

Exmoor National Park Authority

A Statement on the Economy of Exmoor



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1. Foreword

Exmoor is one of only two National Parks in South West England. Designation by Government as a National Park recognised the high quality of the Exmoor environment and the need to conserve the area for future generations. The special status of Exmoor based on its environmental quality underpins the local economy and that of the sub region of western Somerset and northern Devon. The special status as a National Park and the combined efforts of the local community and public bodies offers the prospect of developing a truly sustainable economy that values the environment, and meets the needs of all sectors of the community and future generations.

- 1.1 This statement on the development of the Exmoor economy has been prepared by the Exmoor National Park Authority in response to widespread concern about future economic prosperity within the National Park. These concerns have grown in recent years in response to a general trend towards lower returns from the primary economic activities of agriculture and tourism on Exmoor. In 2001, the foot and mouth disease crisis served to highlight the fragility of the local economy as a whole and provided the stimulus to bring together people from all sectors of local business in a common approach to Exmoor's problems.
- 1.2 The worst aspects of the crisis are now over and there are signs of a recovery. However, it is now more clear than ever, that local people must work together to ensure future prosperity for the area. It is no longer enough to rely on traditional means of generating business as all business activities face challenges that emanate from well outside Exmoor and its sub-region. The business community of Exmoor needs to take the initiative and be proactive and imaginative in ensuring a viable future. Much can be achieved through strong partnerships with the public agencies that serve the area's communities and the development of a shared vision for the future and joint programmes for action.
- 1.3 There are many opportunities for future economic development within the National Park area and this statement provides a wide range of suggestions and proposals for future action. Crucially, however, the statement is founded on the premise that it is essential to develop the economy in ways that conserve and enhance those features of Exmoor that make it special and provide the area's unique assets. This statement takes the purposes of National Park designation as its starting point and indicates means to shape a truly sustainable economy to the benefit of those who live and work in, and visit, Exmoor.
- 1.4 This document is not a strategy or a plan as these are more properly the responsibility of the principal local authorities and regional development agencies that cover the Exmoor area. The statement is a contribution towards the development of future strategies for the Exmoor sub-region and it is intended that this statement will help ensure that future development plans for Exmoor National Park maximise the benefits of its special status and the advantages that this status provides, and take full account of the statutory purposes of National Park designation as set out in the Environment Act 1995:
 - *to conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park, and*
 - *to promote opportunities for the understanding and enjoyment of the special qualities [of the National Park] by the public.*

2. Sustainable development in a National Park

Sustainability

- 2.1 The Brundtland Commission (1987 World Commission on Environment and Development) defined sustainable development as “... *development that meets the needs of the present generation without compromising the ability of future generations to meet their own needs.*” Achieving sustainable development requires a long term approach that maximises economic development, social needs and effective conservation and protection of environmental resources.
- 2.2 In 1997, all the National Park Authorities of England and Wales adopted a joint statement on sustainability. National Parks have made a special contribution to work on sustainability aided by their twin purposes – to protect the environment and promote understanding of its special qualities – allied to the duty to foster economic and social well-being.
- 2.3 For economic development to be sustainable on Exmoor, every enterprise operating within the National Park should aim to enhance the value of the environment and the quality of life for visitors and local communities.

Box 1 – The principles of sustainable development

Sustainable development

Development is some set of desirable goals or objectives for society. These goals undoubtedly include the basic aim to secure a rising level of real income per capita – what is traditionally regarded as the ‘standard of living’. But most people would now also accept that there is more to development than rising real incomes – ‘economic growth’. There is now an emphasis on the ‘quality of life’, on the health of the population, on educational standards and general social well-being.

Sustainable development involves devising a social and economic system which ensures that these goals are sustained, i.e. that real incomes rise, that educational standards increase, that the health of the nation improves, that the general quality of life is advanced.

The means of achieving sustainable development in this broad sense might be summarised as follows:

- ◆ *The value of the environment* - Sustainable development involves a substantially increased emphasis on the value of natural, built and cultural environments.
- ◆ *Extending the time horizon* – Sustainable development involves a concern both with short- to medium-term horizons, *and* with the future longer-run future to be inherited by our grandchildren and beyond.
- ◆ *Equity* – Sustainable development places emphasis on providing for the needs of the least advantaged in society (‘intragenerational equity’), and on a fair treatment of future generations (‘intergenerational equity’).

Pearce et al., *Blueprint for a Green Economy*, 1989

Benefits of National Park Designation

- 2.4 The economic disadvantages faced on Exmoor are similar to other remote rural areas in the UK. However, these disadvantages are significantly offset by the quality of Exmoor’s environment and the status of Exmoor as one of only eleven National Parks in England and Wales. These factors attract visitors and raise the profile of the area at a national and international level. There is considerable potential for further benefit to be obtained through the development of an Exmoor ‘brand’ and using the image to market local products and appropriate enterprises to locate and develop in the National Park area.

- 2.5 The special quality of the landscape, wildlife and cultural heritage provided the basis for the designation of Exmoor as a National Park in 1954. Despite many changes over the past 50 years, Exmoor retains its special status compared to the surrounding countryside and now, more than ever before, the high quality environment is key to future economic prosperity within the National Park.
- 2.6 The conservation and enhancement of Exmoor's environment and wildlife is in itself an economic activity and will be an increasingly important driver to sustain the wider economy. The retention and development of skills in farming, forestry and conservation management are essential to maintain the character of the landscape that is the essence of the National Park.
- 2.7 Many other existing businesses, including those based on recreation and tourism, depend on a high quality countryside that is attractive and accessible. For long term benefit, future economic development must be compatible with the maintenance and enhancement of the qualities that make Exmoor special.
- 2.8 ***To be truly sustainable, the National Park economy needs to move away from activities that exploit and degrade the area's environmental assets towards an approach that conserves and enhances the environment at the same time as providing an economic return and social well-being.***

Guiding principles for sustainable development in Exmoor National Park

- 2.9 Exmoor National Park Authority will view economic and community development in the National Park against the following principles:
- ◆ *A vibrant and sustainable community and the ability to offer attractive business and employment prospects are of fundamental importance to the future of the National Park.*
 - ◆ *Economic development should not be regarded as an overriding purpose in itself but should aim at sustainable rural development that also achieves environmental and social objectives. Its contribution towards such goals should be apparent.*
 - ◆ *Employment and business opportunities should derive from and help sustain the National Park's special qualities and environmental resources.*
 - ◆ *Actions by the National Park Authority that assist economic and community development should relate directly to National Park purposes.*
 - ◆ *The National Park Authority sees its planning function as an essential tool to achieve its conservation objectives while safeguarding community interests and facilitating sustainable rural development.*

4. Role of the National Park Authority

- 4.1 The National Park Authority has the principal duty of furthering National Park purposes set out in the Environment Act 1995 (see Foreword). This duty extends to all statutory bodies and principal authorities that operate within the National Park area including district and county councils and statutory agencies such as Countryside Agency, Forestry Commission etc.
- 4.2 In addition to its primary duty, the National Park Authority also has a *duty to seek to foster the economic and social well-being of the local community*. In undertaking this duty the legislation specifically states that the Park Authority should not incur significant expenditure itself in implementing the duty but should co-operate with local authorities and public bodies whose functions include economic and social development within the National Park area. Further guidance is provided in Government Circular 12/96, which states:
- “This... duty reinforces the need for the Parks to take a positive view of the well-being of their local communities, although it does not enable the National Park Authorities to make additional financial resources available and gives them no new powers.”*
- “... it is not appropriate for the National Park Authorities themselves to assume the role of promoting economic and social development in the Parks, nor to compete with those agencies that have the power to do so.”*
- 4.3 Thus, the expenditure of effort and financial resources by National Park Authorities must remain focused on the purposes for which the National Parks were created. However, actions and expenditure by National Park Authorities in support of National Park purposes that indirectly helps foster social and economic well-being of local communities is permissible and, in many respects, desirable.
- 4.4 Despite the constraints, the National Park Authority has a significant contribution to make to help support and encourage economic activity that is compatible with the Authority’s statutory purposes of conservation and enhancement of the National Park and promotion of public enjoyment and understanding.
- 4.5 For example, the policies set out in the Exmoor Local Development Plan and their implementation through the development control system enables sustainable economic development in a way that benefits or relies on the high quality rural landscape. In this way Exmoor will be seen to be a desirable and advantageous place in which to locate a business or expand an existing venture. The quality of the environment can be used to add value to the promotion of the business and its product.
- 4.6 The National Park Authority itself receives government funding to undertake its activities and these have an important local economic benefit. The Authority also plays a key role in securing external funding from national and regional sources for local projects and programmes, and has an important lobbying role on issues affecting the National Park.

5. Regional and sub-regional context

The South West is one of the most rural English regions and has a high quality environment

- A third of the region is designated as protected landscape (Areas of Outstanding Natural Beauty (AONB)) including two National Parks – Exmoor and Dartmoor.
- 25% of England’s nature conservation Sites of Special Scientific Interest (SSSI) are in the South West although the region forms only 15% of the country.

This high quality environment is a key driver for the region’s economy

- Environment related activity contributes around 100,000 jobs and £1.6 billion to the region’s economy each year (A study for the SW Regional Development Agency)
- Tourism contributes over 10% to the regional economy and three quarters of all holiday trips to the South West are motivated by conserved landscapes (National Trust).

Environmental quality as a key driver for the South West economy

- 5.1 The South West region of England is amongst the most rural of the English regions and noted for its high quality landscapes and coasts. A series of recent studies have illustrated the economic importance of environmental quality in the Region. The report ‘An Environmental Prospectus for South West England (March 1999) establishes the case for the value of the environment to the region’s economy and states that the environment contributes 100,000 jobs and £1.6 billion to the South West economy. This equates to over 4% employment and 3% GDP in the South West.
- 5.2 Another report, ‘Valuing Our Environment’ commissioned by the National Trust (1999), examined the value of ‘conserved’ landscape in areas of England and Wales, including South West England. It concluded overall that some 40% of jobs created in tourism were directly dependent on a high quality environment. In the South West analysis it was estimated that conserved landscapes attract a spend of £2,354 million from holiday trips and support 97,200 jobs or the equivalent of 43% of all tourist related jobs in the region.
- 5.3 The importance of a high quality environment has been recognised by the South West Regional Development Agency (SWRDA) whose Regional Economic Strategy (April 2000) identifies four regional strategic drivers:
 - Innovation and technology
 - Skills and learning
 - Partnership South West
 - The Environment.
- 5.4 The Strategy states the need to “ensure that the region’s unique cultural and environmental assets are used to attract and develop business potential” and recognises the environment as “a differentiating driver” that is key to the region’s competitive advantage and is the South West Region’s ‘USP’ or unique selling point.

Exmoor’s regional and sub-regional context

- 5.5 The high quality of Exmoor’s landscape is recognised in the area’s status one of only two National Parks in the South West region. The attractiveness and high profile means that Exmoor plays an important role in the regional and sub-regional economy well beyond the National Park boundary. The draw of Exmoor as a tourist destination benefits businesses over a wide area including most of North Devon and West Somerset Districts and much of neighbouring Torridge, Mid-Devon and

Taunton Deane. Thus, efforts to promote Exmoor and develop the Exmoor 'brand' will have benefits over a wide area.

