

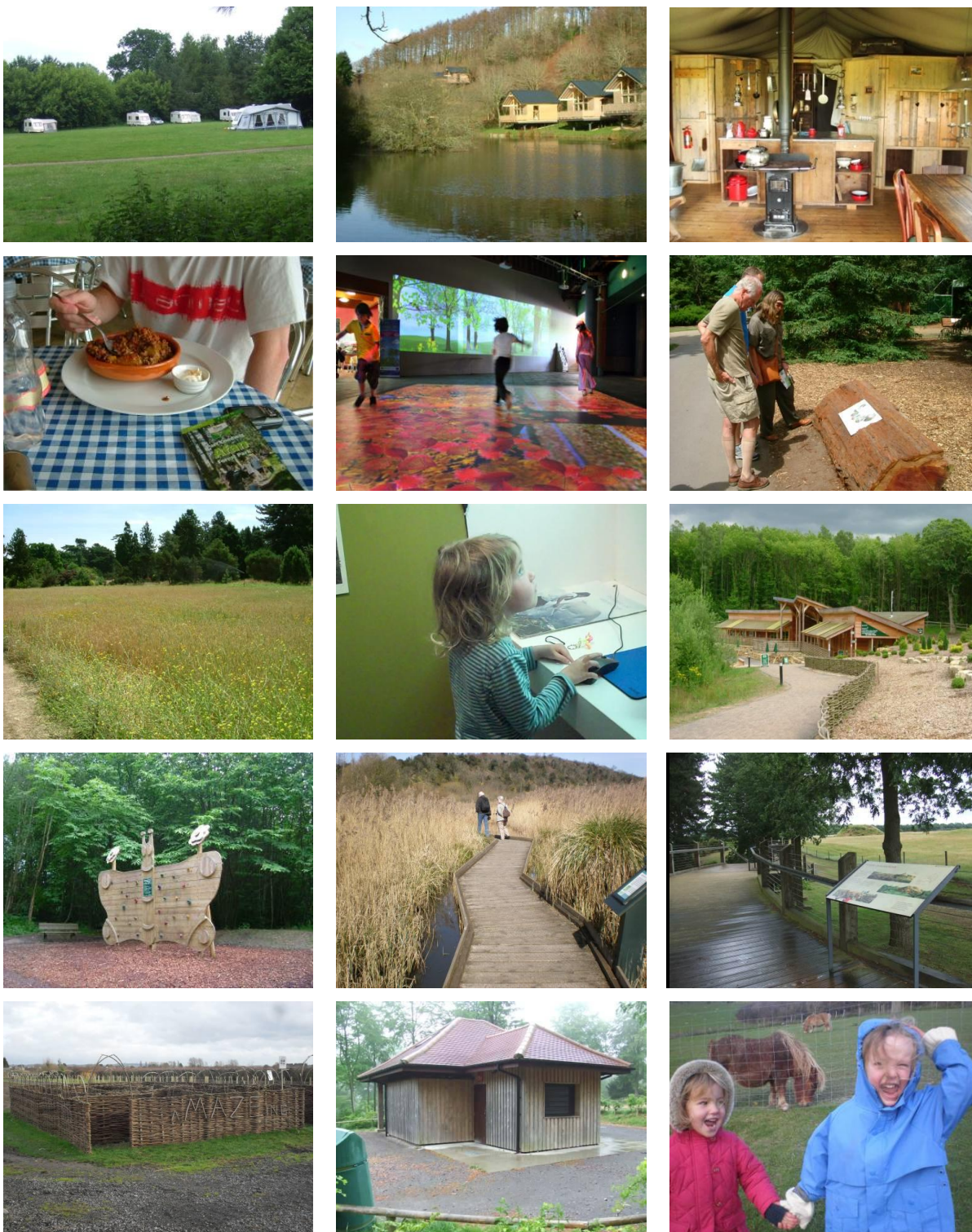
Basingstoke Canal the Vision

Final Technical Report



Prepared by
Planning Solutions Consulting Limited
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Planning Solutions Consulting Limited – creating engaging visitor and community experiences and accommodation products



A selection of leisure photos from the UK

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1.0 Introduction

This **Technical Report** is based upon our submission dated November 2011, Inception Meeting held on 12th December 2011 and Interim Report. The objective of the report is to create an informed vision for the future of the Basingstoke Canal for Surrey County Council and Hampshire County Council. The report is based upon a consultation exercise, market research and outline business review including identifying potential management options.

This Technical Report is structured as follows and provides the background context for the Vision and Action Plan which is presented as a separate document:

Section One, provides an introduction to our approach and sets out the report structure.

Section Two, Canal context, consists of a review of the current position, along with the current assets, wider Canal leisure linkages and a SWOT analysis which sets out the strengths, weaknesses, opportunities and threats associated with the Basingstoke Canal (from product, marketing/market and management perspectives).

Section Three, a consultation exercise has also been carried out amongst key stakeholders and interested parties to identify their aspirations and views on the future of the Basingstoke Canal.

Section Four, market review, demographic trends have been assessed within the UK and locally with focus being extended to the population living within the 30 and 60 minute drivetime contours of the Canal Visitor Centre.

This section also sets out the regional tourism trends and wider trends within the inland waterways sector. Trends in the volunteering sector have also been reviewed as it is felt there is a strong opportunity to increase the number of volunteers who engage with the Canal, contributing to its long term survival and improvement.

This has helped to set the project within the wider context of the market place.

Section Five, case examples have also been reviewed including the Wey and Godalming Navigations, the Lancaster Canal (Glasson Branch and the Ribble Link) and Huddersfield

Narrow Canal along with reference being extended to Ruyard Lake and the Montgomery Canal.

Section Six, set out potential management and governance parameters.

The Vision and Action Plan (please see separate report) sets out a future vision for the Basingstoke Canal with specific actions and a risk assessment. The vision incorporates our summary comments and key recommendations.

1.1 Vision Objectives

It is important to highlight that the key objectives for the Vision as set out in the project brief are as follows:-

- Active and vibrant engagement with the local communities and businesses through which it passes
- A balanced and proportionate strategy to deliver maximum recreational value
- Consensus around the measures needed to conserve its exceptional value for wildlife
- A robust capital investment strategy leading to medium term financial sustainability and the possibility of outsourcing management to a charitable trust in due course
- Opportunities for outdoor learning, apprenticeship and training
- A coordinated strategy to maximise developer contributions
- Recognition of the canal as a significant tourist attraction

1.2 Methodology

Our approach is based upon:

- (1) Reviewing existing documents and information;
- (2) Site visits;
- (3) Consultation, engagement, a research programme and client feedback;
- (4) Our past consultancy experience and
- (5) Our sister company's experience of running leisure businesses, notably Conkers a £16 million day visitor attraction and the former Heart of the National Forest Visitor



Centre www.visitconkers.com and the National Brewery Centre (formerly the Bass Museum) www.nationalbrewerycentre.co.uk

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2.0 Canal context

2.1 Current position

The Basingstoke Canal runs for 32 miles from Greywell in Hampshire through to Woodham in Surrey where it joins the Wey Navigation and beyond to the River Thames. It has a continuous tow path and has some 29 locks. The Canal was constructed between 1788 and 1794 and following its demise as a commercial waterway fell into dereliction. As from 1973/74 the Canal has been owned by Hampshire and Surrey County Councils and has undergone a major restoration programme in conjunction with the Surrey and Hampshire Canal Society. It re-opened as a navigation in 1991.

The Canal forms an important part of local history (including the remains of World War II defences in some parts) and has played an important role in the development of the local area and its economy. In its recent history, the Canal has been subject to funding and maintenance shortfalls with the result that a significant programme of important maintenance tasks have reached a critical stage. A section mainly around Deepcut is currently not 'in water' and the lock gates in the Surrey section are currently undergoing an extensive repair and replacement programme.

It is important to recognise the effort and support provided by the two county councils over more than 35 years and particularly the current political support and cooperation in the face of major pressures on the public purse.

2.1.1 Infrastructure

The Canal has suffered from a lack of capital investment in recent years, however, over £1.6 million capital funding has been allocated to improve the Canal's infrastructure including repairs to the lock gates, banks and also water related issues.

Other infrastructure issues identified:

- Towpath erosion
- Improvement of safety levels on some of the major embankments, at Mytchett Lake and Ash Embankment
- Capacity in terms of available power at Mytchett
- Poor surfacing at some car parks
- Limited availability of moorings
- Canal Centre age and condition

2.1.2 Water supply (management and quality)

There are significant water supply issues which impact on the Canal as a navigation and could become acute during drought periods. One of the key priorities is to resolve the water issues and restore the Canal to make it navigable.

There is a newly formed Water Strategy Group set up with the task of researching and identifying the most effective solutions to enable the Canal to remain as a viable navigation, preferably on a year round basis. This Group are evaluating potential for maintaining water supply via additional licences, new boreholes, back pumping arrangements and improved water storage with the intention of providing a sound basis for overall water strategy.



Water supply is a significant issue for the Canal

2.1.3 Environment

The Canal is an important environmental resource. Most of the waterway (apart from the Surrey section between Hermitage Bridge and Monument Bridge) has statutory protection as a SSSI mainly due to the importance of the aquatic plants and dragonfly species. The Canal is subject to a Conservation Management Plan which is agreed over a ten year period (current relates to period commencing 2008).

The environmental condition of the Canal has declined in recent years, with tree shading being one major issue. There is a legal obligation upon the land owners to manage the environmental quality of the SSSI.

The SSSI places a restriction on boat movements (and development opportunities) which is currently set at some 1,400 movements per annum this level of use has not been reached in recent years. However, there is scope to negotiate future increases as long as this does not

impinge on the quality of the SSSI. We understand an appropriate level of boat movements and canal use can assist in maintaining its environmental quality for example in helping to avoid the build up of invasive plant species and helping to reduce the requirements for dredging. Conversely there is a risk that boats travelling from other waterways can encourage the movement of aquatic plantlife which may include unwelcome species.

Higher Level Stewardship (HLS) agreement is in place on the Surrey section which includes selected tree clearance works and enhancement of bankside vegetation. HLS agreement is due to be in place on the Hampshire section in 2012 with similar works planned.

The environmental quality and wildlife interest also represent important features in terms of the appeal to visitors.

2.1.4 Financial

The Canal has suffered from a lack of capital investment and there is a significant backlog of maintenance issues to be resolved, which have increased the risks associated with the Canal and safety issues which have led to parts of the Canal becoming unusable (resulting in a reduction in boating income).

However, some £1.6 million of funding has been allocated to essential repair projects. A further £2million capital allocation has been secured by Surrey County Council for asset management works around safety and risk reduction on the Surrey section over 4 years from April 2013.

Internal reports suggest that over £5 million in funding is required to bring the Canal up to a usable standard on a year round basis although we understand that this figure is only an estimate at this stage.

Additionally, with increasing pressure on the public purse there has been a significant reduction on the number of staff employed by Hampshire and Surrey County Councils who work directly on the Canal, which has led to extra pressure on the Canal operation and maintenance regimes.

In terms of annual costs / income these are summarised below (up to 31st December). Although we understand that the capital reserves have been reduced in recent years.



| | |
|----------------------------------|----------------|
| Expenditure | |
| Employees | 372,233 |
| Premises and canal maintenance | 71,870 |
| Transport | 36,251 |
| Supplies and services | 22,178 |
| Dredging | - |
| Total revenue expenditure | 502,532 |
| Income | |
| Boat licences | 17,485 |
| Sales | 6,476 |
| Angling | 5,741 |
| Rent and hire of facilities | 44,465 |
| Group activities | 20,435 |
| Fibre optic cable | 14,180 |
| Donations | - |
| Total revenue income | 108,782 |
| Contribution to/from reserves | 121,895 |
| Net revenue expenditure | 515,645 |
| Partner contributions | 515,645 |
| General reserves | |
| Opening balance | 53,643 |
| Capital expenditure | - |
| Capital income | - |
| Sub-total | <u>53,643</u> |
| Revenue variance | 121,895 |
| Closing balance | <u>175,538</u> |

Summary of Financial Position as at 31st December 2011 (source: JMC Honorary Treasurer)

2.1.5 Organisational

The current organisational arrangements have evolved over time with limited status, structure and strategic direction. There are two main committees - the **Joint Management Committee** (made up of local authority members, BCA representatives, Natural England, Environment Agency, User groups and other stakeholders) and the **Joint Advisory Group** which is formed of local authority officers. One of the issues with the efficacy of the current system is the level of decision making powers of the respective local authority or group representatives - the overall organisational structure has become unwieldy and does not appear fit for its current primary purpose (i.e. to oversee the sustainable management and operation of the Canal, its users and adjacent land holdings).

Natural England's (NE) primary involvement is as a statutory consultee with regard to the SSSI status of the Canal and is also a Special Interest Group on the JMC. NE has a remit to enhance the public enjoyment and access to the natural environment whilst not damaging the SSSI features of interest. NE also has direct involvement with Higher Level Stewardship agreements.

The Environment Agency is a key partner for the Conservation Management Plan and is keen to ensure the activities of the Canal are balanced with the need to sustain water supply and water quality issues. In the future this will relate further to meeting the requirements of the Water Framework Directive. The Agency is also involved in overseeing management of fisheries.

Ownership

The Canal is in the joint ownership of Surrey and Hampshire County Councils who each invest significant annual contribution to its maintenance and operation. The County Councils direct the main management committees and also devote significant in-house staff resource to its day to day activities both centrally and through its onsite team under the Basingstoke Canal Authority. Political support for the Canal from both County Councils is currently very strong and there is a strong degree of engagement in helping to deliver a valuable recreation and environment asset.

The Canal Visitor Centre is owned and provided by Surrey County Council who bear all the premises costs for the site.

The Canal passes through six local authority administrations. These riparian district councils are also asked to contribute based on a formula calculated in proportion to the length of the Canal within their boundaries (and also in relation to the immediate population).

Unfortunately, in the past not all of these authorities have contributed the amount asked for, despite the major contribution that the Canal makes to leisure and recreation activities in these districts. These Councils together contribute some 44% of total revenue costs for the Canal although three did not meet their full requested contribution in 2009/10.

