

INLAND WATERWAYS ASSOCIATION RESTORATION COMMITTEE WATERWAY RESTORATION SCHEMES SURVEY 2009 ANALYSIS

1. Background

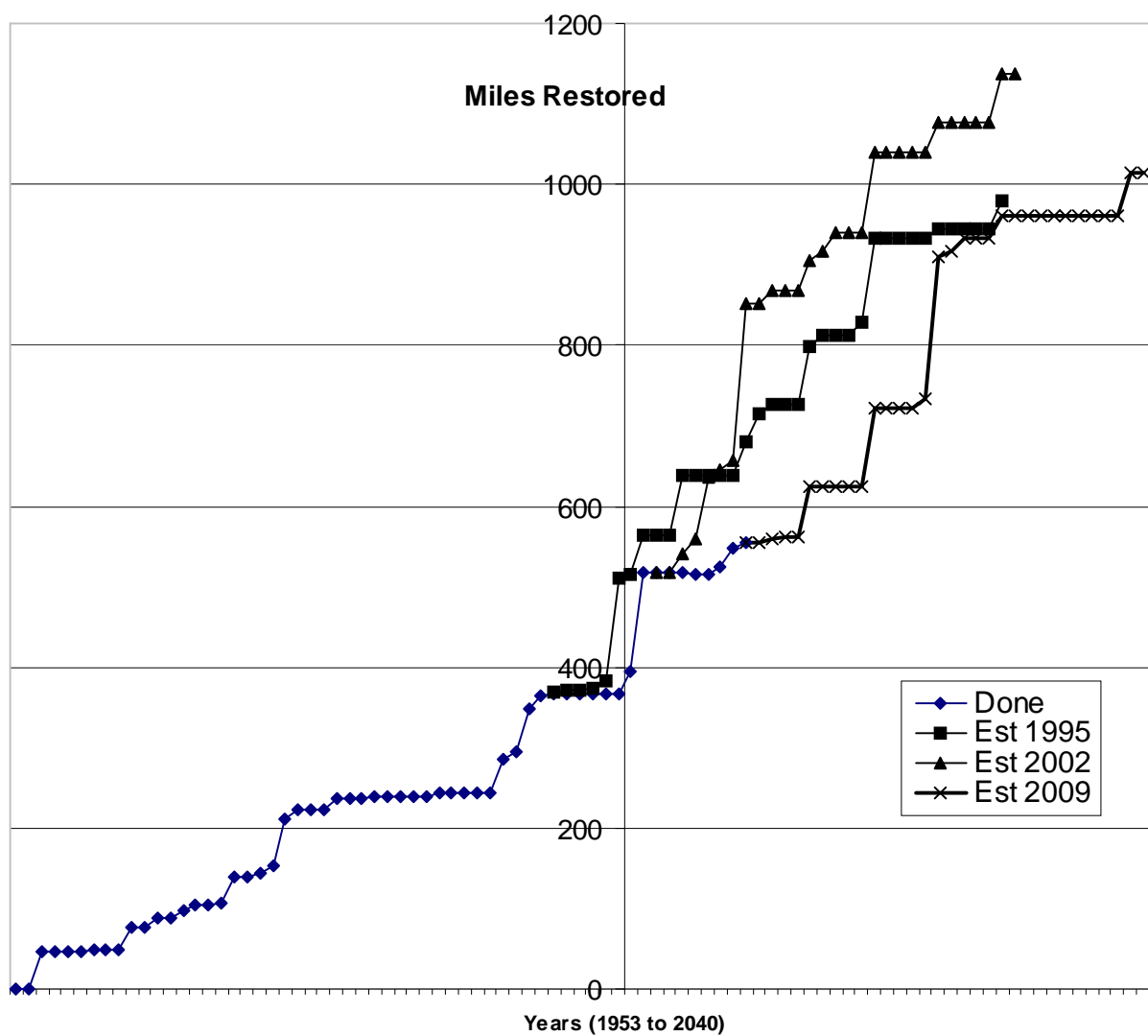
- 1.1. In June 2009 a survey questionnaire (nearly identical to that of previous surveys made in 2002 and 1995) was sent to 70 bodies responsible for the restoration (or construction) of navigations. 58 bodies responded. [2002:53] [1995:41]. Responses in 2009 cover 62 navigations [2002:60] that, in total, have 567 miles [2002:584 miles] remaining to be restored or built.
- 1.2. Anderton, Forth & Clyde, Edinburgh & Glasgow Union, Huddersfield and Ribble Link are now successfully completed and their bodies have disbanded or restructured (and so are not included in this analysis). Driffield, North Walsham & Dilham and Whitchurch did not respond to the 2009 survey but sent responses in 2002 (and so these are applied again in this analysis). No information was available for Dudley, Liverpool Link or Manchester & Stockport (and so they are omitted from this analysis apart from including the completed mileage of the Liverpool Link). Basingstoke, Bugsworth, Kennet & Avon and Rochdale are all navigable but continue to receive significant support from their highly active (formerly 'restoration') bodies (and so are included in this analysis).
- 1.3. The 2009 survey was accompanied by another large questionnaire on training needs. It seems the overall quantity of information required was so large that some responses were not fully considered. A few errors in responses have been corrected as data was entered into the spreadsheet used to compile this analysis. However, the large scale of the overall sample and generally good quality of considered responses makes this analysis robust (though probably not so robust as that of the 2002 survey).
- 1.4. Some 2002 or 1995 survey results (formatted as [2002:Result] or [1995:Result]) are placed alongside corresponding 2009 results.
- 1.5. If a particular statistic or relationship of interest is not included in this analysis, but could be derived from the data, then we would be pleased to derive it and send the information to the enquirer. This will not extend to divulging information that will compromise the confidentiality of any of the responses received. Enquiries (sent to ResCom Survey, Inland Waterways Association, Island House, Moor Road, Chesham, HP5 IWA) should carefully define the relationship required (eg "(A1+B2) vs (C3-D4)").
- 1.6. It is hoped that trends and strengths shown in this analysis will enable waterway restoration bodies to focus on opportunities that will best further their projects. A printed copy of this analysis is distributed to everyone who returned a completed questionnaire.

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 2009 is from a combination of responses to the 1995, 2002 and 2009 surveys. Projected data (from 2009) 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?”.

219 miles for sixteen [2002:167 for eight] projects unable to estimate their completion dates, are omitted.

The ‘Done’ line dips slightly because four miles of the Forty Foot River, restored in 1991, have been unnavigable since 2006.



