

INLAND WATERWAYS ASSOCIATION RESTORATION COMMITTEE WATERWAY RESTORATION SCHEMES SURVEY 2009 ANALYSIS

1. Background

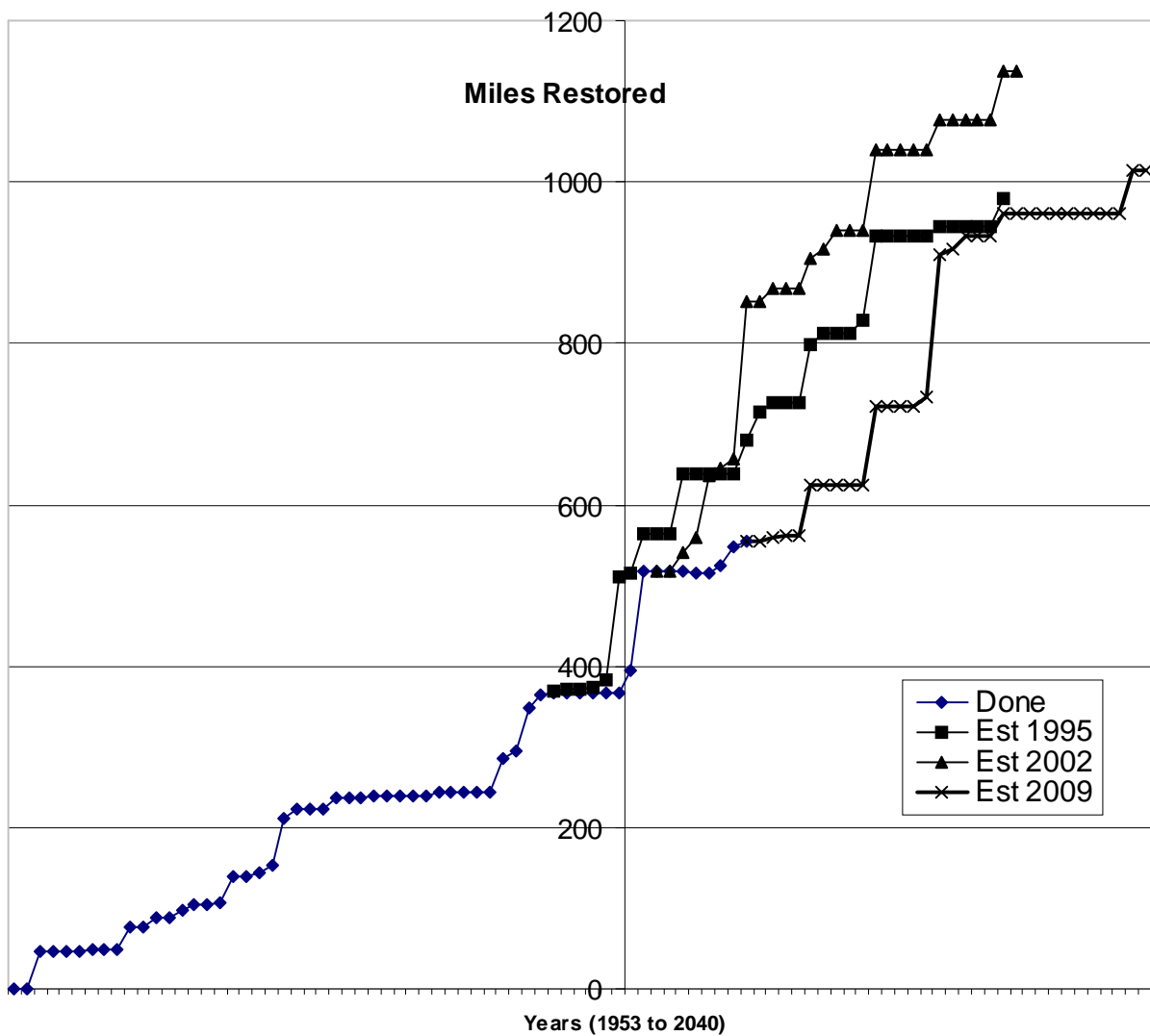
- 1.1. In June 2009 a survey questionnaire (nearly identical to that of previous surveys made in 2002 and 1995) was sent to 70 bodies responsible for the restoration (or construction) of navigations. 58 bodies responded. [2002:53] [1995:41]. Responses in 2009 cover 62 navigations [2002:60] that, in total, 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

