

## **RE-PRICING OF 12 MONTH MOORING PERMITS 2009 MARKET AREA REPORT FOR 'NORTH MERSEY'**

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### **Introduction**

This report provides the rationale for mooring price decisions for 2009. For explanation of the method and relevant policy, please see our overview report at [www.britishwaterways.co.uk/mooringprices09](http://www.britishwaterways.co.uk/mooringprices09).

The government's announcement of the reduction in VAT from 1/12/08 was made whilst work on the review was in progress. To avoid confusion, we continued with our analysis showing VAT rates at 17.5%. Then, once we were ready to enter the new rates into our invoicing system, the necessary reductions were made to take VAT at 15%. Where prices are presented in this report, we indicate which VAT rate applies. VAT is payable at the rate set by the government for the date when the permit is purchased.

Profiles of privately operated sites in the area are appended. We researched and compared their prices with the BW rates to inform our judgements, but because so many operators asked us not to publish their price data, it is not included.

A network map showing all sixteen market areas is downloadable from [www.britishwaterways.co.uk/mooringprices09](http://www.britishwaterways.co.uk/mooringprices09)

### **Local market overview**

This area covers the eastern sections of the Leeds and Liverpool canal including Leigh and Rufford branches. Lying between Ormskirk, Chorley and Preston, the area is popular for boating population of these towns, and proximity to the M6 and M58 means that it also draws boaters from farther afield.

We offer the following moorings in the area, all managed by our North West business unit.

Site name	Site capacity (berths)
Haskayne Towpath	6
Saracens Head	27
Weavers Bridge 27	1
Heatons Bridge	10
Crabtree Moorings	23
Lathom Moorings	27
Burscough Bridge	18
Ring O Bells	13
Rufford Top Lock	23
Parbold	11
Red Rock	19
Rawlinson	15
Botany Bay	11
Sparks Bridge	3
Total capacity	207

## Supply assessment

In addition to these BW long term moorings, there is a total of some 250 online and 300 offline basin or marina moorings in the same area. Thus the total market comprises some 750 berths.

The past year has seen no change in the number of moorings within the area itself or close enough to its borders to be a possible alternative mooring for customers. In 2009 we expect a further 390 moorings to become available at the new marinas opening at Southport Road, Lower House Farm & St Mary's Extension. As part of our online mooring reduction policy, we expect to close some 33 berths. The sites where we would prefer closures to take place are Saracens Head, Haskayne Towpath, Heaton's Bridge, Crabtree Lane, Lathom, Burscough Bridge, Ring O Bells and Rufford Top Lock. Vacancies arising at these sites will therefore not be advertised for tender until the full 33 berths have been withdrawn. The net effect will be an increase of approximately 47% in supply.

## Demand assessment

Occupancy, measured by the number of current permit holders divided by site capacity, currently averages 83% across BW sites in the group. Most of the marinas in the area have vacancies, particularly the two most recently opened.

A summary of mooring tender results is below. Most sites are relatively small so it is perhaps not surprising that few vacancies have come to the market. However, this does demonstrate that current customers have been unable to find better value moorings anywhere else. Only 13 vacancies have been advertised. No vacancies resulted in contracts below the guide price and all 13 exceeded it.

## Analysis of tendered vacancies

The table below summarises the results of tenders during the 12 months from November 2007. More recent results can be found on [www.bwmooringvacancies.co.uk](http://www.bwmooringvacancies.co.uk). (The moderation phase of the pricing review ran from November to January and during this period we took account of latest evidence.)

*(the prices shown in this table include VAT at 17.5%)*

Site Name	Guide (current) £ per metre	Length	Total Vacancies advertised to date	Total Tenders	Total Tenders > prevailing guide price	Average contracted* £ per metre following tender
Lathom	£55.00	10m and under	4	12	4	£58.50
Burscough Bridge	£67.50	10m and under	1	0	0	£0.00
Ring o Bells	£63.50	10m and under	1	3	0	£60.71
Parbold	£64.00	Over 10m	3	11	5	£94.45
Rawlinson Lane	£60.00	Over 10m	2	3	1	£62.50
Botany Bay	£75.00	Over 10m	1	3	1	£82.29
Sparks Bridge	£83.00	Over 10m	1	5	5	£157.50

## Private operator reference sites

We have identified the following privately operated mooring sites as being the most relevant to the BW sites for price comparison purposes

Fettlers Wharf Marina  
St Marys Marina  
BWML White Bear Marina

New Lane Moorings  
PB Mechanical  
Southport Road

Brief profiles of BW and these privately operated sites are summarised in the appendix

## Pricing Conclusions

The table below summarises our site-by-site conclusions across the area. Prices include VAT at 15%.

