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Planning Design Economics

EXMOOR NATIONAL PARK

EMPLOYMENT LAND REVIEW

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Contents

Figures

Tables

Appendices

Executive Summary

Introduction

1 This study, prepared by Nathaniel Lichfield and Partners (NLP), is intended to assist Exmoor National Park Authority in its assessment of the anticipated future direction of the economy. In so doing, it will inform its decision making process regarding the identification and development of land in order to achieve its economic aspirations and to meet future employment purposes.

2 The overall approach that was adopted in undertaking this Employment Land Review was largely based upon the DCLG Guidance Note (2004) on Employment Land Reviews although the scope of the study was extended to take account of other (non-B Class) economic activities due to their dominance within the local area. A key input into the study was engagement with various stakeholders such as agents and local businesses.

The Local Context

3 Exmoor National Park is a small, rural area that forms part of North Devon District and West Somerset District. The study has found that the area has a number of defining characteristics which have significantly influenced the growth of the economy within this area.

4 In particular, the area has a high proportion of older people due to the relative attractiveness of Exmoor as a retirement location. There is also a high proportion of self-employed people which directly reflects the nature of the economy which is dominated by small-scale businesses.

5 Not only is Exmoor’s economy dominated by small scale businesses, it is also focused upon a number of key non-B Class sectors such as tourism, agriculture and the public services. As such, traditional employment (B Class) sectors are substantially less significant within Exmoor than in neighbouring authorities, the South West or England. It is anticipated that this trend will continue in the future and that it will exert a considerable influence upon the requirements for B Class employment land in the future.

6 This composition of employment in non-B Class uses was found to reflect the current supply of employment land in Exmoor with the level of B Class employment space and the rate of new B Class employment development being relatively limited. However, there is no overriding evidence to indicate that this composition of employment facilities is undermining Exmoor’s economy but rather that a balance between the supply and demand of such workspace appears to have been achieved.

Existing Employment Locations

7 The study assessed 45 B Class employment sites in the National Park using a Site Assessment Criteria matrix which allowed scores between 1 and 5 (1 = poor, 5 = very good) to be awarded for a variety of issues relating to location, access, quality, market factors and local context.

8 Using these criteria, the quality of the existing portfolio was found to be relatively high with 60% of sites reviewed as 'good' or 'very good' and only 13% classed as being of 'poor' quality. Location was seen to be one of the biggest influencing factors to the perceived quality of sites with accessibility, market attractiveness and access to services and labour particularly important factors.

9 The study recommends that none of the existing sites should be released for non-B Class purposes and instead consideration should be given as to how the viability of the sites can be maintained and enhanced to ensure they are able to make a valuable contribution to the local economy. In addition, future LDF policies should seek to protect existing employment land from redevelopment.

The Future Economy of Exmoor

10 The study considered the current economic climate and its likely impact upon Exmoor's economy and concluded that the recession was unlikely to affect Exmoor as severely as other areas although this does not mean that it will remain unaffected. In the long term, Exmoor's economy will continue to be dominated by small scale activities and non-B Class activities will continue to be particularly important. The importance of non-B Class sectors as a component of the local economy is emphasised throughout the report.

11 The National Park Authority must seek to promote and encourage key (B and non-B Class) sectors to locate within Exmoor's settlements which offer the most appropriate locations for future business activities.

12 Opportunities for increased activity were found to exist in the following key sectors in the National Park:

- i Agriculture;
- ii Tourism;
- iii The processing of agricultural / forestry products;
- iv Traditional building;
- v Environmental sector / environmental technologies;
- vi Lifestyle businesses; and,
- vii Knowledge based and creative business.

13 The study also recognises a need for complementarity between the economic prosperity and environmental quality of Exmoor. Whilst existing planning policies provide a basis by which this objective can be achieved, it is important that this approach should continue in the future and specifically through the emerging Local Development Framework.

14 In seeking to deliver these aspirations for growth, it will also be important to work with the adjoining local authorities of North Devon and West Somerset. Attention should be given to the ways in which experiences might be shared and stronger links might be developed at all levels – by the authorities, businesses and communities. Cross working between the public and private sectors will also enable examples of best practice to be shared and the opportunity to be taken to establish a stronger platform for the development of shared growth sectors. It will also enable a firmer platform to be established for long term sustainable development. Indeed, the potential benefits for Exmoor are particularly significant as it could realise the benefits that are associated with its proximity to larger centres such as Barnstaple and Minehead in addition to the benefits associated with its National Park status.

Future Employment Levels

15 The starting point of the assessment on the future need for employment space in Exmoor National Park was an understanding of the likely changes in the job requirements of different sectors.

16 Data was prepared by Experian Business Strategies (Experian) which found that the overall number of jobs was expected to rise by 5.3% (or 270 jobs) between 2006 and 2026, which can be compared to a forecast increase of 2.9% in the number of persons of working age:

	Forecast Job Change 2006-2016	Forecast Job Change 2006-2026
Office (B1)	0	-10
Manufacturing (B1c/B2)	7	0
Warehousing/Distribution (B8)	-26	13
Total change in B Class Jobs	**-19**	**3**
Non-B Class	189	276
Total change in Jobs	**170**	**279**

Source: Experian Business Strategies Limited/NLP, 2008

Table ES.1: Forecast employment change in Exmoor, 2006-16 and 2006-26

17 The impact of these changes by sector is demonstrated in the table above which shows that by 2016, a total of 19 jobs would have been lost from B Class sectors and that by 2026, the number of B Class jobs would have increased by just 3. By contrast, a total of 276 jobs are expected to be created in non-B Class sectors by 2026. These differences underline the continued dominance of the non-B Class sectors within the local economy.

Employment Based Space Requirements

18 The implication of the employment forecasts is that there is expected to be a very limited requirement for future B Class employment development within Exmoor, a trend that is clearly supported by the evidence of what has happened in the past.

19 The land requirements associated with the employment forecasts can be ascertained by using typical ratios of jobs to floorspace for the different B Class uses. Floorspace requirements can be translated into land requirements by applying average plot ratios.

20 The study adopted two scenarios for assessment – one in which no safety margin is applied and an alternative scenario which applies a 25% safety margin. As the table below shows, Scenario 1 found a need for 650 sq. m of floorspace (0.16 ha land) and Scenario 2 found a need for 812.5 sq. m floorspace (or 0.2 ha of land). The resultant land requirement is therefore minimal.

	Scenario 1: 0% Safety Margin		Scenario 1: 25% Safety Margin	
Use Class	Floorspace Requirement (sqm)	Land Requirement (ha)	Floorspace Requirement (sqm)	Land Requirement (ha)
B1	*0*	*0*	*0*	*0*
B2	*0*	*0*	*0*	*0*
B8	*650*	*0.1625*	*812.5*	*0.2*
Net	***650***	***0.1625***	***812.5***	***0.2***

Source: Experian Business Strategies Limited/NLP

Table ES.2: Gross Employment Floorspace/Land Requirements in Exmoor, 2006-2026

21 Application of an alternative development scenario – based upon an assumed increased level of B1 demand – similarly concludes that the employment land requirements in Exmoor are minimal.

22 The study concludes that the evidence clearly points to the fact that the level of future employment development within Exmoor will be very limited with the small level of forecasted employment growth shaping the requirement for additional business space.

23 In the light of this evidence, together with that obtained from discussions with stakeholders, an assessment of past trends and the character of the economy

and the existing employment stock within the National Park, it is recommended that no land should be allocated for future employment development. It is anticipated that much of the new employment space that will be created within the LDF period will result from the conversion of existing buildings.

24 At this stage, it is not possible to ascertain which premises are most likely to be converted and so the allocation of sites that are likely to come forward for employment purposes cannot be achieved with any acceptable degree of accuracy. In this context, there is a concern that the allocation of land or premises for employment purposes would not serve a positive economic function as there could be no realistic assurance that such land would come forward for development within the Plan period. In this context, additional (non-allocated) land might also be required to come forward for employment purposes, resulting in an inefficient pattern of development and land use.

25 Rather than allocating land for development, the Local Development Framework should contain policies that provide a basis for the release of appropriate sites and premises for development in response to emerging needs. This approach would enable small sites to come forward throughout the National Park in a manner that reflects the character of the local economy and emerging requirements. It will reflect the reality of local circumstances and the fact that a continuation of past trends is expected to occur. In so doing, it will provide an appropriate response to the character of the National Park. In addition, policies should seek to protect the existing employment land stock from alternative forms of development unless there are clear reasons to justify any such loss.

Recommendations

26 Taking account of the above conclusions within the report, 20 recommendations have been made, designed to assist the National Park Authority throughout the progression of its Local Development Framework.

27 These include the recommendations that:

i No land should be allocated for B Class employment development;
ii The LDF should contain a policy platform to support appropriate types of development, including the protection and expansion of existing business premises, homeworking, and the promotion of new business sectors and non-B Class activities;
iii LDF policies should also seek to ensure that the mutual benefits that exist between sustainable economic development and the promotion of the environment can be achieved and should seek to address accessibility problems;
iv Changes in the use of employment land and in employment levels in different sectors should be monitored; and,

v Other (non-planning) approaches should be adopted in respect of the promotion of the local economy. These would include training, mentoring and business support initiatives; efforts to enhance activity and average wage levels and the continued marketing of Exmoor as a location to visit and to work.

1.0 INTRODUCTION

Scope of the Study

1.1 This Employment Land Study has been commissioned by Exmoor National Park Authority to inform its forthcoming Local Development Framework (LDF). It is intended to assist the National Park Authority in its assessment of the anticipated future direction of the economy and, in so doing, will inform its decision making process regarding the identification and development of land in order to achieve its economic aspirations and to meet future employment purposes.

1.2 The key aims of the study are to:

a Review the existing employment stock within Exmoor National Park and consider its role, quality, fitness for purpose and its current and potential future contribution to the local economy;

b Review the key (existing and anticipated) economic sectors within Exmoor and discuss the land and property requirements arising from these activities;

c Consider the National Park's future employment land and premises requirements over the period to 2026; and,

d If necessary, identify the scale, location and type of sites that are needed to meet the future requirements of Exmoor National Park.

1.3 The starting point for this study has been the advice contained within the 2004 (then) DCLG Employment Land Review Guidance Note. However, the detailed methodology that we have adopted has been amended to reflect the specific context of the National Park.

1.4 The DCLG guidance states that employment land reviews should focus on those employment land uses or premises which are within the scope of PPG4, specifically:

a Offices;

b Light and general industry;

c Wholesale and freight distribution; and,

d High technology premises, including research, business and science parks.

1.5 These activities reflect those contained within the group of B Class uses, as follows:

B1	(a)	Offices, not A2 (financial and professional services)
	(b)	Research and development, studio, laboratories, high tech
	(c)	Light Industry
B2		General Industry
B8		Storage and Distribution: wholesale warehouse, distribution centres, repositories

Table 1 Definition of B Class Employment Sectors

1.6 The emerging Regional Spatial Strategy (RSS) for the South West has introduced a new approach which sets out a job requirement for each local authority area. This represents an important departure from previous strategic guidance which has tended only to have considered (B class) employment land. This new approach is significant in recognising the job creation capacity of other sectors beyond traditional B Class activities.

1.7 The position set out in the emerging RSS reflects an important and timely acknowledgement of the complexity of the economy and the fact that its strength and well-being is dependant upon a wide range of activities – including but not just B Class sectors. The relative importance of B Class activities compared to other sectors of the economy varies on a local and regional level. In Exmoor, traditional B Class ‘employment’ sectors are significantly less important than other activities. For this reason, and in order to provide a comprehensive overview of the local economy within Exmoor, the scope of this study has been extended to take account of the following non-B Class sectors:

a Tourism;

b Agriculture;

c Retail; and,

d Public sectors.

1.8 Our review of these key non-B Class activities is intended to provide an understanding of their relative importance within the local economy and an indication of the likely future changes in their role. It will also consider the implications of these changes upon the economic wellbeing of the National Park and the achievement of Exmoor National Park Authority’s economic development aspirations. It is not intended to provide a detailed study or analysis in respect of these sectors and is not designed to provide a specific land requirement figure or recommendations in respect of the possible allocation of land for such purposes.

The Implications of Exmoor's Status as a National Park

1.9 PPS12 and the DCLG Practice Guidance acknowledge the importance of ensuring that any employment land study is firmly rooted in a clear understanding of the local area. A detailed overview of the local context is set out in Section 2. At this stage it is important to frame the study within an understanding of Exmoor's status as a National Park. It was designated as a National Park in 1954, primarily because of the quality of its natural landscape, and despite half a century of change, the Exmoor National Park Management Plan 2007 to 2012 has identified nine key qualities which continue to characterise the area:

a *"Large areas of open moorland providing a sense of remoteness, wildness and tranquillity which is rare in southern Britain;*

b *A distinct and diverse landscape of softly rounded hills and ridges, with heather and grass moors, spectacular coastal views, deeply incised wooded valleys, high sea cliffs, fast flowing streams, traditional upland farms and characteristic beech hedgebanks;*

c *A landscape mostly free from intrusive development such as major roads, power lines, military activities, quarrying, mining, large scale developments, light pollution and clutter;*

d *A mosaic of habitats supporting a great diversity of wildlife including herds of wild red deer, rich lichen communities, rare fritillary butterflies, bats and other species uncommon in southern Britain;*

e *A complex and rich historic landscape that reflects how people have lived in, exploited and enjoyed Exmoor over the past 8,000 years, including burial mounts on ridges, discrete stone settings, ancient farmsteads and settlements, picturesque villages and historic estates;*

f *A deeply rural community closely linked to the land with strong local traditions and ways of life;*

g *A farmed landscape with locally distinctive breeds such as Red Devon cattle, Devon Closewool, and Exmoor Horn sheep, and herds of free living Exmoor Ponies;*

h *An exceptional rights of way network and extensive areas of open countryside, providing superb opportunities for walking, riding and cycling; and,*

i *A landscape that provides inspiration and enjoyment to visitors and residents alike."*

1.10 In order that their key qualities are managed and retained, the 1995 Environment Act sets out two statutory requirements which are placed upon all

National Park Authorities and which are required to shape their actions. These are:

a To conserve and enhance the natural beauty, wildlife and cultural heritage of the area; and,

b To promote opportunities for the understanding and enjoyment of its special qualities by the public.

1.11 National Parks Authorities are also required to prepare Management Plans. These provide a basis for the protection and enhancement of the environment and area and should be reviewed every five years. The Exmoor National Park Management Plan 2007-2012 sets out a vision of *'enhancing the qualities that make Exmoor special'*. This vision is built upon the aspiration of enabling changes that help to meet current and future needs in ways that contribute to and do not detract from the quality of the National Park.

1.12 The statutory requirements for Exmoor National Park are central to all activities that are undertaken by the Authority and all functions, including those relating to the promotion and enhancement of the local economy must be viewed in the context of these primary objectives. However, there can be a clear synergy between the promotion of the economy and the enhancement of the local environment.

1.13 In order for economic development in Exmoor to be sustainable, all activities should aim to enhance the quality of the environment and the quality of life for the local communities and visitors alike. Economic development is not viewed as an overriding aspiration in itself but in the context of providing a mechanism by which the National Park Authority's environmental and social goals might be achieved and as an important contributor to the well-being of local communities.

1.14 Like all other elements of the Exmoor LDF evidence base, this Employment Land Review must fit within this local context. It recognises the future economic growth must respect the quality of the local environment and take account of the implications of Exmoor's geographical location – some distance away from large urban centres and markets and from the strategic road and rail network. Whilst the economy is likely to experience change over the LDF period, its structural bases will be retained. It is likely to continue to be characterised by micro businesses and the connection between the environment and the economy is also likely to be preserved.

Methodology

1.15 The overall approach that we have adopted in undertaking this Employment Land Review is set out in Table 2. As detailed above, this is largely based upon the 2004 DCLG Guidance Note on Employment Land Reviews, albeit that the scope of the study has been extended to take account of other (non-B Class) economic activities that are dominant within the local area.