- 5.6 At the regional level, the presence of two National Parks in Exmoor and Dartmoor is an important draw to the region. Closer working and joint promotions between the two National Parks and their local business communities could provide significant benefits in economic terms. An existing example is the 'Two Moors Way' long distance footpath. Use of this route provides additional custom to a range of businesses including accommodation and village shops etc., many of which would not otherwise have benefited to any great extent from visitors.
- 5.7 A number of authorities and agencies have an important role to play in developing Exmoor's economy. In particular, the ideas set out in this statement need to be integrated into the work of a range of partner organisations, including:
- ◆ **Government Office for the South West (GOSW)** – integrates the activities of central government at the regional level including taking a lead role in: the promotion of sustainable development and the use of natural resources across the South West; food, farming and rural development; culture and tourism, and European funded programmes and initiatives. The latter includes overall administration of the South West Objective 2 programme. The Objective 2 area includes Exmoor and many of the actions set out in the Exmoor Economic Statement have the potential to benefit from this funding opportunity.
 - ◆ **South West Regional Development Agency (RDA)** – as well as its strategy for the region as a whole, the RDA's '*Rural Renaissance*' initiative will be of fundamental importance to Exmoor and surrounding rural areas. The RDA's recently published draft '*Innovation Strategy*' identifies four key areas where innovation could form the basis for economic development in the region wave energy, new-age fuels, bandwidth roll-out and food processing. These all have potential relevance to Exmoor's economy.
 - ◆ **England Rural Development Programme (ERDP)** – is funded through the Common Agricultural Policy (CAP) of the European Community and is managed by the Department of Environment, Food and Rural Affairs (DEFRA). The South West Chapter sets out the criteria for funding provision aimed at the agricultural industry including agri-environment schemes (Environmentally Sensitive Areas and Countryside Stewardship); Rural Enterprise Scheme; Processing and Marketing Grants, and Training. The designation of Exmoor as an Environmentally Sensitive Area (EAS) has attracted substantial funding support for environmental work undertaken by the farming community. Some ??% of eligible farm holdings had taken up the scheme in 2000 attracting over £? million to the Exmoor agricultural economy.
 - ◆ **South West Tourism** – has a key role in promoting the region to visitors.
 - ◆ **South West Chamber of Rural Enterprise – CORE** – includes representatives from land-based industries across the region, including a representative from the National Park Authorities.
 - ◆ **Countryside Agency** supports a wide range of integrated rural development initiatives including 'Vital Villages' and is to support a national pilot project on Exmoor aimed at achieving high standards and sustainability in rural tourism.
 - ◆ **Devon County Council** is active in co-ordinating economic development across the County including Exmoor.
 - ◆ **North West Devon Economic Partnership** is supported by North Devon District Council and a wide range of other organisations including the National Park Authority. The Partnership published its strategy in 2001, including projects and programmes of benefit to communities within the National Park.
 - ◆ **Somerset County Council** is active in co-ordinating economic development across the County including Exmoor.
 - ◆ **West Somerset District Council** publishes an economic statement for the district and supports a wide range of economic development initiatives.

5.8 Future development of the National Park economy depends on the active support of the authorities and agencies set out above. It is hoped that the 'Economic Statement for Exmoor' will encourage that support by setting out a range of practical actions and initiatives that will have economic benefits and be compatible with National Park purposes. Adoption of the ideas set out in this statement in regional and sub-regional economic development strategies and support programmes is essential if Exmoor is to see any tangible improvement in its economic status and realise its economic potential.

6. Overview of the Economy of Exmoor National Park

Exmoor's economy – a profile

- The resident population within Exmoor National Park is estimated at 10,645 (1991 census).
- Average population density is 15.4 people per km² one of the lowest in England.
- The main settlements are Lynton and Lynmouth (1,658); Dulverton (1,347), and Porlock (1,332).
- 933,000 people live within 50km driving distance of Exmoor and the nearest moderately sized settlements to Exmoor are Minehead (population 10,300); Tiverton (17,187); South Molton () ,and Barnstaple (20,767).
- Nearest large urban areas are Taunton (40 km, 43,000 population); Bridgwater (45 km,) Exeter (60 km, 111,000); Bristol (100 km, 400,000); Torbay (90 km, 123,000); Yeovil (80 km, 37,000); Swindon (km, 180,000); Poole & Bournemouth (km, 350,000), Bath (115 km, 170,000); Plymouth (110 km, 253,000).
- Exmoor has a higher percentage of people over 45 than Devon and Somerset as a whole.
- At the time of the most recent census (1991) there were 4,916 (55%) economically active adults and 4,015 economically inactive (students, retired, ill-health, etc.) *(By 1996 it is estimated that the overall economic activity rate for Exmoor was less than 50% compared to the national figure of 61.5%).*
- The Exmoor economy is characterised by a high proportion of small, ‘micro businesses’, with less than five employees and a high proportion of self-employed *(39.0% of economically active adults in the National Park were classified self-employed in 1991 census).*
- The largest sectors for employment are distribution and catering (31.6%); other services (30.9%) and agriculture (19.4%) *(1991 census)* and there is a need to broaden the economic base to help compensate for job losses in traditional industries.
- It is estimated that the foot and mouth disease crisis in 2001 led to a loss of £16 million to the Exmoor economy through its impact on farming, tourism, retail and services businesses.
- Average earnings are relatively low in the National Park because of the dominance of agriculture and tourism and the amount of low-paid casual and seasonal work undertaken. *(Full-time male weekly earnings averaged £304 in North Devon and West Somerset in 1998 and was less than 80% of the UK average of £384.50.)*
- A high proportion of local people rely on more than one source of income to compensate for high seasonality of many local jobs.
- Part-time employment is high at over 40% in most National Park wards.
- In 2000 unemployment in the National Park was running at roughly 1.4% in the summer and 2.9% in the winter with about 47% of the economically active population employed.
- Unemployment rates have been relatively low compared with the county and regional rates and much below the national rate *(2.4% Exmoor National Park, Somerset 3.1%, SW 3.4%, UK 4.7% in September 1998)*. However, there are exceptions to this and the winter rates in coastal wards, particularly Lynton and Lynmouth, have been consistently higher than the National Park average *(1996 –10%, 1997 – 6.3%, 1998 – 5%)*.
- There is a lack of job opportunities locally for those who do become unemployed, particularly in skilled and better paid work.
- Improved access to education is a priority to improve literacy rates that are very poor within the National Park area, and for those who wish to retrain but are remote from centres of higher or further education.

- **Many local people are unable to afford to buy or rent open market housing within the National Park due to relatively low local incomes and high house prices caused by external demand, including for second homes.** (At £182,000 the average house price within the National Park is considerably higher than the national and regional averages - data from house price survey undertaken in August 2000)
- **Adverse market conditions that face conventional business include poor accessibility and transport links; limited labour supply and skills, and lack of suitable premises.**
- **Conversely, there are distinct advantages relating to the Exmoor ‘brand’ and the area’s status as a high quality landscape of national and international importance.**

Employment (1991 census*):		
Economically active adults (aged 16+)	4,916	(55.0% adult population)
% full time employees	37.3%	
% part time employees	16.4%	
% self employed	39.0%	
% on Government scheme	0.8%	
% unemployed	6.6%	
Economically inactive adults	4,015	
Percentage of economically active population (1991 census):		
Agriculture	954	19.4%
Manufacturing	197	4.0%
Construction	403	8.2%
Energy and water	25	0.5%
Transport	162	3.3%
Distribution and catering	1,553	31.6%
Other services	1,519	30.9%
Unemployed	324	6.6%

* The census data covers the resident population but the employment is not just within the National Park area.

Future trends and opportunities

- **There is likely to be a continuing decline in the proportion of people employed full-time in agriculture.**
- **There is likely to be an increase in the proportion of people employed in service industries.**
- **There is a need to diversify local economic activity and increase average wage levels.**
- **There is considerable potential to develop sustainable economic activity that benefits from the Exmoor ‘brand’ and the area’s status as a high quality landscape of national and international importance.**
- **There is potential for closer working between the two National Parks and their communities to the benefit of the Exmoor and Dartmoor sub-regions and the South West region as a whole.**

6.1 The economic indicators demonstrate a need to diversify local economic activity within the National Park to sustain a high level of employment, improve job security, and increase average wage levels and household incomes. By broadening the economic base of the area, losses of jobs in the traditional land-based industries of farming and forestry can be compensated for by gains in other sectors such as information and communication technology or those based on local products and skills. A positive approach by local authorities and regional agencies can reduce the number of obstacles facing a new business and help address market conditions, such as poorly developed ICT infrastructure, increased overheads, limited labour supply and suitability of premises.

7. Land Based Sector

Exmoor's highly valued environment has arisen over many centuries through the impact of Man's activities, particularly farming. A continuation of a viable farming economy is vital to ensure future management of the landscape, wildlife and cultural heritage of the National Park – the very assets that underpin Exmoor's whole economy.

Current profile

- The total agricultural labour force in 2000 was 1304 representing a decline of 8.4% since 1990.
- The percentage of persons living in the National Park employed in agriculture has declined from 24.2% in 1971 to 21.5% in 1981 and 19.4% in 1991.
- In 2000 average hill farm income in the West Country was £9,528. In real terms this was two thirds of the income in the late 1980s.
- 92% of farmers in the National Park reported an adverse economic impact arising from the 2001 Foot & Mouth disease crisis. (Survey conducted by Exeter University in September 2001 on behalf of Exmoor National Park Authority)
- Options for agricultural production on Exmoor are limited compared to those in more favourable agricultural areas and livestock farms will continue to predominate with store lambs and suckler calves likely to remain as the main products from Exmoor.
- Forestry is relatively important in the east of the National Park and there is growing interest in large scale woodland planting and improved woodland management.
- Income from local primary forest products has declined significantly in recent years due to price competition from imports of timber from abroad.
- Commercial shooting enterprises have shown significant growth within the National Park in recent years, primarily based on reared and released pheasants and partridge.
- Hunting has traditionally been an important component of life on Exmoor and provides local employment and wider benefits to local accommodation and service providers, especially in the winter months.

Land use in Exmoor National Park (area)				
Use	Acres	Hectares	% of Park	
Farmland	95,686	38,724	55.8	
Moorland (livestock grazed)	46,987	19,023	27.5	
Woodland	20,881	8,454	12.2	
Cliff and foreshore	1,940	788	1.1	
Urban area	1,497	606	0.9	
Water (ponds, reservoirs)	410	164	0.2	
Other (roads, gardens etc)	3,788	1,521	2.3	
Past land use:	Year -	1887	1964	1979
Farmland %		47	53	60
Semi-natural vegetation %		47	37	30
Woodland %		7	10	10

- 7.1 Census figures group farming, forestry and fishing employment figures together. The percentage of people living and employed on Exmoor in these industries has been falling slowly for decades. Of the total labour force, 24.2% was employed in these industries in 1971, 21.5% in 1981 and 19.4% in 1991. The figures do not, however, reflect the true value of primary industries to the local economy because of their spin-off to service industries. There also appears to be a considerable net import of labour from areas outside of the National Park that does not show in the census returns. Many of the contractors for farming and forestry are based outside the National Park.
- 7.2 This section of the report looks at the current status, future trends and proposed actions for five key areas of the land based economy of Exmoor – farming; forestry, field sports, hunting and conservation of the natural environment.



Farming:

- 7.3 Farmland, along with moorland used for grazing, accounts for 83% of the total land area of the National Park. Agricultural policy following the Second World War placed a high emphasis on food production and the trend towards more intensive farming systems has significantly altered the quality of the natural environment, wildlife and cultural heritage on Exmoor over the past fifty years.
- 7.4 In the late 1970's and early 1980's, measures to reduce adverse impacts on moorland and other habitats were pioneered on Exmoor. Since then, Government and European agricultural policy has begun to move away from its emphasis on production and towards a greater recognition of the role of farmers in environmental management. The period of very gradual transition has coincided with a series of external factors that have had a significant adverse impact on the farming economy to the point where many Exmoor farms are struggling to maintain a viable livelihood. It is vital for the local economy that ways are found to sustain successful farming businesses on Exmoor. It is equally vital to retain a farming infrastructure and skills for the future management of the National Park environment.
- 7.5 Profitability of most farms on Exmoor is dependent upon government grants. These come mainly as subsidies through the new area-based Hill Farming Allowance, and various headage schemes including Sheep Annual Premium and Suckler Cow Premium. Even with this support, information compiled by University of Exeter for management agreement calculations indicates that sheep farming on Exmoor in 2000 was only 33% as profitable as in 1978 in real terms.