The Asset Management Plan has led to the issuing of a formal agreement between the local authorities and BCA in the form of a Memorandum of Agreement which we understand sets out arrangements as from April 2009.

Staffing

The BCA provides the core staffing for the Canal. There has recently been a restructuring exercise, and the new arrangements have established a Senior Ranger, Centre Manager and Finance and Administration Manager reporting to a Site Manager. The Ranger team currently has six members who also run a level of volunteer activities on the Canal including a recently launched regular drop-in session. The new arrangements are more integrated with the overall Hampshire County Council Countryside Service, particularly Blackwater Valley.

The Surrey and Hampshire Canal Society (SHCS)

SHCS was formed in 1966 and initially were fully engaged in the canal restoration programme. The Society now considers one of their primary roles to be as guardians of the Canal to safeguard the Canal's interests. The Canal Society has provided support over more than a 40 year period to restore the Canal to navigation in partnership with the local authorities. It continues to take an active role in ongoing programmes through its targeted volunteer activities, it operates its own boat (John Pinkerton) and also engages with the JMC and a number of working sub groups including the Water Resources Group and The Conservation Management Committee.

The Inland Waterways Association (IWA)

IWA is an active participant of the JMC. IWA is a registered charity with a core mission of campaigning for the maintenance, restoration, conservation and development of a vibrant inland waterway.

IWA has around 18,000 members, with a regional and branch structure throughout England and Wales).

Working and Sub Groups

The management structure for the Canal also includes a range of Working Groups, Committees including the Conservation Management Group, Water Strategy Group, and Users Group which report to the JMC and or JAG.

One of the current issues which is being addressed is to help introduce an Open Access policy to allow greater flexibility and use of the navigation for canal boats.

2.1.6 Heritage Lottery Fund (HLF)

An initial review of the potential for an HLF grant based on the conservation and heritage value of the Canal has been prepared for Hampshire County Council and a paper presented to the JMC on this issue.

In any application, there is a need to ensure that the main aims of the HLF are fulfilled which relate to learning, participation (community involvement) and conservation and that there is a sustainable business plan.

Following completion of this Vision exercise it is important to review key elements which can be packaged to form the basis of a substantial HLF bid and help to create a transformational project for the Canal. It is important to highlight that the HLF process is competitive and as the Canal and River Trust becomes operational there may be several bids to the fund from canal projects around the country.

2.1.7 Users

Whilst no formal data collection on usage currently exists it is estimated that there are some 330,000 regular towpath users. Cycle counters on the Woking stretch show some 60,000 annual bicycle movements in 2011 (source Surrey CC).

During 2006 over 17,000 people enjoyed a boat trip on the Canal. It is also estimated that some 4,000 canoeists use the Canal, along with 4,000 anglers annually. There is a campsite adjacent to the Canal Centre which uses the main facilities and this limits the current capacity. Recently permission was granted for a new ablutions block (alongside canoe club facilities) which will allow the number of pitches to increase to some 75. There is currently a relatively limited programme of education visits coordinated via the Canal Centre.



A wide range of different users

It is important to note that the majority of users of the Canal / towpath are land based.

2.1.8 Development along the Canal

There are several proposed mixed use developments along the length of the Canal, notably Aldershot (Aldershot Urban Extension) which proposes some 4,000 new homes and at Deepcut (former MOD land) which proposes some 1,200 new homes. The Canal will provide an important recreation resource for any new residential communities and these schemes when developed will significantly increase the size of the available local market for canal related activities.

Brookwood Farm at Knaphill has also been identified for future housing development subject to resolving environmental issues and a site at Colt Hill is also in the pipeline.

It is also interesting to note the new WWF headquarters building in Woking provides for a new Canal bridge and offers the potential to raise the overall profile of the Canal.

Waterside developments can enhance property values (it is widely recognised that waterside properties can command a premium value up to 20% uplift on standard values) and these schemes can play an important role in stimulating the local economy. Of equal importance is that new residential and other development could open up potential funding opportunities via the Community Levy Fund / S106 contributions.



Basingstoke Canal

In addition there may be opportunities to consider a proportion of residential boat moorings within adjacent residential developments as they have recently been recognised by Government as offering access to housing for lower income people and as a lifestyle choice which can also make a contribution to the country's housing shortage. It is worth noting however that other waterways including the Wey have deliberately moved away from houseboats as they are considered to require relatively high levels of resource allocation including management and supervision.

2.1.9 Interpretation

There is limited interpretation of the Canal, with minimal interpretive media along its length or at either end of the Canal (ie at its junction with the Wey Navigation (the key entry point) and at Greywell. Whilst the more recent series of panels represent a reasonable level of interpretation, there is a mixed range of styles and quality and some are in a poor state of repair.



Interpretation and way finding panels

2.2 Current assets

As part of our work we have visited the whole length of the Canal as well as key sites accompanied by a Ranger.

The linear nature of the Canal lends itself well to creating an appealing recreation corridor. However, there is limited availability of adjacent land to the Basingstoke Canal owned by the County Councils which limits development opportunities.

In terms of development opportunities linked to built recreation / leisure use, key sites/amenities include:

- **Ash Lock** - located on the north eastern edge of Aldershot, the site is adjacent to the Canal and surrounded by a boundary of mature trees to the north and west.

The site has several buildings located within it, including a building store (126 sqm), two former dwellings one of which is Grade II listed (70 sqm, the other former dwelling is some 65 sqm) and some limited car parking and wooded area. There is also a slipway.

There is an MOD track / gate adjacent to the site.



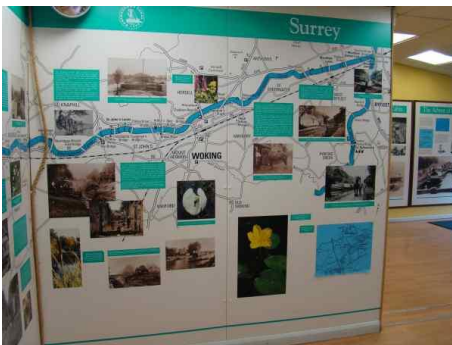
Basingstoke Canal

The site is currently used as a working yard and offices. This is not a visitor facing site and the tow path is on the opposite bank. In our view with the relatively close proximity of the Canal Centre at Mychett there is little merit in investing in this site as a major hub for visitors / users.

However, there are some space use considerations – to increase the available visitor facing space within the Canal Centre. One option is to relocate some of the staff (and volunteers) from the Canal Centre to Ash Lock (subject to further assessment and liaison with the Blackwater Valley Partnership).

A previous study has been carried out behalf of the Surrey and Hampshire Canal Society (SHCS)ⁱ which put forward three development options two of which included introducing a dry dock area. The third option focussed on introducing a larger water area for moorings along with visitor facing facilities included a potential tearoom, exhibition space and museum/gallery in the former Grade II listed building. These options due to the significant level of capital expenditure would need to be assessed as part of a business plan. Currently there is insufficient onsite car parking and would be reliant upon securing additional land from the MOD.

- **Canal Centre** site at Mytchett incorporates a significant area of land and different uses including the Canal Centre (meeting / function room, office provision, small retail / interpretation area and toilets), external play area, café, a limited number of moorings, camping field with a yurt, storage building and car parking with an overflow area. The site has also received planning permission for a new ablutions block. The site is the main ‘destination’ or ‘gateway’ site along the Basingstoke Canal and it lends itself to future development potentially in terms an enhanced visitor centre.



As a gateway site it does already meet a number of services expected: car parking, café, interpretation, small retail area (seasonal), toilets, play area, attractive and pleasant environment.

The existing Canal Centre main building is estimated to have some 12 years until the end of its built life but it remains the major visitor facing asset. It appears to be under-utilised and subject to limited public opening hours at certain times of year. The building incorporates a significant area for office use and there is a major meeting / social function room, which has limited use. The building also incorporates a retail and small interpretation area and toilets.

It is important to note that development restrictions apply to the wider Mytchett site if within 400metres of the Thames Basin Heaths SPA.

Other property assets include:

- The County Councils currently own **five cottages**. We understand Hampshire County Council are intending to dispose of the two cottages in their county and Surrey County Council are looking to obtain vacant possession of their cottages.

The cottage at the Canal Centre has the greatest strategic importance and could become an important component of the onsite facilities.



Cottage in Surrey

- There is a **depot** near Deepcut which we understand has been declared unsafe but the site is useful for storage and maintenance related uses. There is also a dry dock on the adjacent site.
- There is a **car park** area adjacent to **Colt Hill** on the north bank of the Canal. Currently there is a slipway way and a range of boating activities centred around Colt Hill with a small catering hut. Galleon Marine are based at Colt Hill and we understand it is also used for accessibility boating.





- To the east of the car park there is a small area of open land, which is adjacent to the northern bank of the Canal. The site appears to have some charm and is relatively remote. However, it does not appear to be served by a tracked roadway or any infrastructure / services, which would make development costly.
- There is a small **car park** area at the **Barley Mow Bridge**, which is bordered by two roads and the Canal. Again there are no real development opportunities and the car park similar to the car park at Colt Hill performs an important task.
- Similarly there is a **small informal car park** at **Crookham Wharf**.
- **Wharf Copse**, to the south of Malta Barracks does not have direct frontage to the Canal and appears to be used in part as a campsite. To the immediate east there is the A325 and to the north Farnborough Airport which restricts some development opportunities particularly in terms of quiet recreation.
- There is a **car parking area** at the eastern end of the Canal at Camphill.

In summary there are limited physical development opportunities on land currently owned by the County Councils (immediately adjacent to the Canal), in terms of specific sites being able to accommodate development. The site which has the most potential in terms of physical development is clearly the Canal Centre site (the main destination hub).

However, whilst physical development opportunities are limited there are a number of opportunities focussing around interpretation, marketing and branding to help create a more cohesive visitor experience and to tie up / link together the different elements along the length of the Canal. For example the sense of arrival when joining the Canal is very poor

with no real signage (apart from a small finger sign) and evidence of graffiti at its eastern end.

2.3 Wider Canal leisure linkages

The Basingstoke Canal is linear in its nature and at 32 miles in length it passes close to a number of existing leisure uses and businesses. As part of a wider regeneration project the full restoration of the Canal needs to take into account these different leisure operations and facilities as there are opportunities for forming alliances (both formal and informal) and some are likely to benefit economically from the restoration.

Activity centres

Runways End is a new £6 million outdoor activity centre. There are two accommodation lodges one of which includes flexible space which can also accommodate indoor camping. There are also 11 camping areas within the grounds. Activities on offer include: abseiling air rifle shooting, archery, bouldering, canoeing/rafting, caving, high ropes course, low ropes course, orienteering and indoor and outdoor climbing. The site can accommodate over 300 users.



Runways End

At the Quays, a significant lake, Tri-Sports offers training in open water swimming. We also understand that water skiing and wakeboarding are offered at the site. There is a pub located adjacent to the main lake.

Places of interest

Odiham Castle is located adjacent to the Canal and an important ruin built in the time of King John. The site is a Scheduled Ancient Monument and similarly to Basing House has successfully submitted a bid to the HLF in the past. Interestingly, the Castle is mentioned on <http://www.canoedaysout.com>



Odiham Castle

Basing House, whilst located to the west of Greywell outside of the main study area is an important heritage resource and place of interest in Hampshire. It has successfully submitted a HLF application in the past.

There are a number of recreation sites in close proximity to the Canal. These include Frimley Lodge Park covering some 24 hectares, incorporating woodland, picnic areas, playgrounds, a trim trail, sports pitches and miniature railway. The park has won the coveted Green Flag award. This countryside park site is of particular importance as it is next to the Canal itself.

Within Woking there is Sheerwater Recreation Ground. St John's Lye is an open recreation space in St John's and Heathervale Recreation Ground is located just before the junction where Canal joins the Wey Navigation. Part of Brookwood Country Park is also adjacent to the Canal.

Pubs and accommodation

There are a number of public houses located along the length of the Canal from the well known Fox and Goose in Greywell through to the Anchor Inn in North Warnborough and Bridge Barn in Woking. Only a few have waterside frontage. The Canal promotional leaflet lists over 15 pubs and potentially they lend themselves well to working together to produce a pubs walks leaflet linked in with nearby accommodation (which would help to encourage overnight stays and higher spending).

In terms of accommodation there are a several providers including Dogmersfield Park, Lakeside, Potters and some budget operators. It appears that for most of the accommodation stock at present the focus is on business / midweek use and this is reflected in the pricing strategies across the week.

Other venues

It is worth noting the presence of the Mytchett Centre located within walking distance of the Canal Centre and offering an alternative venue for community activities, meetings and functions.

Recreational routes

Sustrans National Cycle Route 221 – the Saturn Trail follows part of the Basingstoke Canal from Pirbright Bridge near Brookwood to Scotland Bridge near West Byfleet. The closest National Trail is the North Downs Way.

There are a range of opportunities for circular routes using train journeys for outward or return 'legs' including links with Wey Navigation.

As noted above there are a range of different leisure / recreational products within the local areas nearby to the Canal which add to the critical mass of the facilities available. In developing the Action Plan / Canal Vision it is important not to duplicate the current product offer but to work in partnership with existing recreation and leisure providers.

2.4 SWOT analysis

A SWOT analysis has been produced to identify a number of key strengths of the Basingstoke Canal. It also highlights a number of key challenges and issues. In terms of creating a vibrant Canal there are a number of key elements, which when developed together help to create a more attractive visitor / community resource.



Strengths

Product

- Rich heritage of the Canal (built, social and natural heritage).
- Visually attractive in parts and provides a 'green corridor' for adjacent residential areas.
- Existing multi-faceted product - Canal, moorings, tow-paths / recreational routes (walking, cycling, trim trail), canal cruises, narrow boat hire on parts of the Canal, camping pitches, visitor centre with some interpretation, function room and small retail area, play area, café etc.
- Car parking at Mytchett and selective points along the route.
- £1.6 million investment programme currently underway in respect of the Canal's infrastructure.
- Additional investment in towpath / cycling route in recent years.
- Recognition as area of important wildlife / environmental value (including SSSI). Although could also be considered a constraint for some uses / developments.