2.2. Sums of Waterway Mileages given in survey:

| | | 2009 | 2002 | 1995 |
|------------------------------------|---|------------|------------|------------|
| A2 | “total originally constructed length” | 1179 | 1039 | 770 |
| A5 | “length ever closed to navigation” | 1014 | 931 | 651 |
| A8 | “lengths over 0.25mile now fully navigable” | 403 | 441 | 258 |
| A12 | “continuously navigable” | 384 | 401 | 141 |
| A13 | Total proposed navigable length | 1108 | 1025 | 656 |
| A2-A8 | Now unnavigable | 776 | 598 | 513 |
| A5-(A2-A8) | Now restored or built | 238 | 333 | 139 |
| A5-A2+A13 | Total proposed to be restored or built | 943 | 914 | 537 |
| (A5-A2+A8)/ (A5-A2+A13) | Proportion restored or built | 25% | 36% | 26% |

2.3. Sums of Locks given in survey:

| | | 2009 | 2002 | 1995 |
|------------------------------------|---|-------------|------------|------------|
| A3 | “originally constructed on the waterway” | 1017 | 955 | 674 |
| A6 | “have ever been closed to navigation” | 952 | 931 | 669 |
| A9 | “now fully operational” | 373 | 330 | 129 |
| A10 | “only require regating” | 61 | 82 | 51 |
| A14 | Proposed “will become fully operational” | 1144 | 940 | 589 |
| A3-A9 | Now unnavigable | 644 | 625 | 545 |
| A6-(A3-A9) | Now restored or built | 308 | 306 | 124 |
| A6-A3+A14 | Total proposed to be restored or built | 1079 | 916 | 584 |
| (A6-A3+A9)/ (A6-A3+A14) | Proportion restored or built | 28% | 33% | 21% |

2.4. Sums of Towpath Mileages given in survey:

| | | 2009 | 2002 | 1995 |
|------------------------|---|------------|------------|------------|
| E7 | “What length ever had a towpath” | 1065 | 974 | 766 |
| E8 | “length open when restoration started” | 599 | 601 | 360 |
| E9 | “towpath currently open to the public” | 700 | 693 | 463 |
| E10 | “towpath re-opened in the last three years” | 18 | 22 | 28 |
| E7-E9 | Now unusable | 365 | 281 | 303 |
| E9-E8 | Now restored or built | 101 | 92 | 102 |
| (E9-E8)/(E7-E8) | Proportion restored or built | 22% | 25% | 25% |

3. Progress

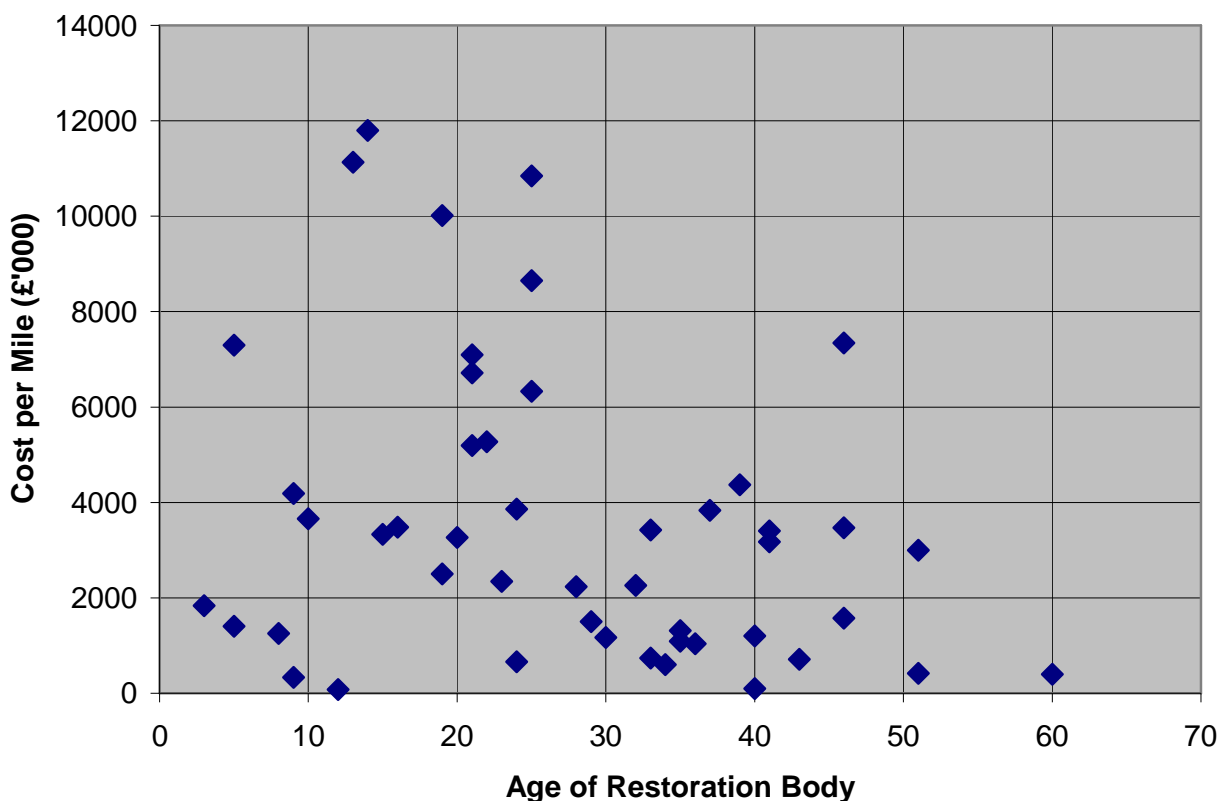
3.1. The “estimated total cost of proposed restoration of the waterway were it all to be done by contractor” (B1A) has been modified for inflation since “the year in which the estimate was made” (B1B) using a 4% compound rate. This gives a mean 2009 estimated cost for each mile that is “proposed should become fully navigable” (A13) of £2,615,000 per mile based on a total of estimated costs (at 2009 rates) of £2,445,000,000 to restore 935 miles. [2002: £1,487,000/mile (£1,957,000/mile at 2009 rates)] [1995: £907,000/mile (£1,570,000/mile at 2009 rates)].

3.2. Bodies were asked (B2) “Who made this estimate”. The mean estimates (based on the 2009 costs derived as described in 3.1) made by the different categories of advisor are:-

| Advisor | No. of Projects | | | Mean Cost (£'000 per mile) | | |
|-----------------------------------|-----------------|------|------|----------------------------|-------------|-------------|
| | 2009 | 2002 | 1995 | 2009 | 2002* | 1995* |
| Local Authority/British Waterways | 11 | 13 | 10 | 1928 | 1228 (1616) | 619 (1071) |
| Professional Firm | 31 | 21 | 9 | 3141 | 1509 (1986) | 1049 (1815) |
| Volunteer | 12 | 11 | 10 | 2635 | 2011 (2546) | 1209 (2094) |
| None | 11 | 14 | 8 | ----- | ----- | ----- |

*Bracketted sum is 1995 or 2002 costs updated to 2009 values.