Direct support payments to agriculture in Exmoor in 1996

Beef Special Premium (BSPS)	£2,385,000
Suckler Cow Premium (SCPS)	£461,000
Arable Area Payments (AAPS)	£1,028,000
Sheep Annual Premium (SAPS)	£4,203,000
SAPS LFA supplement	£666,000
Hill Livestock Compensatory Allow. (HLCA)	£1,096,000
Other schemes	£271,000
Environmentally Sensitive Area (ESA)	£1,865,000
Total Direct Support	£11,975,000
Total per farm holding	£13,373
Total per FTE	£10,200

7.6 A total number of 659 farm holdings in the National Park (measured in 2000 and based on closest fit to the Park boundary) supports a labour force of 1304. A comparison of statistics set out in the table on page 15 shows a series of trends between 1990 and 2000:

- an increase in the number of holdings including large growth in small holdings and decline in middle sized holdings
- small decrease in overall farmed land area and particularly in recent and temporary grassland and crops together with a small increase in farm woodlands.
- substantial decline in dairy herds matched by the increase in beef cattle.
- decrease in the overall sheep flock but only modest reduction in the number of breeding ewes.
- a decline in the overall agricultural labour force of more than 10 jobs a year, leading to an overall 8.4% decline over ten years
- trends in agricultural employment from full-time to part-time employment and towards increased reliance on family members and outside contractors.



Farming data for Exmoor in 1990 and 2000

Farming trends	1990	2000	% Change
Number of holdings	620	659	+6.3
Holding size – tillage and grass area (hectares)			
Less than 5 ha	80	184	+130.0
5 to 20	148	147	-0.7
20 to 50	121	88	-27.3
50 to 100	144	113	-21.5
Over 100 hectares	127	127	0
No. holdings engaged in:			
Cereals	137	116	-15.3
Dairy herd	43	28	-35.0
Beef herd	317	258	-18.7
Breeding ewes	425	376	-11.5
Total land area in holdings (hectares)	51,390	49,650	-3.4
Of which - crops/fallow	2,503	2,263	-9.6
permanent grassland (> 5y)	30,987	30,987	0
recent and temporary grassland	5,255	3,766	-28.3
moorland\rough grazing	11,058	9,984	-9.7
woodland	1,221	1,711	+40.1
set-aside	0	416	+100
all other land	366	523	+42.9
Livestock numbers			
Cattle - dairy herd	1,584	938	-40.8
beef herd	11,934	12,349	+3.5
breeding herd replacements	3,254	3,552	+9.1
other cattle over 1 year	5,545	6,479	+16.8
cattle and calves under 1 year	12,398	11,589	-6.5
Total cattle and calves	34,715	34,907	+0.6
Sheep - breeding ewes	188,837	179,843	-4.8
lambs under 1 year	201,638	173,083	-14.2
other sheep	13,221	6,891	-47.9
Total sheep and lambs	403,696	359,817	-10.9
Pigs - breeding sows and gilts in pig	31	22	-29.0
all other pigs	145	165	+14.8
Total pigs	176	187	+6.3
Goats - Total goats	384	114	-70.3
Labour changes:			
Farmers, partners, directors - full + part time	877	903	+3.0
Managers and regular hired workers	328	207	-34.9
Seasonal and casual workers	218	194	-11.1
Total agricultural labour force	1423	1304	-8.4
Full time employees	190	95	-50.0
Part time employees	124	96	-22.6

Forestry:

- 7.7 There are currently about 3,000 hectares of commercial forestry plantations in the National Park. The majority of these are conifer plantations that are well established and are actively being cropped and replanted in line with forest design plans agreed by the Forestry Commission following consultation with the National Park Authority.
- 7.8 Little of the timber grown on Exmoor is utilised locally and most is transported out of the area for processing. The South West region has relatively little processing capacity and the markets for

locally grown timber and forest products are prone to considerable fluctuation due to competition from imports, including from regions across the world where forests are not being managed in a sustainable way.

- 7.9 The exceptions to this general picture include local high quality oak board manufacturer and a small number of craft and furniture making businesses that use locally grown wood products. The National Park Authority produces all of its rights of way signs and stiles etc., from timber grown in its own woodlands and extracted as part of the conservation management of these woodlands.

Field sports:

- 7.10 Game shooting can provide valuable extra income to a farm or estate and also generates economic benefit to the wider community in the National Park and it is estimated that shooting contributed £7.5 million to the Exmoor economy in 2001. However, reliable figures on the importance of the industry are currently unavailable and should be a priority for future research. Furthermore, the shooting season takes place over the Autumn and Winter periods when visitor numbers are low.
- 7.11 Red Grouse are now virtually extinct on Exmoor and the last sporting shoot took place on Dunkery in the 1960's. Today, the quarry species for game bird shooting are reared and released pheasant and partridge. These commercial shoots have important impacts on the local environment. High densities of reared gamebirds can damage hedges, unimproved grassland and the ground flora and invertebrate fauna of woodland. Their droppings can change vegetation and wildlife can be affected by vermin control and chemicals used in management of game birds, such as disinfectants and the antibiotics added to their food. Pens and feeding areas can also be unsightly and their siting affects vegetation, as does the creation of tracks and planting of conifers for roosting and shelter. Game crops can also have a major impact on the beauty of the landscape if their siting, shape and composition are not designed to fit in with existing field patterns.
- 7.12 More positively, recent research by the Game Conservancy Trust, has shown that well managed game crops can make a significant contribution to providing winter feeding areas for many farmland birds which have suffered substantial declines since the 1970s.
- 7.13 The clean rivers of the National Park make up the headwaters of the River Exe system and support wild trout and salmon populations. Fishing does take place on Exmoor and rights to these rivers are of high economic value. Overall, however, there is evidence that numbers of migratory salmonid species are substantially down on historical records, primarily due to pressures well outside Exmoor waters.
- 7.14 Exmoor is prized for its relatively large population of red deer and commercial stalking of the deer for sport is offered by a small number of enterprises in the National Park. Many regard Exmoor as generally unsuitable for this activity, given the fragmented land ownership; high woodland cover and high visitor numbers compared to more suitable areas such as the Scottish moorlands.

Hunting:

- 7.15 There is a strong tradition of hunting with hounds on Exmoor and 14 hunt packs exist within the National Park and surrounding area. Principal quarry species are red deer, fox and hare, and Exmoor and the Quantocks are the last areas of the UK where staghounds meet. During the season there can be 30 or more meets during any one week with high levels of participation and large numbers of followers.
- 7.16 A survey by the Centre for Rural Studies on the economic impact of stag hunting on Exmoor, commissioned by the National Trust in 1993, produced the following figures:
- Number directly employed in stag hunting 147
 - Number indirectly employed by stag hunting 129
- 7.17 A report to West Somerset District Council in 1997 stated that about 40 people were employed by the seven hunts in their area, including the two staghunts, so there are variations in what is meant by 'directly employed'. Such figures need to be used carefully, however, they do indicate a significant

number of local people employed in the existing Exmoor hunts. In addition, visitors following the hunts help to support the local economy, especially in the winter months. The report stated that hunt subscribers spent £4.5 million a year on their sport in North Devon and West Somerset.

Conservation of the natural environment:

- 7.18 Conservation of the natural environment is central to the achievement of the statutory purposes for National Park designation. To be successful, this work requires a wide range of skills ranging from detailed ecological survey and management planning work through to practical delivery on the ground. Many of the employment opportunities in the scientific aspects of survey work are offered by the National Park Authority and agencies such as English Nature and the Rural Development Service, but there are opportunities for private sector consultancy and voluntary bodies.
- 7.19 Many of the practical skills needed are essentially similar to agricultural and forestry work, albeit with a conservation objective rather than production. A significant number of people are employed on Exmoor in estate work, woodland management, hedgerow management, bracken and gorse control etc.

Future trends and opportunities

Farming:

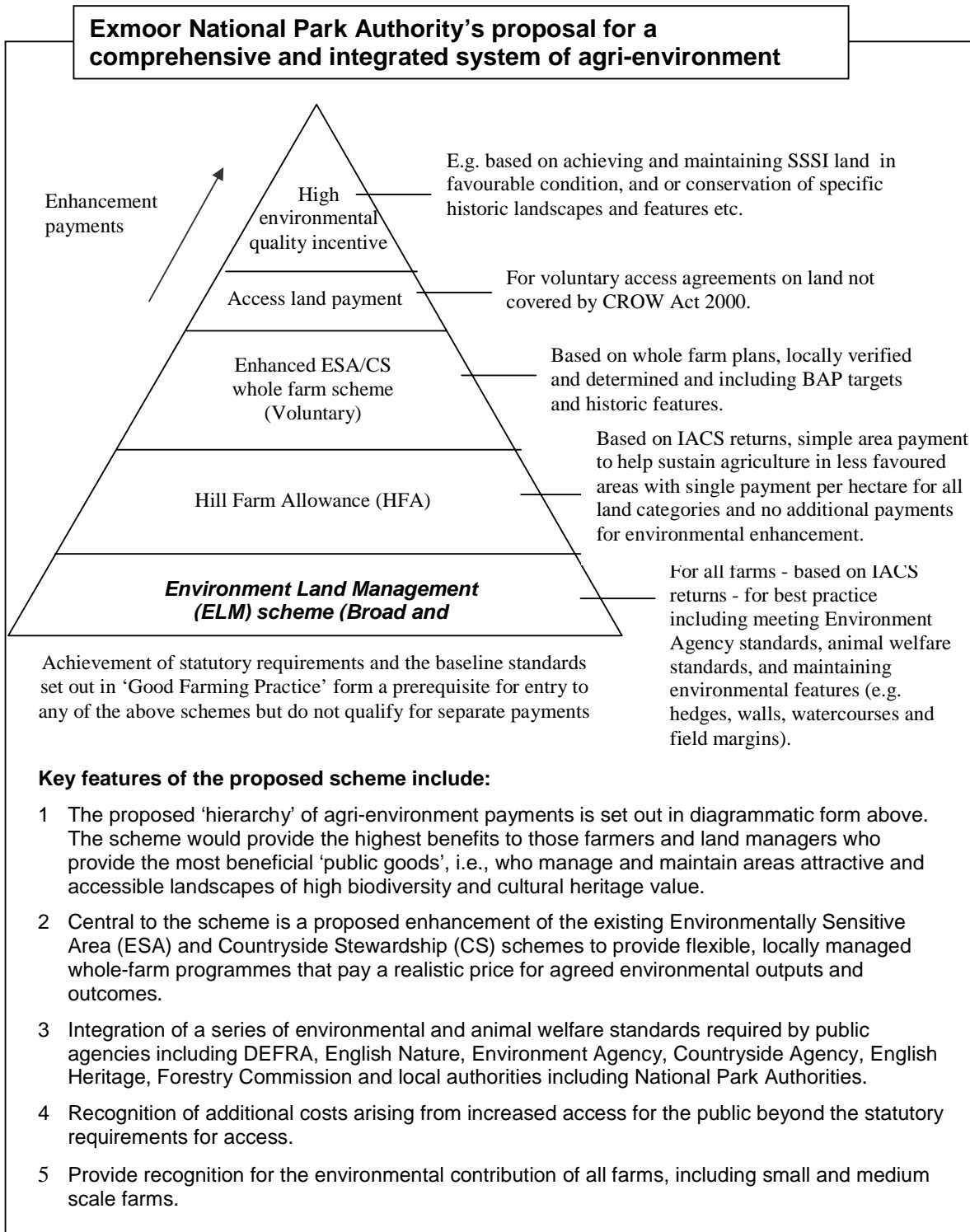
- 7.20 Farming is, to a large extent, at the mercy of economic factors affecting the market for farm products and European Union and Government policy. It is, therefore, vulnerable to change and farming in the uplands is seriously under threat. Farm incomes and profits fell between 50 and 100% during 1999, were predicted to fall by a further 35% in 2000 and have been hit further by the foot & mouth disease crisis of 2001. The BSE crisis, strong pound and FMD have devastated the export market, while cheap imports have driven the market price of British livestock to new lows. Changes to the Common Agricultural Policy under Agenda 2000 are having further effects on upland farming as agricultural support is de-coupled from production.
- 7.21 If income from production continues to decline, continuing agriculture in the National Park will become increasingly reliant on agri-environment funds and it will be vital to influence the provision of these to ensure that they are targeted effectively. For example, the Environmentally Sensitive Area scheme run by the Ministry of Agriculture brings more than £2 million into the economy of Exmoor each year. This directly benefits the farmers who receive the payments, and also generates work for local contractors, keeping rural skills alive and enabling farmers to afford to carry out positive maintenance to features of their farms. In turn, extra money is spent locally on products and services, indirectly benefiting a larger number of businesses.
- 7.22 In the past, funding from agri-environment schemes has been based on ‘profits foregone’ by the farmer. As the overall profitability of farming has fallen so has the relative value of agri-environment payments. Increasingly, the approach to agri-environment schemes will need to provide a more realistic return for the work undertaken in maintaining and enhancing the environment for wider public benefit. The recent Government inquiry chaired by Professor Curry on the ‘Future of Food and Farming’ has strongly advocated this approach alongside a wide range of other measures to provide a more secure future for agriculture. Farmers operating in the most attractive and sensitive environments should stand to gain most from this new approach, especially in National Parks.
- 7.23 As the target for public funding moves towards the production of environmental benefits it is to be expected that more resources will be available for management and restoration of high value habitats such as moor and heath and semi-natural grassland. Some 5,000 Ha of moor and heath on Exmoor have been lost since the National Park was designated. About 80% was improved for agriculture and the rest was planted with trees. Policy change means that there are now opportunities to return some of these areas to heathland.
- 7.24 A national target for the re-establishment of 6,000 Ha by 2010 has been set for lowland heath. Exmoor’s Biodiversity Action Plan has set targets of 200 Ha by 2010 for lowland heath and 100 Ha for upland heath. Re-establishment of heath by clearing plantations is quite straightforward, as there has been little change to the soil. The same process on agriculturally improved soils is more

complicated especially if the archaeological resource is to be protected. Research and field trials will have to precede any large scale projects but, once developed, these techniques will have considerable potential on Exmoor and in other moorland areas. More immediately, substantial wildlife gains could be achieved by stopping further inputs of fertiliser and lime to semi-improved grasslands.