- Canal Centre represents an important amenity as the principal all weather facility along its 32 mile length. The presence of onsite staff also makes it a relatively safe environment for leisure activities.
- The Canal Centre also represents a facility close to the halfway point along the Canal and is therefore well placed to act as a focal point for the overall visitor offer.
- Canal benefits from a skilled and experienced staff quotient including rangers, administration and management.
- Contribution from Canal Society in terms of specific funding.
- Some communities, notably Woking are embracing the Canal in a positive way as a recreational, heritage and amenity resource.

Market / marketing

- Within short drivetime of major urban conurbations (market on the doorstep) with relatively affluent profile.
- Multiple existing users - including recreational users, walkers, joggers, canoeists, volunteers, campers, cyclists, education groups, canal boaters etc. Interesting to note that the majority of users are land based.
- Good access by road, (for example, five minutes from Junction 4 M3) and also accessible by train from a number of mainline railway stations within walking distance of the Canal.
- Some attractive 'features' along or close to the Canal corridor (e.g. Odiham Castle, country parks and pubs).

Operational / management

- Political support from County Councils for enhancing the Canal to promote economic development.
- Existing volunteer base and a new volunteer programme.
- Support from technical experts including the University of Liverpool.
- Technical expertise, commitment and skills of Canal Society.
- Operation of Canal has a track record of partnership working.

Weaknesses

Product

- Suffered from lack of capital investment (although now capital is being invested in major infrastructure projects).



- Not navigable along the whole length of the Canal at present.
- History of significant water supply issues. Currently, low water levels along parts of the Canal (closed for part of the year).
- Long narrow corridor (limited availability of circular routes). The narrow corridor heightens potential conflict between different user groups e.g. anglers and boat users.
- Limited external interpretation at Mytchett.
- Some of the public benefits of the Canal are relatively 'intangible'.
- Relatively few sites within County Councils' ownership capable of supporting transformational interventions.
- Canal Centre building at Mytchett looks tired and is disjointed from the cafe.
- Intrusive water plant species (currently an issue along parts of Canal).
- Some waterside communities have historically 'turned their back' on the Canal in terms of engaging with residents and linking with local amenities.

Market / marketing

- Lack of 'coherent identity' (no strong unifying brand) at present.
- The name does not reflect its location.
- Does not currently present a balanced marketing profile to reflect the wide range of different user groups (water and land based).
- Unknown as a 'tourism destination'.
- Perception of that the Canal is not 'currently open for business.'
- Reduced appeal to boating community because not navigable on a year round basis.
- Limited budget available for marketing / events.

Operational / management

- Financial resources are limited (capital and operational).
- No dowry secured to assist with long term sustainability.
- Inconsistent funding commitment from some local authority partners.
- Operational team has recently been reduced in number limiting the range of services which they are able to deliver.
- Number of organisations, bodies and statutory authorities involved with different aspirations and agendas which can prove difficult in terms of agreeing the strategic direction.
- Lack of legal status for Canal Authority which affects decision making processes.



- Lack of clear lead body in terms of decision making.
- Ageing volunteer base.
- The relationship between the owners, the Canal staff, the SHCS and other stakeholders is poorly defined (this affects implementation).
- Current governance structure appears unwieldy.
- Decline in overall income between 2001 / 2002 and 2008 / 2009.

Opportunities

Product

- Restore the Canal to be navigable on a year round basis including addressing water issues.
- Develop/enhance central hub/gateway at Mytchett.
- Acquire additional land, particularly if MOD sites become available (although there is likely to be competing demand).
- Potential for HLF grant support for product / service development.
- Work with local authorities to secure planning gain from new developments within districts adjacent to the Canal.
- Explore opportunities to build on strength of outdoor recreation and tourism to link in with cultural and arts based projects. There may for example be ways to develop links between activity (particularly at either end of the Canal and other key entry points) and arts project which could help to widen the appeal of the Canal. Such development can also promote the distinctiveness of the destination beyond the natural environment.
- As part of the interpretation strategy introduce new technologies such as downloadable route maps, geocaching etc.

Market / marketing

- Create strong brand identity including supporting material such as a new website, new promotional leaflets and a 'guide' similar to those found in other destinations (to target a range of audiences including volunteers).
- Promote as a day visitor destination.
- Consider renaming the Canal to create a more marketable proposition.
- Major new housing developments, for example, in Aldershot and Deepcut provide new markets.



Operational / management

- Create more streamlined new management structure to maximise fund raising potential, reduce liability to Hampshire and Surrey County Council, to deliver and implement a coherent vision.
- Define roles and responsibilities of new management structure and key staff.
- Co-ordinate existing range of volunteers and volunteer activities including reporting, management, roles and responsibilities, recruitment, health and safety etc.
- Expand volunteer base to include a wider range of demographic profiles.
- Explore links with new Runways End outdoor activity centre.
- Potentially change operating structure and move asset of the Canal into a Trust (or similar vehicle).
- Explore potential for economic development / regeneration linked to the restoration of the Canal.

Threats

Product

- Flood risk, particularly on Hampshire stretch of Canal.
- Potential lack of regular supply of water to maintain water levels at operational requirement.
- County Councils self insure which means they are potentially liable for a significant claim (e.g. major breach, substantial leak etc).
- Lack of funding to secure 'Canal product' and decline in viability of the navigation.
- Potential conflict between any intensification of use and impact on the environmental quality / designations.

Market / marketing

- Decline in boat users if Canal not restored.
- If intrusive water weed is not removed from upper reaches of the Canal it could further affect usage levels.
- Do not secure appropriate marketing budget to deliver vision, leading to a decline in usage.
- If re-naming taken forward then potential risk of alienating current users and supporters.

**Operational / management**

- Breakdown in working relationship between partners.
- Difficulties in reaching consensus on new organisational structure.
- Insufficient funds for long-term effective management and maintenance.
- Cuts in staffing and resources.
- Potential conflict among volunteers with different priorities and motivations (requires effective coordination).
- Stringent environmental designations not being met in the future.
- Local authorities reduce their annual contributions or fail to contribute to the canal maintenance programme.
- Change in key funding streams.
- HLF grant not secured.
- Change in the political leadership which currently supports the Canal.

3.0 Consultation

3.1 Consultation themes

An important element of our initial work has been to consult with key partners and stakeholders involved (in varying degrees) in the operation, use and management of the canal via face to face discussions and written questionnaire. We attach as Appendices the questionnaire used to consult with stakeholders and a list of the main consultees.

From the consultation completed to date there is a notable level of commitment to the success of the Canal and we perceive significant momentum in taking forward initiatives to make a positive contribution to its future sustainability.

During this phase of work, the discussions focused on identifying product strengths, gaps and opportunities as well as future prospects and priorities. A number of common themes have emerged from these discussions and our research, which are summarised below.

Current assets / activities

- **The continued use of the Canal as a restored navigation is seen as integral to its appeal and activities.** The vitality of the Canal is widely seen as being intrinsically linked to its role as a navigation with adequate water levels usable by multiple market users.

- **Basingstoke Canal recognised as an attractive linear park.** The Canal is easily accessible for recreation by the people living along its length which is seen as a real contribution to quality of living in an otherwise relatively urban setting.

- **The Canal is seen as offering great opportunities for walking, jogging, canoeing and cycling.** There is general agreement that the area is blessed with significant natural assets for those seeking activities in the outdoors, particularly in relation to 'quiet recreation'. Walking, cycling and canoeing offer best prospects for future development with a need for better support infrastructure and information. There is a recognised need to enhance linkages between existing routes and to improve information signage. Canoeing needs less equipment and facilities than many watersports, has lower entry barriers and offers longer term development potential.

- **Educational role** of the Canal is seen as important for wildlife and outdoor recreation and also for 'developing an appetite' among young people to appreciate and enjoy the Canal.
- **Contribution and value of volunteers** are widely deemed to be essential to the Canal's survival.

Market positioning

There is broad consensus that the area has a low level of market awareness and could benefit from **a unifying brand and stronger marketing activity**. For example it is believed there is an opportunity to build on existing canoe trails and walks with further marketing effort. Some consultees report lack of awareness of the Canal even among local residents and there is a need for more proactive and effective marketing and information provision.

- Basingstoke Canal recognised as an **attractive yet relatively undiscovered area** with potential to develop as a destination with an activity focus.
- Developing existing hubs identified as an important theme. Basingstoke Canal has significant visitor hubs at Mytchett and nearby Frimley Lodge Country Park. Strategic 'centres' can help to boost the profile and reputation of a destination for related outdoor activities and offer an opportunity to develop different themes at each hub. The focus for future investment needs to be on enhancing one or more strategic hubs with specific development of products suited to the needs of the main target market(s). The primary hubs could then encourage visitors to visit secondary hubs. The role of private sector investment is recognised as being important in achieving additional development.
- **Support for tourism / recreation** - there appears to be some support for developing tourism within the Basingstoke Canal corridor although it is recognised that the product offer is currently limited and fragmented.
- Potential to exploit **cross cutting themes** in line with the political agenda (e.g. integrating with healthcare provision and wellbeing).

Addressing product deficiencies

- **The Canal is prone to significant water supply problems, particularly in dry weather.** This is felt to have been exacerbated by a lack of maintenance and has also engendered a poor reputation among users notably canal boaters.
- **Lack of towpath maintenance.** Makes it difficult and sometimes dangerous for walkers and cyclists.
- **Lack of proper camping and moorings.** There is agreement that further investment is required in facility development, improved access arrangements although there is now existing planning consent for a new facility building for campers.
- Opportunity to introduce additional **linear moorings** in appropriate locations.
- The **visitor centre** is not deemed to be fit for purpose as a modern and engaging visitor resource.

Events

- **Maximising opportunities from events.** Events are seen as a possible added activity. They provide an opportunity to 'spread' tourism in space and time. This includes events such as The National Canoe Marathon Race where possible linked to activities. These will need to be effectively resourced, coordinated, managed and marketed to raise the profile of Basingstoke Canal.
- It is also important to state that there is recognition that events can be costly particularly when weather dependent. The narrow towpath itself does not lend itself to large scale events.

Organisation / management

- **Collection of licence fees and other dues.** Respondents feel that there is a significant level of uncollected licence fees both from boat users and residential properties adjacent to the canal with gates onto the towpath.



- **Recognised difficulty for BCA to combine its core function** on Canal related activities with generating additional income from non-navigation sources.
- **Volunteers** provide valuable support including a level of selective direct funding from the Canal Society.
- Recognised that many activities on the canal take place outside **normal working hours** which places extra strain on staff resources.

Other

Recent and proposed initiatives which could have a positive impact on The Basingstoke Canal include (mentioned in the consultation):

- Runways End
- The Quays watersports centre
- Marina development in Woking
- Potential residential developments / additional features

3.2 Priority future markets

In terms of the priority future markets to engage with in respect of the Canal, it is local residents and canal boat users who have received the highest response from the consultation in terms of top positions (please see table below).



| Market segments | % of Top Position Listings |
|-------------------------------|----------------------------|
| Education market | 5.26 |
| Local residents | 26.32 |
| Day visitors | 15.79 |
| Canal boat users | 26.32 |
| Canoeists | 10.53 |
| Volunteers | 10.53 |
| Other watercraft users | 5.26 |
| Walkers / joggers | 5.26 |
| Cyclists | - |
| Anglers | - |
| Tourists (staying visitors) | - |
| Heritage enthusiasts | - |
| Wildlife enthusiasts | - |
| People attending events | - |
| Hard to Reach Groups (eg:BME) | - |

Local residents and canal users also score well in terms of number of Top 3 positions. Day visitors are also seen as important markets / users.

Interestingly local residents, anglers, boat users and canoeists gain a regular listing among the Top Seven markets selected by consultees.

Overall score

Whilst there is an overlap between different user groups, not surprisingly it is local residents, canal boat users, recreation users (walkers / joggers and canoeists) and day visitors who are seen as the key markets to engage with.

In terms of the main products and services which could potentially be introduced, we set out below the responses from the consultation.



| Potential opportunities | Strongly agree | Agree | Maybe | Disagree | Disagree strongly |
|---|----------------|--------------|-------|----------|-------------------|
| New visitor centre | 25.0% | 40.0% | 30.0% | 0.0% | 0.0% |
| Enhanced camping | 60.0% | 35.0% | 10.0% | 0.0% | 0.0% |
| Education programmes | 30.0% | 40.0% | 25.0% | 0.0% | 0.0% |
| Events | 20.0% | 65.0% | 10.0% | 0.0% | 0.0% |
| Hotel/other accommodation | 5.0% | 15.0% | 55.0% | 20.0% | 0.0% |
| Increased involvement opportunities (eg volunteering) | 35.0% | 65.0% | 0.0% | 0.0% | 0.0% |
| Increased skills and training programmes | 0.0% | 70.0% | 25.0% | 0.0% | 0.0% |
| Outreach and community work | 5.0% | 55.0% | 25.0% | 10.0% | 0.0% |
| Destination waterside pub | 25.0% | 20.0% | 20.0% | 25.0% | 0.0% |
| Events programme | 30.0% | 50.0% | 20.0% | 0.0% | 0.0% |
| Interpretation | 5.0% | 65.0% | 20.0% | 0.0% | 0.0% |
| Activity water sport centre | 25.0% | 20.0% | 20.0% | 20.0% | 15.0% |
| Increased boat usage | 70.0% | 20.0% | 10.0% | 0.0% | 0.0% |
| Marina | 45.0% | 20.0% | 30.0% | 5.0% | 0.0% |
| Further recreational trails | 20.0% | 30.0% | 50.0% | 0.0% | 0.0% |
| Additional residential moorings | 30.0% | 20.0% | 30.0% | 15.0% | 5.0% |
| Enhanced cafe / catering offer at Mychett | 30.0% | 35.0% | 30.0% | 0.0% | 0.0% |
| Enhanced retail opportunity at the current Visitor Centre | 35.0% | 20.0% | 45.0% | 5.0% | 0.0% |



Increased camping and enhanced boat usage received strong backing. Also well supported are increased involvement opportunities (e.g. volunteering), a new visitor centre, events and interpretation. Clearly these reflect aspirations and need to be financially viable and to be considered as part of a coherent plan.

3.3 Summary - consultation

Consultation with key stakeholders and user groups confirms a broad consensus to enhancing the Basingstoke Canal as a navigation and for recreation and wildlife interest.