1.16 The purpose of the Employment Land Review is to build upon the current context in Exmoor and to provide a basis for the future enhancement of its economy. It must therefore be rooted in an appreciation of the current demographic, economic and physical context and the ways in which these matters impact upon the scale and direction of future growth. A detailed review of the current context is therefore a key initial stage of the study. However, the fact that economic, demographic and social trends do not respect administrative boundaries can create difficulties in the collection and interpretation of data. Large amounts of information are collected on a district level by the UK Statistics Agency but, given its position – straddling parts of West Somerset District and North Devon District – this data is unavailable for Exmoor National Park. Where possible, we have sought to overcome this challenge by reviewing data at a parish and by ward level or identifying alternative sources of data. In some cases, background information was not available at a National Park scale although any such occurrences are identified in the study.

1.17 A key input into the study was engagement with various stakeholders. The consultation strategy drew a number of elements together, as follows:

a **Review of past consultation exercises**. A number of separate consultation exercises have been undertaken in Exmoor National Park in recent years. Many of these have addressed economic development issues and have provided a detailed source of information about the existing strengths and weaknesses of the local economy and about aspirations and expectations for the future.

b **Business Surveys**. Separate surveys have been undertaken of the following groups:

i businesses that occupy B Class premises;
ii businesses that are involved in agricultural activities; and,
iii businesses that are involved in tourism.

1.18 The purpose of these surveys was to achieve a detailed understanding of the views of individual businesses about the strength of the local economy, their existing premises and their future aspirations. The surveys were based upon consultation lists that were provided by Exmoor National Park Authority and despite being wide-ranging, were not designed to achieve a 100% survey of all businesses in Exmoor.

a **Discussions with local agents**. Rather than including a single agent within the project team, our preferred approach has been to adopt a ‘portfolio’ approach and to liaise with a number of agents that are active in the local market. Detailed discussions were undertaken with a number of local agents in order to ascertain their views on the strength of the local market and the likely requirements for land and premises to sustain growth in the future.

b **Stakeholder Consultation**. Additional discussions were held with a wide range of stakeholders that are active in the local area. This element of the study comprised our involvement at two workshop sessions that were organised by Exmoor National Park Authority and which dealt with 7 key topics that are relevant to the National Park at this time and which will inform the emerging LDF. In addition, separate discussions were held with a number of key stakeholders in order to gain a more detailed understanding of some of the issues that were discussed at the workshop sessions.

1.19 Other key inputs included an assessment of existing business premises and locations. NLP developed a site assessment matrix which was used to inform our site-surveys and to judge the quality and the fitness for purpose of existing business premises within the National Park. Our survey of business locations was based upon a list of premises that was provided by the National Park Authority. Although it was not possible to survey each individual business unit within the National Park, our approach did provide a detailed overview of existing employment sites.

1.20 In addition, a review of recent trends in the local property market and demand for different types of employment space was undertaken, based upon a review of published statistics relating to levels of development, business enquiries and activity levels. This process helped to inform our assessment of the need for additional space for business purposes which also relied upon employment forecasts which have been undertaken by Experian Business Strategies Limited specifically for this study.

1.21 In the light of our recommendations relating to the level of employment land that is to be required within Exmoor over the LDF period, it was not necessary to identify future employment locations. However, the study does conclude by highlighting a number of important considerations that will need to be taken into consideration by Exmoor National Park Authority at this policy making stage and also in the longer term as it considers proposals for employment related development and applications that, if permitted, would result in the loss of existing employment space.

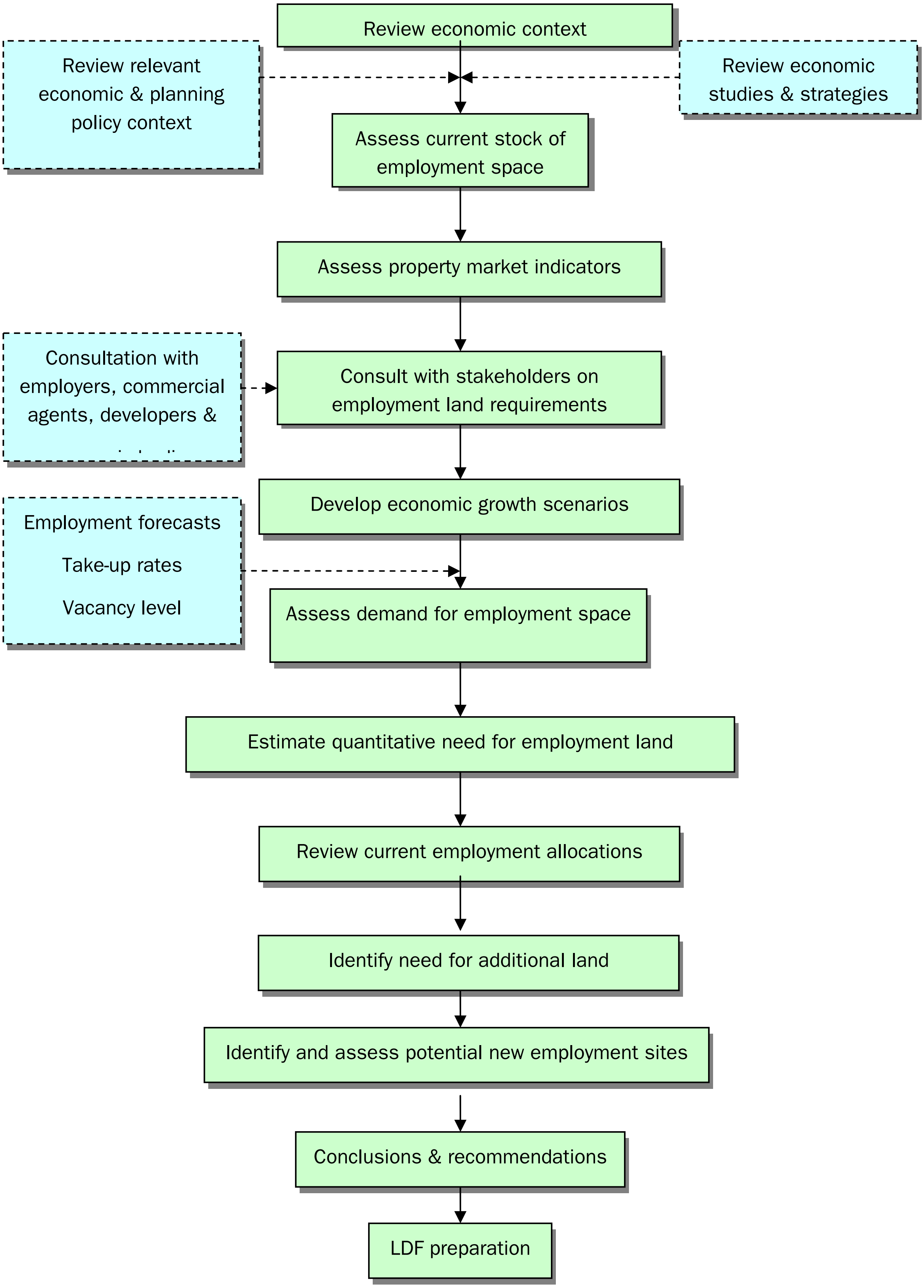


Table 2 Exmoor Employment Land Review Methodology

Report Structure

1.22 This report is structured as follows:

- An overview of the current economic conditions and recent trends in Exmoor National Park (Chapter 2);
- An overview of the key planning and economic development policies that are relevant in Exmoor (Chapter 3);
- An assessment of the current stock of employment space in the National Park (Chapter 4);
- A summary of the consultation process that informed this study (Chapter 5);
- A review of existing employment sites in Exmoor in terms of their quality and adequacy to meet current and anticipated future needs and the scope for their potential release or redevelopment (Chapter 6);
- A consideration of the future economic role of Exmoor National Park and the specific sectors which have potential for growth (Chapter 7);
- An assessment of the level of employment land that is required to meet future needs (Chapter 8);
- A review of the role of non-B Class sectors within the local economy (Chapters 9 and 10); and,
- Conclusions and recommendations (Chapter 11).

2.0 # Local Context

2.1 PPS12 emphasises the importance of ensuring that LDF Core Strategies are appropriately supported by a robust evidence base which is proportionate to the job being undertaken by the plan, relevant to the local area and as up-to-date as practical. On this basis, this chapter sets out the existing geographical, social and economic context of Exmoor National Park.

2.2 Some area specific contextual information is not available for the National Park. In order to address this issue, consideration has also been given to the published statistics for North Devon and West Somerset and also to the individual wards within the National Park. A comparative assessment has been undertaken of the National Park in relation to the South West region and England in order to achieve a clearer understanding of the local economic performance of Exmoor.

2.3 The analysis in this section examines the range of indicators relating to employment, economic activity and the labour market. It concludes by setting out the main strengths and weaknesses of the National Park.

Geographical Context

2.4 Exmoor extends to 267 square miles and its coastline stretches for 34 miles from Minehead in the east to Coombe Martin in the west. 71% of the National Park lies within West Somerset and 29% lies within North Devon.

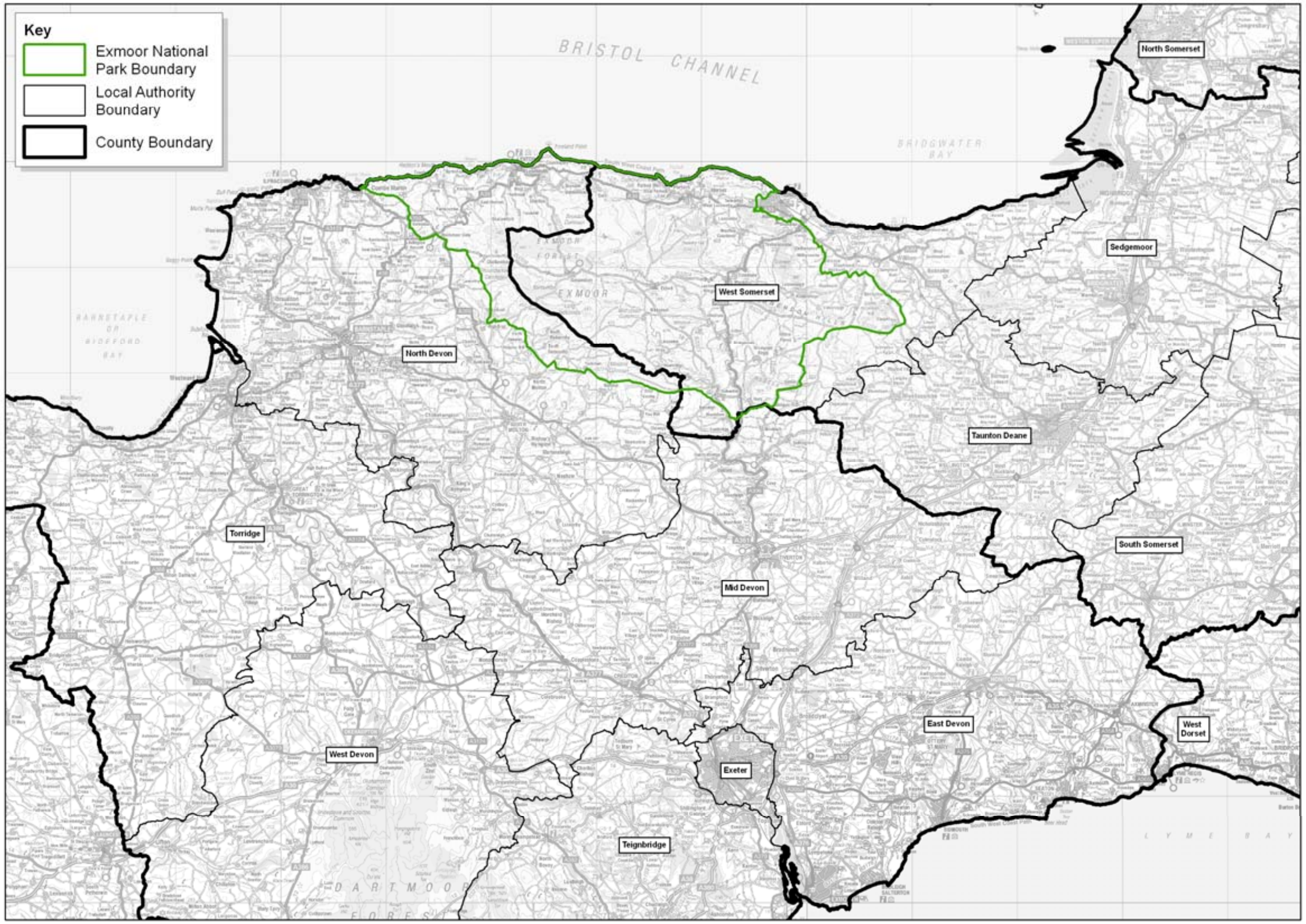


Fig 1 Context of Exmoor National Park

2.5 About half of Exmoor's population of approximately 11,000 people live in small towns and villages and the remainder live in isolated farms and hamlets. Only a very small part of the National Park is built up and all of the settlements are limited in scale – fewer than 4,500 people live in the three largest settlements – Lynton & Lynmouth, Porlock and Dulverton. As shown in Table 4, much of the National Park is used as farmland or remains as moor and heathland or woodland:

a)	Moor and heath	27.5%
b)	Farmland	55.8%
c)	Woodland	12.2%
d)	Urban	0.9%
e)	Water	0.2%
f)	Cliff and foreshore	1.1%
g)	Other (roads and gardens etc)	2.3%

Source: A State of the Economy of Exmoor Report, 2002.

Table 4 Land Use in Exmoor by Area

Population

2.6 In 2001 the population of Exmoor was 10,873 (2001 Census). This represented a 2.14% increase on the 1991 population of 10,645, a significantly lower rate of increase than was experienced in the South West region and in England over this same period (Exmoor National Park Census Monitor 2001).

	1991	2001	Change (%)
Exmoor National Park	10,645	10,873	2.1
South West	4,611,442	4,928,434	6.9
England	47,055,205	49,138,831	4.4

Source: derived from 2001 Census

Table 5 Population Change between 1991 and 2001

2.7 The majority of England's population lives in towns and even the South West region, which is predominantly rural, has several large towns and cities. As demonstrated above, the character of Exmoor is very different to this national and regional context. Its pattern of dispersed and small settlements and specific policies restricting open market residential development serve to explain this lower level of population growth.

2.8 In 2001 the population density of Exmoor was 0.16 persons per hectare. This is significantly lower than both the England average of 3.45 and the South West average of 2.07 (Exmoor National Park Census Monitor 2001). However, at 2.22, the average household size within Exmoor is only marginally less than the English average (2.3) and is slightly greater than the South West average (2.21). It can be concluded from this that the population density of the settlements in Exmoor is likely to be rather more aligned with the regional and national averages and that the low overall density in Exmoor is principally a function of the character of the area and the fact that very large areas of the National Park away from the settlements are very sparsely populated.

Economic Activity

2.9 In 2001 there were 8,009 people of working age within Exmoor National Park, of which 63.1% were economically active (2001 Census). This is the lowest level of economic activity in the area, except for West Somerset (61.1%). The level of economic activity for North Devon is 66.5% – higher than the levels in Exmoor and West Somerset but lower than the regional (67.5%) and national (66.9%) averages and the figures for many other neighbouring districts.

2.10 The differences between the levels of economic activity in Exmoor National Park and surrounding districts can be attributed to the character of each area and the scale and importance of the key settlements. For example, Taunton Deane has the highest level of economic activity (68.6%) as it contains Taunton – an SSTC and a regionally important economic centre. It is also noteworthy, however, that the economic activity level for Dartmoor National Park (the only other National Park in the South West) is higher than for Exmoor (65.5% compared to 63.1%). This difference can be attributed to the fact that Dartmoor benefits from better strategic accessibility – adjacent to the A38 dual carriageway which links it to the M5 – and contains several larger settlements such as Ashburton.

2.11 The high level of economic inactivity in Exmoor can be partly understood from the fact that almost 60% of inactive persons are retired (2001 Census). This is particularly high compared to a figure of less than 50% in the South West and only 40% in England as a whole and may be attributed to the fact that large numbers of people decide to move to Exmoor for early retirement (2001 Census). The implications of the current demographic profile and future population changes upon the economic performance of the National Park and the need for key public services should be appraised as part of the LDF process.