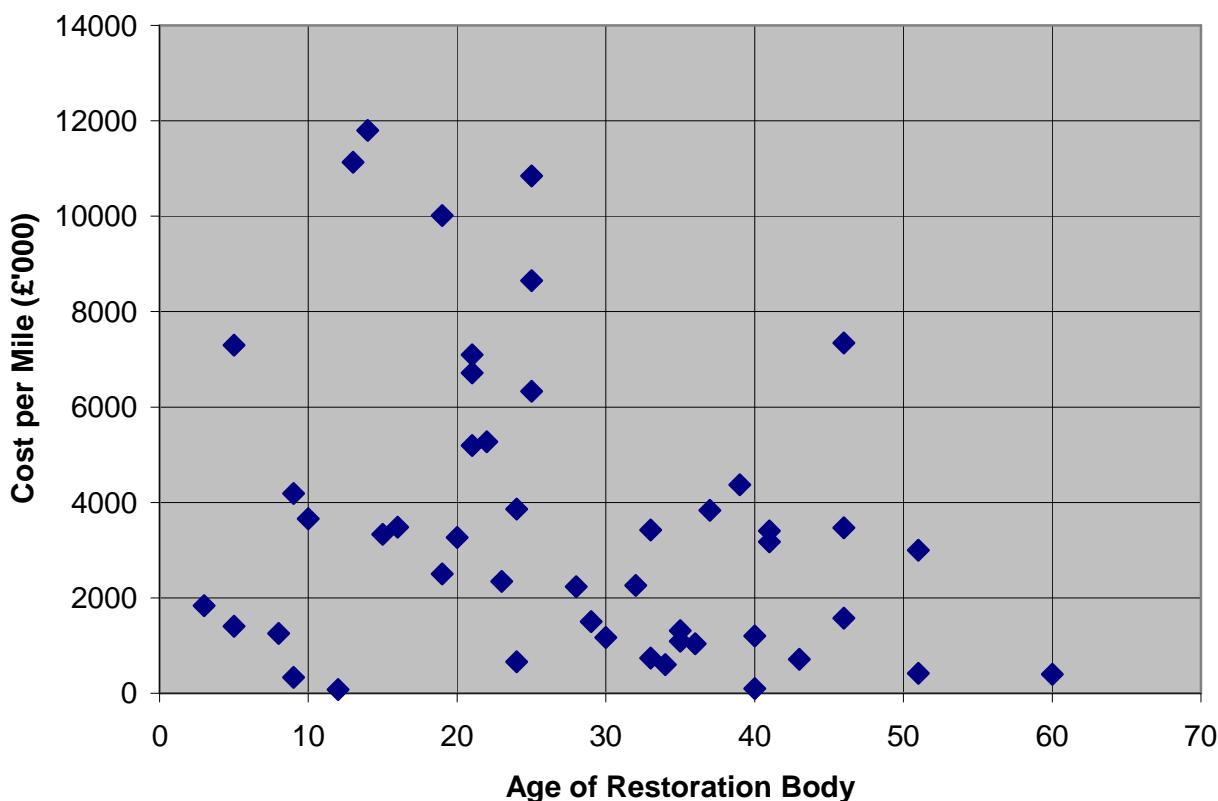
3.1. The “estimated total cost of proposed restoration of the waterway were it all to be done by contractor” (B1A) has been modified for inflation since “the year in which the estimate was made” (B1B) using a 4% compound rate. This gives a mean 2009 estimated cost for each mile that is “proposed should 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’.