The overall objective must be to provide a high quality accessible experience that leads to increased expenditure from residents and day visitors and in the longer term (as the product develops) a greater volume of staying visitors.

Any future interventions must lead to the sustainable management of the Canal and build awareness of its key attributes and character among the priority growth markets.

4.0 Market review

4.1 Demographic review

We have generated drive time catchment data to understand the residential market profile and to support the Basingstoke Canal Vision. Each drivetime contour is compared to the national average (set out in the tables as 'Index').

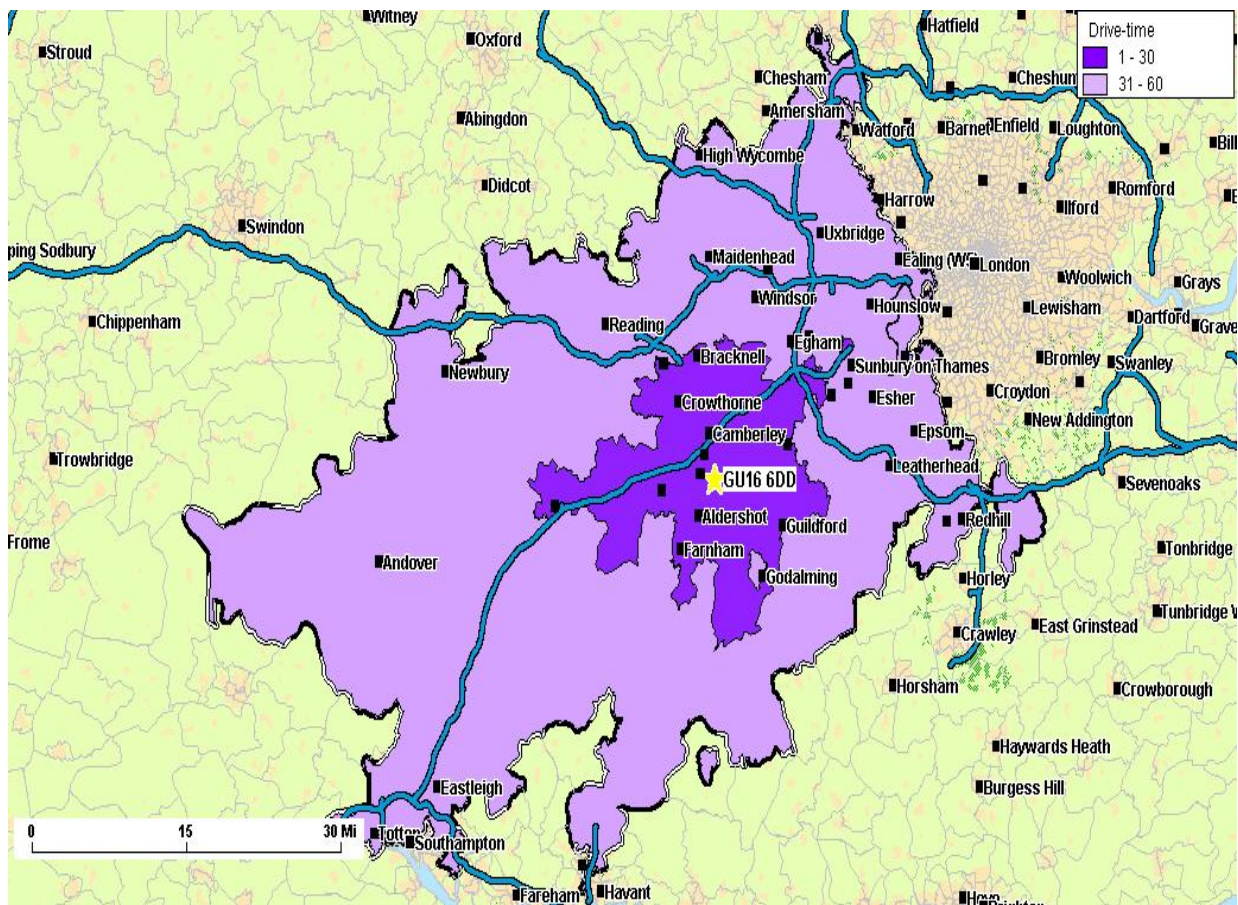
For the centre at Mytchett, we have reviewed two drive time contours and it is important to highlight that because different end uses will have different primary or 'core markets' in terms of the distance users are prepared to travel to reach their destination.

| Drive Times (Minutes) | Residential Population |
|-----------------------|------------------------|
| 1 to 30 | 705,637 |
| 31 to 60 | 3,455,916 |
| Total | 4,161,553 |

Source: Call Credit Information Group

Within the 30 minute drivetime contour the residential population reaches 700,000 and within the 60 minute drivetime the headline population reaches just over 4 million. These catchments are likely to represent the core markets for leisure and tourism activities and the overall population of some 4 million is very strong (although the majority of leisure based users are likely to be drawn from within the 0 to 30 minute drivetime contour).

We also carried out analysis for the 30 minute drivetime catchments from each end of the canal near Greywell in Hampshire and Woodham in Surrey. The overall catchment population is slightly higher for Woodham (724,214) and lower at Greywell (623,536).



Source: Call Credit Information Group

The map above shows that the 30 minute contour includes the population centres of Guildford, Aldershot, Farnham, Camberley and Bracknell. The 60 minute contour takes in a large part of west and south west London and stretches to the south coast at Southampton.

Parts of the Basingstoke Canal are within short drive times of major centres of population, as congestion on the road network increases particularly during peak holiday periods, this could have an impact of potential visitor numbers. However, seven train stations are within walking distance of the Canal and there are likely to be opportunities to promote green transport.

Age profile

The table below provides a breakdown of the age profile for the drive time contours.

The under 30 minutes and the 60 minutes drivetime contours are broadly similar with a higher than national average population in the 20 to 55 age groups and a lower representation above this age (i.e. over 55s). Both contours have a slightly higher level in



the under 10s but a lower level in the 10-20 age groups. In respect of this higher than national representation of residents aged between 20 and 55 this is encouraging as they are more likely to take part in recreational activities such as walking, cycling and canoeing, which both the tow path and Canal lend themselves to along with the cycle route introduced in Woking.

Overall however it shows that there is strong representation in the population of working age. The most significant variation from the average is seen for residents aged between 25 and 40 which is between 7 and 11% **above** the national average in both catchment contours.

Conversely for over sixties the population level is between 9 and 14% **below** national average. However, walking along parts of the towpath is likely to appeal to this group as it is flat, un strenuous and relatively safe.

In terms of comparisons to the Woodham and Greywell 30 minute catchments, Woodham has a lower representation in the 10-30 age bracket and less marked differences between the working and retired populations (albeit the proportion in the 30-60 age range is still above the national average). Greywell has a similar age profile to the Mytchett catchment but has a lower proportion in the 15-25 age range.

As mentioned above these levels are interesting in terms of the main appeal of the site for active recreation / leisure use. Importantly, the cafe at Mytchett has broad appeal amongst different user groups.

| Age | Core Market | | | | | |
|---------|----------------|--------|-------|------------------|--------|-------|
| | 0 - 30 minute | | | 0 - 60 minute | | |
| | Area total | Area % | Index | Area total | Area % | Index |
| 0 - 4 | 43,977 | 6.2% | 105 | 259,310 | 5.9% | 105 |
| 5 - 9 | 45,422 | 6.4% | 101 | 264,563 | 6.4% | 100 |
| 10 - 14 | 45,364 | 6.4% | 97 | 262,341 | 6.6% | 96 |
| 15 - 19 | 42,636 | 6.0% | 97 | 249,892 | 6.2% | 96 |
| 20 - 24 | 42,385 | 6.0% | 100 | 263,507 | 6.0% | 105 |
| 25 - 29 | 50,696 | 7.2% | 109 | 302,939 | 6.6% | 111 |
| 30 - 34 | 58,196 | 8.2% | 108 | 341,358 | 7.6% | 107 |
| 35 - 39 | 61,608 | 8.7% | 111 | 351,701 | 7.9% | 107 |
| 40 - 44 | 53,028 | 7.5% | 106 | 306,733 | 7.1% | 104 |
| 45 - 49 | 46,654 | 6.6% | 104 | 271,226 | 6.4% | 103 |
| 50 - 54 | 50,179 | 7.1% | 103 | 286,232 | 6.9% | 100 |
| 55 - 59 | 39,519 | 5.6% | 99 | 226,989 | 5.7% | 96 |
| 60 - 64 | 31,392 | 4.4% | 91 | 185,625 | 4.9% | 91 |
| 65 - 74 | 50,688 | 7.2% | 86 | 307,880 | 8.4% | 88 |
| 75 + | 43,991 | 6.2% | 83 | 282,156 | 7.5% | 90 |
| | 705,735 | | | 4,162,452 | | |

Source: Call Credit Information Group, Mytchett catchment

Economic activity

The table below shows the economic activity of the resident population which presents a very positive picture overall. The economically active population is significantly above the national average representation for both drive time contours, most significant is recorded in the proportion of employees the 1 - 30 minute contour, being 17% above the national average. These profiles are even stronger for the Woodham and Greywell catchments - Woodham notably has a higher proportion of self employed residents.

| Economic Activity | Core Market | | | | | |
|------------------------------|----------------|--------|------------|----------------|--------|------------|
| | 0 - 30 minutes | | | 0 - 60 minutes | | |
| | Area total | Area % | Index | Area total | Area % | Index |
| Economically Active | 385,496 | 74.4% | 112 | 2,179,711 | 71.6% | 108 |
| Employee | 314937 | 60.8% | 117 | 1738448 | 57.1% | 110 |
| Self-employed | 47038 | 9.1% | 112 | 284899 | 9.4% | 115 |
| Unemployed | 9359 | 1.8% | 53 | 68869 | 2.3% | 66 |
| Full-time student | 14132 | 2.7% | 105 | 87495 | 2.9% | 111 |
| | | | | | | |
| Economically Inactive | 132,447 | 25.6% | 76 | 862,628 | 28.4% | 84 |
| Retired | 58319 | 11.3% | 83 | 352821 | 11.6% | 85 |
| Other | 74128 | 14.3% | 71 | 509807 | 16.8% | 83 |

Source: Call Credit Information Group

There is a low level of unemployed in the 0 – 30 minute contour at almost half the national average rate (53%) and some two thirds the national average rate in the one hour catchment.

The levels of economic inactivity are also low and this includes a relatively low level of retired persons which appears to align with the age breakdown as previously discussed.

There is a higher than national average of full-time students in both drivetimes (some 5 to 11% higher) which could be explained by the nearby presence of Surrey and Kingston Universities.

Income

The table below provides an overview of household income for the drive time contours. For both contours there is a substantially higher than national average representation of households who earn above £40k. The proportion within the contours increases as the salary bands increase and the most significant variation is in over £100k category with more than **six times** the national average (in both contours). From a development and usage perspective this is very encouraging as families with disposable income are likely to be prepared to pay for the use of some recreation and leisure services which could be introduced as part of the vision. This pattern is repeated for the Woodham and Greyweell catchments which show even higher levels of earners over £75k. Greyweell is nearly seven times (index of 679) the national average in the proportion of earners over £100k.

| Income | Core Leisure Market | | | | | |
|----------------|---------------------|--------|-------|----------------|--------|-------|
| | 0 - 30 minutes | | | 0 - 60 minutes | | |
| | Area total | Area % | Index | Area total | Area % | Index |
| Over £100k | 13,713 | 4.4% | 642 | 76,867 | 4.2% | 612 |
| £75k to £100k | 43,629 | 14.1% | 468 | 252,825 | 13.9% | 462 |
| £50k to £75k | 92,094 | 29.8% | 221 | 485,517 | 26.7% | 198 |
| £40k to £50k | 63,680 | 20.6% | 176 | 348,450 | 19.2% | 164 |
| £30k to £40k | 48,706 | 15.7% | 89 | 309,634 | 17.0% | 96 |
| £20k to £30k | 33,527 | 10.8% | 44 | 230,651 | 12.7% | 51 |
| £10k to £20k | 13,389 | 4.3% | 17 | 106,741 | 5.9% | 23 |
| Less than £10k | 729 | 0.2% | 7 | 8,258 | 0.5% | 13 |

Source: Call Credit Information Group

The opposite is seen in the proportion of households earning less than £40k and this proportion decreases as the salary bands decrease. This may reflect the location as a commuter area for London but also the relatively prosperous urban settlements of Guildford and Reading.

This does have several implications for Mytchett and the wider Canal in terms of product development mix and pricing strategies in respect of future development plans. Generally, canal boat ownership is likely to be higher among higher earning residents.

There are relatively low economic entry barriers for the majority of non-water based users which helps to encourage usage.

Social grade

The table below shows a breakdown of the social grade profile for all drivetime contours.

| Social Grade | Core Market | | | | | |
|---|----------------|--------|------------|----------------|--------|------------|
| | 0 - 30 minutes | | | 0 - 60 minutes | | |
| | Area total | Area % | Index | Area total | Area % | Index |
| AB Middle and upper middle class | 176,779 | 32.4% | 150 | 983,842 | 30.3% | 141 |
| C1 Lower middle class | 173,488 | 31.8% | 108 | 1,051,307 | 32.4% | 110 |
| C2 Skilled working class | 70,184 | 12.9% | 84 | 403,667 | 12.4% | 81 |
| D Working class | 66,183 | 12.1% | 70 | 417,856 | 12.9% | 74 |
| E Lowest levels of subsistence | 58,937 | 10.8% | 66 | 390,069 | 12.0% | 74 |

Source: Call Credit Information Group

For the social grade AB (middle and upper middle class) it shows that there is a far higher than national average for both drivetimes with between 41 and 50% more than the national average. The most pronounced difference from the national average is seen in the 0-30 minute contour. Interestingly higher social grades show a higher propensity to take part in volunteering activities.

For the C1 (lower middle class) social grade there is a slightly higher than national average representation in both contours (8-10% higher).

The opposite is seen for all other social grades (C2, D and E) and in the 30 minute contour there are some one third less residents than the national average in the 'lowest levels of subsistence' category.

