hire bases	30	27.5
G9	Off line moorings	1138	1115
G10	Waterside housing units	2702	1074
G11	Waterside shops/pubs	100	51
G12	Other water-related businesses	60	40

8.6. 25 projects estimated 16,400 “full-time equivalent jobs” would be generated by their restorations. (G13). [1995: 10 projects, 2800 fte jobs]

8.7. 279 miles of waterway is presently “covered by a fishing rental/fishing management agreement” (E11) and 264 miles are planned (E12). [95+02:168 miles and 181 miles] [1995:“present coverage”173 miles]

9. **Councils**

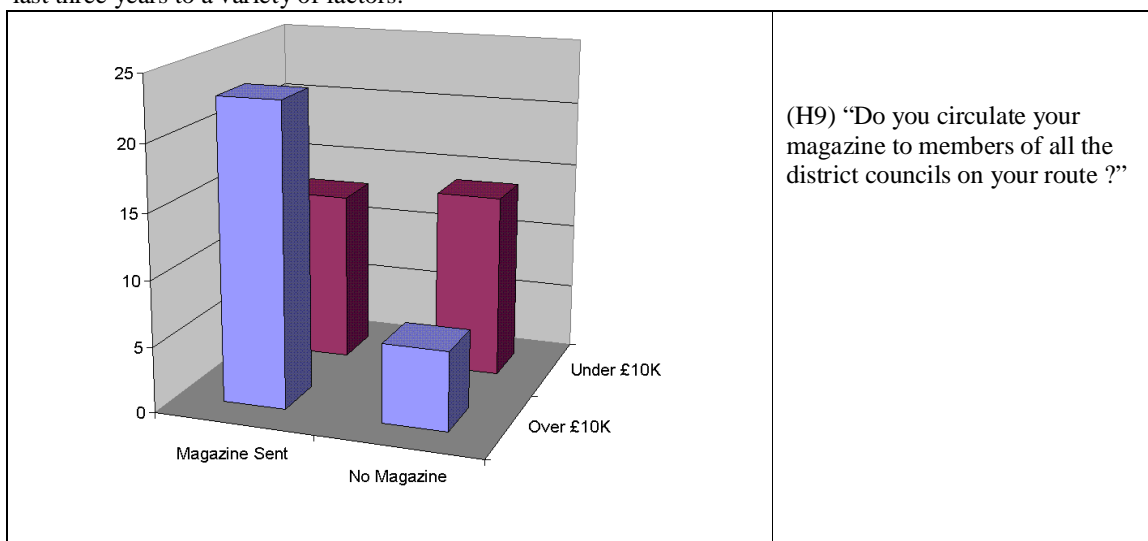
9.1. 143 (73%) of a total 96 first tier and 101 second tier local authorities have “stated in writing that they support the principle of restoration” (H3). [1995:76%]

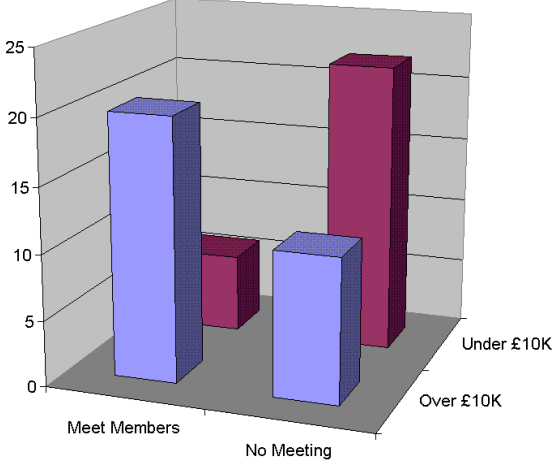

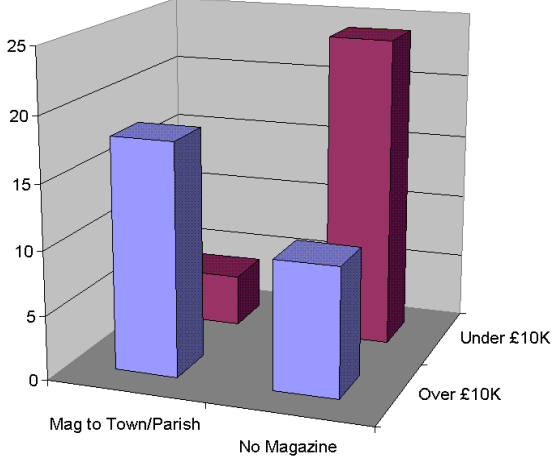
9.2. 656 miles is “specifically protected in the local plan from developments likely to hinder restoration” (H4). That is 65% of the total length proposed for restoration. [1995:73%]

9.3. 77 councils (39%) have “provided direct assistance to the restoration in the form of technical advice, plant, materials or finance worth over £10,000 in the last three years” (H5). [1995: 42%]

9.4. 109 (55%) of “councils are members of a trust or similar body established to promote restoration” (H6). [1995:25%].