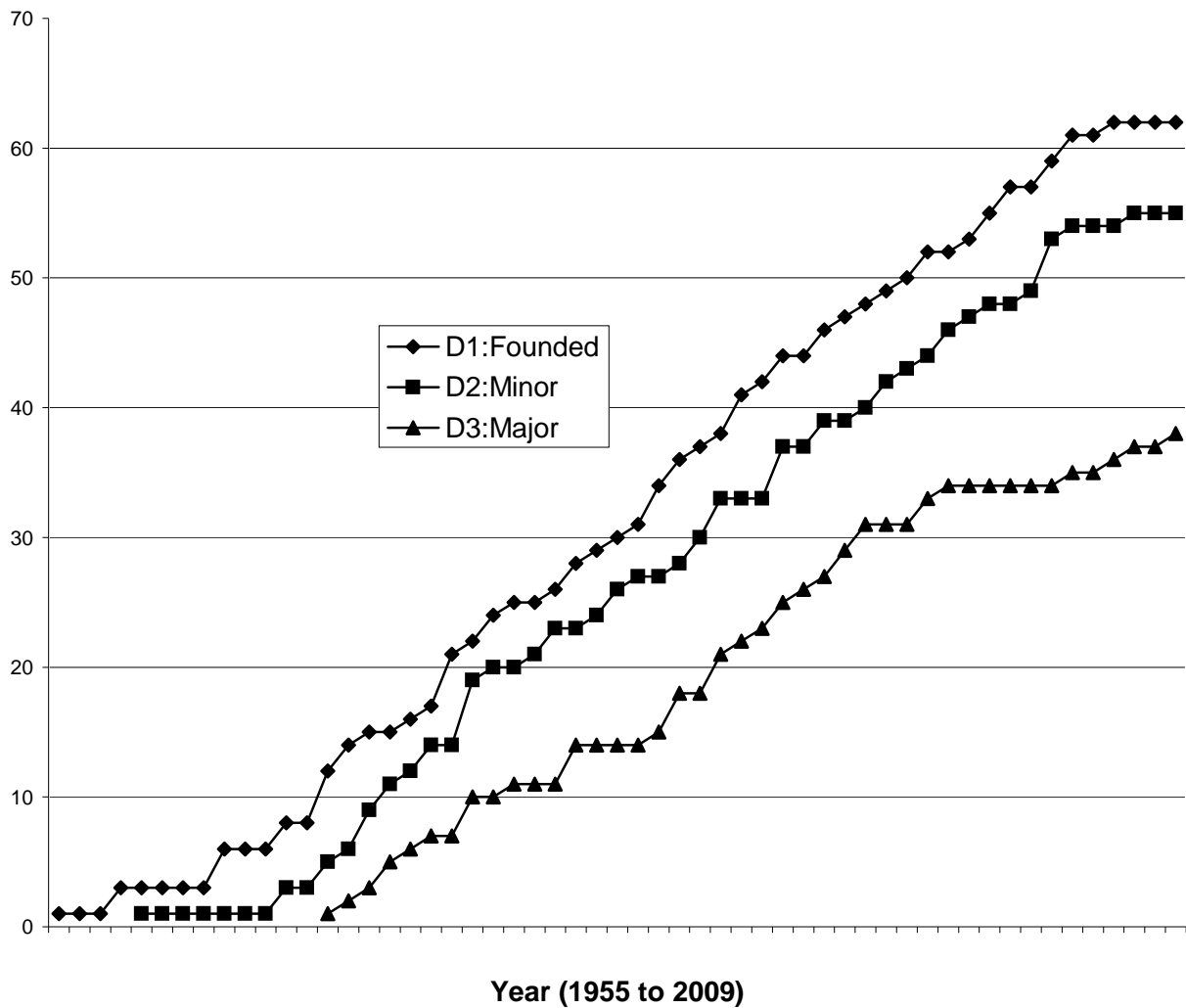
5.3. Waterway “lengths that are navigable, or proposed to be, that can be described by each of the following” (C3 to C7) are:-

	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

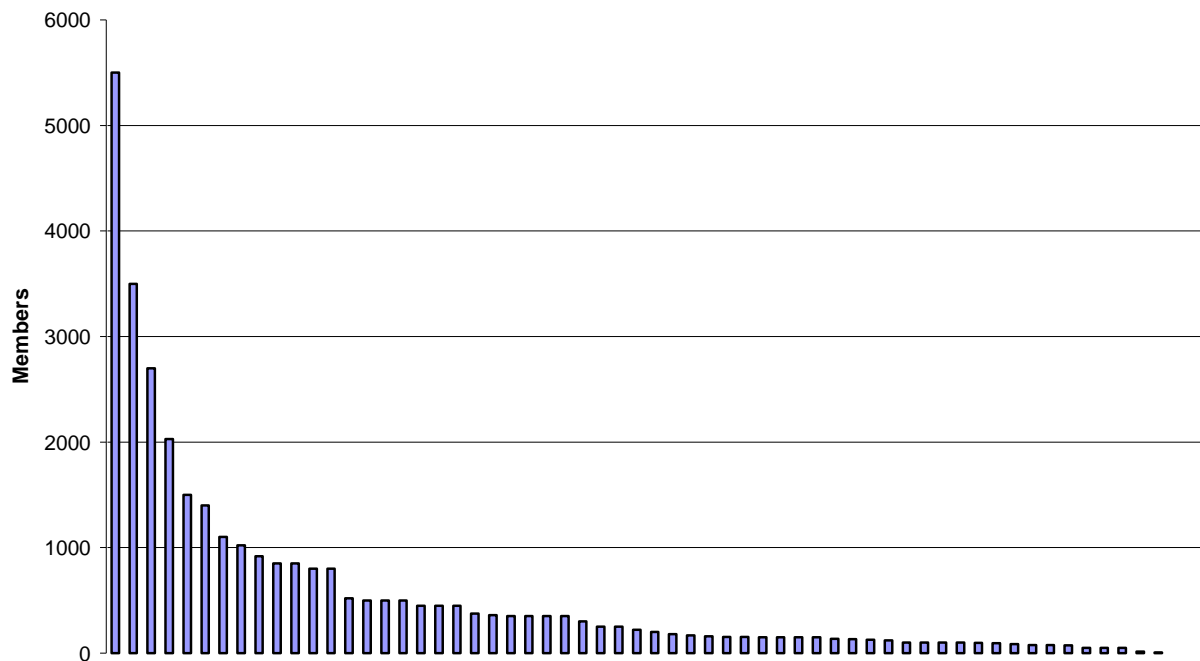
- 6.1. The graph below shows the total number of restoration bodies that were, in each year:
 (D1) in existence
 (D2) undertaking towpath clearance, reed pulling or minor repair
 (D3) undertaking major work leading to navigable standards



