

Dear Clare

Following our discussion last week regarding the assessment of demand for recreational moorings on the Oxford Canal, I have given some further thought to this and comment as follows.

Firstly, I think it would be useful to provide some background on the applicants and ourselves.

The applicants are farmers who own and farm a large block of land to the north of the Oxford Canal, extending up almost as far as Lower Boddington.

They are also connected to an existing marina operator who operates a marina at Debdale Wharf and is currently completing construction of a new marina at North Kilworth. They therefore have extensive experience and knowledge of the boating industry and would not be proposing the construction of a marina at this location if they were not satisfied that there is sufficient demand for recreational berths on the Oxford Canal that will ensure that their investment in this enterprise is successful.

We have been involved with inland marina development since 2007. I have personally been involved with over 20 new marina schemes in England. My involvement begins with site assessments and evaluation of financial viability through the entire design and planning process and project management of the construction. As a Chartered Surveyor, I have also been involved with valuations of new and existing marinas which provides me with a valuable insight into the overall market and demand for boating facilities within England.

It can be quite difficult to obtain accurate up to date data on the availability of moorings and the numbers of boats on the network. Unfortunately, this lack of information now makes it more difficult to put actual figures in appraisals and much of the work relies on local knowledge and a more subjective assessment on potential demand.

My investigations have located a moorings area report for Oxfordshire produced in 2015 by the CRT. I cannot find any reports dealing with this matter since that date.

I attach a copy of the report. As you can see, in 2015 the CRT concluded that there were approximately 870 berths on the Oxford Canal from Napton in the North to the southern end where it joins the River Thames. In addition to the Canal and River Trust long term moorings totalling 190, there was a further 680 mooring comprising online third-party moorings and offline basin or marina moorings. The report confirmed that most marina and mooring operators in the area were reported to be full or near to full.

The privately operated mooring sites referred to in the report included:

- Cropredy Marina
- Napton Marina
- Wigrams Turn (Napton)
- Fenny Compton Marina
- Oxford Cruisers
- Sovereign Wharf
- Oxfordshire Narrow Boats
- Kings Ground Narrow Boats
- Bossoms
- Thrupp Cruising Club
- Walkers Services

Many of the mooring sites referred to in this list provide either hire boats or residential moorings and many are based down either in or around Oxford. Cropredy, Napton, Wigrams Turn and Fenny Compton are the commercial offline marinas on the Oxford Canal.

I believe you are familiar with Cropredy Marina as this application was dealt with by Cherwell District Council.

Fenny Compton is an older marina with very short jetties that are not ideally suited for modern narrow boats. It is also located immediately adjacent to a railway line and an industrial site. It does not provide the most attractive location for recreational moorings.

Both Napton Marina and Wigrams Turn are at the far northern end of the Oxford Canal, immediately adjacent to the Grand Union. I am not able to state categorically that both of these marinas are full, however local knowledge indicates that they are almost at capacity. Both of them are located at the point where the Oxford Canal meets the Grand Union and are therefore in a very popular location. Most of the boats from these marinas will cruise northwards through the Grand Union rather than south on the Oxford Canal.

There is no doubt that there is significant demand on the Oxford Canal, particularly on the southern section close to Oxford for residential moorings. Many of the older marinas are not subject to planning conditions that restrict residential and they are therefore able to offer these facilities.

However, our experience and that of our clients confirms that customers with boats moored for recreational purposes would prefer not to moor within marinas that also provide facilities for permanent residential. People who live permanently on their boat use them in a way that is significantly different to those who use them for recreational purposes and it is not terribly successful when you attempt to mix the two.

This is the primary reason why this application for the new marina at Claydon is for purely recreational berths as this is where our clients believe the demand is.

I have also located a press release from the CRT dated 13 April 2018. The press release is intended to report on the CRT's success in reducing license evasion, however it does also contain information on boat numbers and licenses. See the attached.

The Oxford Canal is located within the South-Eastern region. Boat numbers have increased by 0.4% which is greater than the overall annual increase of 0.2% nationally.

Whilst an increase of 0.4% is modest, it is still an increase and demonstrates that the numbers of boats on the South Eastern canal network is increasing.

In 2007/8 boat license numbers plateaued and then declined for a number of years as the recession following the banking crisis started to hit.

It has taken some time for the market to recover but reports from boat builders are that there is increasing demand for new boats and these boats are being purchased for recreational purposes. Our clients are seeking actual data from boat builders that will confirm this, we will forward this information when collated.

Finally, I have also located another press release from the CRT dated 1 March 2018 which confirms that the **Oxford Canal is the nation's most popular waterway with boaters**. Copy attached.

The popularity of the Oxford Canal has prompted the CRT to make significant investment in improvements and repairs at the northern end of the canal.