3.3. The following graph contains one point for each body that provided both “estimated total cost of proposed restoration of the waterway were it all to be done by contractor” (B1A) and “year...organisation...founded” (D1). “Cost per Mile” is adjusted for 4% inflation and “Age of restoration body” is from (2009-D1).



4. Contributions

“In very round figures... the value of restoration work funded since the estimate....” is:-

| | 2009 (£'000) |
|---|-----------------|
| (B4) Voluntary contributions and labour | 7,743 (11%) |
| (B5) Government/Local Authorities/HLF | 59,169 (87%) |
| (B6) Commercial sponsorship/development | 802 (1%) |

“In very round figures... the value of restoration work funded in the last three years...” is:-

| | 2009 (£'000) | 2002 (£'000) | 1995 (£'000) |
|---|-----------------|-----------------|-----------------|
| (B7) Voluntary contributions and labour | 3,379 (13%) | 3,120 (5%) | 1,888 (23%) |
| (B8) Government/Local Authorities/HLF | 22,421 (84%) | 51,086 (86%) | 6,111 (75%) |
| (B9) Commercial sponsorship/development | 768 (3%) | 5,215 (9%) | 110 (1%) |

5. Demographics

5.1. The total “approximate population living within 5 miles of the route of the waterway” is 19,400,000 (C1). [2002: 20,800,000] [1995:10,200,000]. 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” (C2) gives the total unemployment within 5 miles of waterways being restored as 803,000 [2002: 789,000]. Again, there is a degree of ‘double-counting’.

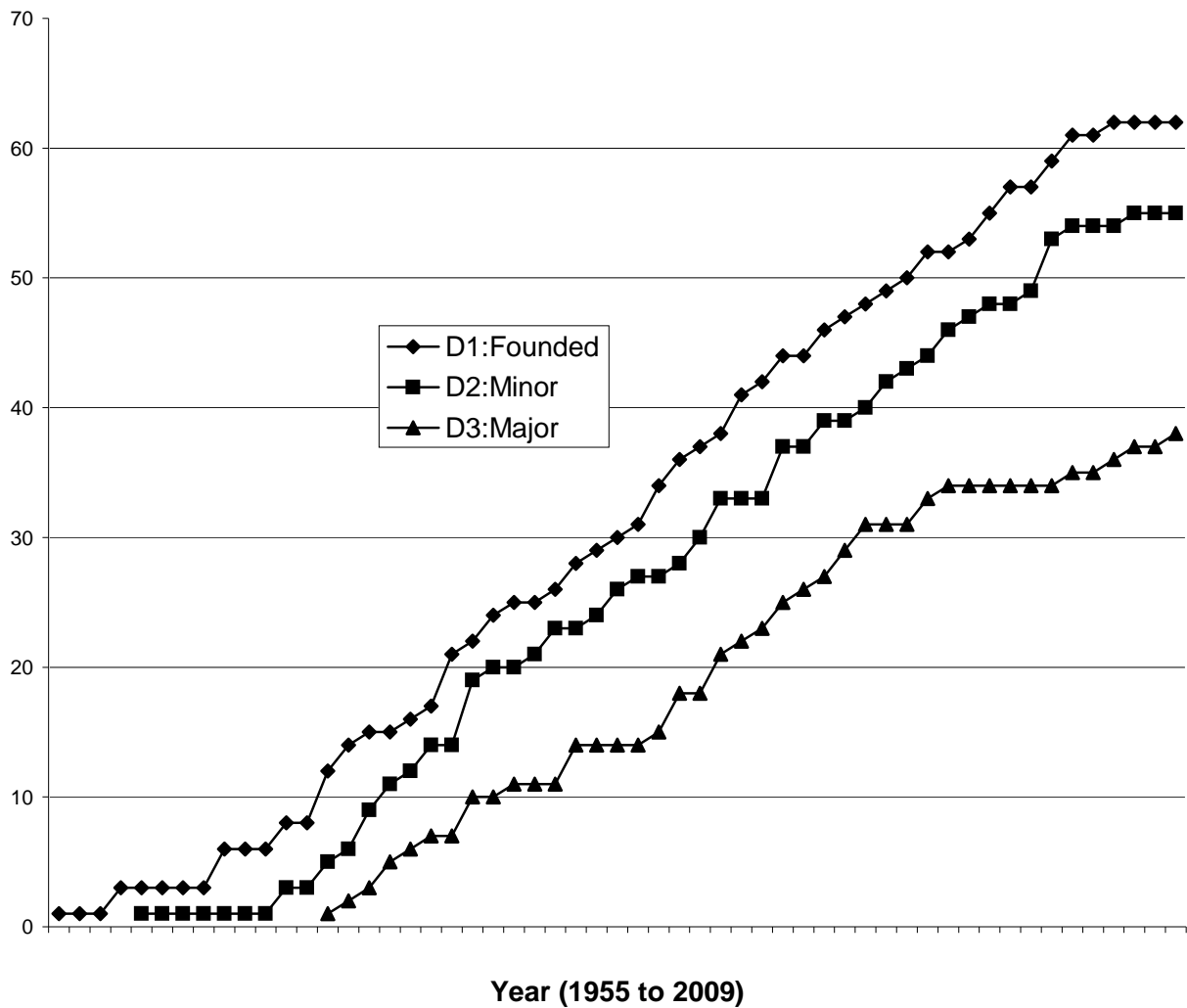
5.3. Waterway “lengths that are navigable, or proposed to be, that can be described by each of the following” (C3 to C7) are:-

| | 2009 | 2002 | 1995 |
|--------------------------|------------|------|------|
| (C3) Derelict industrial | 30m (3%) | 2% | 2% |
| (C4) Industrial | 41m (4%) | 3% | 5% |
| (C5) Urban | 77m (7%) | 5% | 4% |
| (C6) Suburban | 101m (9%) | 12% | 10% |
| (C7) Rural | 859m (78%) | 78% | 78% |

5.4. Schemes totalling 283 miles (25%) [2002: 334 miles (33%)] [1995:42%] lie partly or wholly “within an area that has EU assisted status” (C8).