Again this pattern is similar for the Greywell and Woodham catchments and the above demonstrates a relatively strong social status which usually signifies higher spending power on discretionary items such as leisure.

Health

The table below highlights that within all drivetime contours there is a higher representation of residents which are in good health and a low than national average of residents who are in poor health. These figures are closely mirrored (within 1 percent for good health and fairly good health) for the 30 minute catchment drivetimes from Woodham and Greywell.

| Health | Core Market | | | | | |
|--------------------|----------------|--------|-------|----------------|--------|-------|
| | 0 - 30 minutes | | | 0 - 60 minutes | | |
| | Area total | Area % | Index | Area total | Area % | Index |
| Good Health | 527,979 | 74.8% | 109 | 3,062,807 | 73.6% | 107 |
| Fairly Good Health | 136,731 | 19.4% | 88 | 830,761 | 20.0% | 90 |
| Poor Health | 40,916 | 5.8% | 62 | 267,947 | 6.4% | 69 |

Source: Call Credit Information Group

It is interesting to note that healthy people are more likely to undertake recreational activities which are likely to form an important part of the overall product mix for Basingstoke Canal. The Canal Centre at Mytchett could potentially lend itself well as a hub for health based activities. If improving the Canal can be demonstrated to have wider non-economic benefits - such as improving the health of the population - it may help local authorities deliver key policies

Ethnicity

Within the 30 minute drivetime the ethnic profile is mainly White with two ethnic groups above national levels in terms of Chinese and 'other'. The 60 minute profile (and the 30 minute catchment from Woodham) has a broader ethnic mix with Indian and other Asian groups some two and half times the national average as well as significant representations of 'mixed' Pakistani, Chinese and 'other'.

The ethnicity within the 30 minute drive time contour is mixed with the representation of 'whites' slightly below the national average. However, there is an above average representation of Pakistani residents (some 186% above the national average) and at the same time there is a below average representation of residents with a Bangladeshi and Black African ethnic origin.

This is partly due to the fact that the latter contour takes in larger parts of the major London conurbation.

4.2 Tourism market - Surrey and Hampshire

Surrey

The tourism market in Surrey has an annual turnover of £1.9bn, employing 33,000 people across the county (Cambridge model statistics 2009). Tourism is an important contributor to the service economy of Surrey.

According to Visit Surrey there were some 25,139,000 tourism day visits and 8,955,000 visitor nights in the County in 2009.

Surrey's own website claims: "Surrey has it all for a wonderful day out or short break. With stunning countryside, fascinating museums and galleries, historic houses, beautiful countryside, brilliant sports facilities, family fun, relaxing spas, scrumptious food and fantastic accommodation to rest and recuperate".

The destination marketing vehicle for the county is Visit Surrey, which is a Community Interest Company with a Board of Directors made up from local Surrey tourism businesses and the County Council. It is a not for profit self-financing company which aims to promote Surrey a great visitor destination to both local residents and incoming visitors. Visit Surrey works alongside local tourism businesses and some of the district / borough authorities collaborating where possible to promote the whole of Surrey tourism.

Given its proximity to London, Basingstoke Canal represents an important asset for day visitors, short stay tourists and visiting canal users.

It is recognised the canal presents another way of seeing the countryside and offers recreation and health benefits. Surrey County Council Countryside Team and Visit Surrey are evaluating ways of encouraging greater countryside access (under the banner 'Explore Surrey') and the Basingstoke Canal offers a range of opportunities in this respect.

Whilst Surrey is not generally seen as a traditional tourism destination, there are wide ranging opportunities for people to come and spend time either on a day visit or longer break and the canal represents an important asset in this respect with many stretches offering a 'get away from it all feeling'.

Hampshire

Hampshire has a strong visitor economy with tourism contributing an estimated £2.67 billion (Cambridge Model 2008) and supporting up to 43,500 jobs, representing 7.7% of the County's total employment (ABI 2008).

Hampshire possesses a wide variety of visitor attractions, leisure facilities and heritage sites and hosts regular large-scale events, shows and festivals, attracting millions of visitors each year on both day trips and longer breaks.

There were 37 million day visitors to Hampshire in 2008 (Cambridge Model 2008) although again the major destinations were in the South of the County.

Rushmoor and Hart are the district authorities have the lowest levels of trips and spend in the county from both domestic and inbound visitors (UKTS and Cambridge Model 2008). But they still represent an important part of the economy of the sub-region and have potential for growth with strong market opportunities, particularly from short break and day visitor markets.

Hampshire has a number of focal points and honeypots for tourism including two national parks and Portsmouth and Southampton. In some ways these serve to drag the focus away from the north and north east parts of the county including the districts of Rushmoor and Hart which have the lowest levels of day visits in the County. The other destinations also benefit from larger marketing budgets. Farnborough International Airshow is a major feature on the County's annual calendar of events.

In recent years there has been significant investment in the central and northern parts of Hampshire including the accommodation sector (Aviator Hotel and a number of budget operations) and attractions (Basing House and Laverstock Mill (Bacardi Company)). Building on existing operations such as Dogmersfield Park and Farnborough De Vere Village Hotel, this does demonstrate an interest in growing the product and tapping into its strategic location notably for short breaks, business tourism and day visits.

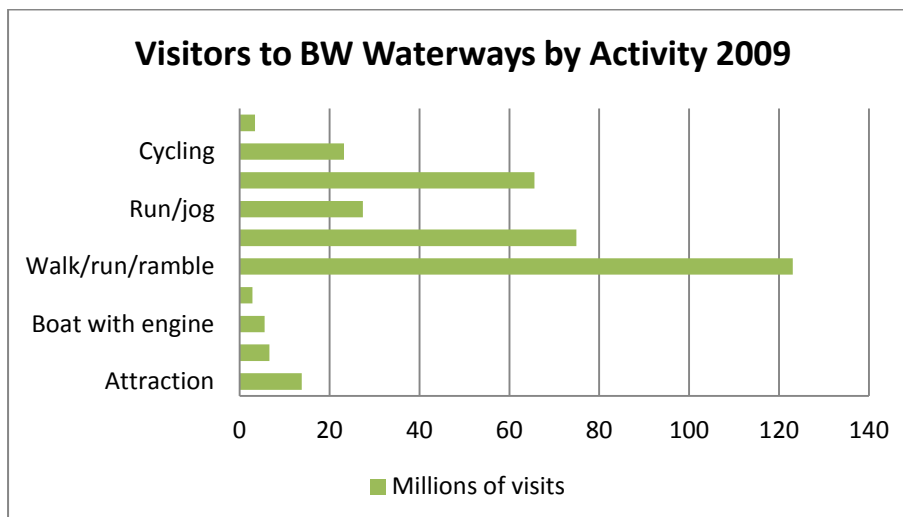
Overall, The Basingstoke Canal does offer tranquillity and attractive rural locations and has the potential to become an important tourism asset for both counties and to further develop into a distinct destination in the longer term.

4.3 Canal use and wider inland waterway trends

“There are approximately 5,000 km (3,000 miles) of fully navigable inland waterways in England and Wales, about 450 km of which are tidal.”ⁱⁱ

We set out below the key user statistics to inland waterways:

- Inland waterways are an important recreation resource which are becoming increasingly popular. Over 380 million visits were made to waterways in 2009 by 13 million people, an increase of 26% over the previous year.ⁱⁱⁱ This shows growth in the popularity of water based / waterside activities.
- Interestingly, over 50% of the population lives within 5 miles of a canal or river,^{iv} helping to explain in part the reasons behind the growth of visits to waterways.
- Users visit waterways to take part in a number of activities including cycling, running / jogging, walking, fishing, boating etc (please see table below). One of the key drivers is that for a number of non-boating activities there are very low economic entry barriers which encourages participant. It is interesting to note that the predominance of non-water based activities amongst users.



- From an economic perspective the waterway based recreation and tourism generates approximately £1.1 billion expenditure – supporting 24,000 jobs.^v

- There is some limited data available on the overall number of watercraft using the Basingstoke Canal. Research carried out by the Association of Inland Navigation Authorities indicates that between 2002 and 2007 the number of craft using the Basingstoke Canal decreased from 310 to 148.
- However, overall looking at the navigation authorities the number of watercraft increased from 78,041 to 88,267 over the same period.

4.4 Volunteering

“Waterways have a long tradition of attracting loyal and skilled volunteers. In 2009 British Waterways recorded 16,000 volunteer days on its network. By 2020 it predicts a volunteer workforce of over 5,000 regular volunteers, contributing approximately 80,000 volunteer days.”^{vi}

With the squeeze on the public purse, the introduction of the Big Society programme and the localism agenda volunteering will become a more important part of the operation at many recreation, education and community sites. A number of leading organisations work with volunteers to deliver services, organisations such as the RSPB, the Wildlife Trusts and National Trust. New volunteers have a particularly important role in the future of the Basingstoke Canal (if adequate numbers can be attracted).

The report, Quantifying the Extent and Value of Volunteering in relation to Inland Waterways, commissioned by the Association of Inland Navigation Authorities identified that:

- There are approximately 21,000 regular volunteers undertaking volunteering activities on or because of inland waterways;
- Volunteers spend an estimated 11,000 volunteer days per month with inland waterways organisations;
- A large numbers of volunteers are aged over 55 - 44%. This is reinforced by the volunteer survey with 70% aged over 55;
- 68% of volunteers are male;
- Interestingly, the main activity undertaken by volunteers is practical restoration and maintenance.^{vii}

From a national perspective this paints a picture where there are a limited number of volunteers, a volunteer base which is made up predominately of older adults and the actual activities appeared to be limited to maintenance related activities.

To maximise volunteering opportunities – to broaden access and attract new volunteers (younger, female with different interests) it will be important to provide:

- Volunteer co-ordinator
- Financial support (volunteering budget)
- Develop a volunteer programme
- Recruitment drive
- Work in partnership with other organisations e.g. Wildlife Trusts
- Develop links with major corporations based along the length of the Canal to develop employee volunteering days. This will help to engage with a younger audience.

Whilst there are opportunities to increase volunteering at the same time the opportunities to attract funding to provide '**training opportunities**' should also be considered. For example, the Berkshire, Buckinghamshire & Oxfordshire Wildlife Trust have recently been advertising eight Green Talent Traineeships where they offer paid for training opportunities in nature conservation. We understand that funding has been awarded under the Skills for the Future via the Heritage Lottery Fund.

5.0 Case examples

As part of developing the vision we have case examples, including:

- Wey Navigation, National Trust
- Lancaster Canal
- Huddersfield Narrow Canal

The case examples help to identify areas of best practice and common challenges which have important implications for the development for the future of the Basingstoke Canal. We have also made reference to Rudyard Lake and the Montgomery Canal.

5.1 Wey and Godalming Navigations

The River Wey Navigation still functions under the original Act of Parliament 1653 and was constructed in just two years. It is one of the earliest navigations, built some 100 years before the industrial Canal Age and the Navigations has never been closed. There are some 16 locks along its full length. The original Act enables the Navigation to charge users on the waterway – it is interesting to note that the original Act to introduce a new canal often specified if the owner had a legal right to charge canal users.

The River Wey Navigations runs for 15.5 miles from Guildford to the Thames at Weybridge. The Godalming Navigation (opened in 1764) extended the navigable waterway a further 4 miles to Godalming.

There is a main National Trust visitor centre at Dapdune Wharf which offers a range of facilities for visitors including interactive exhibits and displays. The focus is on the history of where the Wey barges were built and it includes one of the last surviving barges 'Reliance'. The centre is not open on a year round basis. It is interesting to note that the majority of users at Dapdune Wharf are National Trust members (some 70%) however elsewhere on the Canal, National Trust members account for some 30% of users. The National Trust is a membership based organisation and this has clear benefits in terms of attracting visitors (both members and non-members). It also provides marketing support.

The Canal is owned and managed by The National Trust and it is supported by a large body of active volunteers numbering some 180 members – providing some 10,000 hours of support per annum. Approximately half of the volunteers work at Dapdune Wharf with the

remainder working with lengthsmen who maintain specific lengths along the Canal. The volunteers also provide specialist input in terms of IT support and legal advice. Marketing volunteering opportunities using Twitter, Facebook and noticeboards has been essential to the success of the volunteering programme.

There are five key user groups and the National Trust organises meetings twice a year for group representatives:-

- Towpath users (ramblers, cyclists)
- Non-power boaters, (rowers etc)
- Power boaters (mostly individuals rather than clubs)
- Anglers (fishing clubs associated with stretches of rented fishing rights).
- Commercial operators

The tow-path to the canal forms a continuous, level (except at the locks) footpath along the entire 20 mile length of the canal and is therefore very popular as an informal recreational asset both with visitors and local residents. According to an Environment Strategy Report in 1997, the tow path was estimated to generate some 500,000 visits per annum and usage is widely believed to have grown since that date.

There are some 350 hundred privately owned boats moored on the canal, with less than a dozen residential canal boat moorings. There is currently a policy against residential moorings primarily due to issues such as sewage, water management and visual impact. There are an estimated 450 visiting boats per annum. The boat licences and associated mooring fees form an important direct income to the waterway.

The National Trust leases out its fishing rights to four local clubs and all lengths are also subject to Environment Agency Rod Licence regulations.

The key use of the canal and tow paths are leisure and recreation users with no commercial traffic, apart from the occasional canal boat which sells coals to other canal boat users and residents who have property adjoining the Canal. There are two hire-boat companies on the Navigation and boat trips are offered at Dapdune Wharf and Guildford Boathouse with horse drawn trips from Godalming Wharf. Guildford is the major destination on the Canal. Rowing boats, punts, canoes and narrowboats can be hired from Guildford and Farncombe

Boat Houses. There is one marina at Pyrford with some 150 berths and a further 38 or so in the latest extension project.

The main education focus is at Dapdune Wharf and the Canal remains a valuable resource in terms of history / heritage, bio-diversity, natural history and the built environment. There is some use of the Canal for informal learning by volunteer groups and outreach work is also carried out.

The Canal is owned by National Trust with its main physical presence at Dapdune Wharf. The Wey Navigation has 22 staff. This includes 1 lock—keeper (at Thames Lock, the entry point to the Canal), 6 'lengthsmen', a mobile river warden, 6 maintenance staff (+ 2 apprentices), plus learning programme staff, management, administration and seasonal cover. The Canal also uses a direct labour team for certain larger maintenance programmes to avoid 'absorbing' the resources of the core team.