Site Name	2008 Price	Price from April 2009	Notes on pricing decision
Haskayne Towpath	£59.21	£61.66	As this site has been highlighted for reduction as part of the on line mooring plan in 2009/10, there have been no tenders, so we have been unable to draw any conclusions from tender data. Taking account of differences in facilities and immediate environment, this price is consistent with the new marina at Southport Road.
Saracens Head	£32.79	£34.26	This site has been highlighted for reduction as part of the on line mooring plan in 2009/10, therefore no tenders to draw conclusions from. Taking account of facilities and immediate environment, this price is consistent with that of Heatons Bridge. This site is priced lower than other comparable British Waterway sites in the area. Third Party access issues with pub landlord will be reviewed during 2009.
Weavers Bridge	£29.36	£30.83	No customers have resigned their mooring permits at this site, suggesting that the existing price was not too high. Taking account of differences in facilities and immediate environment, this price is consistent with that of the new marina at Southport Road.
Heatons Bridge	£34.74	£36.21	This site has been highlighted for reduction as part of the on line mooring plan in 2009/10, therefore no tenders to draw conclusions from. Taking account of differences in facilities and immediate environment, this price is consistent with the new marina at Southport Road. Third Party access issues with pub landlord will be reviewed during 2009.
Crabtree	£53.83	£56.77	No customers have resigned their mooring permits at this site, suggesting that the existing price was not too high, however the site has since been highlighted for reduction as part of the on line mooring plan in 2009/10. Taking into account the facilities and immediate environment, this price is consistent with that of Lathom Long Term Moorings.
Lathom Moorings	£53.83	£56.77	Vacancies at this site which have been tendered have resulted in prices at approximately the current level. Taking account of differences in facilities and immediate environment, this price is consistent with the new marina at Southport Road.
Burscough Bridge	£66.06	£69.00	Only one tender at this site for a very small berth which received no tenders, however the site has since been highlighted for reduction as part of the on line mooring plan in 2009/10. Taking account of differences in facilities and immediate environment, this price is consistent with the new marina at Southport Road.
Ring O Bells	£62.15	£64.60	Only one tender for this site, which received three tenders and resulted in a price slightly below the guide price however this is possibly due to the small size of the space. This site has since been highlighted for reduction as part of the on line mooring plan in 2009/10. Taking account of differences in facilities and the immediate environment, this price is consistent with that of Burscough Bridge Long Term Moorings.
Rufford Top Lock	£69.98	£73.40	As this site has been highlighted for reduction as part of the on line mooring plan in 2009/10, there have been no tenders, so we have been unable to draw any conclusions from tender data. Taking account of differences in facilities and immediate environment, this price is consistent with the new marina at Southport Road and the two marinas on the Rufford Branch.
Parbold	£62.64	£71.94	Mooring site located close to Parbold village and all its amenities. Vacancies at this site which have been tendered have resulted in prices at considerably higher levels. Taking account of differences in facilities and immediate environment, this price is consistent with that of competitors.
Red Rock	£58.72	£64.60	No customers have resigned their mooring permits at this site, suggesting that the existing price was not too high. Taking account of differences in facilities and immediate environment, this price is consistent with that of competitors and Rawlinson Lane Long Term Moorings.