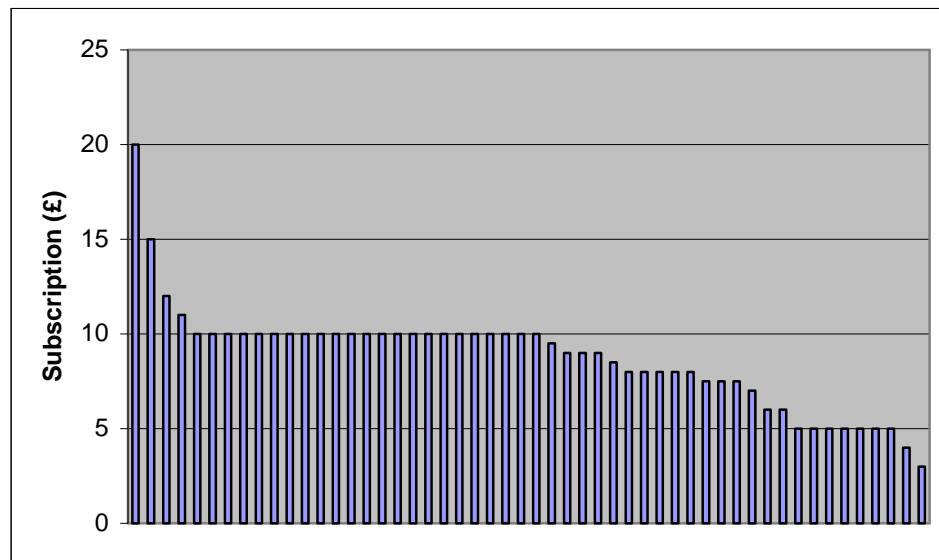
- 6.2. (D5) The total membership of restoration bodies responding to this survey is 32,700 (counting families as two and companies or societies as four). [2002: 27,400] [1995:17,398]

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:-



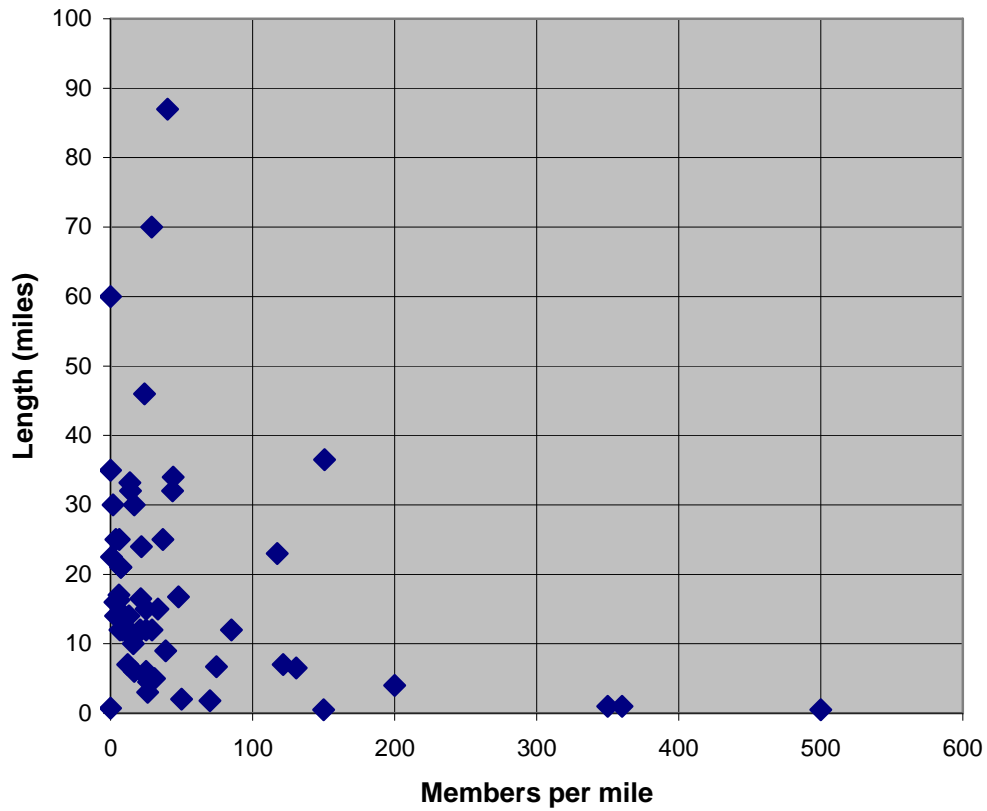
6.4. The “individual annual subscriptions” (D7) of each restoration body:-