- 7.25 This does not imply any diminution of farming in the future management of Exmoor's environment as it is vital that sufficient livestock levels are provided to maintain appropriate grazing of moors and grassland. With the right marketing this livestock could achieve a premium price as interest grows in locally-distinctive, locally-sourced produce, marketed directly from the producer to the consumer. The development of an Exmoor 'brand' and the UK equivalent of a 'fair trade' scheme that signifies that a producer has received a fair price for goods would be a key advantage in marketing local goods. Any brands will need tight criteria and close monitoring if they are to retain credibility with purchasers.
- 7.26 To benefit from this demand, farmers need to learn how to add value to their wares through finishing stock, processing, packaging and advertising, requiring expertise in a range of areas, including information technology and dealing with the public. These are all new skills for an industry used to maximising production volume for an assured outlet and the requirement for more intensive farming methods and buildings to finish stock will have environmental impacts.
- 7.27 This trend also has benefits for the National Park in terms of the way that public attention is drawn to the area and its special qualities, providing an opportunity to publicise the needs of a protected area and promote good practice in linking farming and the environment for an economically sustainable future.
- 7.28 The change from a mixed farming system to intensive pastoral agriculture has had a profound effect on farmland wildlife. This has been well documented for birds but must also be true for invertebrates and plants, especially arable weeds. Even a modest proportion of farms reverting to a more mixed regime could help to reverse the decline in wildlife, although much depends upon the intensity of the farming and a landscape managed for greater biodiversity will provide an enhanced attraction to visitors to the National Park.
- 7.29 Small changes such as wider field margins in both arable fields and pastures would develop the wildlife potential of hedges, banks, ditches and streams. Replacement of pasture by intensive arable with high fertiliser and pesticide inputs and without winter stubble is not likely to be beneficial but a change back from autumn to spring sowing of cereals will increase the winter feeding available on stubbles for many seed-eating birds, notably finches and buntings as does the increased planting of 'game crops'. Many of the once common bird species have declined on Exmoor and nationally but can recover in response to appropriate conservation management and so benefit the tourism economy of the National Park.
- 7.30 Maximum gains will be achieved through the development of more sustainable farming systems across the National Park. Most farms on Exmoor rely on imported feed, fertiliser and straw. Present subsidy payments have encouraged an increase in stock numbers. It would be better for the environment if farms were less intensive and more self-reliant, for example, by returning to a system that includes arable crops as set out in the preceding paragraph. Careful use of agricultural wastes also has an important contribution to more sustainable agriculture by reducing inputs from artificial fertiliser etc. Organic farming is an extension of this philosophy. Examples also exist of innovative products derived from animal wastes, including biogas production, garden composts etc.
- 7.31 A grant system is available nationally for conversion to organic farming and the possibilities for the introduction of organic systems of farming on Exmoor should be explored with the farming industry. No incentive scheme is available to encourage sustainable systems that are not organic, but the opportunity exists to explore these farming systems through the National Park Authority's Farm Conservation Scheme in conjunction with Devon County Council's initiative into sustainable farming. There could also be opportunities to consider small-scale sustainable energy systems on farms generating energy from crops, including coppice, as well as wind, water and solar power.
- 7.32 Good examples of farm diversification exist in the National Park including tourism related, food processing, direct marketing of livestock products and high technology enterprises. There are limits

to any form of diversification, however. For example, there is already sufficient tourism accommodation on Exmoor in the small scale bed-and-breakfast category.

- 7.33 Furthermore, diversification and the development of new business activities usually requires investment and financial risk. Farm businesses that are already suffering from a fall in incomes are not always well placed to take this additional risk.
- 7.34 The Countryside and Rights of Way Act 2000 may provide opportunities for land managers to develop additional enterprises that benefit from greater access, particularly in activity holidays.



Forestry:

- 7.35 Current employment in forestry and woodland management is relatively small on Exmoor. In 1998, the National Park Authority was a partner in the development of the Greater Exmoor Woodlands Initiative. This has been successful over the past four years in encouraging the sustainable management of small woodlands, creating new woodlands and assisting the local economy through the development and marketing of a wide range of woodland products. Considerable potential remains for the development of this project and there are potential employment opportunities in conservation management work; charcoal production; wood fuel heating systems; utilisation of small wood products, and production of finished goods such as wood crafts.
- 7.36 As with farming, there is a need to learn new skills on adding value to local products through processing, packaging and advertising, requiring expertise in a range of areas, including information technology and dealing with the public.
- 7.37 As well as deriving greater economic benefit from existing woodlands there is considerable scope for new woodland planting on improved farmland in areas where this can enhance the landscape and diversity of habitats and provide valuable additional income to farmers and landowners. One such area is the Brendon Hills part of the National Park.
- 7.38 Woodland areas are also able to absorb more pressure from visitors than more sensitive open moorland habitats and some active pursuits such as horse riding and mountain biking can be enjoyed in woodland areas without adversely affecting quiet enjoyment of the National Park by other users.

Field sports:

- 7.39 Commercial shooting has a wealthy client base and Exmoor has a good reputation for this activity. To be sustained, future development will need to maintain high quality and minimise any adverse environmental impact. An emphasis by the industry on achieving positive environmental gains will also enable the importance of the industry and its beneficial aspects to be presented to visitors and local people who may have concerns about large scale shooting activities.

Hunting:

- 7.40 Hunting did not take place for most of 2001 as a precaution to prevent the spread of foot and mouth disease. This period of inactivity had an adverse economic impact on the hunts themselves and on associated businesses, especially equestrian businesses. Over the past few years there have been a series of campaigns in parliament seeking to ban hunting and there is the prospect of legislation over the course of the current parliament.
- 7.41 Any ban will have a serious impact on individuals and enterprises that currently benefit directly and indirectly from hunting. As well as the hunts themselves, benefiting enterprises include livery businesses and stables, all equestrian related enterprises, clothing suppliers, accommodation businesses and caterers etc. The hunting season operates through the Autumn and Winter months at a time when visitor numbers are much lower so that hunting is an important means of extending the tourism season.
- 7.42 There is little doubt that much of this economic activity would substantially reduce following any ban. Drag hunts are unlikely to fill the gap and it is not easy to identify alternative activities that would enable many of the businesses adversely affected to replace the income lost.

Conservation of the natural environment

- 7.43 This area of work is likely to grow as emphasis on agri-environment schemes increases. A recent example is a proposal by the tenant of moorland near Warren Farm, to undertake a substantial programme of moorland diversification and management. This proposal is supported by the National Park Authority and English Nature and will require a substantial investment including the

purchase of specialist machinery and development of a range of new techniques with wide application on many sites in Exmoor.

- 7.44 In certain locations wildlife viewing for example of deer and, in the case of Porlock Bay, saltmarsh bird life, can provide an attraction for visitors. Indeed, examples such as the reserves owned and managed by the RSPB and the Wildfowl and Wetlands Trust can attract many thousands of visitors with clear spin-off for the local economy.

Recommended Actions

Farming:

- **Influence Government and EU agricultural, socio-economic and agri-environment policy for the uplands, with the intention of achieving a prosperous farming community that contributes to the achievement of National Park purposes by:**
 - *encouraging Government to bring about a shift in national public expenditure support for agriculture towards more integrated and sustainable farming systems that contribute to the purposes of the National Park.*
 - *seeking a more flexible and better funded agri-environment scheme for Exmoor based on delivery of specific environmental benefits including the re-creation of semi-natural habitats and Biodiversity Action Plan targets.*
- **Manage farmed land in ways that ensure the conservation and enhancement of the wildlife, natural beauty and cultural heritage of Exmoor by:**
 - *supporting environmentally friendly farming through a range of mechanisms including agri-environment schemes that take into account habitat quality and potential, including statutory and County wildlife site status and biodiversity targets.*
 - *protecting and managing ecologically and historically important hedges and other boundary features of Exmoor, including watercourses, and locally distinctive features such as beech hedgebanks.*
 - *encouraging the conservation management and restoration of species-rich and semi-improved grassland and moorland habitats.*
 - *re-establishing upland and lowland heath on former heathland site.*
 - *providing advice and support to farmers and landowners on landscape, trees and woodland, nature conservation, archaeological sites and historic buildings and support funding bids that enable farmers to conserve and enhance these features.*
- **Increase the extent of farmed land managed by more sustainable methods by:**
 - *encouraging sustainable and organic farming systems.*
 - *encouraging small-scale sustainable energy systems on farms.*
 - *encouraging more effective use of agricultural waste, e.g. biogas and composting.*
- **Undertake research into alternative products from farming suited to the climate and soils of Exmoor (compatible with National Park purposes) and into new uses for materials derived from moorland management including heather and bracken.**
- **Support measures that allow the traditional Exmoor family run farming enterprise to provide a reasonable rate of return, for example, by:**
 - *providing support through business appraisals, advice services, development grants, training courses etc.*
 - *seeking increased financial recognition of the non-farming benefits produced by traditional farming systems.*

- **Support measures that allow Exmoor producers to gain greater control over the food chain from initial production to final sale to the customer by:**
 - *supporting the provision of sufficient abattoir and food processing facilities within and near to Exmoor.*
 - *encouraging the development of co-operatives, local marketing and branding initiatives.*
 - *support the development of local ‘foodlinks’ initiatives.*
- **Establish a farm advisory service to help maximise benefits from the England Rural Development Plan for Exmoor.**
- **Establish area based ‘Rural Regeneration’ Initiatives which provide the capacity and support needed to develop the economy in rural areas and unlock local potential.**
- **Help farmers to meet the demand for local produce and other diversification options, and to maximise the opportunities to promote good practice for the integration of farming and the environment for an economically sustainable future by:**
 - *supporting initiatives that provide funding and training opportunities to enable farmers to diversify or develop their existing businesses in ways that contribute to National Park purposes and that foster the social and economic well being of the local community.*
 - *promoting best practice for integrated, multifunction, sustainable farming.*
 - *helping farmers and their advisors to understand the planning system.*
 - *providing advice and assistance on planning and farm diversification.*

Forestry:

- **Increase the manufacturing of sustainable products from Exmoor woodlands by:**
 - *encouraging the use of local timber and woodland products throughout the National Park.*
 - *providing advice to farmers and landowners on the sustainable management of woodlands for timber, woodland products, wildlife conservation and recreation.*
- **Extend the area of new native woodland within the National Park in line with national targets and to restore former ancient woodland by:**
 - *planting new native woodlands in appropriate locations where they do not conflict with other conservation objectives.*
 - *encouraging the restoration of native woodland on former ancient woodland sites in line with national targets.*

Field sports:

- **Survey the economic importance of the industry to Greater Exmoor including direct and indirect economic benefits.**
- **Review existing research on the environmental impacts of game bird rearing and associated land management to encourage best practice and reduce any adverse impacts.**
- **Encourage the promotion and development of food products using game birds.**
- **Ensure that game shooting is managed sustainably so as to avoid adverse impacts on landscape, wildlife and public safety by:**
 - *encouraging good practice relating to game shooting, the environment and public safety.*

Hunting:

- **Update research into the direct and indirect economic impacts of hunting on Exmoor in order to respond to any proposal for legislation that may affect hunting.**
- **Support ongoing research on red deer populations within the National Park.**

Conservation of the natural environment:

- **Ensure that traditional agricultural and rural skills such as hedge laying and stone walling are perpetuated, for the benefit of both traditional landscape features and the local work force by:**
 - *setting up initiatives for training in rural skills and conservation management.*
 - *securing funding to maintain and enhance farmland and other habitats that will maintain a demand for traditional rural skills.*
- **Restore and recreate diverse wildlife habitats to achieve biodiversity action plan targets and increase Exmoor's attractiveness to visitors by:**
 - *researching and promoting the potential for wildlife and special habitats to act as the stimulus for local economic development*
 - *supporting the proposals for moorland diversification and regeneration and Warren Farm as a demonstration project*
 - *implementing a specialist management plan for Porlock Marsh to encourage wildlife and provide an attraction for visitors.*

8. Tourism and Recreation Sector

There is a tourism destination in the South West of England that receives two million visits a year. 80% of the visitors are on repeat visits and the majority of visitors are seeking opportunities for touring, walking, riding, active pursuits including country sports and quiet enjoyment of peace and tranquillity.