6. Growth and Membership

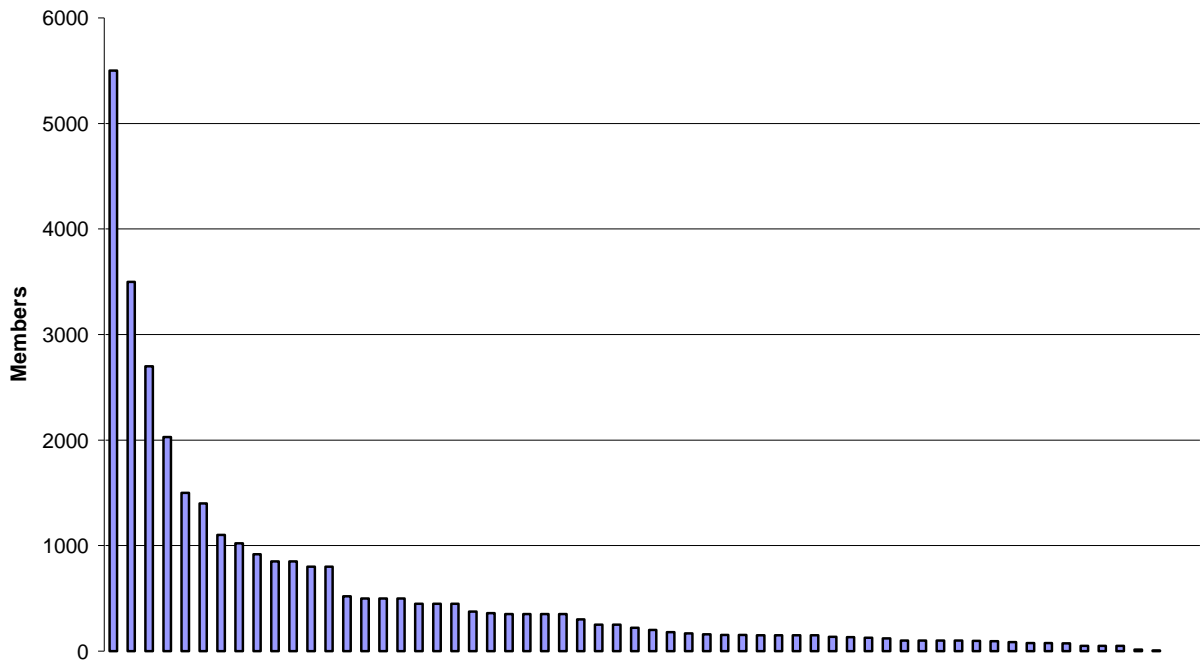
- 6.1. The graph below shows the total number of restoration bodies that were, in each year:
 (D1) in existence
 (D2) undertaking towpath clearance, reed pulling or minor repair
 (D3) undertaking major work leading to navigable standards



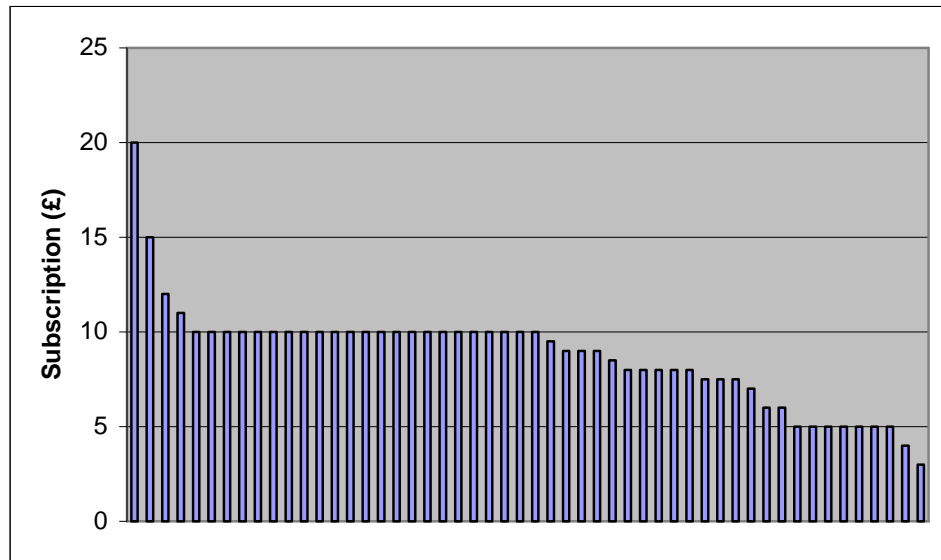
- 6.2. (D5) The total membership of restoration bodies responding to this survey is 32,700 (counting families as two and companies or societies as four). [2002: 27,400] [1995:17,398]

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. It should also be noted that many people are members of more than one waterway restoration body. So the total population of waterway restoration enthusiasts is less than this sum.

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



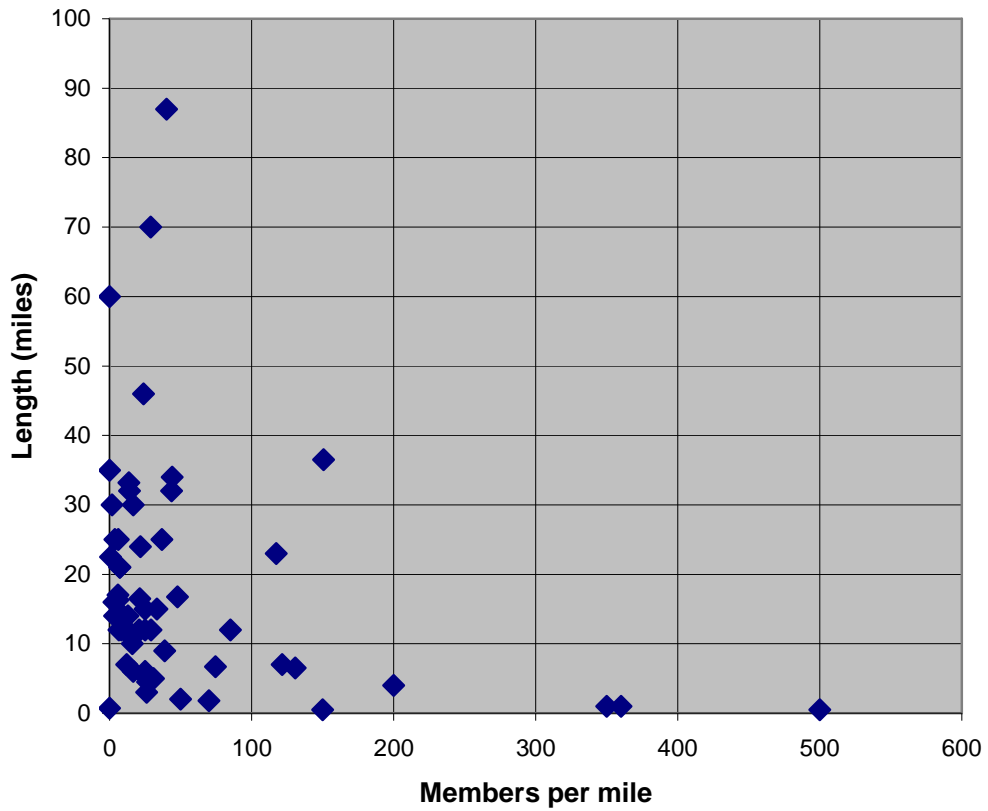
6.4. The “individual annual subscriptions” (D7) of each restoration body:-