	Exmoor	West Somerset	North Devon	Dartmoor	Mid Devon	Torridge	Taunton Deane	Sedgemoor	South West	**England**
Economically Active	63.1	61.1	66.5	65.5	68.5	64.1	68.6	66.9	67.5	66.9
Economically Inactive	36.9	38.9	33.5	34.5	31.5	35.9	31.4	33.1	32.5	33.1

Source: 2001 Census

Table 6 Percentage of Economically Active People 16-74

2.12 Whilst Exmoor National Park also has a reasonably low level of unemployment, there are differences in the level of unemployment across different age groups, with the highest level of unemployment being amongst those aged over 50 years. The level of unemployment in Exmoor is lowest for those aged between 16 and 24 years. It will be important to monitor future unemployment levels in Exmoor in order to assess the local impact of recession and to identify possible local responses to the current economic climate.

	Employees: Part Time	Employees: Full Time	Self-employed	Unemployed	Full Time Student
Exmoor	17.7	36.6	38.8	4.5	2.4
South West	19.6	57.9	14.9	3.8	3.8
England	17.7	61	12.4	5.0	3.9

Source: 2001 Census

Table 7 Percentage of Economically Active People

	Retired	Student	Looking after family / home	Permanently sick / disabled	Other
Exmoor	58.6	7.2	17.3	10.3	6.6
South West	47.6	12.0	18.8	13.9	7.7
England	40.9	14.1	19.7	16.0	9.4

Source: derived from 2001 Census

Note: Only full-time students are included as economically active. Part-time students who are economically active are included in the relevant category e.g. part-time employees. Economically inactive students may include full-time and part-time students.

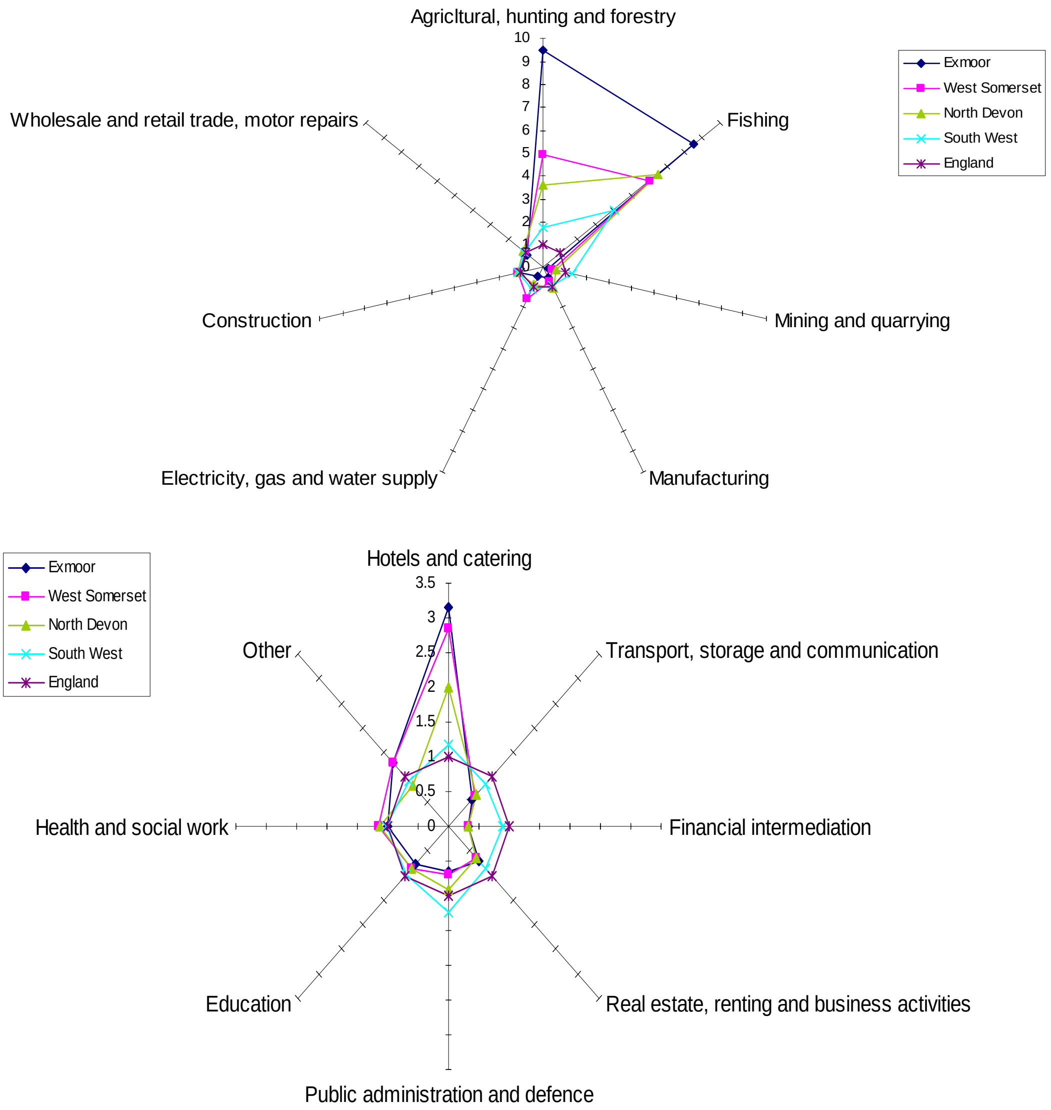
Table 8 Percentage of Economically Inactive People

2.13 As shown above, the National Park has a substantially above average level of self-employment – at 38.8% it is 23.9% above the South West average and 26.4% above the English average. This reflects the nature of the economy which is dominated by very small scale businesses and reflects an entrepreneurial spirit which is likely to be important in sustaining the future well-being of the National Park. The implications of small businesses in terms of their land and premises requirements are considered in the subsequent chapters of this report.

2.14 Another important trend in local employment relates to the surprisingly low level of full time employed people in the National Park (36.6% of economically active people). This reflects the character of many of the key economic sectors, the high rates of self-employment and the quality of the local area which might attract people for lifestyle reasons whereby they specifically decide to work only part time rather than full time. However, it is important to recognise that this figure relates only to employees and is therefore affected by the very high level of self-employment within the National Park.

Distribution of Employees by Sector

2.15 The relative concentration of a particular economic sector in an area, compared to the national average can be shown by comparing location quotients (LQ). Figure 2 below sets out the LQ scores for Exmoor, North Devon, West Somerset, the South West and England.



Source: derived from 2001 Census

Note that the data used to calculate this is the same as used in Table 9. This figure provides a graphical illustration of the comparative importance of sectors at different geographical scales.

Fig 2 Location Quotients

2.16 The radar charts demonstrate the importance of 15 different economic sectors in Exmoor, North Devon, South Somerset and the South West in relation to their role in the English economy. The LQ of each sector in England is shown to be 1. An LQ above 1 for each individual area as a whole would indicate a relative concentration of a particular economic sector (above the English average), whilst an LQ of less than 1 would indicate a local shortfall of a particular sector, compared with the English average.

	Exmoor	West Somerset	North Devon	South West	England
Agricultural, hunting and forestry	13.7	7.2	2.5	2.5	1.5
Fishing	0.17	0.12	0.08	0.08	0.02
Mining and quarrying	0.06	0.1	0.3	0.3	0.25
Manufacturing	7.6	9.9	13.9	13.9	14.8
Electricity, gas and water supply	0.3	1.1	0.8	0.8	0.7
Construction	7.3	7.4	7.2	7.2	6.8
Wholesale and retail trade, motor repairs	14.3	16.4	17.1	17.1	16.9
Hotels and catering	15.0	13.5	5.6	5.6	4.7
Transport, storage and communication	4.0	4.3	4.4	6.2	7.1
Financial intermediation	1.6	1.6	1.5	4.3	4.8
Real estate, renting and business activities	9.35	8.7	8.6	11.4	13.2
Public administration and defence	3.7	3.89	5.14	7.04	5.66
Education	5.84	6.9	6.7	7.6	7.7
Health and social work	10.6	12.3	12.0	11.0	10.7
Other	6.6	6.7	4.3	4.9	5.2

Source: derived from 2001 Census

Note that the data used to calculate this is the same as used in Figure 2. This table provides a comparison of the relative importance of different sectors at each geographical scale.

Table 9 Percentage of Employees by Sector

2.17 According to the 2001 Census, the largest employment sector in the National Park is hotels and catering which accounts for almost 15% of the working population. This is a reflection of the nature of the National Park, which attracts many visitors due to the natural environment. The agriculture, hunting and forestry sector is also a large employer within the National Park accounting for almost 14% of local employment. Together these two sectors make up almost one third of employment within the National Park showing that they are clearly drivers of the economy and an important source of jobs locally. The level of people employed in each of these sectors is substantially higher than both the regional (2.5% - agriculture and 5.6% - tourism) and national averages (1.5% - agriculture and 4.7% - tourism). Whilst Exmoor has significantly higher levels of agriculture than either West Somerset or North Devon – showing that its economy is unique in its character and composition – the pattern of local employment in these two key sectors is more closely aligned to West Somerset than to North Devon.

2.18 Despite being the second largest individual sector of employment in Exmoor, the wholesale and retail trade and motor repairs sector (which accounts for 14.3% of the workforce) is less important within the National Park than in the other areas set out in Table 9. It can therefore be recognised as being locally important but slightly weak within the local context, a characteristic which is due to the nature of the National Park and the scale and role of its settlements.

2.19 These figures also highlight the local importance of the public sector in employment terms. The public administration, health and social care and education sectors all form the public sector and collectively account for 20% of local employment. Although this is lower than at other geographical scales, it does account for a very large proportion of local employment and, as such, makes a vital contribution to the local economy.

2.20 The Census reports that traditional B Class employment sectors are less important in Exmoor than in neighbouring local authorities, the South West or England. At 7.6% of the working population, the manufacturing sector in Exmoor is substantially smaller in relative terms than in West Somerset, North Devon, the South West or England. Even so, it still makes a reasonable contribution to employment within the area when compared to several of the other sectors.

2.21 Only 1.6% of working people were employed in the financial intermediation sector in the National Park in 2001. This is much less than the regional level (4.3%) and the England level (4.8%) although it is broadly similar to the levels employed in West Somerset (1.6%) and North Devon (1.5%) The relative importance of real estate, renting and business activities in Exmoor (9.3%) is similarly lower than the regional (11.4%) and national (13.2%) levels but is on par with the levels employed in this sector within both West Somerset (8.7%) and North Devon (8.6%). This indicates that Exmoor is not in isolation in having low levels of employment in these sectors which are relatively weak in this part of Devon and Somerset.

Qualifications

2.22 Table 10 compares the qualifications of the working age population in the National Park to those of North Devon and West Somerset, the South West region and England. The level of people with no qualifications in Exmoor is 28.3% which, despite being higher than the regional average, is slightly lower than the national average.

2.23 At 18.3% the number of people with a Level 4 or 5 qualifications in the National Park is slightly below the English and South West averages. However, the overall figure for Exmoor National Park is higher than those for North Devon and West Somerset, suggesting that Exmoor has a more highly qualified workforce than surrounding areas.

	Exmoor	North Devon	West Somerset	South West	England
No qualifications *	28.3	29.5	30.1	26.2	28.9
Level 1**	16	18.7	16.8	17.7	16.6
Level 2***	22.4	21.6	21.9	21.4	19.4
Level 3****	7.7	7.1	6.7	8.6	8.3
Level 4/5 *****	18.3	14.7	16.7	18.8	19.9
Other / unknown ******	7.3	8.4	7.9	7.2	6.9

Source: derived from 2001 Census

No Qualifications*	No formal qualifications held
NVQ1 and above**	e.g. fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ 1, intermediate 1 national qualification (Scotland) or equivalent
NVQ2 and above***	e.g. 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ 2, intermediate 2 national qualification (Scotland) or equivalent

NVQ3 and above****	e.g. 2 or more A levels, advanced GNVQ, NVQ 3, 2 or more higher or advanced higher national qualifications (Scotland) or equivalent
NVQ4 and above*****	e.g. HND, Degree and Higher Degree level qualifications or equivalent
Other Qualifications******	includes foreign qualifications and some professional qualifications

Table 10 Qualifications expressed as % of total working age population

Deprivation

2.24 The Social Disadvantage Research Centre[1] has produced and published a set of Indices of Deprivation. These indices provide a range of information including detailed breakdowns for small areas (Super Output Areas) and aggregate summary statistics for each local authority.

2.25 Summary measures of the overall Index of Multiple Deprivation (IMD) have been produced at local authority level, which describe different aspects of multiple deprivation in each area. Each of these is designed to capture a particular way in which a local authority may experience multiple deprivation. No single summary is favoured over another, as there is no best way of describing and comparing multiple deprivation. The measures include:

a **Local concentration** – shows the severity of multiple deprivation in each authority, measuring 'hot-spots' of deprivation;

b **Extent** – the proportion of a district's population that lives in the most deprived Super Output Areas in England;

c **Average Scores and Average Ranks** – two ways of depicting the average level of deprivation across the entire district; and,

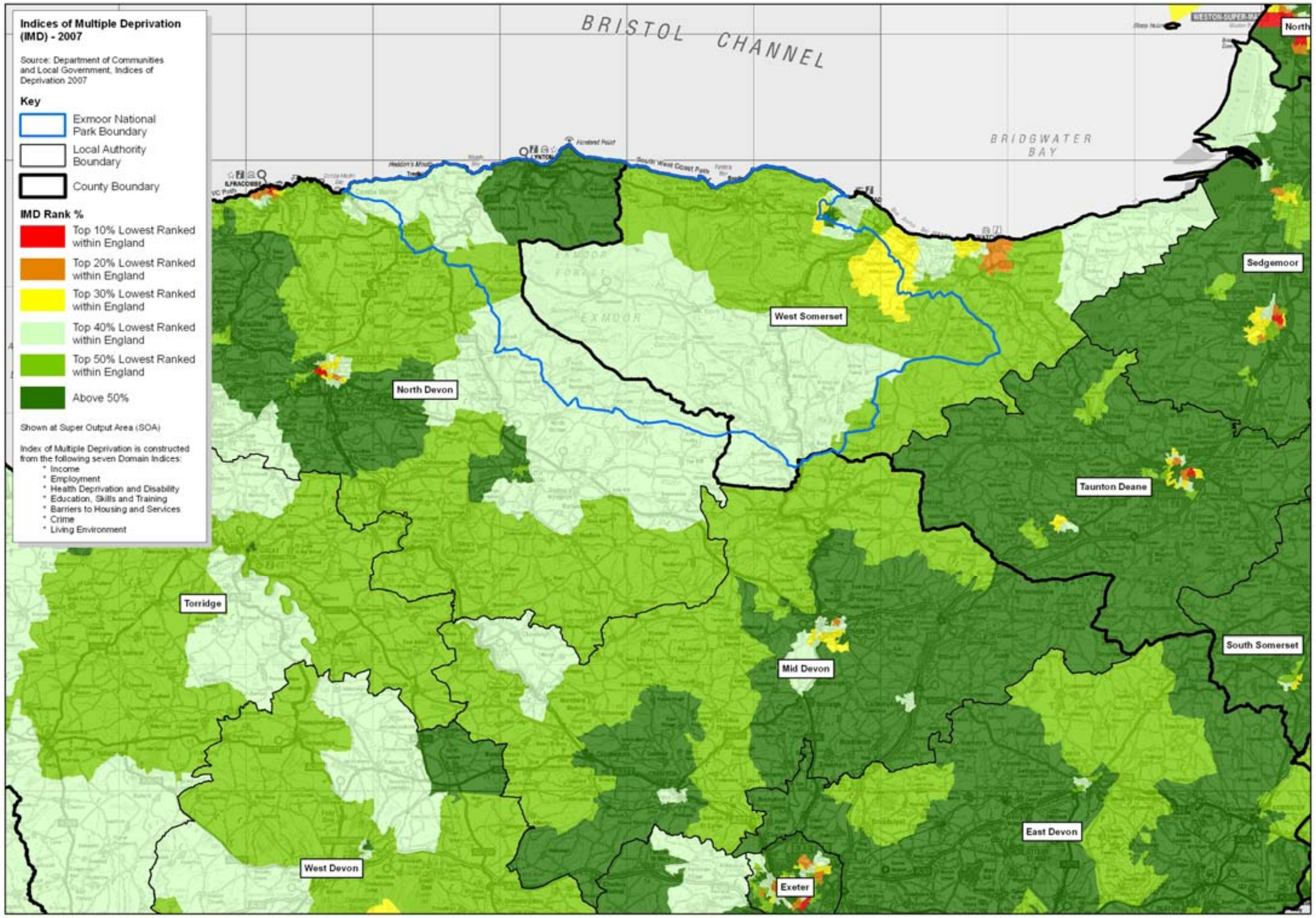
d **Income Scale and Employment Scale** – the number of people experiencing income and employment deprivation respectively.