The combined spend of visitors is more than £20 million each year supporting more than 3,000 livelihoods.

The tourism destination is Exmoor National Park.

- 8.1 The high quality of the National Park landscape and opportunities for breathing clean air, seeing wildlife and experiencing quiet and tranquillity are the principal attractions for visitors to Exmoor. Future development of the tourism economy of Exmoor should seek to conserve and enhance these strengths. Success in protecting these qualities will increase in value as the spread of development and urbanisation alters the character of much of the rest of Britain.
- 8.2 The remainder of this section sets out the current status of the tourism and recreation economy on Exmoor, future trends and opportunities, and a series of recommendations to sustain and develop this aspect of the economy in ways that are based on and support Exmoor's special qualities.

Current profile

- The high quality environment and excellent public access are the basis of Exmoor's tourism and leisure economy and walking was cited as the most common activity for visitors to the National Park.
- An estimated 1,200,000 bed nights are spent annually on Exmoor.
- The percentage of day visitors is low compared to other National Parks and over 75% of visitors are holidaying within or near Exmoor.
- The majority of visitors are from Greater London and the South East (38%), the South West (18%) and the West Midlands (15%).
- Tourism is worth at least £20 million per year to the Exmoor economy as a whole.
- Tourism is the largest employer in the National Park and provided roughly 33% of local employment in 1991.
- The Foot and Mouth crisis during 2001 led to an estimated loss in turnover of £3.6m in the tourism and leisure sector in the National Park.
- Challenges to the tourism and leisure economy include:
 - Over capacity of self catering holiday accommodation arising from comprehensive conversion of rural buildings.
 - Recent trend of closure of large, traditional country hotels.
 - Lack of indoor tourism facilities.
 - Poor development of active recreational activities.
 - Perception of poor public transport within NP - very poor public transport links to NP from rest of UK.
 - Relatively remote from large urban areas - low level of day visits.

- **Lack of coordinated marketing.**
- **Short season.**
- **Much tourism employment is seasonal, part-time and low paid.**
- **Variable level of customer care and quality in accommodation provision.**
- **Lack of training and business advice to the tourism and recreation sector.**
- **Potential for tourism and leisure activities to adversely affect the environment on which tourism depends.**
- **Relatively low retention of tourism income in the Exmoor economy through low uptake of local products and services.**
- **Recovery from the adverse impact of the Foot and Mouth Disease crisis in 2001.**

8.3 Tourism, particularly the development of farm based tourism and the relatively recent increase in the ‘green or sustainable tourism’ market, is of increasing importance to the Exmoor economy. But this sector of the economy is itself sensitive to external changes, such as the strength of the pound, over which it has no control and, on Exmoor, it is still very seasonal. The foot and mouth disease crisis in 2001 clearly illustrated the importance of the tourism industry to the local economy, its dependence on countryside quality and access, and its vulnerability to a sharp decline in visitor numbers over a relatively short period.

Visitor numbers

8.4 As throughout the West Country, the overall numbers of people visiting Exmoor have been in slow decline since the 1970s. The reason most often given for this is the relatively low cost of package holidays abroad. Until recently the number of foreign visitors had been increasing but the strength of the pound has meant that over the last five years the foreign market has not risen whilst the home market has also remained static. It is extremely difficult to assess the overall numbers of visitors to large areas like National Parks and surveys have had large margins of error, so it is not possible to accurately measure trends. In 1994 a survey of visitors to all National Parks took place with the purpose of comparison between the parks through using the same survey methods over the same period for each park.



Estimates from All Parks Visitor Survey 1994:	
Private vehicle, day visits from home	300,000
Private vehicle, holiday days from outside Park	700,000
Private vehicle, holiday days from inside Park	200,000
Public transport, days	180,000
Other transport	4,000
Day visits from Park residents	13,000
TOTAL: visitor days per year	1,397,000

- 8.5 In this survey, Exmoor had the lowest number of visitor days per year for any English or Welsh National Park. This can be accounted for by a number of factors, including the small size of the Park, its distance from centres of population, the amount and type of holiday accommodation and the facilities available.
- 8.6 However, the annual survey of accommodation undertaken by Devon Tourism shows that about 1,200,000 bed nights are spent annually on Exmoor and this is very different from the 200,000 nights suggested by the 1994 survey. The 1994 survey, because it was a survey of visitors exiting the National Parks, may well have underestimated the number of visitors staying on Exmoor.

Origin of visitors

- 8.7 There are 1,773,000 people living within a 50km radius of the National Park boundary and 5,186,000 within a 100km radius. Excluding the proportion of this population that resides in South Wales reduces the figures to 933,000 and 3,389,000 people respectively.
- 8.8 The Hobhouse Report of 1947 recommended that Exmoor should be a National Park partly because of the population in South Wales that it would serve. Many people used to come to Exmoor from South Wales on passenger steamers but reliance on the car has changed this pattern. South Wales is 300km from Exmoor National Park by road and now only 3% of Exmoor's visitors come from the whole of Wales.
- 8.9 Travel times from London and the South East are as short or shorter than from most parts of Wales and Exmoor receives a large proportion of its visitors from London and the south east. Most of its visitors are from southern England and, regardless of actual transport times, there is a perception amongst visitors and locals that Exmoor and Dartmoor are the National Parks which serve this region.
- 8.10 80% of day trippers to Exmoor are from Devon and Somerset, with about a third altogether from the main towns surrounding Exmoor: Taunton, Minehead, Tiverton, Barnstaple and Bridgwater. The remainder, as one would expect, came mostly from the remainder of the West Country, plus 3% from the Midlands and 2% from the South East.

Origin of visitors staying on Exmoor in 1994	
South East and Greater London	38%
South West	18%
West Midlands	15%
East Midlands	7%
North West	6%
Wales	3%
East Anglia	3%
Yorkshire and Humberside	3%
North	1%
Scotland	<1%
Northern Ireland	<1%
Abroad	5%

Type of visitor

Day visitor days (visitors starting from home)	23%
Holiday visitor days (visitors staying outside Park)	45%
Holiday visitor days (visitors staying within Park)	31%

Monitoring Visitor Numbers

- 8.11 The National Park Authority and the tourism industry need to know how many people are visiting Exmoor, the trends in visitor numbers over time, the places they visit, the activities they take part in and their patterns of behaviour in order to be able to develop policies, to assist the tourism industry and to have some influence on the impact of visitors on the National Park.
- 8.12 The National Park also requires information about what visitors know about the National Park and what they want to know about it. The best means of obtaining this information is by carrying out detailed surveys.

Impact on Exmoor's economy

- 8.13 Visitors make a major contribution to the local economy. A rough calculation, using the results of the 1994 National Parks Visitor Survey, indicates that gross expenditure on all types of tourism activities, including accommodation, by all visitors to Exmoor National Park in 1994 was about £20 million (generated by around 1.4 million visitor days). Some of this money is lost to the local economy (e.g. through taxation and services and products that cannot be provided locally), but there is scope for more to be retained within the local area. The work on developing sustainable tourism will, in the longer term, help to encourage tourism operators and visitors to source products and services locally and to spread the benefits of tourism more widely through the local economy.
- 8.14 Average daily spending of visitors in and around Exmoor National Park:

All visitors	£7.80
Visitors staying in and around the Park	£11.70
Average daily spending on accommodation	£18.90

Employment

- 8.15 Tourism is the largest industry in the National Park in terms of persons employed, with more jobs than agriculture. However, many more of these jobs are seasonal and part time, some people may have more than one such job and many jobs are taken by persons residing outside of the National Park. Full time equivalents were estimated to be 1,590 in 1979. A survey of 1988 estimated that there are 2,641 jobs in the tourist industry in the National Park and a further 384 jobs are indirectly dependent upon the industry. The seasonal nature of the tourist industry means higher unemployment in winter.
- 8.16 The pattern of tourism is changing and, although there is no increase in the length of stay of visitors on Exmoor, there is a lengthening of the season in some types of tourism. Despite this, much employment in tourism still tends to be part-time and seasonal. Extending the tourism season outside the April to October period is important for providing permanent jobs. This requires improved accommodation facilities to cater for guests in wet weather, keeping attractions open all year and marketing the qualities of Exmoor. Qualities of the National Park such as tranquillity and wildness can often be enjoyed more in winter and there is a need to identify such qualities and promote them.

Impact on the environment

- 8.17 The income and the jobs and services that tourism supports are clearly important. However, at peak times and in popular locations, tourism can create problems of overcrowding, traffic congestion, over-demand for parking spaces and a reduction in the quality of experience for the visitor and in the quality of life of the local resident.
- 8.18 The National Park Authority and the tourism industry have a common interest in ensuring that Exmoor is not compromised by short-term opportunistic tourism development. This common interest is best expressed in the development of sustainable tourism - encouraging tourism on Exmoor that can be maintained without degrading the environment in which it takes place and

which can have positive benefits for the tourism industry. It requires a balance between the needs of the visitor, the environment and local communities and the Environment Act 1995 requires that tourism and recreation do not adversely impact on the conservation and enhancement of the National Park environment. The *Principles for Tourism in National Parks* agreed by the National Park Authorities, the English Tourist Board and Countryside Commission are reproduced below.

PRINCIPLES FOR TOURISM IN NATIONAL PARKS

National Park Authorities will work in partnership with others to foster tourism in innovative ways which ensure a better quality of life for everyone – socially, economically and environmentally – now and for generations to come.

Tourism is about people

People choose to visit National Parks because of their landscape quality, their opportunities for outdoor recreation and their peace and tranquillity. Tourism activities should draw on the special character of the National Parks, recognising that some places are valued for being wild and remote.

Activities and facilities which are developed should be relevant and accessible to the whole of society.

National Park Authorities will work in partnership with the tourism industry to deepen people's enjoyment, appreciation, understanding and concern before, during and after a visit.

The environment in National Parks is special

Although the environment is often robust, the tourism industry should seek guidance about the short and long term effects of all activities.

The scale, design, management and marketing of developments should respect local distinctiveness and diversity, the carrying capacity of the local environment and its communities, and seek to enhance the landscape.

The tourism industry should encourage and support practical conservation measures, including through raising the awareness of their guests.

Natural resources are finite

National Parks are places where tourism has the opportunity to demonstrate strong environmental concern. Energy reduction, the encouragement of public transport, staff training and the monitoring of environmental impacts should be key factors for new and existing businesses.

Economic growth and employment support living National Parks

The tourism industry should support the economy and vitality of local communities, particularly by the use of local supplies, skills and services.

A balance should exist between tourism and other local economic activities, particularly agriculture.