The Canal has an operating budget of some £1million per annum.

In terms of costs, approximately half of this figure is salaries and wages, and the remainder is split between conservation and property costs.

There is a rolling programme of property upgrades and replacement of infrastructure of some £250k per annum based on an estimated lifecycle of key items (e.g. lock gates, fittings and furniture for cottages etc). There is also an annual management fee of some £250k paid centrally to the National Trust.

Income is generated by all boats using the waterway, which require a boat license, with the National Trust being the licensing authority. Income is also generated by the estate management from - moorings, fishing agreements, access agreements, leases, rents, licenses, etc., which all contribute income to the waterway.

In terms of income some £400,000 is derived from wayleaves, commercial licences and rent. The limited asset base (land and buildings, rights, etc) means that the waterway requires support from National Trust (in the form of a dowry based payment). This generates some £300,000 of income per annum. The remainder is from mooring incomes and navigation licences and other income (such as admissions and events). Dapdune has around 16,000

visitors per annum with about 3,000 paying for entry. The income and expenditure for Dapdune is included within the above figures.

The budget aim is to allow for a surplus of some £100k per annum to feed into the reserve fund (currently standing at some £1.4 million). This means that the management can respond quickly to any major bank breach or other large issue to avoid aggravation of the problem.

Key successes

- A viable well managed Navigation with well structured asset management and maintenance programme and an excellent reputation in the Inland Waterways sector.
- Creation of a desirable asset – the heritage and landscape value of the Canal has been developed to the point where it is seen as a nationally important asset, sometimes used as a marketing tool to promote Surrey as a tranquil destination.

Relevant points for the Basingstoke Canal

- It is a challenge to balance the needs and demands of stakeholders; all waterways attract a variety of users and beneficiaries often with different requirements.
- Budgetary pressures – the Canal is at the end of the network, with a limited range of potential destinations for boat users.
- The importance of a substantial dowry allows for an effective ongoing operations and maintenance plan.
- Very clear and focussed management structure able to respond to needs and implement solutions immediately.
- The wide ranging volunteer programme, activities and organisation are vital to the success of the Wey Navigation.
- Benefits from a substantial in-house team of personnel are important to maintain the Canal and programme of events.

- The brand position is very clear, strong and articulated which helps to attract visitors and recruit volunteers. The brand position includes a strong and clear vision of what the historic waterway and its surroundings should look like - this includes the planning guidance document. Anything which is not appropriate to this vision such as houseboats are positively discouraged or resisted through the planning framework.
- The navigation is successful because it is usually open for business - except in very exceptional circumstances. It is also connected to the heart of Britain's inland waterways through the Thames. As such it has significant income from boating activities and ancillary businesses as boaters are not put off from mooring cruising narrow boats on the canal.
- It does not generally have a water supply problem.

5.2 Lancaster Canal, Glasson Branch and Ribble Link

The Canal runs north – south from Kendal to Preston over 56 miles. It is navigable for 42 miles from Tewitfield locks at Carnforth to Ashton Basin at Preston, and is lock-free on this length. There are two arms, Glasson Branch (2.5 miles & seven locks) and the Millennium Ribble Link (4 miles and 8 locks) which connect it to Morecambe Bay and the River Ribble respectively.

The Canal was built from 1794 and finished in 1826. The northern section from Tewitfield to Kendal was cut off by the construction of the M6 motorway in 1965. In 2002 the Ribble Link was opened (funded by the Millennium Commission) allowing access to the River Ribble via the Savic Brook and hence the Leeds and Liverpool Canal, Rufford Branch via the river Douglas.

The Canal is fed from Killington Reservoir north of Tewitfield locks.

This is a leisure waterway with no commercial traffic, the main users of the Canal are pleasure boaters, fishermen and walkers. There are hire-boat operators and marinas which form the bulk of the commercial trade on the canal.

The Canal is owned and managed by British Waterways (soon to be the Canal and River Trust – a registered charity). There are two canal societies, the Lancaster Canal Trust and the Ribble Link Trust. There are also several boat clubs usually associated with moorings or marinas and fishing clubs again associated with stretches of rented fishing rights.

The Canal is designated as a ‘cruising waterway’ which implies no commercial traffic and has restricted the government grants available to the Canal, the northern reaches are designated ‘remainder waterway’ reducing further the grant available. The key use is for leisure and recreation and this centres on the availability of the navigation which is not guaranteed and in some cases specifically restricted through environmental, engineering and/or water management factors.

There are several hundred privately owned pleasure boats registered to the Lancaster Canal. The boat licences and associated mooring fees form the main direct income to the waterway. They are moored on linear moorings, marinas or end-of-garden moorings. The number of boats is a function of the availability of the moorings and the conurbations which punctuate the Canal.

There are two hire-boat centres which service the Canal with approximately 20 boats available at any time. This is probably the maximum which could be sustained with such limited assets to attract the holidaymaker. Lancaster is the only major destination on the canal and only by navigating the Glasson branch can locks be experienced and to travel onto the rest of the system is a particularly daunting (and lengthy) task for even the most seasoned sailor.

All the fishable lengths of the canal, its feeder and Killington reservoir are let to fishing clubs who manage the operation, ticketing and stocking (where appropriate) directly. The rights to fish are shared between a variety of beneficiaries as some landowners retained the fishing rights when the land was sold to form the Canal 200 years ago. All lengths are, however, subject to Environment Agency Rod Licence regulations.

The tow-path to the Canal forms a continuous, level (except at the locks) footpath along the entire length of the Canal and is therefore very popular as an informal recreational asset both with visitors and local residents. Sections of the tow-path are designated as public footpaths where the surface is the responsibility of the local authority but the majority of the 50 miles is maintained by the owner for public benefit.

There is limited use of the canal as an educational resource, it lacks facilities such as classrooms, toilets, shelters or suitable coach parking which are essential for schools and colleges. There has been no large scale development of educational programmes to support the national curriculum. However the Canal remains a valuable resource in terms of bio-diversity (large sections are designated as SSSI's), natural history and the built environment.

There is some use of the Canal for informal learning by volunteer groups (BTCV for example), and as a secondary benefit of, for example, healthy living programmes. Again this is seen as a public benefit rather than a paid-for service.

There is a healthy volunteering programme on the Canal through the Canal Trusts and other related organisations like BTCV. There have been some community activities based around urban 'clean up' campaigns by local residents but these are usually associated with some event (i.e. clean-up of Ashton Basin for Preston Guild)

Although not providing any commercial return, the Canal provides a vital land drainage function, acting as an interceptor, rain water storage and discharge. This has an operational cost (water control) but is offset by reduced need to provide water for operation of the Canal and the possibility of selling on to commercial interests (see below)

Water abstraction for industry and agriculture – very little industry populates the hinterland of the Canal but commercial sales of water are possible, primarily to agriculture for irrigation during low rainfall periods (ironically when the canal water is also at its lowest).

All boats using the waterway require a boat license and a certificate of worthiness, British Waterways being the licensing authority. Surpluses are distributed by a formula between the waterways. The Lancaster Canal is home to several hundred boats and benefits from the income accrued.

Moorings, fishing agreements, access agreements, leases, rents, licenses, etc, all contribute income to the waterway. The limited asset base (land and buildings, rights, etc) means that the waterway cannot, by any means, be self-supporting but the exploitation of these assets forms a key element in British Waterways' integrated business strategy for minimising its dependency on grant aid from HMG.

During the 1990's stretches of the Canal tow-path were assessed for the suitability of the installation of fibre-optic cables, although the tow-path was suitable over much of its length this was not able to be exploited at the time.

The Canal is owned by British Waterways with a small operational base at Galgate south of Lancaster. The key operations are:

- Reservoir keeping – there is one reservoir keeper based at Killington
- Maintenance and operation – there is a small team of operatives (similar to wardens) carrying out routine inspections, water control, agricultural maintenance and basic structural maintenance.
- Major maintenance is carried out by contractors.
- Lock operation on the Ribble Link is by staff and trained volunteers.

Both Canal societies have volunteer programmes which are integrated with the staff work – Ribble Link Trust is primarily lock operation and water control on the Link The Lancaster Canal Trust is mainly concerned with restoration of the “Northern Reaches” and organises campaigning events and work parties

Key successes

- Partnership working – the success of the partnerships created to deliver the Ribble Link and the on-going operation of the Canal have resulted in the first new leisure canal to be built for 100 years, jointly operated by British Waterways and the Ribble Link Trust.
- Creation of a desirable asset – the heritage and landscape value of the Canal has been developed to the point where it is seen as a regionally important tourism asset, often used as a major marketing tool to showcase Lancashire as a destination.
- Integration of the volunteer programme with the canal staff

Key challenges and relevant points in respect of the Basingstoke Canal

- Balancing the needs and demands of stakeholders – this is not unique to the Lancaster Canal; all waterways attract a variety of users and beneficiaries often with diverging requirements to be balanced.
- Environment – the natural environment intertwined with the built heritage forms a valuable mix but one where tension between the two is inevitable. The most marked example of this is the conflict between the need to dredge to maintain the navigation and the need to conserve the very same aquatic habitat to maintain bio-diversity, particularly in areas designated as SSSI.
- Budgetary pressures – because most of the public benefits of maintaining the Lancaster Canal are less tangible than elsewhere pressure on funds available is marked. The Canal is at the end of the network, has low usage (although high boat numbers) and demand, and only has one significant destination (Lancaster City). Its relative value to the overall network is seen as limited and the argument for investment consequently weakened.
- There are relatively few income generating opportunities associated with the Canal. However, it is important to note that the Basingstoke Canal benefits from greater potential for non-waterway income generating opportunities related to, for example, camping revenue and rental from the cafe at Mytchett.
- There appears to be an effective working partnership between British Waterways and the two canal societies as well as with other partners such as BCTV.

5.3 Huddersfield Narrow Canal

The Canal runs east to west from Huddersfield to Ashton-under-Lyme for over 20 miles and includes 74 locks. It rises to a summit on Saddleworth Moor at Standedge Tunnel, the longest canal tunnel in the UK which is also the highest above sea level and the deepest below ground level.

The canal was built from 1794 and completed in 1811. In 2001 the canal was re-opened (funded by the Millennium Commission) after being abandoned in 1944. It links the Huddersfield Board Canal and the Manchester and Ashton-under-Lyme Canal. The Canal is

fed from a supply at the summit at Marsden with seven reservoirs providing the water resource.

This is a leisure waterway with no commercial traffic; the main users of the Canal are pleasure boaters, fishermen and walkers.

The Canal is owned and managed by British Waterways (soon to be the Canal and River Trust) with the Huddersfield Canal Trust its main third sector partner. The latest annual accounts for the Trust on the Charity Commission's website for 2008 show a fixed investment of just under £400,000.

The Canal is designated as a 'remainder waterway' which implies no commercial traffic and has restricted the government grant available to the Canal. The key use is for leisure and recreation in terms of private boating – the Huddersfield Narrow Canal forms the southern arc of the South Pennine Ring, a network of waterways including the Ashton, Rochdale and Huddersfield Broad Canals which form a circular route through the Pennines. The Canal is considered one of the most challenging in the UK and successful navigation of it counts as a major achievement, this is the main allure of the Canal. There are a number of privately owned pleasure boats registered to the Canal but this does not form a significant element to the waterway. There are few linear moorings, marinas or end-of-garden moorings as the canal is 'narrow' (7' width), densely locked and cuts through heavily industrialised or very hilly country leaving little space for basins, arms or lay-bys.

There are no hire-boat operations on the canal but several exist on adjacent waterways, though the challenge of navigating the Huddersfield Narrow Canal means few hire-boats use it.

All the fishable lengths of the canal and reservoirs are let to fishing clubs who manage the operation, ticketing and stocking (where appropriate) directly. The rights to fish are shared between a variety of beneficiaries as some landowners retained the fishing rights when the land was sold to form the Canal 200 years ago. All lengths are, however, subject to Environment Agency rod Licence regulations.

The tow-path to the canal forms a continuous (except at Standedge Tunnel) footpath along the entire length of the canal climbing a total of 438 feet and is therefore very popular as an informal recreational asset both with visitors and local residents. The Canal bisects the

Pennine Way (including a short section on the tow-path) at Marsden and therefore links to the wider regional footpath network. Sections of the tow-path are designated as public footpaths where the surface is the responsibility of the local authority but the majority of the 20 miles is maintained by the owner for public benefit.

Other than at the visitor centre at Marsden (see below) there is very little use of the canal as an educational resource, it lacks facilities such as classrooms, toilets, shelters or suitable coach parking which are essential for schools and colleges, nor has there been large scale development of educational programmes to support the national curriculum. However the canal remains a valuable resource in terms of bio-diversity (large sections are designated as SSSI's), natural history and the built environment.

The visitor centre at Marsden does provide a resource for education and learning within its hinterland, the history of the Canal, particularly the saga of digging Standedge tunnel has strong connections to the national curriculum.

Informal learning – there is some use of the canal for informal learning by volunteer groups (BTCV for example), with some use by fitness groups. Again this is seen as a public benefit rather than a paid-for service.

There is a strong volunteering programme on the canal through the Canal Trust and other related organisations like BTCV. The Huddersfield Narrow Canal has a very long history of hosting restoration projects based on volunteer labour and is an example for other restoration projects with hundreds of people involved over the years.

There are several commercial considerations, including land drainage - although not providing any commercial return the Canal provides a vital land drainage function, acting as an interceptor, rain water storage and discharge. This has an operational cost (water control) but is offset by reduced need to provide water for operation of the Canal and the possibility of selling on to commercial interests (see below).

Water abstraction for industry and agriculture – the Canal is heavily industrialised over around half of its length and manufacturing industry still populates the hinterland of the canal where commercial sales of water are undertaken including two to three notable examples. There is a conflict between the needs of the traditional Canal users and industry further complicated by the shortness of the stretches of canal between locks but agreements have

been reached for emergency supply (in the event of fire for example, or for periods when public supply fails) which provides security of provision to industry dependant on water for manufacturing processes.