2.26 None of the wards within Exmoor National Park are within the 10% or 20% most deprived areas in England. The majority of the Park is shown to fall within the 40-50% IMD band, suggesting an overall picture of relatively low levels of deprivation, albeit that these figures can obscure local variations. This is not surprising given the South West has the lowest level of Lower Super Output Areas in the most 20% deprived in England.

2.27 The low level of deprivation in Exmoor represents a more dramatic example of a trend that is in evidence throughout the South West. The high level of wealthy retired people within Exmoor National Park contributes to the low levels of deprivation both by virtue of their personal prosperity and as a result of their presence resulting in increasing competition within the housing market, rising

[1] The Social Disadvantage Research Centre (SDRC) is an inter-disciplinary social research group carrying out policy related research within the Department of Social Policy and Social Work at the University of Oxford.

house prices and the consequential displacement of people who may be more deprived to areas outside of the National Park.



Source: English Indices of Multiple Deprivation, 2007

Fig 3 Deprivation

Commuting Patterns

2.28 As with the data relating to other contextual issues, no data is specifically available relating to commuting patterns in the National Park. The analysis in this section is therefore based upon those wards that are wholly or largely contained within the National Park boundaries as follows:

a Alcombe East;

b Aville Vale;

c Bratton Fleming;

d Carhampton and Withycombe;

e Combe Martin;

f Dulverton and Brushford;

g Dunster;

h Exmoor;

i Lynton and Lynmouth;

j North Molton;

k Old Cleeve;

l Porlock and district; and,

m Quarme.

2.29 As would be expected, commuting flows from the National Park into the remaining parts of North Devon and West Somerset. There are also relatively large flows into the surrounding districts and smaller flows to more distant locations such as Bristol, Exeter and London.

2.30 The plans below show that the two main flows of commuters into the National Park are from North Devon and West Somerset and that there are also quite strong flows from Torridge, Mid Devon and Taunton Deane. Due to policy restrictions upon the delivery of open market housing in the National Park it is not surprising that a significant number of people travel into the National Park from the adjoining districts. This trend is expected to continue – and potentially worsen over the period to 2026 as the level of jobs increase at a faster rate than the resident population and the pressure for housing increases.

2.31 This analysis of commuting patterns shows the extent to which Exmoor's economy is localised in nature. The pattern of movements into and out from the National Park is dominated by linkages with North Devon and West Somerset. The commuting trends for Exmoor are relatively balanced in terms of the level of people in-commuting compared to the level out-commuting. Whilst the level of in-commuting is generally representative of housing pressures in the area, it is somewhat surprising that there is not more out-commuting to the neighbouring centres. This does, however, signify an inherent strength within the local economy which has the capacity to provide for the employment needs of a large proportion of the local population. An alternative explanation may be that there are a large number of retired people within the area. Factors such as the ability to work from home may contribute to this local provision of employment opportunities and might be important in sustaining high levels of relative self-containment in the longer term.

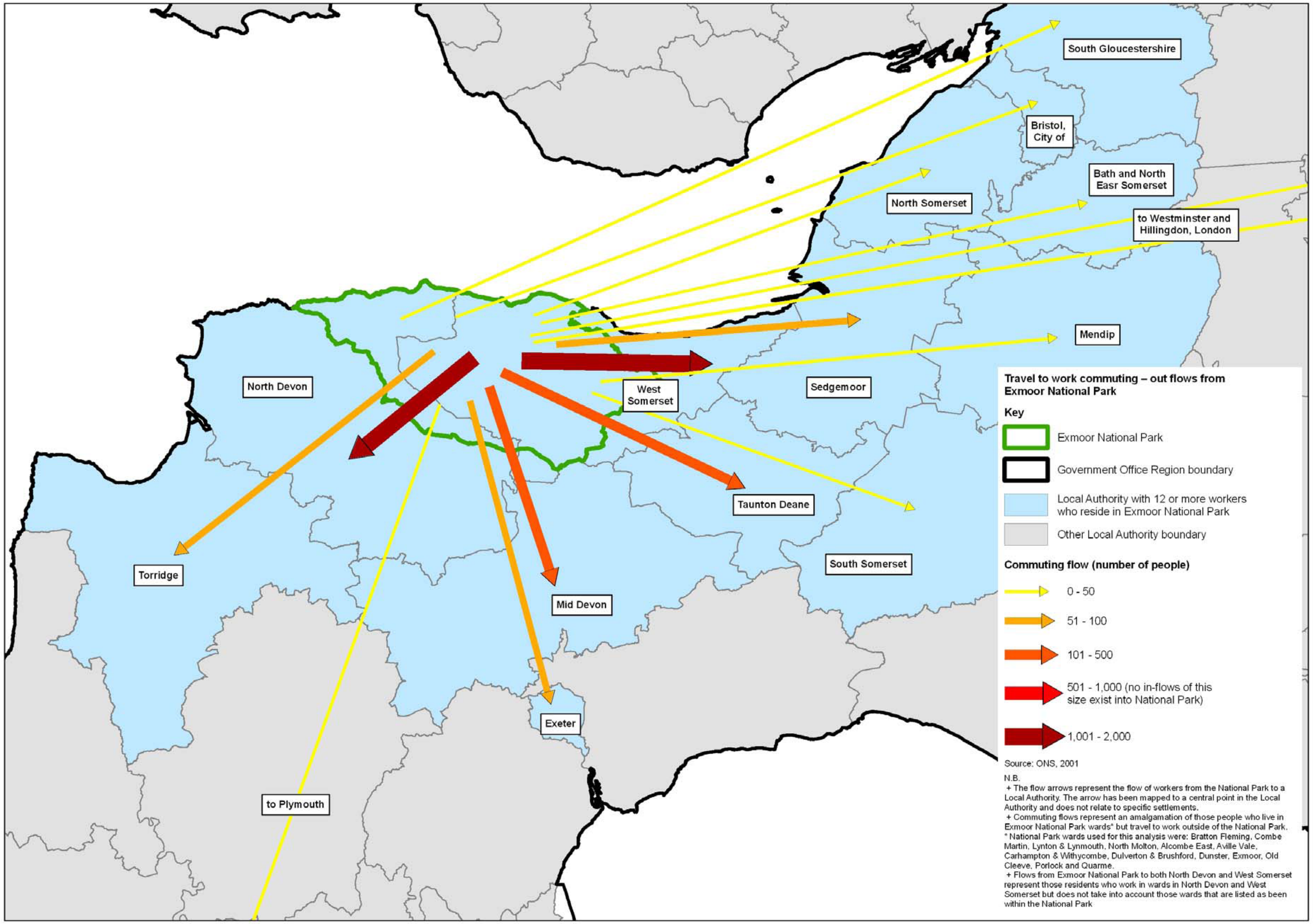


Fig 4 Exmoor Out-commuting Pattern

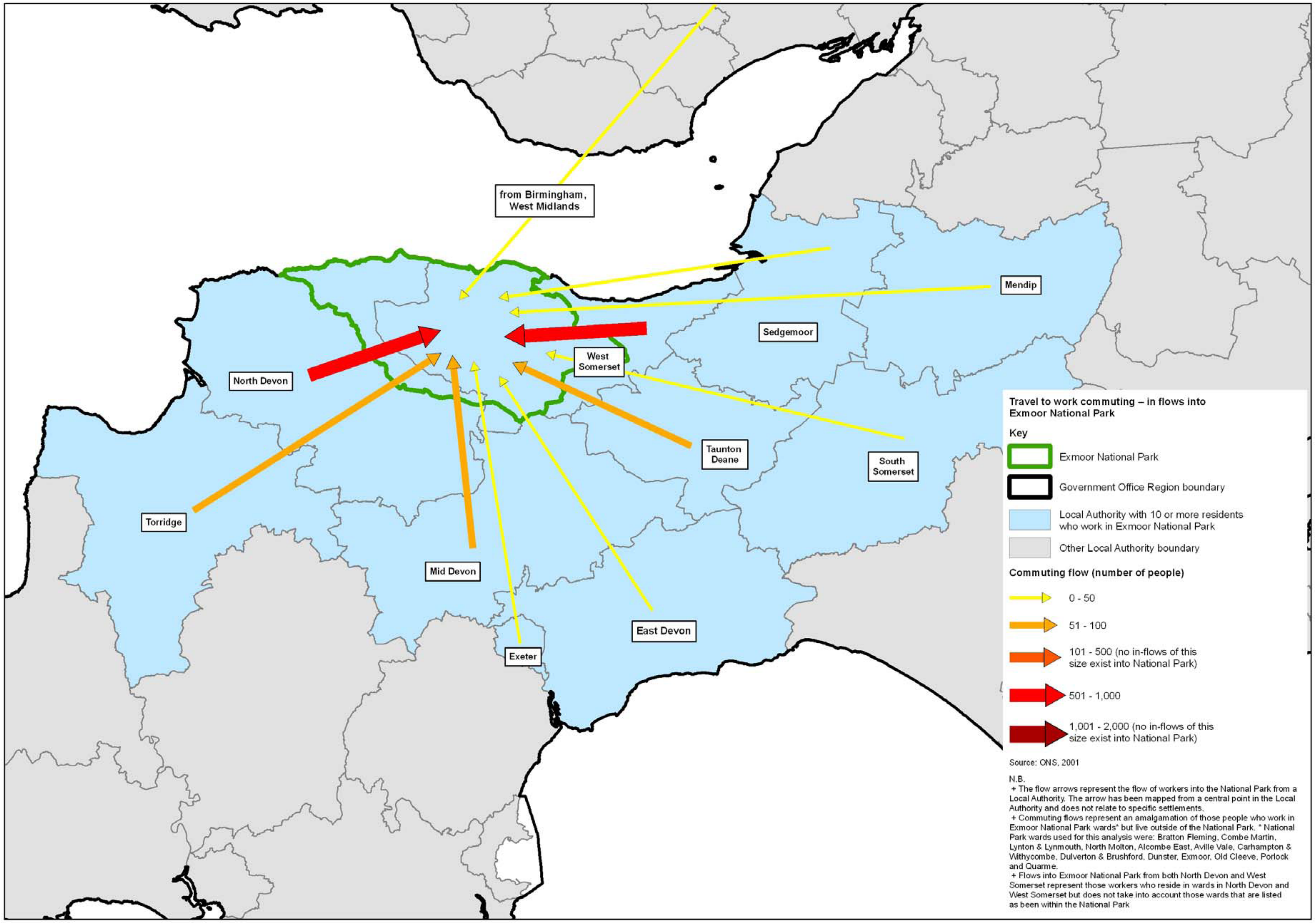


Fig 5 Exmoor In-commuting Pattern

Businesses

2.32 The majority of businesses in the National Park are of a micro-scale (i.e. employ less than 5 people). These types of businesses would generally be expected to have very low turnovers and many would fall below the threshold for VAT registration (which is presently £75,000).

Conclusion

2.33 The table below highlights the key strengths and weaknesses within the economic profile of Exmoor National Park. These represent the basis for the future enhancement of the local economy by building upon existing strengths, seizing emerging opportunities and addressing current weaknesses and potential threats. The issues raised in this chapter will have important implications for the long term well-being of Exmoor and should be appraised in detail as part of the LDF process as well as in the preparation of other relevant local strategies.

Strengths	Weaknesses
• Low level of deprivation • Strong representation in key sectors • Low unemployment • Resilience of the local economy • High levels of entrepreneurship	• Low levels of economic activity • Poor accessibility • Seasonal employment
Opportunities	**Threats**
• Capitalise upon the existing strengths • Improve education standards and increase training • Develop more sustainable / annual forms of tourism • Improve connectivity, increase provision of broadband • Further realise the economic benefits associated with the high quality environment	• Further loss of working age or skilled population • Competition from other areas

Table 11 SWOT Analysis for Exmoor National Park's Economic Profile

3.0 Policy Context

3.1 This chapter provides a summary of the relevant economic and planning documents and strategies at the national, regional and local level as follows:

Planning Policy

a National Guidance (PPGs / PPSs / Best Practice Guidance);

b Regional Guidance (RSS);

c County Guidance (Structure Plans); and,

d Local Guidance (Past / Existing / Future Plans and Supplementary Guidance).

Economic Policy and Strategies

a Regional Strategies;

b Somerset (including West Somerset) Strategies;

c Devon (including North Devon) Strategies; and,

d Exmoor Strategies.

Community Strategies

a West Somerset Sustainable Community Strategy; and,

b Devon's Sustainable Community Strategy.

Planning Policy Context

National Guidance

Draft PPS4: Planning for Sustainable Economic Development

3.2 Draft PPS4 was published for consultation in December 2007. In August 2008 DCLG set out an analysis of comments that were received as part of the consultation process.

3.3 The five main aims of PPS4 are to:

a Raise the productivity of the UK economy;

b Maximise job opportunities;

c Improve the economic performance of all the English regions and reduce the gap in economic growth rates between regions;

d Deliver sustainable development; and,

e Build prosperous communities.

3.4 The guidance recognises the economic development potential of those sectors that do not fall within the traditional ‘B class’ category and, as such, applies to other forms of development, such as retail, leisure, agriculture and tourism development.

3.5 Whilst PPS4 is intended to facilitate economic growth and higher levels of productivity, it recommends that this should be pursued within the context of sustainable development and as a result, it prioritises the re-use of previously developed land. It also recommends a presumption in favour of economic development, unless the economic, social or environmental costs of development are likely to outweigh its potential benefits. It states that where development is in accordance with an adopted LDF, it should normally be approved. The implications of this in terms of the types of development that could or should be promoted will depend upon the character of the local area. For example, draft PPS4 recognises that the type and range of employment development that could be accommodated within urban areas will be substantially different in type, scale and scope than those that could be accommodated in the countryside.

3.6 Draft PPS4 recognises that accessibility is a key issue in rural areas but nevertheless encourages rural authorities to identify and pursue locally appropriate forms of economic growth and mechanisms for facilitating such growth. The following options are specifically identified:

a Recognising the role of farm diversification;

b Recognising that a site may be an acceptable development location even though it may not be readily accessible by public transport;

c Supporting sustainable rural tourism and leisure developments; and,

d Supporting small-scale economic development where it provides the most sustainable option in villages that are remote from and have poor transport links with local service centres.

3.7 In order to achieve the goals set out, the guidance states that local planning bodies should thoroughly assess the existing supply of land for economic development through an employment land review.

PPS7: Sustainable Development in Rural Areas

3.8 The objective of PPS7, which was published in August 2004, is to deliver sustainable and balanced growth in rural areas. It states that the majority of economic development should be concentrated within or close to existing local service centres, albeit that it also stresses the importance of supporting small-scale development where it proves the most sustainable option in more isolated villages.

3.9 Emphasising its focus upon the most sustainable forms of development, PPS7 prioritises the re-use of redundant buildings and recognises the important role of farming within the rural economy and, in particular, the role of diversification. Tourism is similarly viewed as being vital to the rural economy, in terms of facilities, attractions and accommodation. It is noteworthy that the objectives and policy aspirations that are set out in PPS7 are already reflected in Exmoor in terms of the scale, nature and type of economic activities that exist in the local area.

Regional Guidance

Draft Regional Spatial Strategy for the South West, including proposed changes

3.10 The Secretary of State's proposed changes to the Draft Regional Spatial Strategy (RSS) were published in July 2008. It is now anticipated that the final document will be adopted in Summer 2009.