- 8.19 The National Park Authority's statutory duty to conserve and enhance the natural beauty, wildlife and cultural heritage of the Park is the guarantee for the future of Exmoor's tourism industry. Exmoor is ideally suited for quiet countryside recreation pursuits and, from surveys, the majority of visitors are undertaking some activities which, in themselves, are sustainable. They become unsustainable only where large numbers of people, and more particularly cars, are involved. Touring by car for the purpose of sightseeing is still the major activity and the challenge is to help visitors to find greater enjoyment from more sustainable activities.

- 8.20 Exmoor has avoided the worst excesses of tourism development seen in some other National Parks and tourist areas (static caravan parks and chalet developments for example), perhaps because the most likely location for these - the coast - is relatively inaccessible. Strong development control policies help to ensure that inappropriate development does not take place. The challenge for the National Park Authority is to work with the tourism enterprises within the Park to maintain the quality of the environment, to demonstrate that sustainable tourism is the key to continued economic success and to develop it for the benefit of all.
- 8.21 The National Park Authority will commence a national pilot project on Exmoor in 2002 to promote sustainable tourism in rural areas. The scheme is funded by the Countryside Agency to develop sustainable tourism practices among tourism operators, both in the operation of their businesses and in their approach to marketing and providing services.

Visitor Payback

- 8.22 The National Park Authority is keen that everyone who gains from the enjoyment of Exmoor should be encouraged to contribute to, and become more directly involved in, the process of conservation and enhancement of the National Park.
- 8.23 The idea that people should be encouraged to put resources back into the environment that they enjoy has been successfully piloted in the Exmoor Paths Partnership. This Project, a partnership between the National Trust and the National Park Authority, and part-funded by the European Union, has demonstrated that visitors recognise the impact that over-use is having on paths and the environment generally, and are willing to make a voluntary contribution towards the cost of maintenance. 'Visitor Payback' is a recognition by all who benefit that the resource needs to be maintained. The maintenance can include a wide range of practical measures and may involve a contribution in kind rather than cash, but it is important that the effects of contributions are clearly demonstrated.

Special qualities of Exmoor

- 8.24 The Environment Act, 1995 charges the National Park Authority with 'promoting understanding and enjoyment of the National Park's special qualities' without seeking to define those qualities. All National Parks share some special features such as the quality and remoteness of the scenery and a sense of wildness.
- 8.25 When asked what they think are Exmoor's special qualities people give a wide range of responses. These results indicate what people value and this, together with information about what is actually different about Exmoor, helps us to decide what is most important to conserve, enhance, understand and enjoy.

Special qualities of Exmoor	Residents	Visitors
	%	%
Deer	38	
Peaceful/spiritual/uncrowded	25	36
Variety/contrast/blend of scenery	35	26
Beauty/scenery	34	35
Unspoilt/uncommercialised	29	20
Openness	19	
Wooded combes/trees	18	
Moorland		10
Wildness	16	7
Friendly locals		10
Wildlife	15	11
Rural way of life/rural community	15	
Ease of access for walking/riding	14	15
Exmoor ponies	11	
Sense of history/timelessness		7
Gentle/warm/soft scenery		7

Promoting opportunities for recreation

- 8.26 As one of the twin purposes of National Parks, providing for recreation is a vital part of the National Park Authority's function. A wide range of activities are acceptable in a National Park but almost any activity can be damaging to the environment without careful management. Because of this National Park Authorities have tended to concentrate on reducing any adverse effects of recreational activities.
- 8.27 However, many activities can be actively encouraged. Walking tends to be the most popular activity and receives the greatest promotion but there are other suitable activities such as rock climbing, cycling, canoeing, boating, sailing, riding, fishing, the study of natural history and the creative arts. Of these, at present, cycling is the fastest growing activity for which increased provision is needed. The National Park Authority supports the aim of the National Cycling Strategy and Somerset and Devon County Councils' cycling strategies, to maximise the role of cycling as a transport mode and to ensure the needs of cyclists are taken into account in new infrastructure.
- 8.28 Recreation need not only imply physical activity. Sitting in the car and enjoying the view is a recreational activity enjoyed by many people and enjoyment can be achieved through the arts and other cultural activities.

Access

- 8.29 Exmoor provides an excellent walking environment. There are over 1000 km of public Rights of Way, giving a high density of paths and a good choice of routes. There are more than 9000 Ha of open country available to the public for walking and this is likely to be extended as the provisions of the Countryside and Rights of Way Act 2000 come into force.
- 8.30 About 60% of the public Rights of Way are bridleways, reflecting the historic and present importance of horse riding on Exmoor and now providing attractive opportunities for both horse riders and cyclists.
- 8.31 The importance of the rights of way network and access land to the tourism industry was reflected by the results of the 1994 All Parks Visitor Survey. The survey showed that 47% of day trip visitors identified walking as the main purpose of their visit to Exmoor while 33% of holiday visitors were on a 'moderately active visit', including walking. 54% of holiday visitors had gone for walks of between 1 and 4 hours and 12% had gone hill walking for more than 4 hours. In addition, among visitors as a whole, 7% had taken part in horse riding or pony trekking.
- 8.32 The footpath closures implemented during the 2001 foot and mouth disease outbreak led to a substantial decline in visitor numbers to Exmoor. The result was considerable hardship for businesses that depend on visitors for their income and showed the importance of rights of way to the local economy.

Promotion and enhancement of access on Exmoor for public enjoyment

- 8.33 Access to Exmoor is generally good and has continued to improve. However, it is largely based on a Rights of Way network which has evolved historically for the practical use of local people. The challenge is to allow the network to evolve in a manner which continues to be of practical benefit but also serves a variety of modern recreational uses and fulfils National Park purposes in helping people to enjoy Exmoor's special qualities.
- 8.34 Clear waymarking is vital to the enjoyment of the rights of way network and the minimisation of any conflicts between path users and landowners. Devon and Somerset County Councils have delegated their powers for the maintenance of Rights of Way to the National Park Authority. The Authority makes a significant investment on signs, the construction and replacement of gates and stiles, vegetation clearance and path repairs to maintain a high quality rights of way network. This work is undertaken by local teams and uses renewable resources including local timber from sustainably managed Exmoor woodlands.

- 8.35 The South West Coast Path is the sole National Trail on Exmoor. Regional Routes include The Two Moors Way, Tarka Trail and an extension to the Macmillan Way. Such routes are valued because they bring economic benefits of tourism to otherwise isolated rural areas, attract funding for maintenance and improvements to the footpath network and help to extend the path network to provide more enjoyable walks and access to areas of special quality.
- 8.36 Exmoor is fortunate that such routes have not suffered from the over use which has occurred in other areas, particularly from large organised events. Care, however, needs to be taken to assess the environmental impact of proposals for such routes and to manage them in accordance with agreed plans. Care should also be taken to ensure that such routes do not divert resources away from the remainder of the route network.

Long distance recreational routes taking in Exmoor National Park

National Routes
South West Peninsula Coast Path
North Devon Cycle Route
Other routes
Two Moors Way
Tarka Trail
MacMillan Way
Proposed routes
Coleridge Way bridle route
Exmoor Circular Path



Car Parks

- 8.37 Demand for car parking space within the National Park is largely confined to the larger settlements, particularly at Lynton, Lynmouth and Dunster, although there are growing numbers of cars parked at popular locations in the countryside. The National Park Authority’s approach to management is to make better use of existing car parks through encouraging their use at less popular times and to encourage people to use alternative means of transport such as buses to reach places on Exmoor.

Public Conveniences

- 8.38 There is no perceived demand for more toilets in the countryside. Complaints about the lack of toilets are rare but there are complaints if toilets are not well maintained or closed when people need them. Many toilets have to be closed in winter because of possible frost damage and efforts should be made to keep more open as long as possible in recognition of the lengthening tourism season.
- 8.39 The National Park Authority has recently invested in the replacement of toilets at Lee Bay and Bossington and the latter have won an award for design. Such facilities are upgraded periodically and there is a need to upgrade all to design standards appropriate to a National Park, to include facilities for disabled people and for baby changing and to make them more ‘environmentally-friendly’. However, significant capital expenditure is required to do this. As a result, up-grading often takes place as and when money is available rather than within a timetabled programme.

Visitor Accommodation

- 8.40 There is a need for a range of types of accommodation within the National Park to cater for all potential visitors. The cost of accommodation on Exmoor is high compared with other National Parks and, whilst there is a surplus of middle price guest house accommodation and a continual upgrading, there is little new accommodation at the lower end of the market.
- 8.41 There are few small basic campsites, bunkhouses and camping barns for backpackers and just three youth hostels. Since the last National Park Plan, two camping barns have been created on Exmoor and these have proven successful. There is interest in extending the network but such barns require considerable investment. They produce very slow returns and funding for new projects is not readily available. However, there is a perceived need for such facilities, particularly near to the coast and to long distance trails, and alternative sources of funding should be sought.
- 8.42 Facilities that are provided should be available to all who wish to enjoy the special qualities of Exmoor, including those who experience physical or learning difficulties.

Traffic and Transport

- 8.43 Within the National Park, average daily traffic on the A39 west of Minehead increased by around 15% between 1987 and 1997 and by 11% over the same period on the A396 south of Dulverton. August daily traffic flows are significantly greater than the average for the year on all Exmoor roads.
- 8.44 Levels of traffic on Exmoor's roads are considerably less than in other National Parks and in much of the National Park current traffic levels can be tolerated, even in summer. However, there are areas where problems of congestion occur, particularly popular locations and towns and villages such as Lynton/ Lynmouth, Dunster, Dulverton and Porlock, and traffic is starting to affect other locations and the environment of the National Park generally. Some of Exmoor's roads are not suitable for the levels of traffic now being experienced. Traffic passing through, to and from other destinations outside Exmoor, adds to the local and visitor traffic.
- 8.45 The effects of traffic on the environment of the National Park are seen in the congestion of streets and over-demand for parking space in some towns and villages at peak periods. This results in a reduction in the quality of life and the experience of the National Park for residents and visitors, damage to the physical fabric of buildings and, in some cases, restrictions on the passage of buses and emergency vehicles. Conditions for pedestrians are unsatisfactory in some settlements. There is intrusion of parked vehicles into the landscape of the open areas in the National Park. Other problems include heavy goods vehicles using inappropriate roads and excessive speeds in some villages and on some open roads.
- 8.46 There are also incidental environmental effects of road safety, traffic management and highway maintenance measures introduced by the Highway Authorities. While it is clear that roads on Exmoor should be safe to use, both for vehicle drivers and other users, the introduction of new signs, road markings and other "infrastructure" can have a harmful effect on the character of the locality in which they are situated and, cumulatively, on the character of the National Park as a whole.
- 8.47 Wherever possible, people should be encouraged to travel by more sustainable means than the private car - by bus, train, cycle and on foot - for appropriate journeys. It must be accepted, however, that achieving a substantial shift from the car to other modes is a difficult task within Exmoor.
- 8.48 The number of people who will consider travelling to Exmoor by rail or bus is small. However, it is possible to get to the National Park by train and bus all year round and take up might be improved by increased provision of information about the opportunities to use public transport to reach Exmoor.. Improvements are planned for the West Somerset Railway, which will provide a permanent link to Taunton and the national rail network. The Exeter to Barnstaple rail line also provides opportunities, in combination with bus services, for access via the western part of the National Park.

- 8.49 Within Exmoor itself, travel by bus is the only practical alternative to the car and the National Park Authority is working with the County Councils to encourage more use of buses on Exmoor.
- 8.50 There are opportunities to encourage cycling as an alternative mode of transport for leisure journeys by encouraging interchange between cycles and buses by providing secure cycle facilities at key points on bus routes, for example. Making opportunities available for recreational cycling can help to take visitors' cars off the road network for at least part of the time.