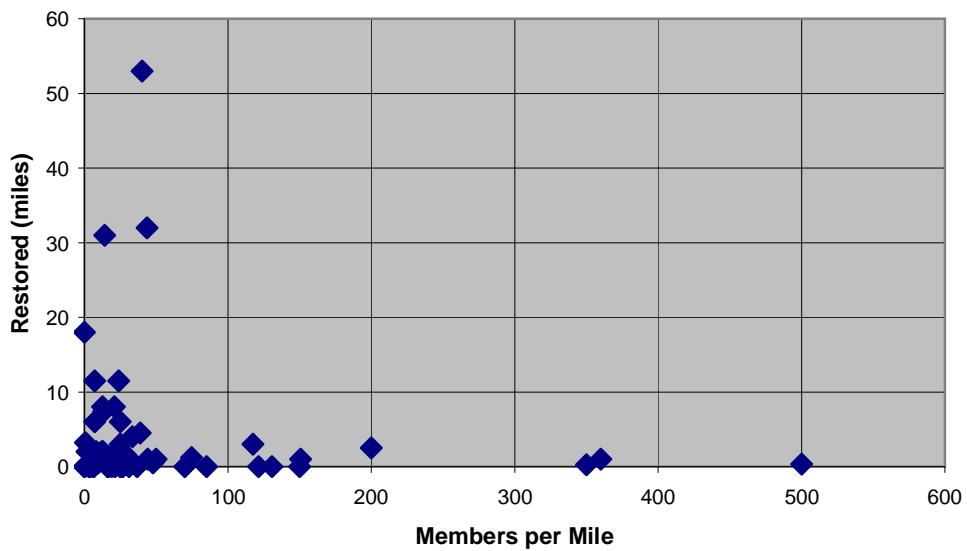
6.5. Total subscription income of all societies (D7*D5) is £329,000 [2002:£239,000 (£314,000*)] [1995:£117,000 (£154,000*)].

*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):-

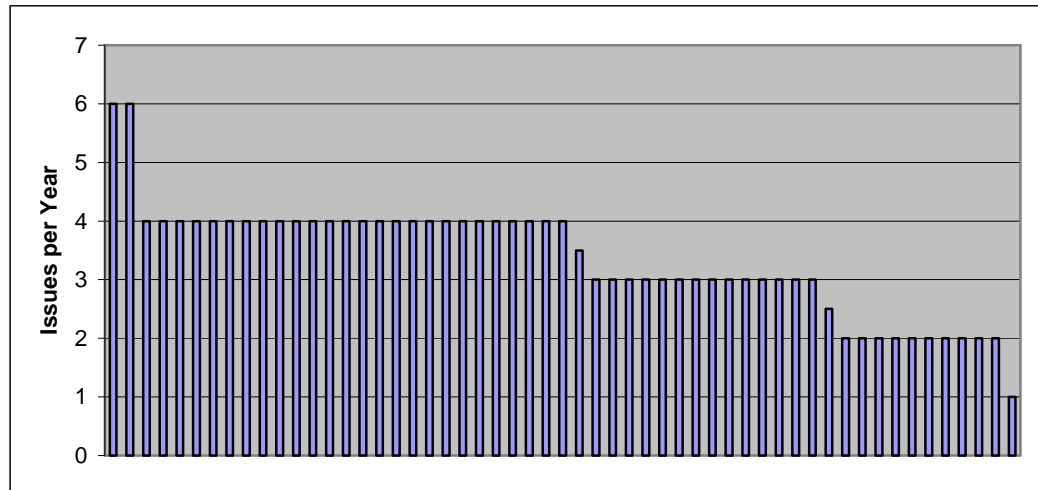


6.7. Number of members per mile (D5/A13) relative to waterway length restored or built (A5-A2+A8):-



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):-



7.2. (D11) 19 society magazines “take paid ads other than small ads”. [2002: 20] [1995: 14]
 (D12) 23 magazines have “one or more pages in full colour” in “every issue”. [2002: 5] [1995: 1]
 (D10) Magazines range from 1 to 52 “pages in a typical issue”.
 (D10 * D9) The total number of different pages created per year is 3420. [2002:3200] [1995:2400]