3.11 A key aspiration within the draft RSS is to ensure that every part of the region – including the rural areas – can fulfil their economic potential, albeit that it seeks to set proposals to enhance economic prosperity within environmental limits. These ideas are particularly important to a sensitive rural area such as the National Park.

3.12 Similar to draft PPS4, the RSS promotes rural growth that is focussed on the most sustainable solution. Specific options that are considered in the RSS include home working, the creation of live / work units and the re-use of redundant farm buildings. Policy ES1 supports sustainable economic prosperity, recognising the need to support and diversify the rural economy and promote sustainable communities. It states that:

"Local Authorities, working with SWRDA, other public sector organisations and the private sector, should include measures in their LDDs to promote a switch from employment-led to productivity-led growth. These measures should include:

Guiding investment to locations where it will have maximum benefit and reduce the need to travel recognising:

The role of the region's largest urban areas as key drivers of productivity;

The need to support and diversify the rural economy and promote sustainable communities; and,

The need to achieve successful regeneration as well as ongoing economic development.

Ensuring a range and choice of appropriate sites and premises to meet business need, including a quota of smaller sites for micro, small and medium sized enterprises, to cater for both organic growth and inward investment;

Promoting innovation and the development of the knowledge driven economy …; and, *Supporting the development of priority business sectors …"*

3.13 The draft RSS emphasises the need to regularly review employment requirements and the sites that are available to meet emerging needs. Policy ES2 of the draft RSS sets out a requirement to identify a 20 year supply of employment sites. It states that this would support:

a A better balance between jobs and housing;

b The on-going restructuring and diversification of the economy;

c The successful delivery of economic development and regeneration initiatives;

d The development of more accommodation for smaller businesses, including smaller units for SMEs and micro-businesses; and,

e The role of non-B use class sectors, including health, leisure, tourism and education as key employment generators.

3.14 This recognition of the importance of and the need to take greater account of non-B class uses is a particularly important element of the economic strategy that is contained within the draft RSS. It is of considerable significance to areas such as Exmoor where the economy is largely rooted in those sectors that do not occupy B Class employment land and that have not traditionally be viewed as contributing towards the achievement of economic aspirations.

County Guidance

Somerset and Exmoor Joint Structure Plan Review to 2011

3.15 The Joint Structure Plan was adopted in April 2000 and under transitional arrangements, certain policies have been saved and remain in force as the strategic guidance for the area. Upon adoption of the RSS, the Structure Plan will cease to provide any strategic guidance for the County.

3.16 Policy 16 states that provision should be made for an appropriate scale of development to meet social and economic needs. Policy 18 augments this by seeking employment development in appropriate locations by ensuring:

a That sites are located close to the existing county or national road / rail network where significant levels of freight traffic are likely to be generated;

b Activities are environmentally compatible with other adjoining uses, existing or proposed;

c Activities which are not compatible with other land uses are located where their impact on the local environment can be mitigated; and,

d Large developments with high employment density activities are located close to established public transport nodes.

3.17 Policy 19 considers issues relating to economic development in rural areas and states that provision should be made for development in areas where it would create or enhance local employment, shopping or community facilities. This includes development necessary for the purposes of agriculture and development associated with the diversification of agricultural units.

Local Guidance

The Exmoor National Park Local Plan, to 2011

3.18 The Local Plan was adopted by the National Park Authority in March 2005. Under the transitional arrangements, all policies have been saved until they are replaced by the relevant Development Plan Documents.

3.19 Whilst the Local Plan does not allocate any sites for employment purposes, it adopts a relatively flexible approach to this form of development. Policy E1 permits the development of small scale B1, B2 and B8 uses within and immediately adjoining the defined local rural centres and villages and also allows for conversion or extension of existing buildings in these areas for Class B1, B2, B8 and C1 uses. Although Policy E2 seeks to resist new business development in the open countryside, it states that the conversion of existing buildings to business use may be permitted where there is no adverse effect on important planning interests.

3.20 In order to achieve a balance between economic growth and the protection of the local environment, Policy E4 prevents large scale, intrusive or environmentally damaging development.

3.21 In addition to permitting small-scale employment development, Policy E3 also seeks to control the amount of employment space that is available by restricting the loss of the existing provision. It states that development that would result in the loss of employment land or buildings would only be permitted where:

a Enhanced employment generating uses will be created; or,

b The use of the site / building for employment purposes cannot be continued or made viable in the longer term.

3.22 Recognising the small scale of employment activities in Exmoor, Policy E5 provides the basis for use of residential properties for a home working business provided there are no adverse impacts.

3.23 These policies are important in providing the basis for economic development in Exmoor. Although no land is allocated for B Class development, the policies do provide a clear basis for the delivery of appropriate premises and facilities in suitable locations within the National Park. Importantly, the Local Plan also contains a strong basis for the retention of existing employment space. This firm policy basis has been important in supporting the economic well-being of Exmoor and a similar policy approach is required within the Local Development Framework in order that the strength of the local economy might be retained and enhanced.

Economic Policy Context

Regional

Regional Economic Strategy for South West England 2006-2015

3.24 The Regional Economic Strategy (RES) is reviewed on a regular basis and the current strategy covers the period to 2015. The document examines the critical issues surrounding economic development in the Region and identifies 5 key issues for the Region to address to 2015:

a Population growth, ageing and distribution;

b Business creation and retention;

c Rapidly changing industrial and employment mix;

d Technology and other knowledge dissemination; and,

e Energy use, resources and climate change.

3.25 The RES recognises that flexibility is the key to success in rural areas. This means that support should be given to local solutions that are designed to respond to the changing needs of rural communities and on-going issues such as access to jobs and services and changes in the agricultural sector.

3.26 The economic vision for the Region has two strands:

a Recognising the aspiration to provide a high quality life for everyone: *"South West England will have an economy where the aspirations and skills of our people combine with the quality of our physical and cultural environment to provide a high quality of life and sustainable prosperity for everyone"*; and,

b Recognising the environmental limitations that exist within the region: *"South West England will demonstrate that economic growth can be secured within environmental limits to bring prosperity to the Region".*

3.27 This document identifies the key economic drivers that will deliver its vision as including skills, innovation and protection of the environment. One of the key messages contained within the document is the importance of productivity led growth in order to achieve higher efficiency. This means that additional prosperity and well-being need not be reliant upon the development of additional land, something that is likely to be particularly important to Exmoor's economic future.

Future Economic Activity in the South West's Rural Areas and Smaller Settlements

3.28 The purpose of this document, which was prepared as part of the evidence base for the RSS, is to examine the current trends in the South West's small settlements and countryside and to provide an understanding of what will be happening in the Region over the next 20 years. Its findings have been reflected in the RES strategy.

3.29 This study identified three key issues which will shape development in rural areas in the South West over the next 20 years:

a Climate change and its direct / indirect impacts;

b IT developments particularly related to communication; and,

c Demographic changes, both the ageing population and the immigration.

3.30 The study concluded that the promotion of broadband connections represents the most important technological development at this time and, if the proposed roleout of services takes pace as planned, the majority of the Region will have access to a high speed connection within 4 years. This would deliver vital economic benefits to the region and would be particularly beneficial to rural areas where it would provide opportunities for increased levels of activity and would particularly provide opportunities for increased levels of homeworking.

County

Somerset Economic Strategy

3.31 The Somerset Economic Strategy (SES) was prepared by a strategic partnership comprising public, private and voluntary sector bodies. It covers the period to 2015 and establishes a vision to develop a *"dynamic, high value and a leading edge economy for Somerset"*.

3.32 In order to ensure that the County achieves this goal, the document identifies a number of strategic objectives which will be beneficial to the National Park. These objectives include:

a Developing the effectiveness of Somerset's economic voice, partnerships and strategic delivery capacity;

b Maximising the long-term investment attractiveness and dynamism of Somerset's economy;

c Increasing the competitiveness and productivity of Somerset business; and,

d Increasing access to economic opportunities for all Somerset residents.

West Somerset Economic Strategy (April 2009)

3.33 The objective of this document is to deliver 'a new equilibrium' and the strategy has been developed under the broad themes of 'People', 'Place' and 'Business' with a number of key objectives under each including:.

a People

i **Priority A:** *"To stimulate an aspirational, enterprising and entrepreneurial culture within West Somerset"*. This includes creating a youth enterprise Co-ordinator, Young Enterprise Award Programme and a young advisors network. Will also ensure increased involvement in the Children's University Project.

ii **Priority B:** "*To ensure that the West Somerset workforce has the skills required by business to innovate and improve their competitiveness*." Specifically this includes extending the provision of adult education and training opportunities and improving facilities and their usage such as the Skills and Enterprise Centre and remote learning opportunities.

iii **Priority C:** "*To tackle pockets of worklessness, meeting LAA targets to reduce claimant numbers*". West Somerset Employment and Skills Group is to produce an action plan for delivery to reduce worklessness.

iv **Priority D:** "*To ensure wide community engagement in, and scrutiny of, economic regeneration activity*". This will include the establishment of a West Somerset Economic Forum and a Local Economic Charter.

b Place

i **Priority E:** "*To create a network of sustainable rural enterprise hubs to foster business growth across the District*". To create rural enterprise hubs, a study to assess employment space availability and demand will be commissioned. In addition, an assessment of the need for the conversion of existing 'difficult to let' workspace will be undertaken and the continued support will be given to the conversion of existing buildings for use as workspace. More site specific strategies will be to:

- Undertake an options appraisal for the Minehead Hospital site including an assessment of its role as the 'western rural enterprise hub'; and,
- Deliver appropriate workspace as part of the network vision, including the Cutcombe mixed use development.

ii **Priority F:** "*To find imaginative and sustainable solutions to transport and communication challenges, particularly in relation to Taunton/Brigwater*". This will involve working with the Hinkley developers to identify and deliver appropriate economic benefits and transport improvements, review the potential to increase commuter capacity on the West Somerset railway, support a range of demand-led rural/community transport solutions, establish high speed broadband coverage and commission a fully independent feasibility study into a jetty at Minehead.

iii **Priority G:** "*To ensure effective, integrated and industry focused marketing of the tourism offer across Exmoor and West Somerset*". This will be achieved by working with all partners to establish a single Exmoor Tourism Partnership.

iv **Priority H:** "*To ensure that the built environment of West Somerset's primary settlements is of a quality that will attract private sector investment*". This will include:

- Production of a Masterplan for Minehead and review of its Community Plan to aid regeneration;
- Support development of a Townscape Heritage Initiative (THI) proposal for Watchet; and,
- Support Williton Regeneration Partnership particularly 'relief road' concept.

c Business

i **Priority I:** "*To develop the quality tourism offer within the District, maximising its existing assets, and linked to its environmental quality".* This includes widening the tourism offer with a focus on 'indoor' provision and in outdoor activity/country sport skills and training and increase involvement in regional tourism based environmental audits/award schemes. Specific to Exmoor, Interpretative Centres will be developed to include local products showcase and continued support will be offered to 'Active Exmoor'.

ii **Priority J:** "*To encourage the growth of small 'high value' sectors, appropriate to West Somerset including small business sectors, climate change etc".*

iii **Priority K:** "*To ensure businesses have access to the support required to enable them to innovate, grow and develop e.g. through Business Link, encouraging local purchasing/business networking etc"*.

iv **Priority L:** "*To encourage business start up and growth, including through provision of mentoring, support and provision of appropriate workspace by establishing a Business Mentors Scheme and small business start up grants fund".*

Devon Economic Strategy 2008

3.34 The theme of developing a dynamic economy which respects the environmental qualities of the area is carried forward in the Devon Economic Strategy which seeks to ensure that *"Devon will have a dynamic, competitive and sustainable economy that builds on its strengths, promotes opportunity for all and enhances the environmental qualities of England's greenest county".*

3.35 The Devon Economic Strategy sets strategic priorities and actions and creates a focussed direction for the development of the Devon economy. Its key priorities include:

a Achieving sustained investment in business infrastructure and communication;

b Tackling worklessness and economic exclusion and disadvantage;

c Providing co-ordinated support to unlock the economic potential of the most disadvantaged communities;

d Developing and harnessing skills to achieve a competitive economy; and,

e Encouraging business start-up and growth by promoting enterprise and improving productivity through promotion and innovation and development of the knowledge economy.

3.36 The Strategy also sets out five priority sectors – food and drink, marine technologies, environmental technologies, tourism, and creative industries although it notes that not all of these would be relevant to all parts of the

County. However, it is evident that Exmoor has the capacity to build upon its existing strengths in respect of a number of these areas.

Devon Employment Space Strategy 2008

3.37 This document builds upon the visions set out in the Devon Economic Strategy and the RES and establishes a strategy for employment space in Devon:

"Devon is a competitive location in a changing global economy by ensuring employment space is sustainable, of appropriate quantity and scale, and relevant to range of modern working requirements"

3.38 The key findings of this report reflect the RES and the Devon Economic Strategy. It recognises that productivity-led growth is leading to lower land requirements for each unit of GVA growth than has traditionally been the case and that whilst a lack of sustainable development in the past has led to increased commuting, there has recently been a marked increase in remote and mobile working. This will be important in helping to increase productivity and to address the challenges associated with rising levels of commuting.

3.39 An important finding of the study was that, in overall terms, there appears to be an adequate supply of employment land to meet projected demand to 2026. However, it does recognise that there are mismatches between local levels of demand and supply and that action will be required in order to address these issues. Specific to rural areas, it concluded that there is a continuing need for rural workspace to be provided where it would contribute towards higher levels of sustainability and would contribute towards the provision of local employment opportunities.

Local

Exmoor National Park Management Plan to 2012

3.40 The Exmoor National Park Management Plan provides a foundation for the co-ordination of activities within the National Park so as to ensure the protection and enhancement of the environment and the area. In so doing, it establishes the following vision for Exmoor:

"By 2020 Exmoor's communities retain a continuity and connection with the land; people have access to affordable services and facilities, and there is a strong, diverse and sustainable economy that benefits from and contributes to the care and appreciation of Exmoor National Park".

3.41 The achievement of this vision is supported by a series of objectives. Whilst all of these are complementary and relate to one another, Objective H3 considers economic development and provides a basis by which this might occur in the future:

"To develop the greater Exmoor economy in ways that will increase the range and scope of employment and training opportunities for local people, particularly those that benefit people with relatively low household incomes and that relate to or further conservation and enhancement of Exmoor's special qualities".

3.42 It is evident that the development of skills is viewed as being central to the development of Exmoor's economy to 2020. The theme of ensuring the growth of the economy respects the environmentally sensitive area of the National Park is also evident in this objective which recognises the economic opportunities that exist within Exmoor and the importance of ensuring that environmental capacities are respected.

Greater Exmoor Sustainable Economic Development Strategy 2007

3.43 The Sustainable Economic Development Strategy has taken its starting point from the vision outlined in the Exmoor National Park Management Plan. It is based upon a recognition of the close connections between the environment, well-being and economic development.

3.44 It considers the future economic context of the National Park and identifies a number of key sectors that are likely to become increasingly important:

a **Agriculture and food**: the vision for this is based upon a recognition of its potential to offer improved levels of producer profitability. This will be underpinned by a transition from commodity production and the leaking away of value to a focus on local processing, local markets, quality products, and closer integration with tourism and recreation.

b **Tourism and recreation**: the vision for tourism in Exmoor is for a varied yet integrated offer that is built around stronger and more explicit linkages with the natural environment, i.e. low environmental impact tourism.

c **Building and renewable energy**: the strategy establishes a vision for a sector that is an acknowledged leader in the use of innovation to deliver economic, social and environmental benefits to local people and communities.

3.45 This document is more forward thinking than many other strategies and sets clear targets and goals which are deliverable in the context of the existing strengths and weaknesses of the National Park. These have the capacity to enhance the vitality of the economy, the quality of the environment and the well-being of residents and visitors.

Community Strategies

West Somerset Sustainable Community Strategy 2007-2010

3.46 The Sustainable Community Strategy provides five facets for its vision: prosperity, welcoming, strength, balance and self sufficiency for West Somerset. A specific economic vision for the District is included within the Strategy:

"By 2020 there will be a thriving local economy in West Somerset. People will be able to work close to where they live. The economy will benefit from creative and knowledge based industries which do not rely on high levels of commuting. People will be suitably skilled to work in these industries and will have access to continuing training to update their skills. As a result they will be well paid."