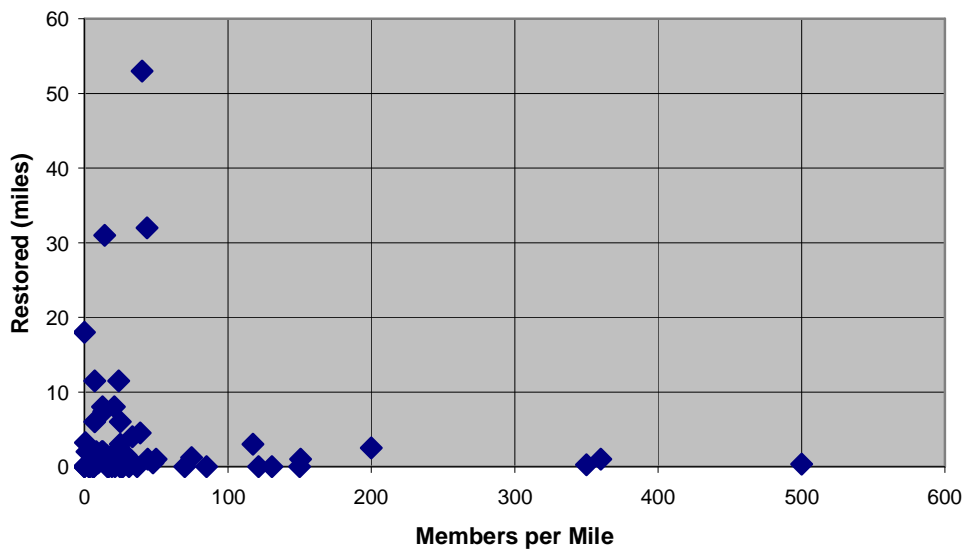
6.5. Total subscription income of all societies (D7*D5) is £329,000 [2002:£239,000 (£314,000*)] [1995:£117,000 (£154,000*)].

*The bracketed figure includes 4% inflation up to 2009.