7.3. (D13) 22 “full-time-equivalent staff are employed by” responding bodies “or their subsidiary companies”.
 [2002: 13] [1995: 20]
 (D14) 28 bodies “have a business plan”. [2002: 17] [1995: 11]
 (D15) 31 bodies “have an organisational structure”. [2002: 29] [1995: 17]

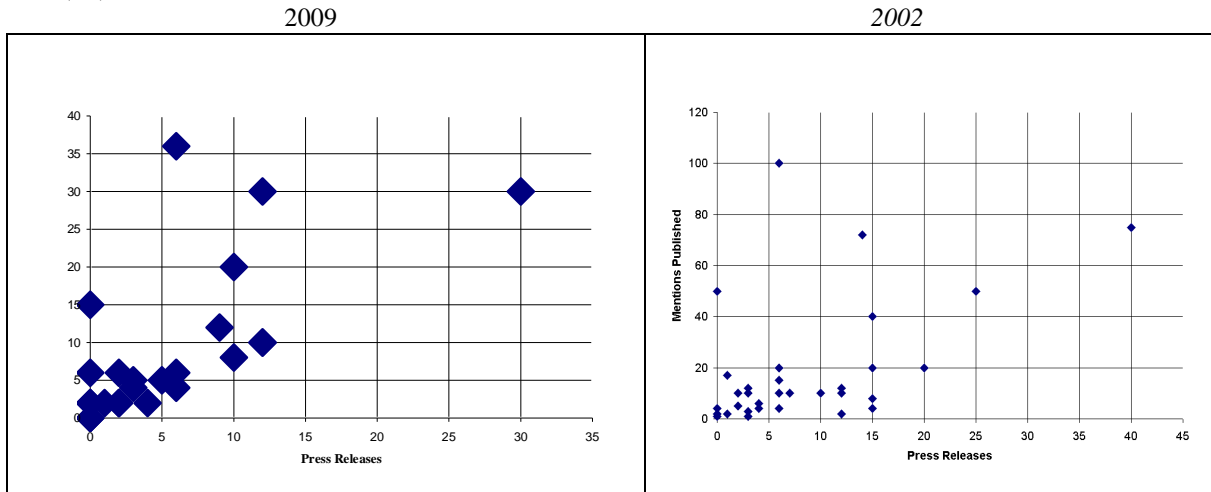
7.4. (D16) “Most restoration work is done by”:-
 1% [2002: 3%] a subsidiary limited company
 33% [2002: 26%] a formal partnership or restoration trust comprising LAs, BW, EA, others
 6% [2002: 6%] local authorities alone
 4% [2002: 5%] navigation authority or company of proprietors
 43% [2002: 44%] “your organisation”
 15% [2002: 15%] others

Those restorations in which ‘The Waterways Trust’ was a leading partner have all included it in ‘a formal partnership or restoration trust’.

7.5. (E1) 237 public meetings have been “arranged and advertised in the last three years”.
 [2002: 195] [1995: 130]

(E2) 163 “information/interpretation boards have been erected in the last three years”.
 [2002: 133] [1995:71]

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).



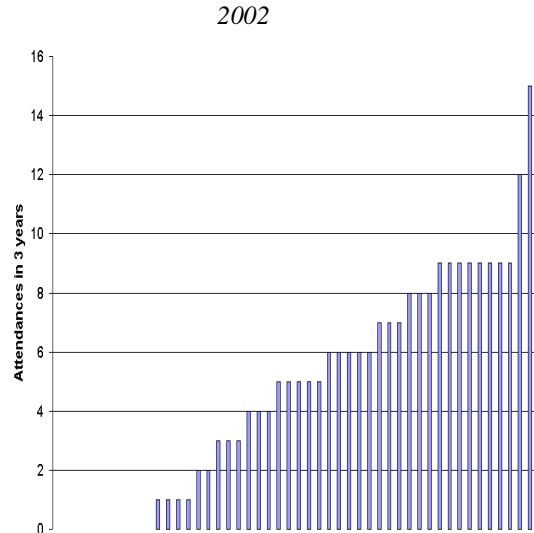
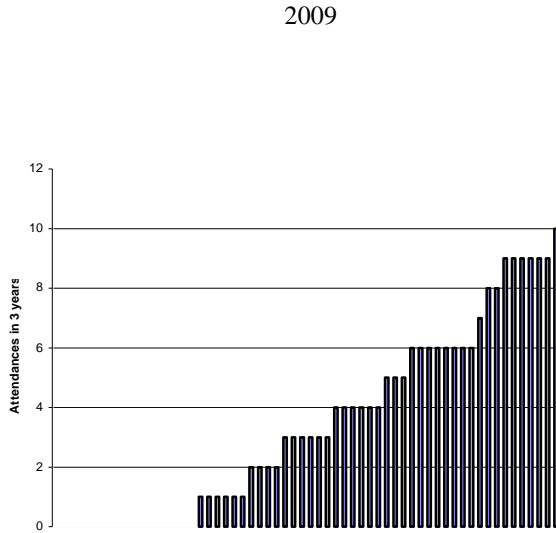
7.7. (E5) 20 “trip boats are operated at advertised times on at least twelve weekends per year”. [2002: 24] [1995: 20]