3.47 The Strategy also includes an environmental vision which seeks to create a low-carbon economy which minimises damaging emissions and a thriving economy through the creation of new opportunities.

3.48 There are three broad ways that the Strategy seeks to achieve its economic vision. These are to make West Somerset a quality location for business; to increase the income from tourism; and to increase economic equality and social engagement. In particular, the Strategy refers to the need to provide adequate land and premises for workspace and to involve local communities in community-based regeneration. A number of indicators will be monitored to measure the success of the Strategy including targets to increase the number of economically active, to increase the number of people in work and to lower unemployment rates.

Devon's Sustainable Community Strategy 2008-2018

3.49 Devon's Community Strategy is "*an overarching plan for improving the quality of life of everyone*" in the County. It's vision is to be:

"England's greenest county with strong local communities that are prosperous and welcoming with an excellent quality of life and a sustainable future."

3.50 One of the key priorities for the Strategy is to maintain a growing economy through the creation of conditions which will maximise opportunities for everyone to contribute to and benefit from an improving economy.

3.51 In a survey of North Devon, 64% of unemployed respondents highlighted transport as a reason for not being able to obtain a job. This finding is reflected in one of a number of measurable improvements which the Strategy seeks to deliver by 2018 – to ensure that sustained investment in infrastructure is made. Other improvements sought include the reduction in economic exclusion and worklessness and the unlocking of economic potential in the most disadvantaged communities.

Conclusion

3.52 The key messages from the planning policy can be summarised as follows:

a At the strategic planning level, the emphasis is on creating sustainable economic development, the definition of which includes a wide variety of uses. It is also recognised that there are unique opportunities for economic development in rural areas;

b The need to ensure sustainable economic development and also to provide a unique solution is also apparent in the Regional policies, which also recognise the need to take account of non-B class uses when considering future employment requirements and the resultant land implications; and,

c Within the National Park, locally appropriate solutions should be identified which take account of the character of the local economy and the nature of the area. The Exmoor Local Plan has fulfilled this requirement by ensuring that the demand for employment land is satisfied through the establishment of a policy framework that provides for small-scale new development in appropriate locations whilst also restricting the loss of existing space.

3.53 Whilst some of the economic strategy documents consider economic development in broad terms and others are more specific in their aims and visions, there is a single key theme coming through all the economic policies and strategies – the development of the economy must take account of and respond to the environmental context and it must be sustainable.

3.54 This review highlights a clear complementarity of approach within each of the policy documents which will provide the basis for the long term and sustainable enhancement of Exmoor.

4.0 The Current Stock of Employment Space

4.1 This chapter assesses the current stock of employment land in Exmoor National Park, as well as the amount of development which is committed or is coming forward in the short term. It considers the amount of employment land and the quality of built employment floorspace, broken down by broad types of employment uses. It also examines the amount of employment land that has been lost to other uses in recent years.

4.2 The current stock of employment space in Exmoor was assessed using the following sources:

a Floorspace in individual premises held in the Valuation Office Agency (VOA) 2006 business valuation records;

b Information on planning permissions provided by Exmoor National Park Authority; and,

c A visual inspection of the land uses in Exmoor.

Existing Stock of Employment Floorspace

4.3 Data on the stock of commercial and industrial property within local authority areas is provided by the Valuation Office Agency (VOA). The VOA revalues commercial and industrial property every five years to set business rate values in line with an assessment of the current commercial and industrial rental market. The statistics used in this assessment are based on the 2005 VOA revaluation.

4.4 The VOA data is provided on a local authority level and is not specifically available for Exmoor National Park. Data was obtained on the stock of property in North Devon and West Somerset districts from which information relating to premises within the National Park was extracted. This was done initially by sieving out those postcode sectors that are located within the National Park, as follows:

Postcode Sector	Parishes in/partly in the National Park	Parishes within the postcode sector not in the National Park
EX36 3	North Molton, Molland, Twitchen, West Anstey, East Anstey	Areas of South Molton, Bishops Nympton
EX35 6	Lynton & Lynmouth, Oare, Brendon & Countisbury	None
TA4 4	Monksilver, Stogumber, Elworthy, Nettlecombe	Bicknoller, Crowcombe, Williton, West Quantoxhead.
TA22 9	Bridgetown, Brompton Regis, Dulverton, Exton, Withypool & Hawkridge	Brushford, Exebridge
TA23 0	Luxborough, Roadwater	Areas of Watchet
TA24 5	Dunster	Parts of Minehead
TA24 6	Dunster, Carhampton, Withycombe, Old Cleeve	Parts of Minehead, Bilbrook
TA24 7	Exford, Winsford, Withypool, Wheddon Cross, Timberscombe	None
TA24 8	Luccombe, Porlock, Minehead & Selworthy Without, Wootton Courtenay	Parts of Minehead

Source: ENPA

Table 12 Postcode Sectors within Exmoor National Park

4.5 Postcode sectors do not respect administrative boundaries and only EX35 5 and TA24 7 are wholly located within the National Park. Although it is not possible to achieve an exact division between the areas within and outside of the National Park, it is particularly important to exclude premises that are located in Minehead and South Molton from any analysis of the National Park. These towns both have a large number of commercial premises, the inclusion of which within our analysis would paint an inaccurate picture of the current context in Exmoor. For the postcode sectors that include parts of South Molton and Minehead, a full six-digit postcode analysis was undertaken in order to achieve an accurate picture of premises that are within and outside of the National Park.

4.6 The nature of this analysis means that it is possible that some premises that are located outside of the National Park have been included. However, the exclusion of a very large number of premises in Minehead and South Molton has reduced any such margin of error to an acceptable level.

4.7 Table 13 provides a detailed breakdown of employment space within Exmoor National Park and illustrates the spread of different types of business space in those parts of the National Park that fall within North Devon and West Somerset. Of the 567 business units in Exmoor, only 35% are Class B1, B2 and B8 business units whilst the others are non-B Class employment spaces such as shops, restaurants and community facilities.

Business Unit	*No. Units*	*Total Space (sqm)*	*Average Unit Size (sqm)*
Offices	*36*	*3,560*	*98.86*
Factories, Garages, Workshops (Workshops)	*100*	*14,200*	*142.05*
Storage and warehousing (Storage)	*59*	*14,200*	*240.8*

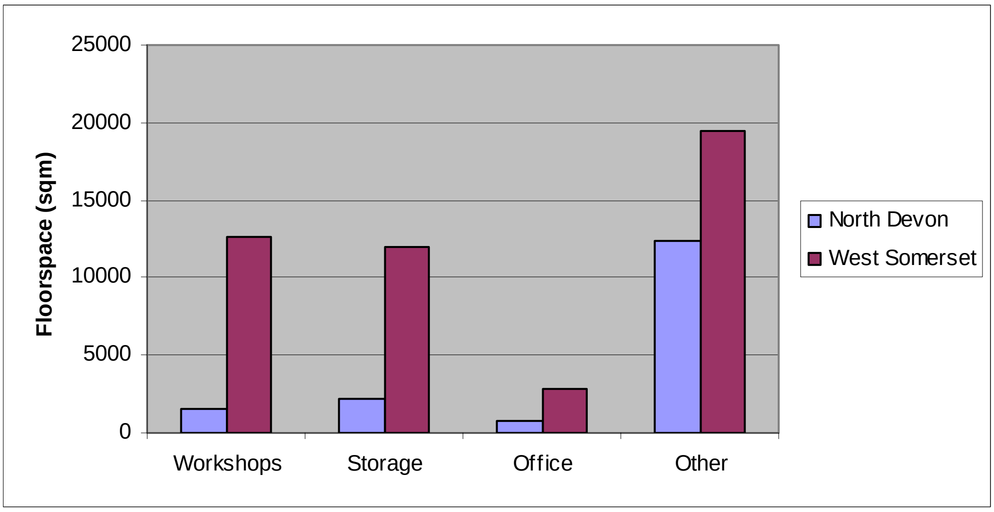
Source: VOA, 2005 revaluation

Table 13 Breakdown of Employment Space in Exmoor

4.8 This evidence highlights the relative importance of workshops in terms of the number of B class employment units (27% of the total B Class premises) and the importance of workshops and storage facilities in relation to the total employment floorspace in Exmoor (both types of employment space account for 46% of the B Class floorspace).

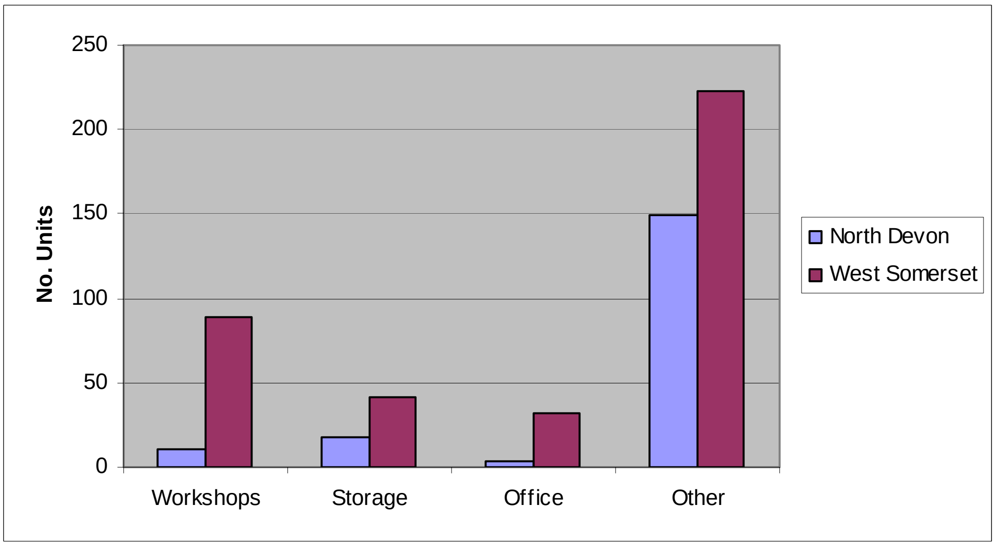
4.9 Figures 6 and 7 show the relative distribution of workshop, storage and office space and non-B Class business space within the parts of the National Park that fall within West Somerset and North Devon. Given the different size of the parts of the National Park that fall within the two local authority areas, it is not surprising that there are substantial variations in the amount of business space within each part of Exmoor. 71% of the area of the National Park and 85% of B Class premises and employment space are located within West Somerset. The distribution of total business premises is rather more equitable with 68% of all premises and 73.5% of all business space being located within West Somerset.

4.10 The differences between the provision of employment space in the North Devon and West Somerset parts of the National Park can be explained by a number of factors including the pattern of settlements across Exmoor and the distribution of different types of economic activity across the National Park. The majority of employment facilities are located within the settlements, demonstrating that they are located where they are best able to serve the employment and business needs of the local community and where any possible impact upon the environment of the National Park might be minimised.



Source: VOA, 2005 revaluation

Fig 6 Business Space in Exmoor by Type and Location - Floorspace



Source: VOA, 2005 revaluation

Fig 7 Business Space in Exmoor by Type and Location - No. Units

4.11 This evidence relating to the provision of employment space within Exmoor reflects the reality of the local economic situation. The National Park has a relatively small scale local economy that is dominated by non-B Class activities. This is reflected in employment levels and, as shown above, in the provision of employment space. The number of non-B Class units in Exmoor is almost double that of the number of B Class employment units whilst the total amount of floorspace within each sector is broadly equitable. Even though all premises in Exmoor are relatively small in size, this highlights that the average size of B Class units in Exmoor is almost double that of the non-B Class units.

Size of Units

4.12 Exmoor is characterised by relatively small business premises. Two thirds of all B Class business units within the National Park are less than 100sqm in size. These units account for 20% of the total B Class employment space. By contrast, only 5% of business units extend to more than 500sqm in size but these account for 36% of the total B Class employment space.

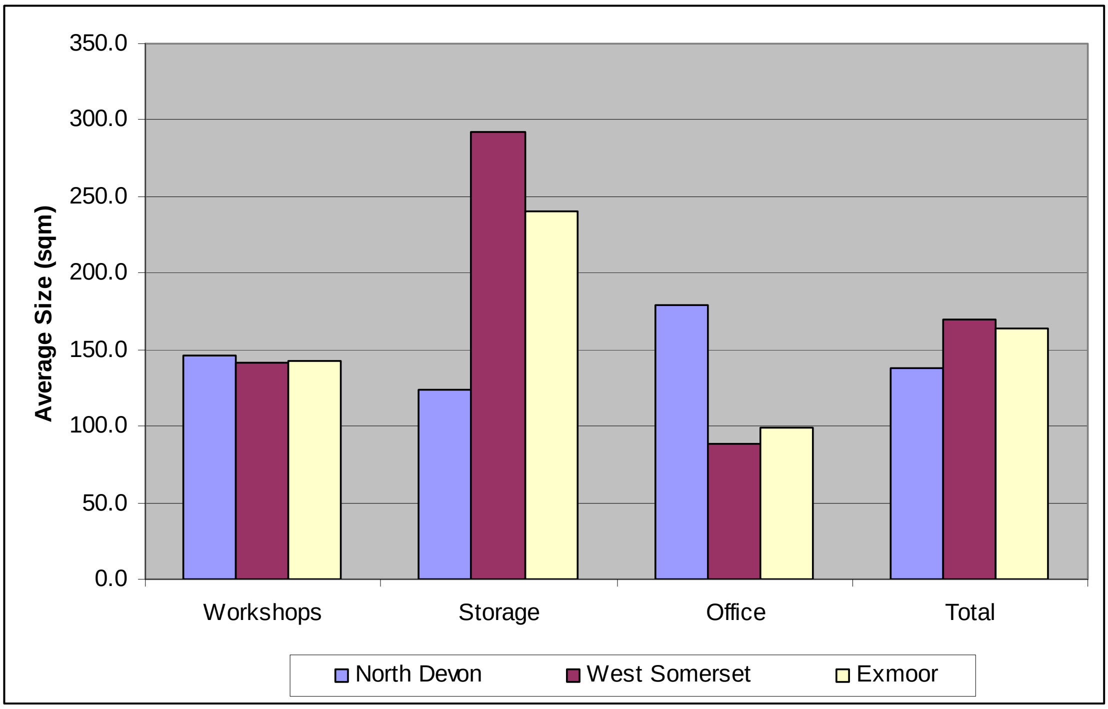
Size (sqm)	Office	Workshop	Storage
0 to 10	2	1	0
10 to 25	12	10	3
25 to 50	10	21	10
50 to 100	5	27	19
100 to 500	4	22	11
200 to 500	0	14	11
500 to 1000	3	5	2
1000+	0	0	3

Source: VOA, 2005 revaluation

Table 14 Breakdown of Employment Floorspace by Size of Units

4.13 Not only are there more business units in the West Somerset part of Exmoor, the average size of units in this area is greater than those in the North Devon part of the National Park. The average size of storage units in West Somerset part of the National Park is similarly larger than those in the North Devon part although the opposite is the case for offices. There is no substantial difference in the average size of workshop units across the National Park.

4.14 Importantly, given the small number of business units that are present within the National Park, it is possible that the average size of units in the local authority area might be skewed by a single large scale unit.



Source: VOA, 2005 revaluation

Fig 8 Average Unit Size

4.15 Despite their small size and limited number, there is no evidence that the current supply of employment space in Exmoor is having any adverse impact upon the local economy. The area has not, and is not expected to attract large levels of future inward investment and so its portfolio of employment space is not required to serve the needs of incoming large scale organisations. Rather, the economy is characterised by small scale, local companies. This is reflected in – and served by – the nature and the level of provision of relatively few, small premises.