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

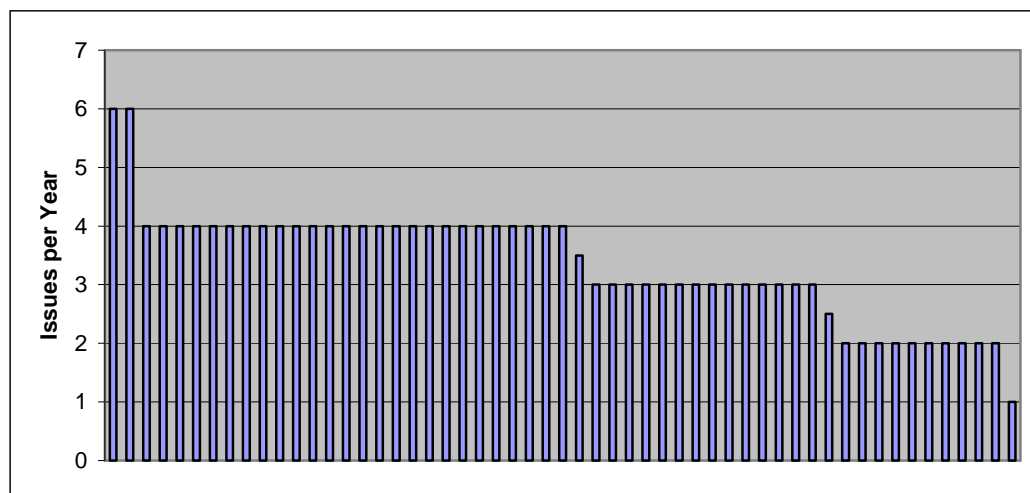


6.7. Number of members per mile (D5/A13) relative to waterway length restored or built (A5-A2+A8):-

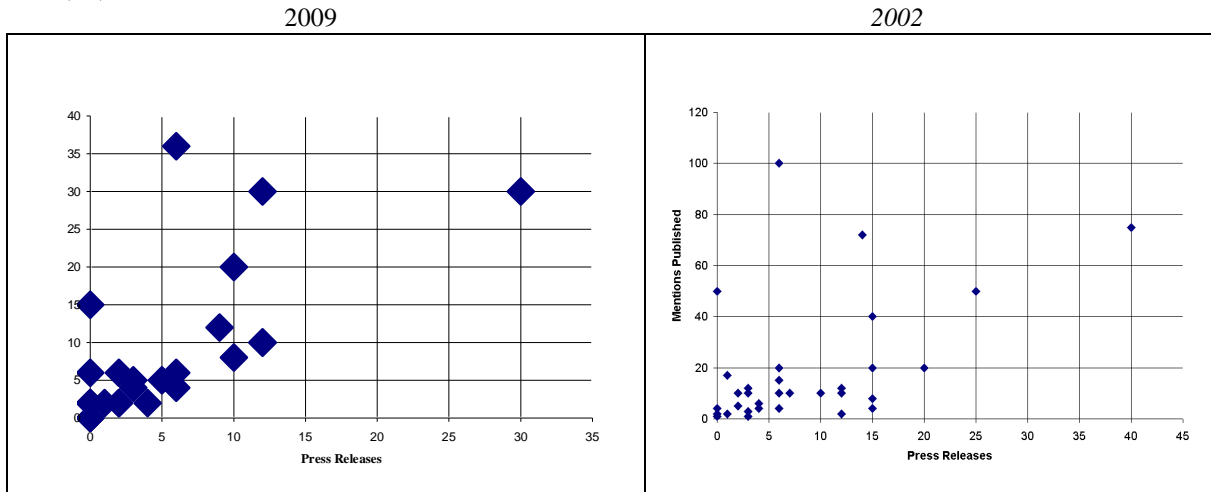


7. Activity and Publicity

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



7.6. The graphs 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).



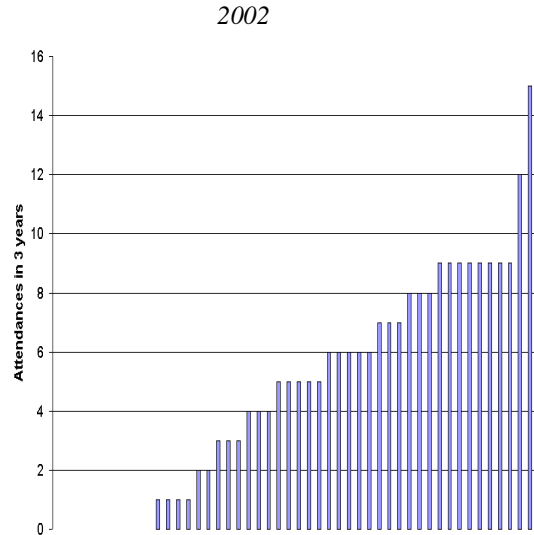
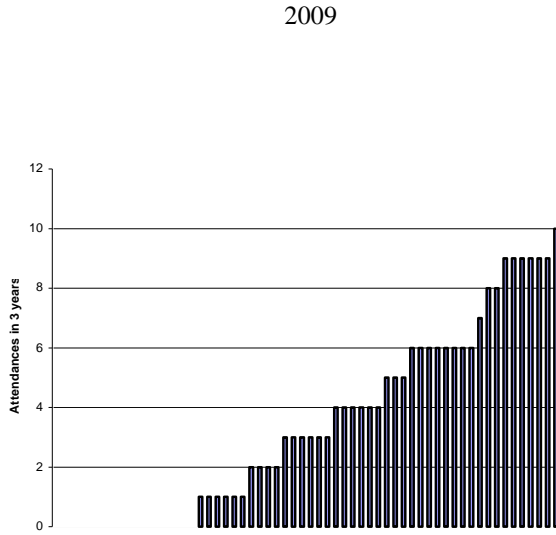
7.7. (E5) 20 “trip boats are operated at advertised times on at least twelve weekends per year”.
 [2002: 24] [1995: 20]

- | | |
|--|--|
| 07883 017 818 | Droitwich Canals Trust |
| 01243 377405 | Chichester Canal Society |
| 01246 280 660 + 01246 551 035 | Chesterfield Canal Trust |
| www.cotswoldcanals.com | Cotswold Canals Trust |
| 01380 721279 | Kennet & Avon Canal Trust |
| 01403 752403 | Wey & Arun Canal Trust |
| www.lancastercanaltrust.org.uk | Lancaster Canal Northern Reaches |
| 0845 803 5787 | River Stour Trust (Essex) |
| 01792 772776 | Neath & Tennant Canal Preservation Society |
| 01962 713564 | Basingstoke Canal |

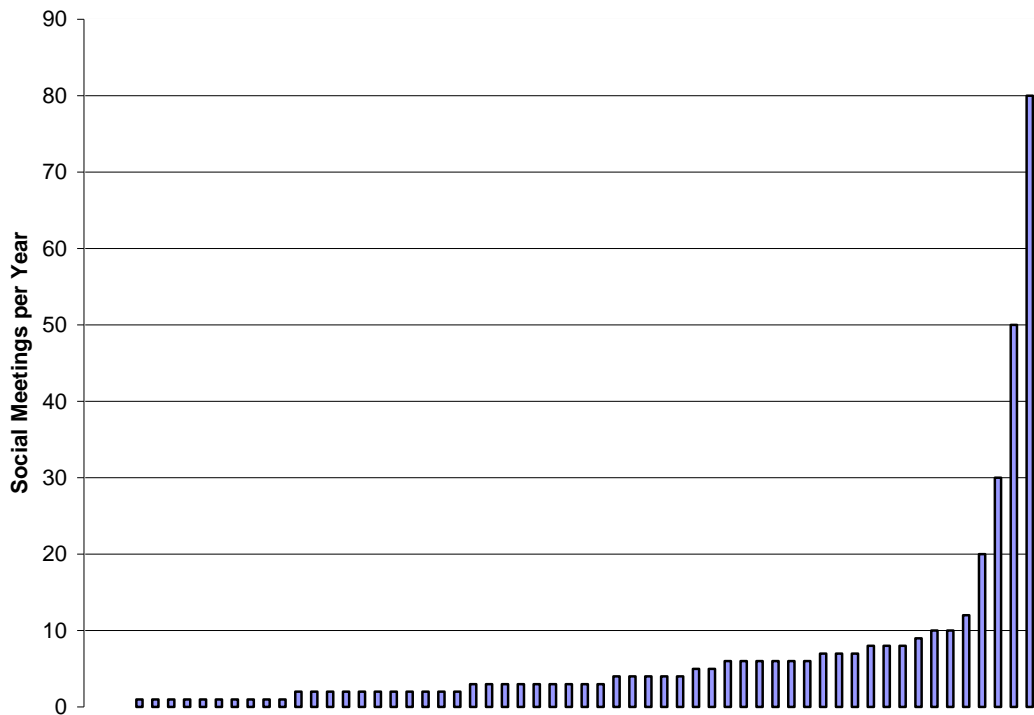
(E6) 9 societies “run a trip boat advertised for private party hire”. [2002: 12] [1995: 13]

7.8. (E14) 53 societies “have a standard publicity/membership application leaflet”. [2002: 42] [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.
 Total 206. [2002: 231]



7.10. The “number of social meetings for members held per year”(D6). (One bar per body).
 Total 391. [2002: 446]



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 | 2009 | | 2002 | | 1995 | |
|-----|---|------|----|------|----|------|----|
| | | No | % | No | % | No | % |
| a | Government Departments: DEFRA/DLTR | 38 | 58 | 34 | 65 | 31 | 76 |
| b | English Partnerships | 11 | 17 | 13 | 25 | 18 | 44 |
| c | Regional Development Agency | 35 | 53 | 27 | 52 | 14 | 34 |
| d | Country Land and Business Association (CLA) | 13 | 20 | 14 | 27 | 9 | 22 |
| e | National Farmers Union | 8 | 12 | 11 | 21 | 10 | 24 |
| f | Natural England [2002: <i>English Nature</i>] | 27 | 41 | 18 | 35 | 19 | 46 |
| g | Unused [2002: <i>Countryside Agency – now within NE</i>] | | | 15 | 29 | 21 | 51 |
| h | Regional Tourist Board | 21 | 32 | 20 | 38 | 24 | 59 |
| i | Regional Council for Sport & Recreation | 10 | 15 | 5 | 10 | 13 | 32 |
| j | Ramblers Association | 23 | 35 | 13 | 25 | 17 | 41 |
| k | Local Boat Clubs | 24 | 36 | 24 | 46 | 21 | 51 |
| l | Cyclists Touring Club/SUSTRANS (or equivalent) | 19 | 29 | 11 | 19 | 9 | 22 |
| m | British Canoe Union (or local equivalent) | 23 | 35 | 8 | 15 | 21 | 51 |
| n | Big Lottery Fund [2002: <i>Heritage Lottery Fund</i>] | 26 | 39 | 26 | 50 | | |
| o | ENTRUST | 19 | 29 | 21 | 40 | | |
| F3 | Environment Agency | 43 | 65 | 44 | 84 | 28 | 68 |

8.2. 49 bodies (74%) know “the names and addresses of the owners of all land on their route” (F1).
[2002: 39 (75%)] [1995: 23 (56%)]