Future trends and opportunities

- There has been a continual national decline of rural tourism since the 1970's, and the number of visitors is highly sensitive to the state of the national economy, weather, money markets and world events.
- Exmoor has a strong identity amongst visitors as a special environment and development of tourism on Exmoor should be based on, and help conserve and enhance, the quality and value of the natural beauty, wildlife and cultural heritage of the National Park.
- If properly managed, Exmoor has the capacity to accommodate more visitors without harming the natural beauty, wildlife and cultural heritage of the National Park.
- New opportunities will be provided by the increase in public access to open country and rights of way improvement plans required by the Countryside & Rights of Way Act 2000.
- Exmoor's special qualities are under-utilised - particularly in relation to active recreation e.g., inland water sports (Wimbleball Lake), mountain biking, canoeing, long distance trail walking, horse riding and coastal activities.
- Out of season qualities under marketed – e.g. autumn colours and spring flowers.
- Links with urban areas can be strengthened to increase day visitor numbers – Large Regional Centres and towns closer to the edge of the Park.
- Past cultural links can be developed further, eg, romantic poets, Lorna Doone, - develop as film location (eg, Land Girls etc).
- Rights of Way Network well developed and maintained – essential to rural tourism as demonstrated by closure during F&M. New opportunities of linking with other trails and marketing of greater access to wild country under CROW Act.
- Successful Paths Partnership Project and Visitor Payback Scheme developed.
- The foot and mouth disease crisis in 2001 has led to a greater realisation that local businesses are interdependent and not necessarily in competition, and need to work together on marketing and promotion.

Recommended Actions

A. *Enhance the quality of the visitor experience to Exmoor by investing in the conservation and enhancement of the National Park environment and tourism infrastructure.*

- Increase investment in conservation projects that will enhance Exmoor's biodiversity and thereby enhance the visitor experience and related business development, by:
 - *developing and implementing specific area management plans to enhance biodiversity and improve access and interpretation for the public, including at Porlock Bay; North Hill, Minehead; moor and heath restoration projects; new woodlands; enhanced woodland management.*
 - *providing training and support for local employment opportunities in conservation and enhancement techniques and management.*
 - *encouraging related employment and business development including wildlife safaris, guided walk leaders and interpreters, etc.*

- **Improve visitor facilities and access in the popular areas within the National Park while minimising adverse impact on the environmental asset and the visitor experience, for example:**
 - *scheme to improve access and enhance the environment around Tarr Steps.*
 - *enhancement project at the County Gate Visitor Centre including improved parking and toilet facilities.*
 - *redevelopment of the Lynmouth Pavilion to provide a visitor attraction based on the special qualities of the local area.*
 - *visual improvement, reduced erosion and improved traffic and parking management in the Valley of Rocks, Lynton.*
 - *development of an ‘Exmoor Pony Heritage Centre’ visitor attraction.*
 - *completion of the Simonsbath Sawmill restoration including interpretation of the Exmoor Forest .*
 - *conservation of the West Somerset Mineral Line and improved public access.*
 - *continuation of Snowdrop Valley visitor management project and application of similar techniques to minimise visitor pressure on fragile environments.*
 - *improved transport facilities within the National Park that reduce the adverse impact of car traffic and create employment opportunities.*
- **Village Enhancement/Economic Regeneration Plans including:**
 - *Dunster Heritage Settlement including improved promotion, interpretation and traffic and parking management.*
 - *Dulverton Improvement Plan including conservation area enhancement and promotion.*
 - *Lynton/Lynmouth Community Development Trust.*
- **Improve visitor care and information, by:**
 - *training to develop customer care skills, and marketing and promotion including web-site development and IT use.*
 - *encouraging seasonal tourism providers to cater for short break holidays and day visitors throughout the year.*
 - *providing advice and support to local tourism businesses in Exmoor’s special qualities and opportunities for enjoyment by visitors.*



B. Develop Exmoor's' active recreational potential while ensuring that recreation activities are compatible with the principle of quiet enjoyment and the activities of persons living and working in the National Park and seek to achieve harmony between the recreation and conservation purposes of the National Park.

- **Maintain a first class public rights of way network and access to open land throughout the National Park and encourage its use and economic benefit, by:**
 - *giving a high priority to improvement and maintenance of public rights of way infrastructure and access to open land in partnership with landowners, land managers and users.*
 - *providing adequate and appropriate signage and information on access opportunities within the National Park.*
 - *promoting and managing long distance walking and riding trails in the National Park and providing improved marketing and new links, including: South West Coast Path; Tarka Trail; Two Moors Way; Macmillan Way West; new Exmoor-Quantocks bridleway; new Exmoor National Park Circular Trail.*
 - *encouraging spin-off business development (e.g. trail leaders / accessories / clothing / packaged walking and riding holidays / trail side accommodation / links to village facilities).*
- **Improve opportunities for access on Exmoor for all people, irrespective of their mobility or other physical abilities, by:**
 - *engaging with groups representing less mobile people and those with disabilities to seek opportunities for improving access to the countryside and public buildings and facilities.*
 - *incorporating provision for less mobile people in all new access schemes where this is practical and environmentally acceptable.*
 - *providing information about facilities suitable for disabled visitors.*
- **Develop Exmoor's reputation as a premier equestrian and horse-riding destination, by:**
 - *appropriate management of the bridleway network.*
 - *developing and promoting new off road bridle routes/guides.*
 - *supporting related business development (e.g. equestrian hire / stabling / accessories / clothing).*
- **Raise Exmoor's' reputation as a premier Mountain Biking destination, by:**
 - *improved marketing.*
 - *encouraging extreme events that are well managed to minimise adverse impacts.*
 - *developing and promoting new off road routes/guides.*
 - *encouraging spin-off business development (e.g. bike hire / manufacture / accessories / clothing).*



- **Raise Exmoor’s reputation as a premier water sports destination, by:**
 - *improved marketing of potential for canoeing, board- sailing, rowing, sailing, surfing.*
 - *encouraging spin-off business development.*
 - *development of Wimbleball Lake Water Sports Training Centre.*
- **Develop Exmoor’s coast as a recreational/tourism resource, by:**
 - *improved marketing as the premier English Coastal National Park - link with projects and initiatives in Coastal Towns – Watchet, Minehead, Lynmouth, Combe Martin, Ilfracombe.*
 - *physical improvement of harbour facilities in Lynmouth and Porlock Weir and promote links with other Channel moorings including Watchet, Minehead and Ilfracombe.*
 - *promoting cruises and exploration of the coast.*
 - *supporting proposals for Minehead Pier – Ferry link to South Wales.*
- **Protect and improve the quality of experience for people who seek Exmoor’s special qualities, in particular opportunities for quiet enjoyment, exploration, solitude and closeness to nature, by:**
 - *managing activities to maintain the serenity of areas perceived to be wild including Section 3 moor, heath, woodland, cliff and foreshore.*
 - *providing support and advice to organisers of recreation activities on Exmoor to minimise adverse impact on the landscape and other people’s enjoyment of the area.*
- **Provide a range of accommodation to suit the needs of those coming to Exmoor to enjoy unspoiled countryside and outdoor recreation compatible with National Park purposes, by:**
 - *developing a network of Youth Hostels, camping barns and campsites suitable for backpackers particularly in relation to long distance trails, e.g. Hoar Oak walkers bothy, Camping Barns at Simonsbath, Exmoor coast and Brendon Hills locations.*

C. Reach a wider audience

- **Increase the number of visitors to Exmoor through targeted tourism promotion & marketing of Exmoor’s special qualities, by:**
 - *developing links with urban populations in the South East, Greater London, South West and West Midlands regions and South Wales.*
 - *developing programmes of events, festivals and themed breaks that appeal to specific interests of visitors linked to the National Park’s landscape, wildlife and cultural heritage.*
 - *encouraging visits in the ‘shoulder months’ and out of season.*
 - *developing links with other regional tourist attractions eg, St Ives Tate, Eden Project, Dorset Jurassic Coast.*
 - *extending use of IT and the internet in marketing Exmoor and booking accommodation.*
 - *supporting initiatives that encourage sustainable tourism businesses based on an attractive environment such as the Countryside Agency’s ‘Integrated Quality Management’ initiative.*
- **Improve information for visitors prior to their visit and during their stay, by:**
 - *providing information for special needs groups e.g., Braille books , disabled access audits and trails and publications/ signs for overseas visitors.*
 - *developing an ‘Exmoor Resource’ - a Web portal and digital database relating to the history and culture of Exmoor.*
 - *developing the NPAs Village Information Points scheme to include other business outlets and to formalise the initiative with additional funding and training.*

- **Develop Exmoor’s cultural links, by:**
 - *raising awareness of Exmoor’s potential as a location for filming - develop film industry and any spin-off business development.*
 - *making better use of cultural links such as Lorna Doone and the Romantic Poets etc.*
 - *Exmoor & West Somerset Festivals & Events Project.*
- **Obtain information about visitors to Exmoor to enable the National Park Authority and the tourism industry to plan effectively for management of visitor pressures and for other purposes related to the understanding and enjoyment of the National Park.**

D. Focus on sustainable tourism development that is compatible with the European Charter for Sustainable Tourism in Protected Areas

- **Promote sustainable tourism practices at all levels throughout the tourism industry of Exmoor, by:**
 - *providing advice and support to local tourism businesses and encouraging participation in sustainable tourism accreditation schemes.*
 - *relaunching Exmoor Paths Partnership Project and develop Payback schemes to help repair any damage caused by recreation and bring about improvements to increase enjoyment of Exmoor's special qualities.*
- **Develop projects that reduce the adverse impacts of travel by visitors within the National Park maximise economic benefits to local business, by:**
 - *minimising the need to travel by encouraging visitors to choose overnight stays; active holidays and concentrating their visit on exploration within the National Park and its immediate vicinity.*
 - *encouraging visitor traffic, coaches and caravans to keep to acceptable routes within the National Park.*
 - *developing more sustainable solutions to manage traffic and reduce the demand for parking, particularly at the most popular destinations.*
 - *establishing a network of ‘quiet routes’ where priority will be given to local access traffic, cyclists, horse riders and walkers.*
 - *developing solutions to problems of congestion and over-parking as a result of tourism pressures including reduction in private car traffic and encouragement of alternative modes of transport..*
 - *seeking improvements to bus services on and to Exmoor and promote their use by visitors so that they use the bus for at least part of their stay on Exmoor.*
 - *supporting the development of local rail services to Minehead and Barnstaple and the improvement of mainline services to Taunton and Tiverton.*
 - *improving co-ordination of bus and rail services to meet user requirements.*
 - *seeking to meet the needs of people with limited mobility when public transport services are being provided or improved.*
- **Ensure that environmentally sustainable tourism brings economic and social benefits to the people who live and work on Exmoor and that these benefits are spread across as wide a range of people as possible, by:**
 - *encouraging visitors to the National Park to use local services and facilities and buy locally produced goods.*

9. Service and other sectors

Current profile

- The service sector is an important element in maintaining Exmoor as a living and working community and excluding tourism businesses accounts for over 30% of the workforce.
- Public services including health, education, social services and conservation are amongst the largest employers.
- There has been a steady and continuing decline in local rural services over the past 30 years and Exmoor has seen the loss of six village shops and one village school over the last ten years.
- Geographical location of service outlets dictates that rural residents need to travel further than those in urban or semi-rural areas, which further disadvantages those without access to a car, which in some cases is the only form of transport.
- Proposed changes to payment methods of social security benefits is likely to reduce the viability of rural post offices even further
- The combination of lower than average wage rates and higher than average house prices leads to particular difficulties for local people to access affordable housing. The ability of local people to live and work locally is fundamental to regenerating Exmoor's economy.
- The inadequacies of the area's IT infrastructure is holding back the development of ICT based businesses.
- Manufacturing on Exmoor consists of a small scale but very important enterprises that are either located on Exmoor because of the high quality lifestyle and environment or are directly dependent upon Exmoor's special qualities.
- Transport also provides employment and there are several coach/bus companies and also haulage firms in the area.
- Most businesses are micro, often family run and are disadvantaged by:
 - poor access to business advice.
 - vulnerability to adverse conditions which larger companies can ride out (*e.g. businesses outside of farming and tourism on Exmoor had an estimated loss of turnover of £10.3m last year as a result of the foot and mouth disease crisis and in some cases led to business closures*).
- Due to the small scale and part time nature of many enterprises there is a lack of specific data on the needs of this element of Exmoor's economy.
- Employment in 'high-tech' industries is very low at less than 1% of local employment.
- There are environmental and physical constraints to business development on Exmoor such as poor road networks, lack of suitable sites and premises, remoteness from markets, availability of labour and poorly developed IT and utility infrastructure.
- There is a perception that restrictive planning policies in a National Park will hold back or prevent business development.

Service sector

- 9.1 The need to maintain adequate and affordable services and facilities for Exmoor's remote and deeply rural communities has been of continuing concern to the National Park Authority and its local authority partners.