All boats using the waterway require a boat licence and a certificate of worthiness, British Waterways being the licensing authority. The Huddersfield Narrow Canal has very few boats registered to it as alluded to above.

Estate management income - moorings, fishing agreements, access agreements, leases, rents, licenses, etc, all contribute income to the waterway. As with the Lancaster Canal the limited asset base (land and buildings, rights, etc) means that the waterway cannot, by any means, be self-supporting but the exploitation of these assets forms a key element in British Waterways' integrated business strategy for minimising its dependency on grant aid. During the 1990's stretches of the canal tow-path were assessed for the suitability of the installation of fibre-optic cables, large lengths of conduit have been installed and this provides valuable rental income to the waterway.

The Canal is owned by British Waterways with a small operational base at Marsden adjacent to the visitor centre. The key operations are:

- Reservoir keeping – there are seven reservoirs on the canal. They now feed the Yorkshire Water public utility system providing extra supply for domestic and commercial consumption in West Yorkshire, but are still maintained by British Waterways under a reciprocal arrangement where water resource is supplied to the canal from the utility except in drought where all the available water is given over to domestic/commercial consumption.
- Maintenance and operation – there is a small team of operatives (similar to wardens) carrying out routine inspections, water control, agricultural maintenance and basic structural maintenance.
- Major maintenance is carried out by contractors.
- Lock operation on the Canal is by users under supervision.

- Tunnel operation, at present navigation of the tunnel at Standedge is a paid-for service provided by British Waterways staff.

Key successes

- Partnership working – the commitment by all parties from the mid 90's onwards to the restoration and operation of the canal and the benefits for each partner being collectively adopted by all parties has meant that funders, statutory agencies and stakeholders could be satisfied that the greater good was being served by supporting the restoration and operation of the Canal. This united front by the partnership has proved particularly effective.
- Operational optimisation – flexibility of staff, volunteers and partner organisations have allowed British Waterways to operate the Canal as efficiently as possible. The arrangement with Yorkshire Water over the reservoirs has added resilience to both organisations operations without extra cost, and joint working between local authority park rangers, British Waterways staff and volunteer wardens has shared cost and effort.

Key challenges and relevant points for Basingstoke Canal

- Operational costs – operating the Canal involves considerable staff resource particularly at Standedge Tunnel.
- Balancing the needs and demands of stakeholders – the geography of the Canal, the regular spacing of locks, their proximity, and the limited resources available make competing needs of stakeholders particularly difficult to reconcile.
- Major works – the number of structures (locks, bridges, reservoirs, etc) and their general condition make for a significant asset management problem despite the investment in restoration over the past 20 years.
- Resources – as with the other challenges limited resources, particularly financial, make for a delicate balance between needs and practicalities.
- Standedge Visitor Centre does not charge an admission fee but it does incorporate interpretation space and it benefits from an open space of some 2,000 sq ft on the first floor. The visitor centre is not open on a year round basis. Interestingly, the

visitor centre is currently recruiting for a wide range of volunteers including retail and catering assistants, visitor centre guides and storytellers, education and event volunteers.

- Benefits from British Waterways ownership in terms of onsite expertise / staff etc.
- Incorporation of lock flights as part of a leisure activity represents part of its appeal as an interesting challenge to negotiate (and a spectacle for passers-by).
- Locks are mainly negotiated by users with a level of supervision.

5.4 Other waterways

The operation of **Rudyard Lake on the Caldron Canal** is an interesting case example. Rudyard Lake is a reservoir feeding the canal near Leek in Staffordshire. It has been a tourist attraction since it was built in the early 1800's serving as "Blackpool" type attraction for workers from the potteries (Rudyard Kipling was named after the lake). Boating, fishing, walking and other water sports take place on the lake (there is a miniature railway running the length of the lake) alongside the water control and operations for the canal.

In the late 1990's British Waterways concluded a 99 year lease with the "Friends of Rudyard" group representing all the users of the lake, for land on the side of the lake not needed for reservoir keeping. The "Friends" have acquired grant aid to build a visitor centre and café, with associated facilities and operate the amenities on the lake at a modest annual surplus. Management and safety are satisfied through a liaison process with clear demarcation between areas of responsibility. The "Friends" are seen as independent of British Waterways.

The **Montgomery Canal** is some 33 miles in length and today seven miles of the Canal have been restored. The restored length stretches from Frankton Junction to Maesbury. Other parts of the Canal are navigable for trailed boats sections between Arddleen and Berriew. The Canal crosses the English / Welsh border between Shropshire and Powys.

Parts of the Canal are designated as a SSSI and Special Area of Conservation. All of the length of the Canal is protected by European legislation because of its aquatic plant life. The Canal passes through a predominately rural landscape.

The restoration project is ongoing and there is a trust – the Montgomery Waterway Restoration Trust, a membership organisation with some 300 to 400 members. It is felt that as the Canal links into the Llangollen Canal which has some 15,000 boat movements per annum that demand to use the restored Canal is likely to be significant. Current boat movements are some 2,500 on the Frankton to Maesbury section and less than 500 on the Welshpool section.

The tow path is linked into a number of long distance walking routes including the Severn Way, Offa's Dyke Path and Glyndwr's Trail. Interestingly, it is estimated that the average density of usage is 19,000 visits per km per annum, in comparison the Kennet and Avon Canal has an estimated density usage of 55,000 visits per km per year. Over the length of the Canal tow path the Montgomery Canal generates over 1 million visits per annum (940,000 informal visits, 9,000 angling based visits and 51,000 cyclist based visits)

It is interesting to note the restoration of the **Kennet and Avon Canal**, which at 140km in length gained a HLF grant to help secure the long term future of the Canal. Following the re-opening in 2003 approximately 1,400 boats are based on the Canal. The restoration has helped to create 500 FTE jobs and has also encouraged significant canal side development - between 1995 and 2005 there has been some £375m to £435m of investment into canal side projects (source: Waterway benefits valuation & economic assessments, Waterways Forward).

It is interesting to note from the above examples:

- Canals to many non-water users represent a 'value for money' for day out as no admission charges are applied to walk along the tow path. However, there may be opportunities to introduce car parking charges at key sites along the canal.
- In urban areas canals can play a positive role as part of area regeneration strategies, particularly in terms of place-making and uplifting waterfront property prices.
- There are significant educational opportunities linked to canals both from environmental and historic perspectives. However, basic education requirement e.g. classroom facility are often not met.

6.0 Governance and operational management

In considering the ownership and management options it is important to state that the Canal is unlikely to attract a private buyer if it was made available to purchase and indeed given its wide ranging infrastructure role including land drainage function there is a need to ensure that the public benefits are protected and risks are minimised. This would be more difficult to maintain without a degree of public sector involvement and control.

It is also important to state that the Canal Society have not expressed any desire or intention to assume an ownership role.

We have looked at examples of ownership / governance including the Canal and River Trust (and formerly British Waterways), The Land Trust, The National Trust and The National Forest Foundation.

In terms of management options we have focussed on the 'whole' of the Canal and its associated assets / landholdings (including canal, towpath, car parking sites, the site at Mytchett etc). It is likely that in the management options there would need to be a comprehensive Service Level Agreement for any operating model involving third parties.

In terms of insurance we have spoken with an insurance broker who suggested that market interest in insuring the Canal would increase if all of the property assets were also included within the overall product to be insured.

In considering how the management structure might be revised, it has been widely acknowledged in the consultation that the existing JMC is unwieldy and decision making processes are often protracted. This highlights the need for a highly focused and streamlined organisational structure while still integrating the involvement of the various interest and user groups.

6.1 Management options

In terms of considering each potential management option the 'organisation' who will manage the Canal will need to:

- **Capacity** to deliver and manage the project and to provide a sustainable future for the site for the benefit of the public;
- **Competence** - having the skills and capacities (and preferably experience) to meet the responsibilities of ownership of the Canal, deliver the overall objectives, and provide onsite management and maintenance (including responsibilities in relation to environmental management (including the SSSI) and overall health and safety and public liability); to have the necessary skills and experience to drive forward both the day to day and strategic management of the operation
- **Credibility** and ability to manage and be accountable for public / external funds;
- **Financial efficacy:** to make optimum use of available resources and manage finances efficiently;
- **Accountability:** to be accountable to the local community and stakeholders to ensure that the project meets broader economic and social inclusion objectives;
- **Value for money:** the preferred operating partner must demonstrate value for money without impingeing on service delivery standards;
- **Deliverability:** to have in place necessary structures and personnel to deliver any new developments / infrastructure programmes on time and within budget to appropriate standards.

Whatever the preferred management option there is a need to update and agree the scope of the full restoration and management costs associated with the Canal. A priority is to restore the Canal to a fully navigable waterway as any partner is unlikely to take onboard the management of the Canal in its current condition (and would not have the funding to do so).

Additionally, the long term maintenance costs will need to be covered either by an annual payment to the operating organisation or via an endowment / dowry and reserve fund as the Canal is unlikely to generate sufficient surplus revenue to invest in an annual maintenance programme and periodic major incidences.

One consideration could be to look at the disposal of the property assets (i.e. the five cottages) and whether the capital receipts could be ring fenced and included within any dowry required.

A further consideration is that the management of the endowment will require a level of financial expertise and securing a large dowry may prove difficult in today's economic climate.

Below we set out the potential future management options for the Basingstoke Canal and their associated strengths and weaknesses.

These are subject to seeking appropriate legal review, particularly in relationship to the ownership, health and safety, public liability, VAT position and risk.

Hampshire County Council's Countryside Team is currently responsible for the management of the Basingstoke Canal Authority staff. Restructuring of the proposed service is currently taking place which will allow greater efficiencies within the Countryside Service of to provide greater strategic leadership and the required level of operational management. There will be a revised Site Manager Post with supporting staff team (including a Centre Manager, Senior Ranger and Finance and Administration Manager).

6.1.1 Maintain status quo – HCC / SCC

The Canal continues to be owned and is the responsibility of HCC / SCC

Strengths:

- Track record of managing the Canal with links to expert staff e.g. flood defence, risk assessment etc.
- Onsite presence.
- Able to achieve economies of scale (which are unlikely to be achieved by Trust or CIC status).
- Major budget holder (compared to new Trust or CIC).

- Detailed understanding of core aims and objectives.
- Long term presence, can take on other development projects associated with the Canal.
- No associated implementation or set up costs.

Weaknesses:

- Multitude of bodies, organisations involved with the project, making it difficult to move forward quickly and respond to market conditions.
- Significant corporate risk to SCC / HCC.
- Does not meet the aspirations of the brief (or some consultees).
- Not commercially driven / orientated.
- Current management structure convoluted.
- Subject to political change and varying priority agendas.
- Desire to secure appropriate exit strategy.

New management structure within existing ownership

A revision of the status quo seems a possible option in the short to medium term in view of the likely high endowment / dowry requirements of a Trust, CIC or similar.

The option of a board of directors reporting to a more general meeting of stakeholders is seen as a possible way forward in the interim. One approach is to consider an alternative to the JMC and JAG and create a new Management Board which:

- Sets the strategic direction;
- Sets the policy framework;
- Evaluates progress against key performance indicators, most likely as part of a service level agreement with the joint County Councils;
- Manages the risks associated with the overall operation;
- Works with the Operation Manager to develop and agree the annual business plan.

In terms of the structure of the Board it needs to be a manageable number and during the consultation it was recommended that the optimum number of members was nine to ensure efficient and streamlined management. Both Hampshire and Surrey County could have two elected members on the Board (budget holders). The other six local authorities could have three elected members on the board on a two yearly rolling basis.

To balance the local government presence we feel it will be important to introduce four members who have between them a strong background in commercial/accounting/corporate strategy, marketing, fund raising and engineering.

To maintain continuity and stability it is recommended that Board members are not replaced on a yearly basis. Also to achieve a continuing skilled succession in the future it will be important to plan for new appointments of the four non-elected members.

Under the board sits the Site Manager who, with an appropriate staffing resource (including a Centre Manager, Senior Ranger and Finance and Administration Manager), is responsible for implementing the strategy set by the Board and delivering the day-to-day management of the Canal.

In terms of the different working groups, user group and the Canal Society it is important not to lose the goodwill, skills and involvement these groups provide. They should report directly to the Site Manager possibly via a steering group or other forum which will act as the main means of communication with interested parties including the Canal Society and other volunteers. This group could meet between 2-4 times per year. The respective roles need to be clearly defined and boundaries set so that all parties understand their role (and responsibilities) within the new management structure and an appropriate 'calendar' of tasks and activities can be established.

6.1.2 Local Trust: Non Profit Distributing Organisation

The operation of the Canal is transferred from HCC / SCC to a Trust for the management of the Canal (assumes that as ownership and some liabilities (e.g. insurance, periodic maintenance etc.) remains with HCC / SCC at least in the short term).

Looking at former coalfield sites and their asset transfer, the model used to calculate the endowment is likely to be based on a sum of approximately **30 times** the annual operating costs of the Canal. It is also likely to include a figure for major renewals and repairs which are periodically required every 5, 10 or 15 years.

The future of inflation will need to be taken into account and this could impact on the formula and dowry sum required. This assumes that the Canal is handed over to a Trust in a fully repaired state as a navigation.

There are varying Trust models but in all cases The Trust must demonstrate a public benefit. In our view this operating model would require a service level agreement to be introduced.

Strengths:

- Potentially stronger opportunity for fund raising than other options.
- Potential financial efficiencies e.g. Gift Aid, business rate relief.
- Responsibilities clearly lie with Trustees for making management decisions.
- Incentivised to generate revenue.
- Profits reinvested directly within the project.
- HCC / SCC can sit on the Board.
- Maintains strong links with the community.
- Focus on the customer and responds to customer / market needs.
- Likely to attract new volunteers.
- Potentially attract high profile business leaders / public figures living in Surrey / Hampshire.
- Not seen as a service offered by county councils therefore may be easier or more acceptable to introduce car parking and other charges.