<b>Site Name</b>	<b>2008 Price</b>	<b>Price from April 2009</b>	<b>Notes on pricing decision</b>
Rawlinson	£58.72	£62.64	Two tenders for this site at the very start of the tendering system. Taking account of differences in facilities and immediate environment, this price is consistent with that of PB Mechanical on the offside.
Botany Bay	£73.40	£77.32	Low turnover of customers on site which demonstrates demand. Only one tender to date, which resulted in a price higher than the published guide price. Site has good links to motorway system and is close to local town. Taking account of difference in facilities and immediate environment, this price is consistent with that of competitors.
Sparks Bridge	£81.23	£91.02	Small site with very low turnover. The vacancy at this site which has been tendered resulted in a price considerably higher than the guide price. This price reflects high demand and high level of on site facilities. The facilities and immediate environment of this site is of a very high standard, this price is consistent with that of the two marinas within close proximity on the Rufford Branch.

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February 2009

## APPENDIX - Mooring site comparisons

Site name (BW sites shown bold)	Setting	Mooring amenity	Facilities
<b>Haskayne Towpath</b>	Semi Rural Location approx 5 minute drive to the local town	Linear towpath leisure site	No on site facilities. Nearest BW shared facilities including showers, elsan and water approx 1 hours cruise.
<b>Saracens Head</b>			No on site facilities. Nearest BW shared facilities including showers, elsan and water approx 1 hours cruise.
<b>Heatons Bridge</b>		Linear off-side leisure site	No on site facilities. Nearest BW shared facilities including showers, elsan and water approx 30 minutes cruise.
<b>Crabtree Moorings</b>		Linear off-side leisure site	No on site facilities. Nearest BW shared facilities including showers, elsan and water approx 30 minutes cruise
<b>Lathom Moorings</b>		Linear off-side leisure site	No on site facilities. Nearest BW shared facilities including showers, elsan and water approx 30 minutes cruise
<b>Burscough Bridge</b>	Semi Rural location, close to local shops and amenities.	Linear towpath leisure site	Shared toilets, water point and elsan.
<b>Ring O Bells</b>	Semi Rural Location approx 10 minute drive to the local town	Linear towpath leisure site	No on site facilities. Nearest BW shared facilities including showers, elsan and water approx 30 minutes cruise
<b>Rufford Top Lock</b>		Linear towpath leisure site	No on site facilities. Nearest BW shared facilities including showers, elsan and water approx 30 minutes cruise
<b>Parbold</b>	Semi Rural Location close to the local shops and amenities.	Linear off-side leisure site	No on site facilities. Nearest BW shared facilities including showers, elsan and water approx 30 minutes cruise
<b>Red Rock</b>	Semi Rural Location approx 10 minute drive to the local town	Linear towpath leisure site	No on site facilities, limited British Waterways parking. Nearest BW shared facilities including showers, water, toilets, pump out approx 30 minutes cruise
<b>Rawlinson</b>	Semi Rural Location approx 5 minutes drive to the local town	Linear towpath leisure site	No on site facilities. Nearest BW shared facilities including showers, water, toilets, pump out approx 1 hours cruise.
<b>Sparks Bridge</b>	Semi Rural Location approx 10 minute drive to the local town	Linear off-side leisure site	Car parking and shared water point, toilets, showers and pumpout. Electricity also available at this site.
Private ref site 1 - Fettle's Wharf Marina		100 berth marina with pontoons	On site car parking, pump out, elsan, diesel, water, electricity, waste disposal, showers, toilets and laundry facilities.
Private ref site 2 - St Marys Marina		100 berth marina with pontoons	On site car parking, diesel, gas & boat maintenance, toilets, showers, laundry facilities, elsan, pump out, diesel, slipway, dry dock, electricity, café, refuse disposal, drinking water available.
Private ref site 3 - BWML White Bear Marina		100 berth marina with pontoons	Chandlery, elsan, diesel electricity, hard standing, laundry, showers, waste disposal, toilets, water point, slipway, hard standing.
Private ref site 4 - New Lane Moorings	Semi Rural Location approx 5 minutes drive to the local town	Online offside moorings	No on site facilities.
Private ref site 5 - PB Mechanical		Online offside moorings	Refuse disposal, elsan, diesel & gas, boat repair and chandlery.
Private ref site 6 - Southport Road Marina	Semi Rural Location approx 10 minute drive to the local town	200 berth marina with pontoons	Drinking water, refuse disposal, car parking, elsan, toilets and security