- | | |
|--|--|
| 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 |

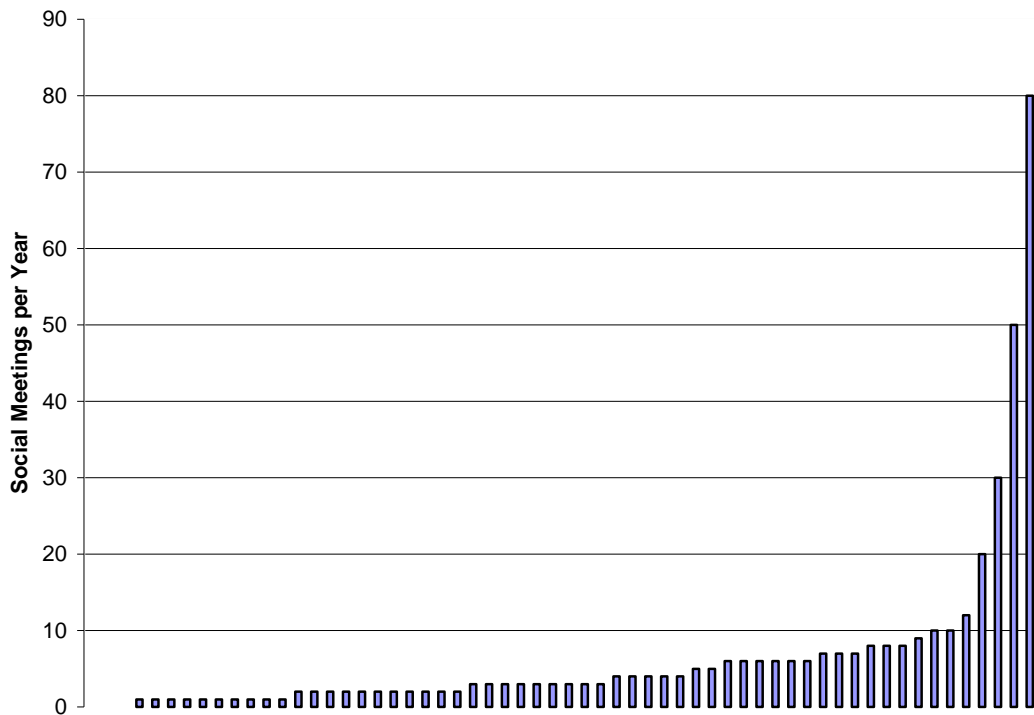
(E6) 9 societies “run a trip boat advertised for private party hire”. [2002: 12] [1995: 13]

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%]

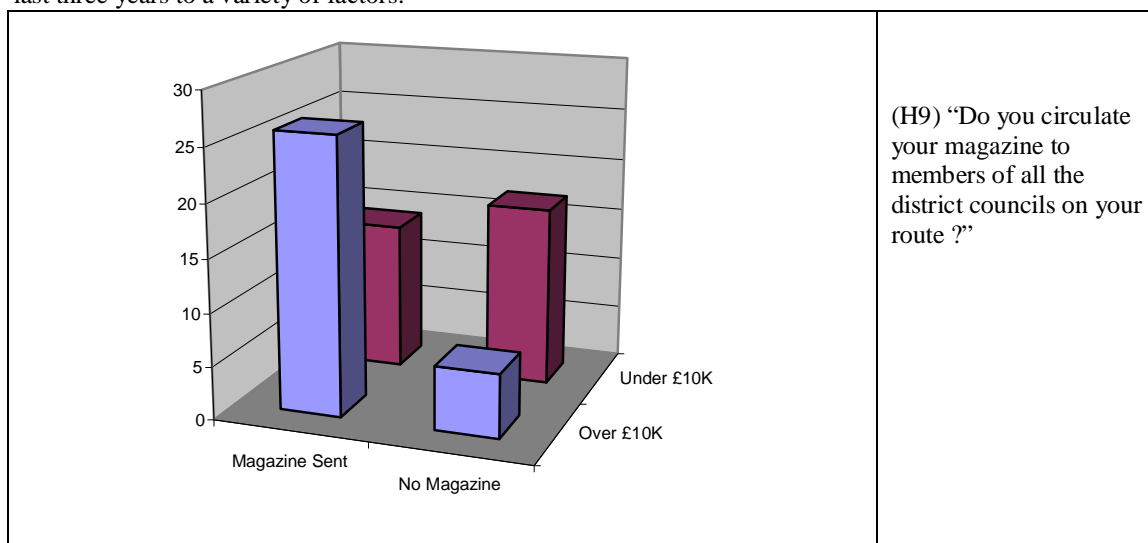
9.3. 85 councils (39%) have “provided direct assistance to the restoration in the form of technical advice, plant, materials or finance worth over £10,000 in the last three years” (H5). [2002: 39%] [1995: 42%]