Weaknesses / constraints:

- Relies on dowry or annual payment.
- Potential to become unwieldy.
- Limited ability to raise funding from bank or commercial sources.
- Can be difficult to find appropriate Trustees able to dedicate appropriate time commitment.
- Requires highly motivated Trustees with appropriate skills in financial, legal, PR and risk management along with commercial aptitude.
- Still reliant upon funding from HCC / SCC e.g. annual payment from HCC / SCC (which would have conditions attached).
- Depends on funding sources which may change over the years.
- HCC / SCC likely to maintain a role and probably legal ownership / responsibility (unless opportunity for the Canal & River Trust or other similar body to take onboard all of the responsibility and ownership).
- Not necessarily able to generate more income than maintaining current position.
- Risk / liability still remains with HCC / SCC as landowners.
- TUPE implications.
- Set up cost implications.
- Risk of high profile failure and then Hampshire County Council and Surrey County Council have to take the operation back in-house.
- Significant technical requirements involved in maintaining sustainable Canal.

- The time and resources needed to establish the development trust.
- Perceived threat to local Members / local authority officers.
- Could compete for resources with other existing organisations.
- Additional net cost of managing the Trust identified to be at least **£78,000** per annum in earlier Options Appraisal (although this includes support services and statutory requirements which could continue to be fulfilled by the County Councils. Irrecoverable VAT is a significant potential cost).
- Currently the under management of two county councils if third sector partner is appointed this leads to another 'party' being involved in the management process, therefore may not streamline the management process.

6.1.3 Community Interest Company

Under this option, the operation of the Canal is transferred from HCC / SCC to a Community Interest Company for the management of the Canal (assumes that as ownership remains with HCC / SCC some liabilities remain with HCC / SCC – at least initially). This would require a degree of local community involvement in on-going management of the Canal and the project will need to have social and economic objectives. Hampshire and Surrey County Councils could become 'golden shareholders' to retain an appropriate level of control. The level of dowry or annual commitment to a CIC is likely to be similar to a Trust.

A Community Interest Company (CIC) is a form of social enterprise whose legal status allows it to generate surpluses for re-investment in the community. A CIC can be either private limited by shares or guarantee or a public limited company, it must however demonstrate it performs a role to the benefit of the community rather than private gain. There is a need to consider from the outset how to involve stakeholders in the project.

A CIC can convert to a charity subjecting the company to the more onerous regulatory regime of charity law, but it cannot become an ordinary company. It is only allowed to cease being a CIC by dissolution / liquidation or by converting to a charity.

There is a regulator of CICs which tests the suitability and community benefit in establishing the CIC and also monitors its activities.

Being a CIC will not confer any special tax status as such. CICs will generally be in the same financial position as any other non charity organisations.

Finance and Governance (Source: Department for Business Innovation and Skills)

- A CIC limited by guarantee with no share capital has no shareholders. The members give a guarantee to cover the company's liability, which is normally nominal and limited to, for example, £1. CLGs usually raise funds through grants or donations, rather than from shareholders.
- The Asset Lock ensures that CIC's assets are used for the benefit of the community and legislation limits the maximum return investors can make on any investment in shares in a CIC to a level the CIC Regulator considers to be reasonable.
- Grants may be available dependent on the expected activities and impact of a CIC's work. Grants are usually targeted at specific projects or for one off capital purchases.
- CICs do not receive tax breaks from the Inland Revenue by virtue of their legal status.
- However, as with any company, deductions for tax can often be made against capital expenses and against some of the costs of running a business, such as training.
- There is no general exemption from VAT for social enterprises that undertake trading activities, however, those engaged in provision of education, health or welfare may find exemptions. In some circumstances local government may provide discretionary rate relief to social enterprises. A CIC cannot apply to Inland Revenue for Gift Aid status.

Strengths:

- Incentivised to generate revenue.
- More freedom to commercialise opportunities than a Trust.



- HCC / SCC can sit on the Board.
- 'Profits' reinvested directly in the project.
- Focus on the customer and responds to customer / market needs.
- Transparency with strong links to the community (must fulfill a community interest purpose).
- Asset lock' to ensure that assets are protected for the community.
- Potentially easier to set up than a Trust.
- Likely to attract new volunteers.
- Involvement of local community.
- Range of financial benefits.
- Investment in local regeneration.

Weaknesses:

- Relies on dowry or annual payment and depends on funding sources which may change over the years.
- HCC / SCC likely to maintain a role and probably legal ownership / responsibility.
- Still reliant upon funding from HCC / SCC e.g. annual payment from HCC / SCC (which would have conditions attached).
- Not necessarily able to generate more income than maintaining current position.
- Risk / liability still remains with HCC / SCC as landowners.
- TUPE implications.

- Significant technical requirements involved in maintaining sustainable Canal.
- The time and resources needed to establish the development trust.
- Time commitment of Board members.
- Perceived threat to local Members / local authority officers.
- Could compete for resources with other existing organisations.
- Risk of high profile failure and then Hampshire County Council and Surrey County Council have to take the operation back in-house.

6.1.4 Private Management Contractor

This approach enables the local authority to offer a management contract to a private sector operator, normally 5-15 years depending on the capital to be invested (assumes that as ownership remains with HCC / SCC some liabilities remain with HCC / SCC).

In our view it is unlikely that a private operator will invest in the Canal due to the lack of return on their original investment.

Additionally, due to the limited revenue generating opportunities it is likely that the private operator will seek an annual operating payment from both Surrey County Council and Hampshire County Council.

Strengths:

- Incentivised to generate revenue.
- Focus on the customer and responds to customer / market needs.

Weaknesses:

- Unlikely to attract a commercial operator to take on overall responsibility without financial support.
- Lack of experienced private sector operators in the market place for this opportunity.

- HCC / SCC likely to maintain a role and probably legal ownership / responsibility.
- Motivation of private sector operator is profit, therefore some current services may not be delivered in the future.
- Risk / liability still remains with HCC / SCC as landowners.
- TUPE implications.
- Risk of high profile failure and then Hampshire County Council and Surrey County Council have to take the operation back in-house.
- Fund raising capacity (from government and charities) is not as strong as Trust or CIC.

6.1.5 Canal and River Trust

The Trust will take over ownership and management of the British Waterways estate on the 1st June 2012. This includes the navigations, land and property valued at approximately £0.5 billion. HMG has concluded a 15 year funding package with the Canal and River Trust for the continuance of the operation of the canal and river network thus giving the new charity a firm financial footing. We understand that the Canal and River Trust will self-insure up to £0.5 million and re-insure above that (for example, for public events, etc). The governance structure for the new Trust is federal in nature, a national body (the Council) will have non-executive responsibility with each operational unit (waterways, canals, groups of navigations – 15 in total so far) having a local Partnership Board to provide leadership, advocacy and support for the operational staff. Each Partnership Board will have a representative on the national council in addition to co-opted members of the council with specialist or national briefs. Existing canal societies and representative groups will have seats on the Partnership Boards.

Strengths:

- A charity can be much more flexible than a government agency – borrowing money for investment against assets, tapping into grant funding. Additionally a charity is one step removed from government and is not seen as being subject to political winds blowing in different directions.

- Natural fit in terms of profile and product.
- Experienced and skilled team onboard to deliver projects.
- Potentially take on the freehold ownership (with appropriate dowry).

Weaknesses:

- Unlikely to have funding to restore the Canal.
- Long term future of Canal and River Trust is not secure (i.e. after 15 years).
- Whilst there will be an experienced team managing the Trust it is unlikely that during their early years that they will wish (or be in a position) to take on another canal.

6.1.6 National Trust

The National Trust own and manage the Wey Navigation, a Canal which is linked to the Basingstoke Canal. Whilst previously the National Trust have expressed a view that assuming responsibility for BC is not a direction it wishes to take, this may change over time with the appropriate restoration work and level of dowry. The Wey Navigation is the only canal managed by the Trust.

In terms of taking on additional properties the National Trust use the 'Chorley' formula which has six key criteria, including:

1. The property must be of national importance because it is outstanding for its natural beauty or natural or historic interest.
2. Ownership by the Trust should increase benefit to the nation.
3. The property should normally be under threat.
4. The property will not be acquired unless the Trust is the most appropriate owner.
5. The property may be acquired to protect an existing property of inalienable standard.
6. The property should be, and should be expected to remain, financially self-supporting.

Strengths:

- Strong partner fit, particularly in terms of economies of scale, adjacent operations and leisure / recreation opportunities.

- Track record of successfully managing the Wey Navigation with appropriate skill base and knowledge of canal system and related issues.
- Benefit from 'cachet' of the National Trust brand and national membership of over four million members.
- Potentially take on the freehold ownership.

Weaknesses:

- Is likely to require a significant dowry to provide annual 'income'.
- Does not meet Criteria Six (above) and is unlikely to be taken on by the National Trust in the immediate future.

At present, neither the National Trust or Canal and River Trust are interested in taking on the Canal. These must be seen at best long term objectives once the Canal has been turned around and even then a dowry will be required. However, if the Canal's earning potential and standing has been increased the level of required dowry may be lower.

In the longer term, there is a further possibility to set up a new Trust with Wey Navigation outside the National Trust, possibly as part of a (or leading to the establishment of) a wider south east waterways network.

6.2 Summary comments (organisation)

In our view the Canal is unlikely to attract a commercial operator or private contractor.

In terms of future governance arrangements, these centre around revising the existing structure into a more streamlined entity, most likely with a management board. In the medium term a new Trust or CIC could be established for the management of the Canal and over time to explore the possibility of a merger with Wey Navigation / National Trust (possibly as a new separate Trust) or the Canal and River Trust. Whilst these may have higher operational costs there may also be greater opportunities to secure external sponsorship and donations. In these options, if there is to be any transfer of assets in the longer term then a substantial dowry will need to be provided alongside a reserve fund. The likelihood of the local authorities finding a £15m dowry for setting up a new Trust is

considered to be remote at present. All models involving a an asset transfer would rely on the Canal being reinstated to a 'steady state' of upkeep, repair and maintenance in line with the condition set out in the Asset Management Plan.

This Technical Report incorporates the background research and consultation and forms the basis of the Vision and Action Plan (please refer to separate document).

Planning Solutions Consulting Limited

June 2012

Appendix One - Basingstoke Canal – Stakeholder / User Questionnaire

Name:

Position:

Organisation / Department:

Tel:

Email:

A. Background Information

A1. What involvement does your organisation / department have in respect of Basingstoke Canal?

A2. How does enhancing the Basingstoke Canal fit with the strategic objectives / policies of your department / organisation?

A3. Do you have any projects currently underway (or planned) which may involve the Basingstoke Canal (or adjacent areas)? (Please describe).

B. Basingstoke Canal

The Basingstoke Canal is 32 miles in length and runs from Greywell Village in Hampshire to Woodham in Surrey.

B1. What are the main strengths of the Basingstoke Canal?

B2. What are the major constraints / risks in terms of developing / encouraging recreation / community activities along the Basingstoke Canal?

B3. Are there any key funding pots which we should be aware of (both in terms of capital funding for projects or ongoing revenue support)?

C. Main Markets

C1. Who are the main current users of the Basingstoke Canal at present?



C2. Are there any missing audiences (people who do currently visit the Canal)?

D. Future Vision

D1. Please could you select and rank the top seven market segments below in order of priority future markets to engage with in respect of the Canal (**with number one being the highest priority**). We recognise that there is some overlap between the different groups.

| Market segments | Top Seven |
|---|-----------|
| Education market | |
| Local residents | |
| Day visitors | |
| Canal boat users | |
| Canoeists | |
| Volunteers | |
| Other watercraft users | |
| Walkers / joggers | |
| Cyclists | |
| Anglers | |
| Tourists (staying visitors) | |
| Heritage enthusiasts | |
| Wildlife enthusiasts | |
| People attending events | |
| Other (please describe) Hard to Reach Groups (eg:BME) | |

D2. What do you think are the main opportunities for the Basingstoke Canal in the future?
To increase use of the Basingstoke Canal we would like to understand what products / services could potentially be introduced. One of the key considerations will be to deliver opportunities which are financially sustainable and have a strong fit with the Canal. Please could you tick one box for each option either (also please feel free to list out other comments and ideas).



| Potential opportunities | Strongly agree | Agree | Maybe | Disagree | Disagree strongly |
|---|----------------|-------|-------|----------|-------------------|
| New visitor centre | | | | | |
| Enhanced camping | | | | | |
| Education programmes | | | | | |
| Events | | | | | |
| Hotel/other accommodation | | | | | |
| Increased involvement opportunities (eg Volunteering) | | | | | |
| Increased skills and training programmes | | | | | |
| Outreach and Community Work | | | | | |
| Destination waterside pub | | | | | |
| Events programme | | | | | |
| Interpretation | | | | | |
| Activity / water sport centre | | | | | |
| Increased boat usage | | | | | |
| Marina | | | | | |
| Further recreational trails | | | | | |
| Additional residential moorings | | | | | |
| Enhanced cafe / catering offer at Mychett | | | | | |
| Enhanced retail opportunity at the current Visitor Centre | | | | | |

D3. Is there an opportunity to further develop the 'hub' at Mychett to act as destination/focal point?

D4. Are there other gateway / hub sites which merit further development?

D5. What role will volunteers continue to play in delivering the activities / programmes along the Basingstoke Canal?

D6. Do you think there is merit in further developing the Basingstoke Canal as a tourist / visitor destination in its own right (please circle):

Yes ./ Possibly / No

Please could you save and email this document to consulting@pslplan.co.uk. If you have any questions please do not hesitate to contact either Kevin Brown or Richard Linington on 023 9248 1999

Thank you for your help and co-operation in answering these questions.

Planning Solutions Consulting



Appendix Two – List of consultees

Grateful thanks to those who responded to our consultation including the following:-

Cressida Wheelwright

David Millet

Rod Edbrooke

Roger Cansdale

Philip Riley

Dean Wall

Joanne Potter

Bob Paton

Ian Brown

Chris Hunt

Cllr Wall

Alan Macdonald

Mike Beckwith

Ivor Caplan

J Greenfield

Cafe Manager

Gareth Jones

Gareth Jones

Julia Jacs

Richard Boreham

Brian Biffin

Andy Ford

John Edwards

Ian Wright

Jenny Radley

Liz Murnaghan

Charles Hicks

Simon Amble

Leigh Thornton

Lisa Creaye- Griffin

Jan Byrnes

James Taylor

Phil Allen

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