Manufacturing / crafts

- 9.2 Good examples exist of successful manufacturing businesses on Exmoor, including Singer Instruments in Roadwater (scientific & musical instruments), and Shearwell at Cutcombe (combining livestock and IT recording equipment). Several food & drink processing businesses benefit from local ingredients such as Dunkery Wine, water bottling at Wootton Courtenay and there are many smaller scale specialist food and craft producers.
- 9.3 Exmoor Producers Association represents a number of locally based manufacturing businesses in Greater Exmoor, including a number of craft industries. Promotions and exhibitions by the EPA have helped to market local products and increase sales.
- 9.4 In February 2002, for the first time, the National Park Authority invited local businesses to the annual leaflet exchange exhibition for tourism providers. This initiative provided an opportunity for local businesses and suppliers to promote their goods and services to tourism businesses.

Future trends and opportunities

- **Many new and innovative schemes are being developed to offset the marginal viability of local shops and services, such as community owned food shops, village development grant schemes, internet retailing, home delivery services, etc.**
- **Attracting more visitors to the National Park can help to make shops and other retail services more viable, particularly if spread over the whole year.**
- **There are opportunities to obtain external funding to assist village services through RDA initiatives – Rural Renaissance and the Countryside Agency’s Vital Villages scheme.**
- **The NPA is working jointly with district housing authorities and housing associations to help deliver affordable housing through supportive planning policies and the creation of a housing enabling officer post to pro-actively identify needs and sites for affordable housing.**
- **Community strategies will enable all service providers to jointly agree on needs and strategies which can then be jointly provided for through the local development plan framework.**
- **Opportunities for district councils to vary business rates and charge 100% council tax on second home properties will reduce the financial burden on local service businesses and allow greater expenditure on local community services and affordable housing.**
- **An ageing population will lead to an increased demand for services and increasing employment in health, social services, nursing, care homes etc.**
- **Exmoor offers a high quality, attractive working and living environment (no traffic congestion, low crime rate etc).**
- **The remote, rural location is not a disadvantage to businesses that produce small high value products or are based on information and communications technology (assuming they have adequate ICT links).**
- **The local authorities in the area are firmly committed to regeneration and economic development which are corporate priorities.**
- **The NPA as local planning authority has in place supportive planning policies for business development.**
- **There is benefit from high quality location branding using local resources (food, wood, wool, water, thatch).**
- **Structural change in the economy of the area is recognised at national and European level and there are a range of external funding opportunities for business development.**
- **Significant potential for exploiting renewable energy to assist business development and provide income (scale and nature compatible with National Park objectives).**

Renewable Energy

- 9.5 Many experts now agree that global warming is a reality and largely the result of the burning of fossil fuels and the emission of pollutants into the atmosphere. The Government has pledged to reduce emissions of 'greenhouse gases' and other pollutants at the national level and is taking some steps to promote reductions in energy use and alternative, non-polluting sources of energy.
- 9.6 Energy conservation measures not only reduce emissions by using less energy but can reduce costs and increase comfort to the consumer and provide employment in supply and installation. Fossil fuel use can be reduced still further by the development of renewable sources of energy such as water, wind power and biofuels. At the level of the National Park, the contribution to global warming of burning of fossil fuels is small. However, we should all 'think globally and act locally' and the highest standards should apply in a protected landscape.
- 9.7 There are considerable opportunities for small scale, non-intrusive developments based on renewable energy generation within the National Park. Pilot schemes have been developed by the National Park Authority at the Pinkery Environmental Education Centre and at Simonsbath Sawmill. The Exmoor Wood Fuel Project has provided a series of demonstrations and indicated the considerable potential for the energy potential of Exmoor's woodlands, particularly using material that has little other commercial value. Other National Park Authorities are also undertaking renewable energy projects, including the potential for pyrolysis plants to convert waste timber products into diesel fuel alternatives.



Photovoltaic roof being installed at Pinkery Education Centre

Transport

- 9.8 A major consumer of fossil fuels is transport use. The remote rural nature of Exmoor's communities means that transport is often a high cost for local people travelling to and from school and work, and when obtaining goods and supplies. The vast majority of visitors to Exmoor arrive in the National Park by car and a series of recommendations to reduce this impact are set out in section 5. Local transport provision, although still underdeveloped, provides important employment for local people and has considerable potential to increase with more imaginative schemes that tackle local needs.
- 9.9 Much of the cost of travel is unseen and accepted as a part of rural living. Fuel price rises have a higher impact on rural areas given the normal travel distances and the overall costs of travel will rise significantly in the mid to long term. Reducing the need to travel and the need to use the car can have significant environmental and economic benefits. Greater use of local shops, and the development of mobile shops and services and home delivery systems will all help provide local employment. The impacts of heavy goods vehicles on villages and the countryside could be reduced by the development of local delivery networks and transhipment points

Conservation of the built environment

9.10 A good deal of attention has already been given to land based industries in the National Park, including the importance of retaining specialist skills in maintaining landscape features. Equally important is the retention of distinctive built heritage of the National Park. There are more than 1,000 listed buildings within the National Park and many others that are important to the overall historic character of Exmoor's settlements, even though not listed.



Conservation work at Burgundy Chapel, near Minehead

9.11 Maintenance of these buildings forms an important role in retaining the attractiveness and interest within the National Park and successful development of historic buildings for modern uses can

be best achieved through the use of appropriate design, materials and construction techniques. Retention of specialist building skills using natural materials and historic techniques should form a key part of any economic development strategy for the Exmoor area.

9.12 Conversely, the use of modern materials and techniques can have a significant adverse effect on the built environment. As well as the adverse visual impact, these materials and techniques can hasten the deterioration of the structure and integrity of the buildings themselves. One particularly worrying example is the growth in the use of uPVC materials for windows and other external fittings. As a material, uPVC has serious adverse environmental impacts in its production, use and disposal. Many of the uPVC products available are also very poor design imitations of the timber windows that they replace with consequent adverse impact on the historical character of a building. Good quality timber windows and doors have none of these disadvantages, and can support local jobs in their production.

9.13 Traditionally, the main structural material for local buildings has been stone or cob for the walls and slate or tiles for roofs. Many former building stone quarries exist within the National Park and the potential to open some of these again on a very small scale linked to specific local materials requirements should be investigated. Unfortunately, there is no readily available local supply of roofing materials and, historically, roof materials were often imported, particularly from Wales and Cornwall. Good quality natural materials are long lasting and reuse and recycling should be encouraged wherever possible.

Recommended actions

- **Increase the range and scope of employment opportunities for local people, particularly those that relate to or further National Park purposes, by:**
 - *providing a flexible planning context to support existing employment and create new opportunities in the Structure and Local Plan*
 - *ensuring that existing businesses are not unduly disadvantaged through lack of services and facilities in the National Park in ways that are compatible with National Park purposes – for example, through the provision of **broadband telecommunications infrastructure using technology that is compatible with National Park purposes***
- **Encourage the provision of multi-purpose community service buildings, through specific inclusion in grant programmes.**

- Commission a study of the existing IT infrastructure of the area and identify weaknesses and future requirements, particularly in relation to better internet links through broadband connection or digital TV or mobile phone internet access.
- Establish Community Support Grant scheme to complement ‘Vital Villages’ projects.
- Ensure joint working with district councils and housing associations, co-ordinated by the housing enabler officer to promote delivery of affordable housing for local people.
- Set up a directory of local businesses to improve awareness and develop networking and marketing relationships.
- New and improved business premises are required - grant aid should be available for re-use of rural buildings in the National Park.
- Speciality retail and equipment manufacturing outlets should be supported which are related to active recreational activities being encouraged on Exmoor.
- Make grant aid available for existing successful businesses to support growth and promote new markets.
- Business advice to be made more accessible to micro businesses - signposting of existing grant aid and advice schemes available - easy understandable and accessible information is needed.
- Better marketing and promotion of what Exmoor has to offer businesses emphasizing the quality of life and market uniqueness of its special qualities (wildlife, landscape, culture, history).
- Develop an Exmoor brand - under the existing Somerset Food Links Project and extend to other products.
- Create IT links between local producers, accommodation providers and ensure that buying locally is both part of the holiday experience.
- Address poor transport links and access problems by setting up trans-shipment points.
- Support railway corridor development and Minehead Railway Centre/transport interchange.
- Develop strategy for the development of renewable energy and introduce grant aid for its development in ways which are compatible with National Park purposes.
- Reduce overall consumption and increase the proportion of energy used on Exmoor which is derived from renewable and non-polluting sources where compatible with National Park purposes.
- Ensure that specialist building skills using natural materials and historic techniques are retained and encourage appropriate design, materials and construction techniques in the maintenance and reuse of historic buildings throughout the National Park.



Restoration work at
Simonsbath
Sawmill

10. Overcoming barriers to delivery

A long term, substantial and co-ordinated approach is required from local authorities and development agencies to foster the positive climate of enterprise, confidence and investment that is necessary for the necessary restructuring of sectors such as agricultural and the greater realisation of local enterprise and entrepreneurship

Current profile

- **The need for economic development within the rural areas of North Devon and West Somerset has been recognised by public agencies and the rural parishes of Exmoor are eligible for Objective 2 and other funds.**
- **The National Park Authority has had some success in attracting external funding amounting to over £1.3 million over the past three years for local projects**
- **Despite some success, access to additional funds is limited by a lack of capacity at the local level to build partnerships, develop bids and provide the matching investment.**
- **Improved access to business support and training is required to help unlock the potential for local enterprise and development**

10.1 The previous sections of this statement set out a wide range of projects, programmes and initiatives that have the potential to contribute to the development of a more prosperous and sustainable economy for Exmoor National Park communities. Without further concerted action these ideas and suggestions are little more than a 'wish list' for future development and the statement will not have achieved its aim of encouraging and stimulating investment and change.

External Funding Opportunities

- 10.2 Exmoor has benefited over recent years from the recognition of the problems and disadvantages that are characteristic of much of remote rural England. External resources have been targeted at improving the welfare of its communities and enabling adjustment to economic and social changes in the countryside. The whole of the National Park was formerly located within a Rural Development Area and it is hoped that Exmoor will benefit from the South West Regional Development Agency's '*Rural Renaissance*' programme that will be launched in 2002.
- 10.3 European funding received through the Greater Exmoor LEADER II project contributed over £2 million to the greater Exmoor economy between 1996 and 2000. This scheme has now ended but much of Exmoor is now eligible for funding under European Objective 2. Although this funding source is significant, a considerable investment of time and expertise is required for successful access to the funding. Local partners are working closely to maximise benefits for Exmoor and the wider area. The achievement of many of the recommended actions set out in this statement is dependent on successful access to Objective 2 funding, particularly through measures 2.1; 2.2; 2.3; 2.4; 3.1, and 3.2.

Priorities and Measures for Objective 2 funding in the South West:

Priority 1 - Neighbourhood renewal (no Exmoor wards are eligible for this priority)

Priority 2 - SME development, technology and innovation

Measure 2.1 Support for start-ups and micro-enterprise

Measure 2.2 Support SMEs to grow

Measure 2.3 Technology, innovation and product development

Measure 2.4 Creating a better environment for business

Measure 2.5 Management and skills for SME development

Priority 3 - A better future for traditional economies

Measure 3.1 Regenerating the rural economy

Measure 3.2 Investing in the rural tourism product

Measure 3.3 Investing in the tourism infrastructure of coastal towns, resorts and city areas

Measure 3.4 Promotion and development of the regional distinctiveness of the area

Measure 3.5 Regenerating fishing communities

Measure 3.6 HRD and training support for traditional economies

Cross-cutting measures – that should apply to all project proposals

Equal opportunities

Information & Communications Technology

The Environment

Recommended Actions

- **Secure support for training and business development and increased local capacity to build partnerships and develop bids so that Exmoor maximises the benefit from external funding for local sustainable development , by:**
 - *establishing Exmoor as a priority for the key agencies including Government Office, South West Regional Development Agency and the Countryside Agency*
- **Ensure that Exmoor continues to benefit from rural development/regeneration programmes and EU structural funds to help achieve local environmental, economic and social objectives, by:**
 - *maximising European Union funding for programmes benefiting Exmoor.*