4.16 The quality of the existing employment stock is considered in detail in Chapter 6.

Existing Employment Land Provision

4.17 Having considered the current context in Exmoor in terms of the supply of business premises, this section reviews its current employment land provision. It is based upon the information that has been made available to the study team by Exmoor National Park Authority. This information comprises:

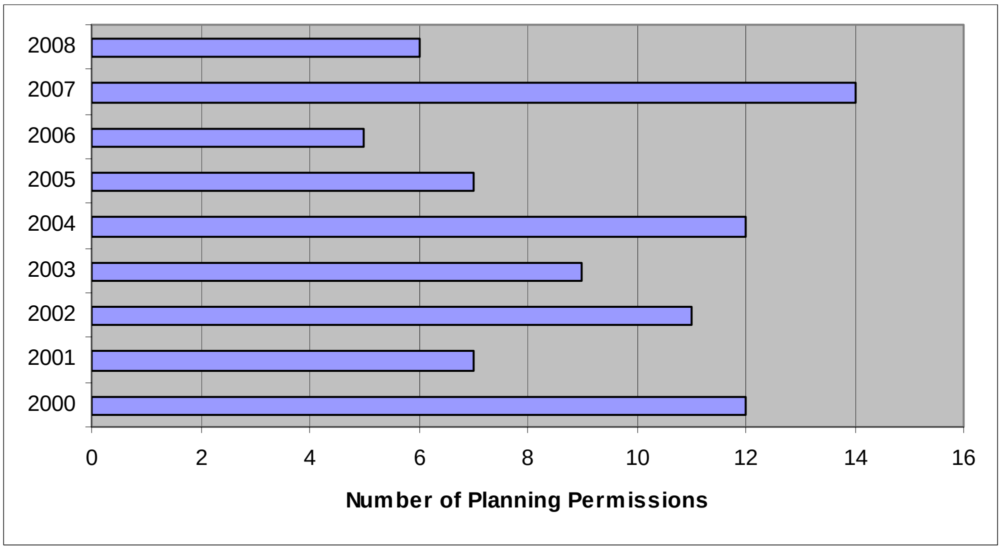
a A schedule of planning applications relating to employment uses that were approved between 2000 and 2008;

b A schedule of planning applications relating to employment uses that were refused between 2000 and 2008; and, c A schedule of employment floorspace losses to residential uses between 2000 and 2008.

4.18 The team has not been afforded the opportunity to verify the information that has been provided and which is set out in our analysis below.

Level of employment generating development activity, 2000-2008

4.19 The level of employment generating development activity in Exmoor has been limited in recent years. According to the information that has been provided by Exmoor National Park Authority, a total of 83 planning applications relating to employment uses have been approved since 2000. These include B Class uses as well as tourism, retail and service functions and represent a very small proportion of the total number of planning permissions that have been granted in Exmoor over this period.



Source: Exmoor National Park Authority

Fig 9 Planning permissions relating to employment uses granted in Exmoor by type, 2000-2008

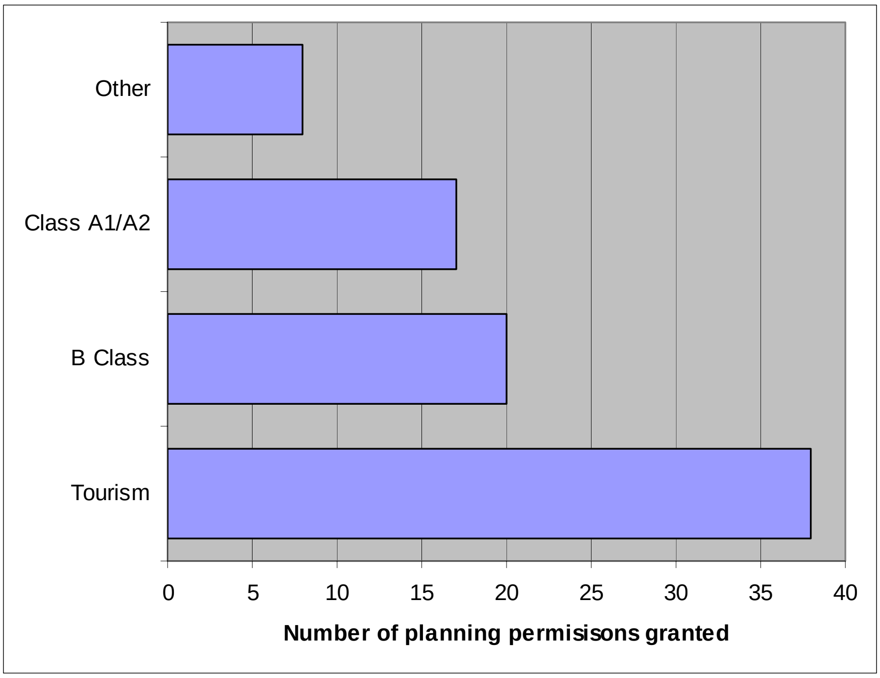
4.20 Only a relatively small proportion (24%) of the applications relating to employment generating uses that have been approved between 2000 and 2008 have related specifically to B Class employment land. Of the 20 B Class planning permissions that have been granted over this period:

a 15 relate to Class B1 office uses;

b 4 relate to Class B2 manufacturing premises; and,

c 1 relates to Class B8 warehousing/distribution uses.

4.21 This pattern of recent development activity is interesting in that it does not appear to reflect the existing pattern of distribution of employment premises. There has been a substantially greater level of office development (compared to Class B2 and B8 uses) since 2000, yet offices account for a very small proportion of the B Class stock within the National Park. It will be important for the National Park Authority to monitor whether this increase in the number of planning permissions that have been granted for Class B1 uses has translated in an increase in the delivery of office space and whether it might therefore start to have an impact upon the employment portfolio.



Source: Exmoor National Park Authority

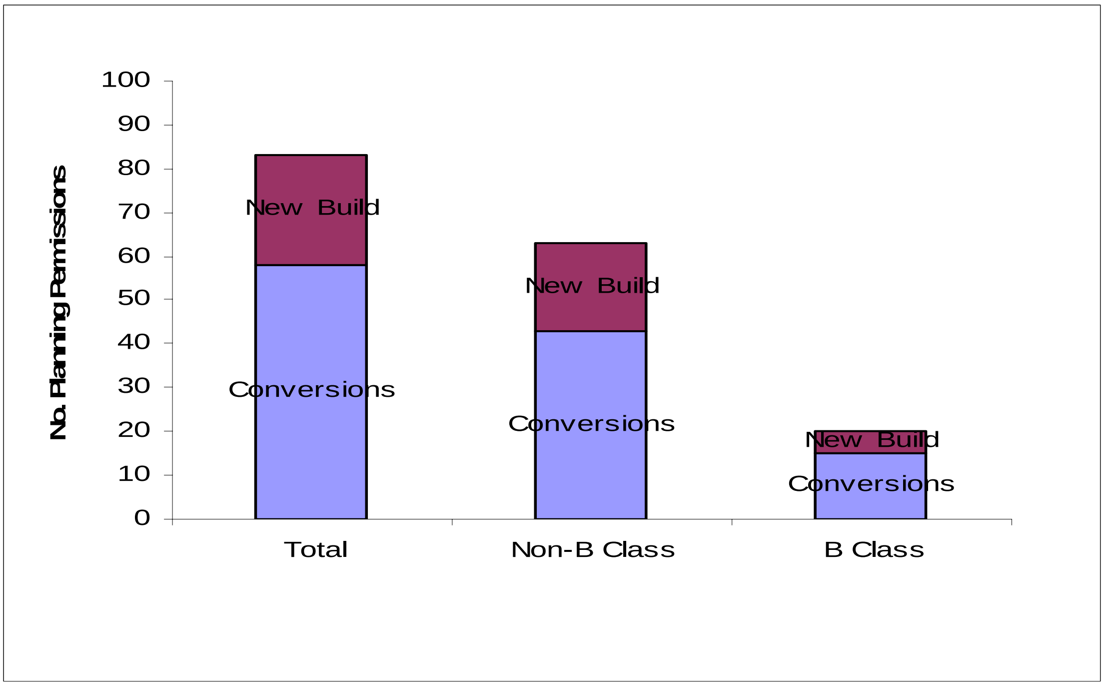
Fig 10 Planning permissions granted in Exmoor by type, 2000-2008

4.22 Figure 10 shows that although the number of planning permissions that have been granted for B Class development has been limited, a larger proportion of the permissions have had implications for the local economy.

4.23 It is particularly noteworthy that almost 40% of the employment-related permissions that have been granted have related to tourism activities. These permissions have included serviced accommodation (17), cafes, restaurants and tea rooms (10) and highlight the dominance of tourism activity within the local economy in Exmoor.

4.24 In addition to the nature of the land uses that have been approved, another important characteristic of planning permissions that have been approved in Exmoor since 2000 has been the scale of development. The development sites and individual proposals have been limited in size and the overwhelming majority of permissions that have been granted have related to changes of use or conversions rather than new buildings. The properties that have been the subject of these conversions have varied in type but a large number of the proposals have sought to bring farm buildings and other vacant premises back into active and beneficial use.

4.25 This trend highlights the importance of conversions and changes of use as a source of capacity. The reuse of existing buildings and premises represents an appropriate and sustainable basis by which the objective of securing sustainable economic growth can be achieved within the National Park. The high level of changes of use and conversions provides an efficient basis for satisfying the needs of local businesses and demonstrates the National Park Authority's acceptance that these can provide a suitable basis for new premises and can thereby reduce the need for new development to meet emerging requirements.



Source: Exmoor National Park Authority

Fig 11 Comparison of planning permissions granted in Exmoor, 2000-2008: conversions and new build

4.26 Not only is the trend towards conversions and changes of use important in terms of reducing the pressure for new-build development in Exmoor, it also has an important policy implication. In many cases, it is neither possible nor appropriate to allocate land for conversions and so any such proposals would come forward as windfall releases. All of the employment schemes that have been approved since 2000 have been windfalls as neither the current nor the previous Exmoor Local Plans have allocated any land for B Class uses.

4.27 This reliance upon conversions and changes of use is likely to continue and will have particular implications upon the policy approach that is to be taken regarding the delivery of employment land in Exmoor in the future.

Refusal of Planning Permission

4.28 According to the information provided by Exmoor National Park Authority, only 10 planning applications relating to employment generating developments (B1, tourism, retail and service uses) were refused between 2000 and 2008, although it is understood that one of these proposals was approved at appeal and one was subsequently resubmitted and approved by the National Park Authority.

4.29 All of the applications related to change of use, rather than new development and only two related to existing B Class activities:

a LPA Ref No: 6/29/00/107 sought permission for the change of use from an office/conference centre to a private dwelling. The reason for refusal related the loss of existing employment premises within Porlock and a failure to demonstrate that there was no continued need for such premises. This application is important in highlighting an aspiration to protect the existing portfolio of business premises and to prevent any loss which might undermine the viability of the local economy.

b LPA Ref No: 6/43/02/106 sought permission for the change of use from a store building into a holiday flat. This application was refused because of a concern that the proposed development would have an adverse impact upon the free flow of traffic along the public highway and that it would detract from the character of the conservation area.

4.30 The other applications that have been refused planning permission have related to the following:

a Change of use from retail to residential (3 applications);

b Change of use from hotel to residential (1 application);

c Conversion and alterations to outbuildings to create a holiday letting unit (1 application);

d Change of use from shop/workshop to drop-in child centre (1 application); and,

e Use of land as clay pigeon shooting school (2 applications).

4.31 The stated reasons for the refusal of these proposals varied but some of the key issues have included:

a Provision of open market housing, contrary to housing policies;

b Loss of community services;

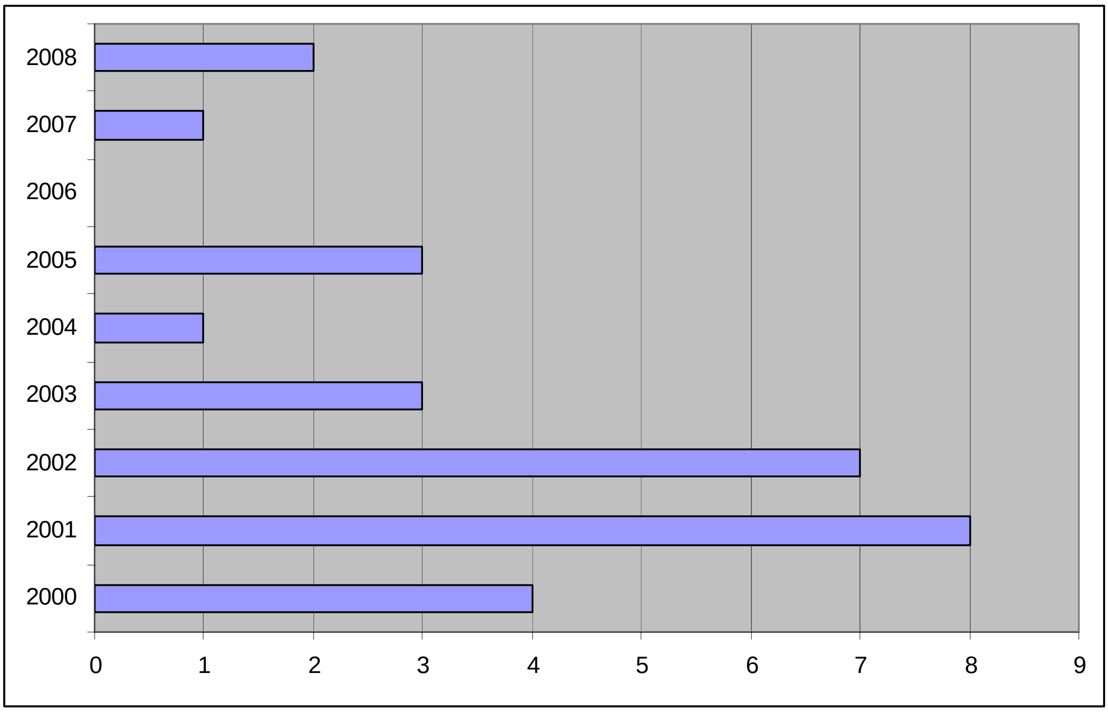
c Impact upon the surrounding area; and, d Traffic impact.

4.32 The proposals for the change of use of a hotel to residential was also refused for reasons relating to the loss of employment opportunities – a clear reflection of the National Park's (appropriate) position in respect of the employment capacity and the potential economic benefits that are associated with non-B Class activities.

4.33 It is noteworthy that no applications relating to new employment premises have been refused by the National Park Authority over this period. This serves to demonstrate that it has been possible to achieve an adequate balance between environmental protection and economic development within the National Park.

Loss of Employment Space

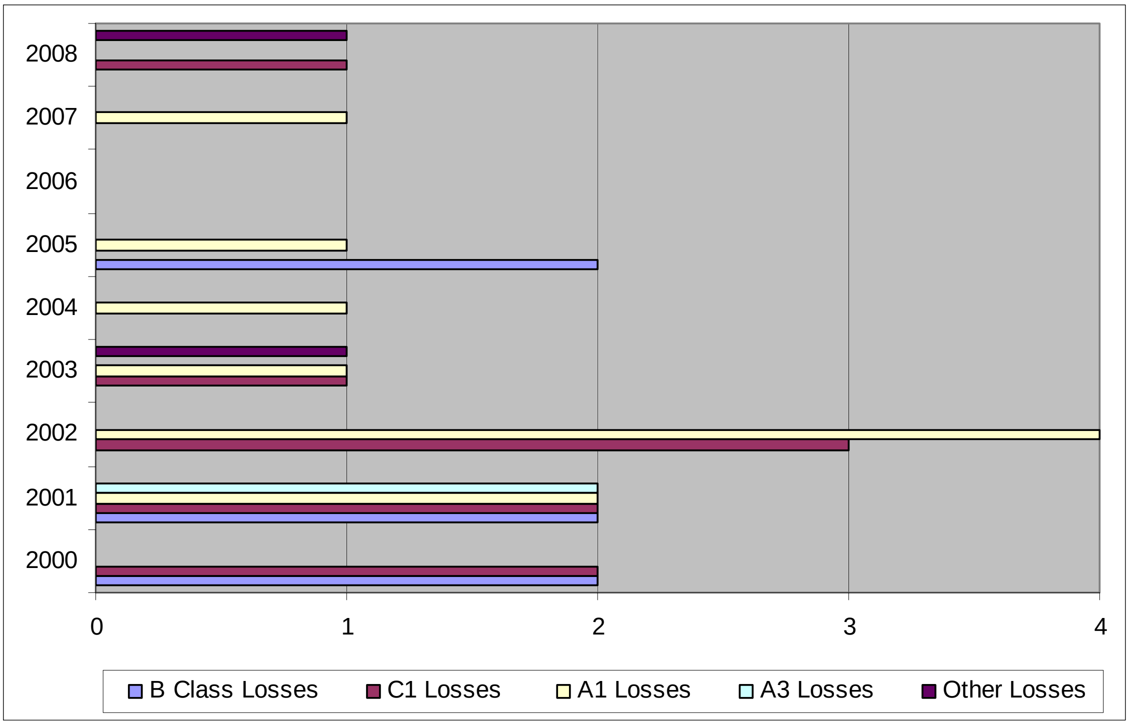
4.34 Over the period since 2000, planning permission has been granted for a total of 29 schemes which have resulted in the loss of existing employment premises to residential uses.