9.5. The charts below relate (H5) whether local authority assistance worth over £10,000 has been received in the last three years to a variety of factors:-



 <p>A 3D bar chart with a vertical axis from 0 to 25. The horizontal axis has two categories: 'Meet Members' and 'No Meeting'. The depth axis has two categories: 'Under £10K' and 'Over £10K'. The bars are colored blue for 'Meet Members' and maroon for 'No Meeting'. For 'Under £10K', 'Meet Members' is approximately 21 and 'No Meeting' is approximately 11. For 'Over £10K', 'Meet Members' is approximately 11 and 'No Meeting' is approximately 24.</p> <table border="1"> <thead> <tr> <th>Income Level</th> <th>Meet Members</th> <th>No Meeting</th> </tr> </thead> <tbody> <tr> <td>Under £10K</td> <td>~21</td> <td>~11</td> </tr> <tr> <td>Over £10K</td> <td>~11</td> <td>~24</td> </tr> </tbody> </table>	Income Level	Meet Members	No Meeting	Under £10K	~21	~11	Over £10K	~11	~24	<p>(H10) "Do you formally meet at least twice a year with the members of all your riparian councils ?"</p>
Income Level	Meet Members	No Meeting								
Under £10K	~21	~11								
Over £10K	~11	~24								
 <p>A 3D bar chart with a vertical axis from 0 to 25. The horizontal axis has two categories: 'Meet Officers' and 'No Meeting'. The depth axis has two categories: 'Under £10K' and 'Over £10K'. The bars are colored blue for 'Meet Officers' and maroon for 'No Meeting'. For 'Under £10K', 'Meet Officers' is approximately 22 and 'No Meeting' is approximately 12. For 'Over £10K', 'Meet Officers' is approximately 9 and 'No Meeting' is approximately 23.</p> <table border="1"> <thead> <tr> <th>Income Level</th> <th>Meet Officers</th> <th>No Meeting</th> </tr> </thead> <tbody> <tr> <td>Under £10K</td> <td>~22</td> <td>~12</td> </tr> <tr> <td>Over £10K</td> <td>~9</td> <td>~23</td> </tr> </tbody> </table>	Income Level	Meet Officers	No Meeting	Under £10K	~22	~12	Over £10K	~9	~23	<p>(H11) "Do you formally meet at least twice a year with the recreation and planning officers of all the borough, district, unitary or metropolitan councils on your route ?"</p>
Income Level	Meet Officers	No Meeting								
Under £10K	~22	~12								
Over £10K	~9	~23								
 <p>A 3D bar chart with a vertical axis from 0 to 25. The horizontal axis has two categories: 'Mag to Town/Parish' and 'No Magazine'. The depth axis has two categories: 'Under £10K' and 'Over £10K'. The bars are colored blue for 'Mag to Town/Parish' and maroon for 'No Magazine'. For 'Under £10K', 'Mag to Town/Parish' is approximately 19 and 'No Magazine' is approximately 9. For 'Over £10K', 'Mag to Town/Parish' is approximately 10 and 'No Magazine' is approximately 25.</p> <table border="1"> <thead> <tr> <th>Income Level</th> <th>Mag to Town/Parish</th> <th>No Magazine</th> </tr> </thead> <tbody> <tr> <td>Under £10K</td> <td>~19</td> <td>~9</td> </tr> <tr> <td>Over £10K</td> <td>~10</td> <td>~25</td> </tr> </tbody> </table>	Income Level	Mag to Town/Parish	No Magazine	Under £10K	~19	~9	Over £10K	~10	~25	<p>(H12) "Do you send your magazine to all the members of town and parish councils on your route ?"</p>
Income Level	Mag to Town/Parish	No Magazine								
Under £10K	~19	~9								
Over £10K	~10	~25								

10. Features of the waterways

- 10.1. 797 miles of proposed navigable waterway on 43 schemes “will join different navigable waterways that form part of the ‘interconnected national system’ (I1). [1995: 492 miles]
- 10.2. 22 proposed connections are to tidal water (I4).
- 10.3. (I5) Largest craft sizes are:-
- | | |
|----------------|-----------|
| Seagoing | 15 miles |
| Broad (12ft +) | 553 miles |
| Narrow (7ft+) | 439 miles |
| Tub+Canoe | 3 miles |
- 10.4. 7 miles “total length of waterway lie within a designated national park”(J1). [1995: 7 miles].
- 10.5. 114 miles “total length of waterway lie within Areas of Outstanding Natural Beauty” (J2). [1995: 23 miles]
- 10.6. 150 miles “total length of waterway lie alongside conservation areas” (J3). [1995: 109 miles]
- 10.7. 223 “museums, craft workshops, theme parks and amusement parks (that are opened at advertised times to the public) lie within 1 mile of” a restoration. (J4). [1995: 116]
- 10.8. 51 “Buildings directly adjacent to the waterway are listed Grade 1 or Grade 2*” (J5). [1995: 71].
- 10.9. 370 “Buildings directly adjacent to the waterway are listed Grade 2” (J6). [1995: 89].
- 10.10. 46000 sq ft “of building (over 100 years old) has been restored as part of the restoration” (J9).
- 10.11. 91 miles of waterway surveyed “is, or lies directly alongside, a SSSI, Ramsar or SAC” (J7). [1995: 91 miles].
- 10.12. 47 miles “is, or lies directly alongside, a SBI” (J8). [1995: 18 miles]
- 10.13. 9 acres “of designated nature reserve have been created as part of the restoration” on five sites (J10). [1995: 33 acres]