The press release also confirms that the CRT are fully aware that the Oxford Canal is an extremely popular waterway. This reflects a change that many of us within the boating industry have noticed over the last few years. Boating has always been more popular in the north of the

country, this has been partly due to the fact that there are more resources in the Midlands and North. Historically, therefore, there have been more boat owners in the Midlands and the North and the numbers have therefore remained fairly constant as next generations who have become used to holidaying on boats continue to do so. Boat numbers in the South have traditionally always lagged behind those in the North, again due partly to the lack of resource. Whilst the the Grand Union Canal does extend down to London and we also have the Oxford Canal and the Kennet and Avon in the South, traditionally there have been fewer facilities on these southern sections of canals which has meant that people have not been able to moor boats within an acceptable driving distance.

We act for a number of marina operators (who operate marina's in the midlands and north of the England) and they are now all interested in developing marina facilities on the southern canal network as they are increasingly being asked by customers for moorings on these southern canals.

The evidence confirms that the popularity of boating in the South is increasing and that the Oxford Canal is now the most popular waterway with boaters.

The increasing number of boat movements on the Oxford Canal undoubtedly puts pressure on water resources and you will have seen a number of objections received from third parties that have referred to a lack of water on the Oxford Canal. These objections are unfounded.

Our clients have fully complied with the CRT's process for assessing potential new marina sites, this has involved the completion of a water resource study which the CRT have undertaken to assess whether there would be any adverse impact on water resource in the canal from the creation of a further 250 recreational berths at Claydon. The water resource study concluded that there was sufficient water resource in the canal to accommodate these additional boats.

(The following is an extract from a response from the CRT to a feasibility appraisal submitted by our clients as part of the New Marina's process.

*REPORT - APPRAISAL OF FEASIBILITY SUBMISSION NO OF BERTHS: 250 (PRIVATE)  
SITE: GLEBE FARM NMU REF: 585 APPLICANT: ROWAN ADAMS*

*Water Resources*

*Water Management has undertaken a Stage 2 Water Resources Study in relation to the proposal to build a 250 berth marina at Glebe Farm. The proposed development site is located on the South Oxford Canal summit pound, which is part of the Oxford & Grand Union Hydrological Unit (Ox & GU), within the Canal & River Trust South East Waterway. The marina will cater for private leisure boats only (i.e. no hire boats).*

*Consequently although the proposed marina will place a greater demand on the Ox & GU hydrological unit's water resources, on balance, the impact is minimal (particularly when viewed within the context of the modelling uncertainty and accuracy of the available data), and therefore deemed acceptable.*

*It is therefore recommended that the marina extension is granted permission to proceed (i.e. a NAA can be negotiated with the marina operator/developer).*

*Please note that filling the basin will require a significant volume of water. Dependent on several factors (including the site's location, time of year, weather conditions over the previous months, number of boats movements, proximity to locks etc.) the filling of the basin may need to be undertaken over an extended period or even delayed. Your program should reflect this risk and discussions will be undertaken upon receipt of the DCNA submission. It should be noted that marina fill is best approached out of the main boating season when reservoirs have refilled)*

To conclude, therefore, it is not possible to accurately determine the availability of moorings on the Oxford Canal, in order to do so we would need the cooperation of the existing marina operations, if we were to seek this honestly, they would be unlikely to provide us with this information as they are likely to object to further competition being developed on the canal for commercial reasons.

However, the CRT as an organisation would be able to gain access to this information and their report published in 2015 concluded that most marina and mooring operators in the area are reported to be full or near to full. We have not been able to obtain the actual boat numbers for the region in 2015, however the data for 17/18 indicates that boat numbers were continuing to increase in the South East and I have no reason to suspect that from 2015-2017 there was any fall. Therefore, my assessment is that marinas and moorings were almost fully occupied in 2015, boat numbers will have either been maintained or slightly increased between 2015 and 2017, they have certainly increased between 2017 and 2018 which would indicate that the available moorings on the Oxford Canal are almost full.

The press release from earlier this year confirms that the Oxford Canal is named by the CRT as the nation's most popular waterway with boaters. A lack of offline mooring facilities on the Oxford Canal is likely to lead to an increase in online moorings. Online moorings cause a number of issues, firstly they obstruct the navigation and make it more difficult for other boat users, secondly they are difficult to regulate and boaters may choose to moor in locations where there are sensitive ecological features.

The CRT appears to encourage construction of offline marinas which help to take boats offline, therefore freeing up the navigation for other boat users.

Offline marinas are regulated by the CRT and have to comply with their criteria for operation. They can also be managed by the Local Authority to ensure that they do not allow permanent residential moorings.

Both myself and my clients firmly believe that there is significant demand for high quality recreational berths on the Oxford Canal. The berths that would be provided at Claydon would be in demand, furthermore they are likely to attract new boaters to the region who will make a valuable contribution to tourism revenue within Oxfordshire. Our Planning Statement evaluates the importance of boating within Oxfordshire in terms of generation of tourism revenue.

I hope that the above information provides sufficient evidence to demonstrate that there is demand for this new marina facility and, when taken into consideration along with the information we have provided regarding the suitability of other potential sites along the Oxford Canal within the Cherwell region, you will hopefully conclude that this is a good location to base a recreational marina.

Please do not hesitate to give me a call if you require any clarification or would like to discuss any of these points in any more detail.

Regards,

Stephen

July 2018