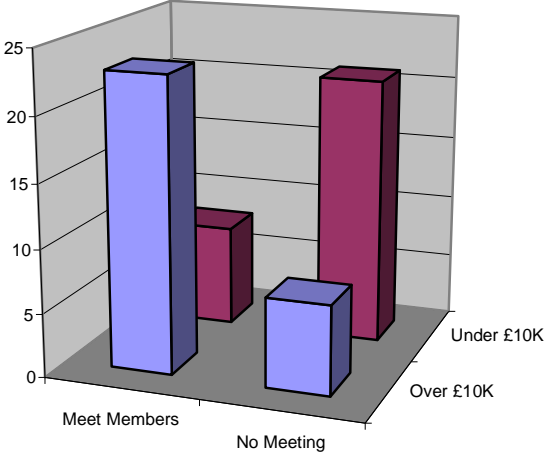
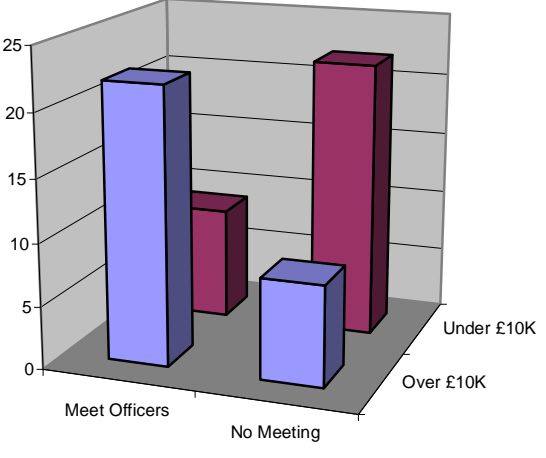
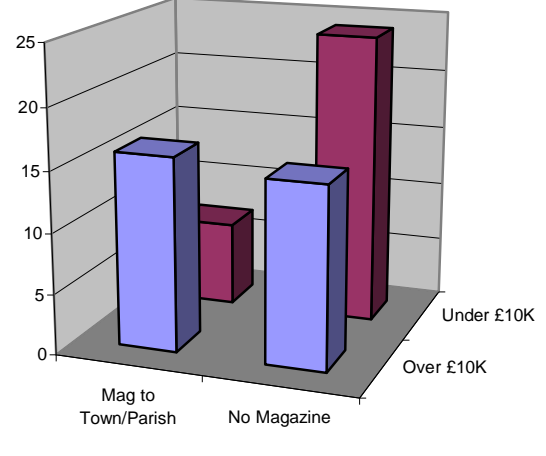
9.4. 104 (47%) of “councils are members of a trust or similar body established to promote restoration” (H6). [2002: 55%] [1995: 25%]

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'. Blue bars represent 'Meet Members' and red bars represent 'No Meeting'.</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>5</td> <td>23</td> </tr> </tbody> </table>	Meeting Status	Under £10K	Over £10K	Meet Members	24	7	No Meeting	5	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	5	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'. Blue bars represent 'Meet Officers' and red bars represent 'No Meeting'.</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>5</td> <td>24</td> </tr> </tbody> </table>	Meeting Status	Under £10K	Over £10K	Meet Officers	23	8	No Meeting	5	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	5	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'. Blue bars represent 'Mag to Town/Parish' and red bars represent 'No Magazine'.</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>12</td> </tr> <tr> <td>No Magazine</td> <td>15</td> <td>26</td> </tr> </tbody> </table>	Magazine Status	Under £10K	Over £10K	Mag to Town/Parish	17	12	No Magazine	15	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	12								
No Magazine	15	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]