37 bodies (57%) “have plans/details of all the main services crossing the” waterway (F2).
[2002: 26 (50%)] [1995: 14 (34%)]

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

| | 2009 | 2002 | 1995 |
|-------------|------|------|------|
| Volunteers | 1 | 3 | 3 |
| Consultants | 32 | 15 | 13 |
| BW/LA’s | 12 | 18 | 8 |
| None | 21 | 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 seven respondents [2002: *eight*] (to whom we are very grateful, since it at least allows a comparison by percentages). Twenty-three respondents [2002: *eighteen*] listed their estimated order of importance of benefits.

| Benefit Source | % of total additional local income | | | Overall order of estimated importance | | |
|----------------|------------------------------------|------|------|---------------------------------------|------|------|
| | 2009 | 2002 | 1995 | 2009 | 2002 | 1995 |
| (G2) Boating | 47 | 30 | 14 | 1 | 1 | 1 |
| (G3) Fishing | 3 | 10 | 10 | 4 | 4 | 4 |
| (G4) Cycling | 8 | 8 | 9 | 5 | 5 | 6 |
| (G5) Walking | 8 | 8 | 20 | 2 | 3 | 3 |
| (G6) Informal | 27 | 39 | 28 | 3 | 2 | 2 |
| (G7) Other | 7 | 4 | 19 | 7 | 6 | 5 |

Total financial benefits of £63,767,000 per year were reported by 15 respondents whose schemes totalled 207 miles, giving an average annual benefit per mile of £308,000. [2002: £58,900,000: 18: 240m: £245,000/m/yr]

8.5. 35 schemes [2002: 30] reported the total “expected number of riparian developments created since restoration started” (to the end of the restoration) as:-

| | | 2009 | 2002 | 1995 |
|-----|--------------------------------|------|------|------|
| G8 | Hire bases | 37 | 30 | 27.5 |
| G9 | Off line moorings | 2076 | 1138 | 1115 |
| G10 | Waterside housing units | 5092 | 2702 | 1074 |
| G11 | Waterside shops/pubs | 94 | 100 | 51 |
| G12 | Other water-related businesses | 81 | 60 | 40 |

8.6. 23 projects estimated 11,300 “full-time equivalent jobs” would be generated by their restorations. (G13). [2002: 25 projects, 16,400 fte jobs] [1995: 10 projects, 2800 fte jobs]

8.7. 296 miles of waterway is presently “covered by a fishing rental/fishing management agreement” (E11) and 79 more miles are planned (E12). [2002: 279 miles and 264 miles] [1995: “present coverage” 173 miles]

9. **Councils**

9.1. 154 (70%) of a total 104 first tier and 116 second tier local authorities have “stated in writing that they support the principle of restoration” (H3). [2002: 73%] [1995: 76%]

9.2. 643 miles is “specifically protected in the local plan from developments likely to hinder restoration” (H4). That is 58% of the total length proposed for restoration. [2002: 65%] [1995: 73%]

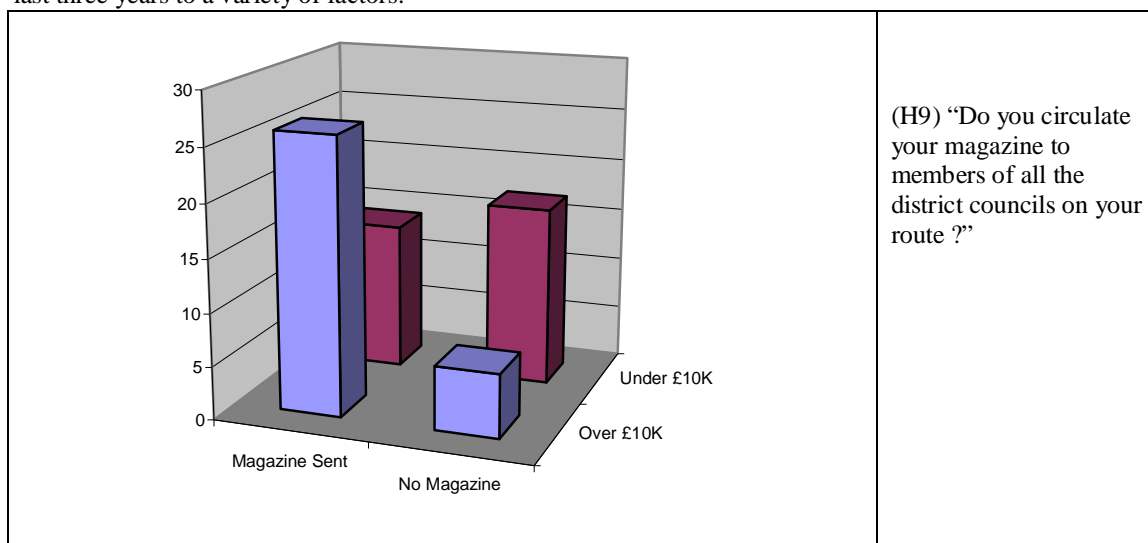
9.3. 85 councils (39%) have “provided direct assistance to the restoration in the form of technical advice, plant, materials or finance worth over £10,000 in the last three years” (H5). [2002: 39%] [1995: 42%]

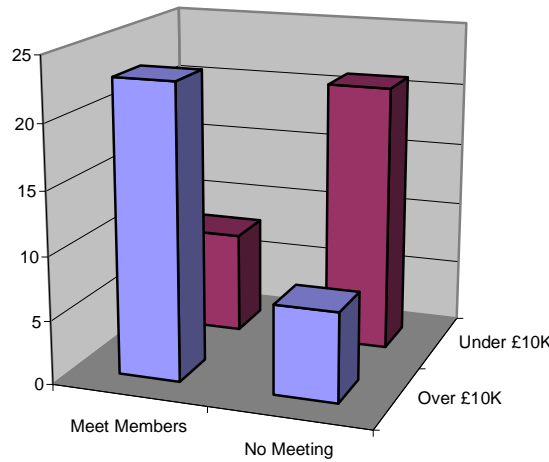
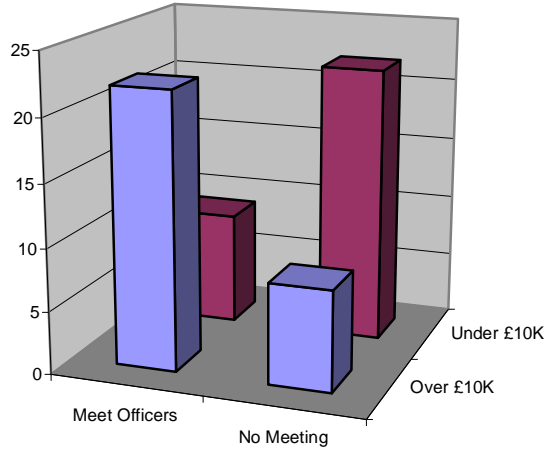
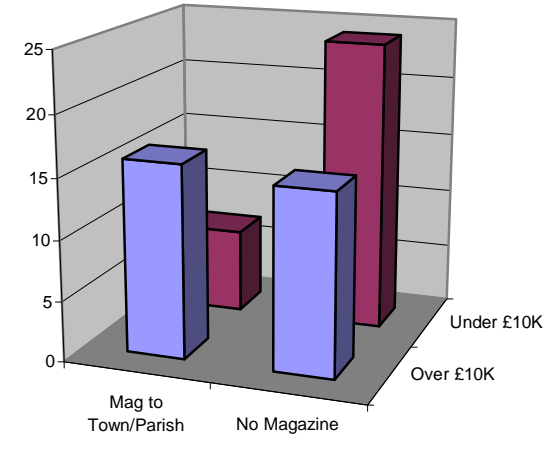
9.4. 104 (47%) of “councils are members of a trust or similar body established to promote restoration” (H6). [2002: 55%] [1995: 25%]

9.5. 12 “councils already fund maintenance” of 126 miles “of restored waterway” (H7). [2002: 14 for 155 miles]

9.6. 3 councils have “given a written undertaking to fund maintenance” of 18 more miles (H8). [2002: 8 miles]

9.7. 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 'Meet Members' bars are blue, and the 'No Meeting' bars are maroon. For 'Under £10K', 'Meet Members' is approximately 24 and 'No Meeting' is approximately 13. For 'Over £10K', 'Meet Members' is approximately 7 and 'No Meeting' is approximately 23.</p> <table border="1"> <thead> <tr> <th>Meeting Status</th> <th>Under £10K</th> <th>Over £10K</th> </tr> </thead> <tbody> <tr> <td>Meet Members</td> <td>~24</td> <td>~7</td> </tr> <tr> <td>No Meeting</td> <td>~13</td> <td>~23</td> </tr> </tbody> </table> | Meeting Status | Under £10K | Over £10K | Meet Members | ~24 | ~7 | No Meeting | ~13 | ~23 | <p>(H10) “Do you formally meet at least twice a year with the members of all your riparian councils ?”</p> |
|---|-----------------|------------|-----------|--------------------|-----|-----|-------------|-----|-----|--|
| Meeting Status | Under £10K | Over £10K | | | | | | | | |
| Meet Members | ~24 | ~7 | | | | | | | | |
| No Meeting | ~13 | ~23 | | | | | | | | |
|  <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 'Meet Officers' bars are blue, and the 'No Meeting' bars are maroon. For 'Under £10K', 'Meet Officers' is approximately 23 and 'No Meeting' is approximately 13. For 'Over £10K', 'Meet Officers' is approximately 8 and 'No Meeting' is approximately 24.</p> <table border="1"> <thead> <tr> <th>Meeting Status</th> <th>Under £10K</th> <th>Over £10K</th> </tr> </thead> <tbody> <tr> <td>Meet Officers</td> <td>~23</td> <td>~8</td> </tr> <tr> <td>No Meeting</td> <td>~13</td> <td>~24</td> </tr> </tbody> </table> | Meeting Status | Under £10K | Over £10K | Meet Officers | ~23 | ~8 | No Meeting | ~13 | ~24 | <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> |
| Meeting Status | Under £10K | Over £10K | | | | | | | | |
| Meet Officers | ~23 | ~8 | | | | | | | | |
| No Meeting | ~13 | ~24 | | | | | | | | |
|  <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 'Mag to Town/Parish' bars are blue, and the 'No Magazine' bars are maroon. For 'Under £10K', 'Mag to Town/Parish' is approximately 17 and 'No Magazine' is approximately 12. For 'Over £10K', 'Mag to Town/Parish' is approximately 15 and 'No Magazine' is approximately 26.</p> <table border="1"> <thead> <tr> <th>Magazine Status</th> <th>Under £10K</th> <th>Over £10K</th> </tr> </thead> <tbody> <tr> <td>Mag to Town/Parish</td> <td>~17</td> <td>~15</td> </tr> <tr> <td>No Magazine</td> <td>~12</td> <td>~26</td> </tr> </tbody> </table> | Magazine Status | Under £10K | Over £10K | Mag to Town/Parish | ~17 | ~15 | No Magazine | ~12 | ~26 | <p>(H12) “Do you send your magazine to all the members of town and parish councils on your route ?”</p> |
| Magazine Status | Under £10K | Over £10K | | | | | | | | |
| Mag to Town/Parish | ~17 | ~15 | | | | | | | | |
| No Magazine | ~12 | ~26 | | | | | | | | |

10. Features of the waterways

- 10.1. 921 miles of proposed navigable waterway on 50 schemes “will join different navigable waterways that form part of the ‘interconnected national system’ (I1). [2002: 797 miles] [1995: 492 miles]
- 10.2. 24 proposed connections are to tidal water (I4). [2002: 22]
- 10.3. (I5) Largest craft sizes are:-
- | | 2009 | 2002 |
|----------------|-----------|---------------------|
| Seagoing | 43 miles | 15 miles |
| Broad (12ft +) | 633 miles | 553 miles |
| Narrow (7ft+) | 414 miles | 439 miles |
| Tub | 14 miles | 3 miles (inc canoe) |
| Canoe | 5 miles | |
- 10.4. 1 mile “total length of waterway lies within a designated national park”(J1).
[2002: 7 miles] [1995: 7 miles]
- 10.5. 113 miles “total length of waterway lie within Areas of Outstanding Natural Beauty” (J2).
[2002: 114 miles] [1995: 23 miles]
- 10.6. 144 miles “total length of waterway lie alongside conservation areas” (J3).
[2002: 150 miles] [1995: 109 miles]
- 10.7. 215 “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).
[2002: 223] [1995: 116]
- 10.8. 67 “Buildings directly adjacent to the waterway are listed Grade 1 or Grade 2*” (J5).
[2002: 51] [1995: 71]
- 10.9. 521 “Buildings directly adjacent to the waterway are listed Grade 2” (J6).
[2002: 370] [1995: 89]
- 10.10. 40,200 sq ft “of building (over 100 years old) has been restored as part of the restoration” (J9).
[2002: 46,000 sq ft]
- 10.11. 137 miles of waterway surveyed “is, or lies directly alongside, a SSSI, Ramsar or SAC” (J7).
[2002: 91 miles] [1995: 91 miles]
- 10.12. 55 miles “is, or lies directly alongside, a SBI” (J8).
[2002: 47 miles] [1995: 18 miles]
- 10.13. 47 acres “of designated nature reserve have been created as part of the restoration” on seven sites (J10).
[2002: 9 acres: 5 sites] [1995: 33 acres]