Source: Exmoor National Park Authority

Fig 12 Loss Changes of Use to Housing in Exmoor National Park, 2000-2008

4.35 Only 5 planning permissions have resulted in the loss of B Class employment premises for residential purposes and one further permission has resulted in the loss of a store to a holiday cottage. This reflects a strength of the existing employment portfolio (i.e. that there is limited pressure for the redevelopment of active B Class premises) and the strength of existing policies that seek to retain existing employment land for economic purposes.



Source: Exmoor National Park Authority

Fig 13 Loss Changes of Use to Housing in Exmoor National Park by type, 2000-2008

Conclusion

4.36 The current supply of employment land in Exmoor reflects the nature of the local economy which is dominated by non-B Class uses and small scale activities. Our discussions with local agents and stakeholders have been important in demonstrating that the current supply of premises is considered to reflect local requirements and demands. There is therefore no clear evidence to suggest that the nature or range of local employment facilities has undermined the economic wellbeing of the National Park.

4.37 New employment related development in Exmoor has also been limited since 2000, again reflecting the character and nature of the local economy. Much of the employment related development that has occurred has related to changes in use or conversions of existing premises. This has been an important source of capacity which relates well with the overarching objectives of the National Park Authority relating to the environment and sustainable economic growth. It is likely that this form of development will continue to be dominant in the future and the LDF should contain policies that will enable this source of capacity to continue to come forward in appropriate locations.

4.38 The limited levels of development that have been evident in Exmoor and the retention of the existing employment portfolio are important in highlighting the strength of the economy and its ability to be sustained without the need for new development. In the future it will also be important to ensure that the LDF contains strong policies which facilitate the continued protection of employment land, in order to preserve the economic wellbeing of Exmoor.

5.0 Consultation

5.1 Consultation with a range of agents, stakeholders and local businesses is an essential element of the Employment Land Review process. An extensive programme of consultation was undertaken in order to understand the main local economic issues that exist within Exmoor and to ensure that these could be adequately accounted for in planning for the future economic development and the continued economic wellbeing of the area.

5.2 In addition to individual discussions with agents and stakeholders, the consultation strategy also incorporated two workshop events and a survey of local B Class, tourism and agricultural businesses. In addition, we have also reviewed the findings of the numerous additional consultation exercises that have been undertaken in Exmoor in recent years. This chapter provides a summary of the key findings of these consultation exercises which have informed the analysis and recommendations set out in this report.

Agent Interviews

5.3 An understanding of the strength of the local market and the strength of particular economic sectors is central to being able to assess the existing demand for B class space and the likely future land requirements. Our understanding of the local market was informed by consultation with five local property agents. Our discussions focused on the level of sales and rental activity within different property sectors, the broad locational distribution of demand and the anticipated future trends and requirements.

5.4 In our experience of undertaking Employment Land Reviews, consultation with a range of agents provides the opportunity for a detailed understanding of the key local market issues. This approach has proven particularly effective in an area such as Exmoor which is characterised by a small scale economy and a relatively limited demand for premises. The agents that we consulted included some that operate from within the National Park and some that are based beyond its boundaries. However, all operate within Exmoor and were able to comment upon the local market.

Strength of the B Class Market

5.5 All of the agents commented that the market for B Class employment sites and premises is not particularly strong within Exmoor. Although the recession is having an impact upon Exmoor, it is not considered to be solely responsible for these market conditions which are rather a function of local factors such as its perceived peripherality and inaccessibility, the limited scale of its settlements and the consequential shortage of premises and labour.

5.6 The agents commented that there is presently only a small amount of B Class space available for sale and rent. These are generally small scale units which are located principally within the settlements and, as such, reflect the key market requirements. Importantly, it is not considered that there are any physical constraints on the supply of land or premises but rather that the amount of space that is available is a reflection of the strength of the market and the level of demand. In this regard, the provision of space is seen to be keeping up with demand.

5.7 In terms of the type of business space that is available, one agent reported that there is office space available, although the majority commented that there is no market in the National Park for this type of space. This view supports the employment forecasts which suggest an anticipated slight decline in employment in Class B1 employment, although it does run counter to the recent pattern of a greater proportion of Class B1 development.

5.8 It was suggested that the greatest level of demand is for light industrial units and workshops although interest is particularly focused upon the rental market. This perhaps reflects the reality that many small scale businesses might not be in a position to purchase premises and may seek to control the financial burdens associated with business operation. The level of demand for this type of premises is interesting given that the employment forecasts do not anticipate any growth within the Class B2 sectors between 2006 and 2026 and there has only been a limited amount of recent development activity in this sector.

5.9 None of the agents surveyed indicated that there is any demand for Class B8 storage and distribution space. It is noteworthy, however, that the employment forecasts suggest that there will be a modest increase in employment in this sector. However, as detailed in our assessment of the future land requirements in Chapter 8, higher (or lower) levels of employment in a particular sector would not necessarily result in changing land or premises requirements.

5.10 The agents confirmed that within the National Park, demand for business space is generally focused upon the settlements of Dulverton, Porlock and Lynton and Lynmouth. This reflects the existing pattern of business activity and the distribution of recent development. However, it was noted that settlements such as Minehead which are located on the immediate fringes of the National Park benefit from a greater supply of employment land and are able to sustain stronger markets, at the cost of restricting the demand for employment space within Exmoor.

5.11 In summary, the agents concluded that there is not a strong market for B class employment space within the National Park and that there is generally sufficient space of the right type, quality and size to meet demand.

Agriculture and Tourism Space

5.12 Recognising the importance of agriculture and tourism to the local economy within Exmoor, our discussions with agents also considered the current strength of the market for space within these sectors.

5.13 It is generally considered that there is a market for agricultural and tourist space, albeit that both of these market sectors are suffering as a result of the present recession. Most of the agents stated that they presently have a number of farm premises on their books but that these units are currently taking longer to sell due to the prevailing economic downturn. Interestingly, however, the recession is not considered to be the only reason why interest in some premises is limited and it was suggested that the market for agricultural premises has been the subject of a longer term decline, albeit that this has been accelerated more recently. This market trend reflects the evidence set out in Chapter 9 regarding changes within the farming sector in Exmoor and the tendency for increasing levels of farm diversification.

5.14 By contrast, the market for tourism is viewed to be generally stronger – albeit that it has similarly been affected by the current economic conditions. Many of the agents reported having tourism accommodation on their books and highlight a clear difference in the level of demand with smaller premises (small hotels and B&B properties) selling relatively quickly but larger accommodation and other forms of tourist facility taking longer to sell. This market split is not surprising and reflects the nature of the tourism industry within the National Park, which is dominated by smaller scale accommodation units.

5.15 The impact of the recession has resulted in the market for farming and tourism premises being poor at present. Given the importance of these sectors to the economy of the National Park, this is a matter of concern and should be carefully reviewed to ensure that it does not remain depressed upon the point of market recovery.

Live / Work Units

5.16 None of the agents who responded had received any queries regarding live / work units. However, it is recognised that there is demand for small scale changes to private dwellings in order to allow people to work from home. Issues relating to homeworking in Exmoor have been considered in more detail in the National Park Authority's recent Affordable Housing Research but it is interesting to note that a high level of demand for home working has not translated into a demand for specific forms of property.

Stakeholder Consultation

5.17 To help inform the emerging Local Development Framework, two workshops were held in Dunster and Lynton on 4 and 10 December 2008 respectively. The workshop sessions covered a wide range of topics that are relevant to the National Park and that will have a bearing upon the new policies that are presently being formulated. These included issues relating to the economy and employment. The study team prepared Topic Papers to inform the workshop events and sessions relating to the economy and tourism were facilitated by NLP.

5.18 The workshop events were well attended by a wide range of stakeholders including Officers and Members from the National Park, Officers from adjoining local authorities, representatives from other public sector organisations and interest groups, local business owners and members of the local community.

5.19 In addition to these events, the team has also interviewed a wide range of local stakeholders with an interest and experience in the local economy and economic development within Exmoor in order to gain a greater level of understanding and appreciation of the key issues affecting the local economy within Exmoor. The key messages that emerged from the stakeholder consultation are summarised below.

Strengths of the Economy

5.20 A range of sub-sectors have been highlighted by stakeholders as either being important to the Exmoor economy at present or as having potential to expand in the future. These are all non-B sectors which fit into the wider tourism and agricultural sectors but include shooting, equestrian activities and forestry. Each of these sectors relate to the natural environment and the attractiveness and quality of the local area is recognised as a particular strength and an important basis for economic activity. It is generally recognised that such complementary opportunities should be maximised albeit that the pursuit of economic growth should not be permitted to undermine the quality of the environment within the National Park.

Key Challenges

5.21 Whilst the economy has performed well due to the success of a small number of key sectors, a concern was expressed that it is insufficiently diversified and that it supports jobs that are generally low paid, low skilled and seasonal. Whilst the diversity of opportunities and earnings in the National Park means that some local jobs are very well paid, this does represent a particular concern and, together with high house prices is viewed as a key economic challenge and a potential threat to the future well-being of the National Park. In addition to providing affordable housing to meet local needs, the importance of increasing the skills base was also emphasised so that local people might be better able to undertake more skilled – and potentially higher paid – jobs. However, the realisation of this aspiration would rely upon the ability to attract a wider range of economic activities into the National Park.

5.22 The quality of the road infrastructure and public transport services in many parts of the National Park is viewed as a hindrance to economic development in the area. The single carriageway road network makes the area unsuitable for large scale ‘B class’ economic activity, with many suppliers choosing not to operate in the National Park as it is seen as a ‘dead end’. The lack of public transport serves to exacerbate accessibility difficulties and undermines the viability and sustainability of existing economic activities. However, it is recognised that the delivery of efficient public transport services can be difficult in rural areas as limited levels of demand and long distances means that many potential routes may generally be unviable.

5.23 Other infrastructure was also highlighted by consultees as being generally insufficient to meet existing and future needs. Particular mention was given to broadband services which were reported as not being of an acceptable standard. This is an important issue which will have a profound impact upon the long term viability of the local economy in Exmoor and will shape its attractiveness to incoming businesses and its continued attractiveness to existing businesses.

5.24 The importance of recognising and promoting the synergies between economic opportunities and the environmental quality was also a common theme among the stakeholders. It was recognised that the nature of the key economic sectors creates a mutual dependency – the continued wellbeing of the economy is reliant upon the preservation of the natural environment and in turn, a stronger local economy provides the basis for environmental preservation and enhancement. However, in spite of this, a concern was expressed by some that the expansion of economic activity and the attraction of new sectors might be constrained by the nature of the environment and the protection policies that exist in Exmoor.

Future Economic Development

5.25 Recognition of the need to diversify the range of economic activities that are taking place in the National Park was shared by most of the stakeholders. This would comprise the introduction of new economic sectors and broadening those already in place. Although it is recognised that attracting new types of economic activity into the National Park might be difficult, possible options that were highlighted include encouraging the re-use of redundant buildings as small offices or workshops and broadening the tourist offer. Despite this aspiration to enhance the breadth of the economic base within Exmoor, there was an agreement amongst stakeholders that there is no particular requirement for large scale 'B class' developments within the local area and that such development would not be suitable in the National Park.

5.26 The enhancement of communications systems and infrastructure was recognised by stakeholders as being essential to the future promotion of the economy within Exmoor. Not only would it be important in helping to attract new businesses into the area, it would also improve the efficiency with which existing businesses can operate. Stakeholders particularly emphasised how improved broadband connections would be important in improving the opportunities for home working – an increasingly important type of activity within the National Park and one that fits well within the local economic and physical context. Given the importance of high quality communications systems to efficient business operation, consideration should be given to the ways in which necessary improvements could be made.

Planning and Economic Policy

5.27 Our discussions with consultees considered the role of planning and economic policy in contributing towards economic development. Although planning policies within the National Park were seen as restrictive, it was generally accepted that this approach is necessary in order to protect the sensitive National Park environment and that the nature of the economy and local demand for development is such that this policy approach does not tend to prejudice the opportunities for growth that do arise. Indeed, the stakeholders accepted that the local policies do allow for an appropriate level of growth and development of businesses and that they direct development to the most appropriate locations, such as the settlements. However, some did suggest that there might be some benefit in allowing more flexibility within the settlements.

5.28 The economic policies that operate within the National Park was seen to be well balanced with the Management Plan and Sustainable Economic Strategy both being seen as being capable of guiding and meeting the needs of the National Park economy and in delivering suitable economic development.

Business Consultation

5.29 As part of the consultation for this Employment Land Review, questionnaires were sent out to gauge the views of the businesses operating within the National Park. Three questionnaires were sent out to different businesses:

a Business questionnaire – this was sent to over 100 B-class businesses operating within the National Park;

b Tourism questionnaire – this was sent to 250 tourism businesses in the National Park; and,

c Agriculture questionnaire – this was sent to 250 farms in the National Park.

5.30 Tourism and agriculture questionnaires were sent out as these are the two non-B class sectors that are of most importance to the National Park. It was therefore important to assess the views of existing businesses in these sectors in Exmoor, as well as the views of the B-class businesses.

5.31 The surveys were undertaken in conjunction with the National Park Authority which provided a list of local businesses that should be included within the survey process. A number of the surveys were, however, returned as undeliverable.

B-class Businesses

5.32 19 responses were received for the business questionnaire, of which 5 were not B class business. 6 respondents stated that they operated from a workshop, whilst 5 occupy office space. Some respondents indicated that they occupy different types of business space (i.e. a workshop with associated office space), highlighting that there is flexibility in the use of employment space within the National Park.

5.33 The majority of businesses are small (employing less than 5 people and occupying small premises) and it is likely that there is a high level of home working in order to accommodate these needs. This reflects the evidence that has been set out elsewhere in this study in respect of the character of the local economy and the resultant requirements for employment premises.

5.34 Only one respondent has been in business for less than 5 years and only 4 have operated for less than 10 years. This is interesting and does not accord with the evidence regarding the level of local entrepreneurship and new business activity. However, the very small response rate means that no firm conclusions can be drawn in respect of this evidence.

5.35 The overwhelming majority of respondents have not expanded in the past 5 years and of those that have, most have remained in situe. Similarly, most respondents do not intend to expand in the next 5 years; this conclusion might reflect the current economic climate as well as particular business aspirations.

5.36 The majority of respondents consider that their premises are of average to good quality and that Exmoor is a good location for business activity. Interestingly, none of the respondents stated they would locate anywhere other than the National Park or the remainder of Devon and Somerset. This may be due to a local connection – one of the most frequently cited reasons for setting up business in the National Park was being from the area.

5.37 Despite the recognised strengths of Exmoor as a business location, concern was expressed regarding a number of barriers to expansion which were defined as including:

a Bureaucracy / planning / building restrictions;

b Lack of opportunity for young people;

c The costs of operating in the National Park;

d Lack of high quality business premises (for expansion or for new businesses); and,

e Accessibility.

5.38 Whilst only a relatively small sample of the B class businesses responded to the survey, overall, the findings are generally consistent with and support the other consultations and research that has informed this study.

Tourism Businesses

5.39 Exmoor National Park Authority collated a list of 250 tourism businesses to which questionnaires were sent. 60 responses were received, a response rate of 24%. Reflecting the character of the local tourism industry in Exmoor, over 70% of respondents were operators of tourist accommodation. The 'other' category included tourist attractions and several retail businesses that cater for the tourist market.

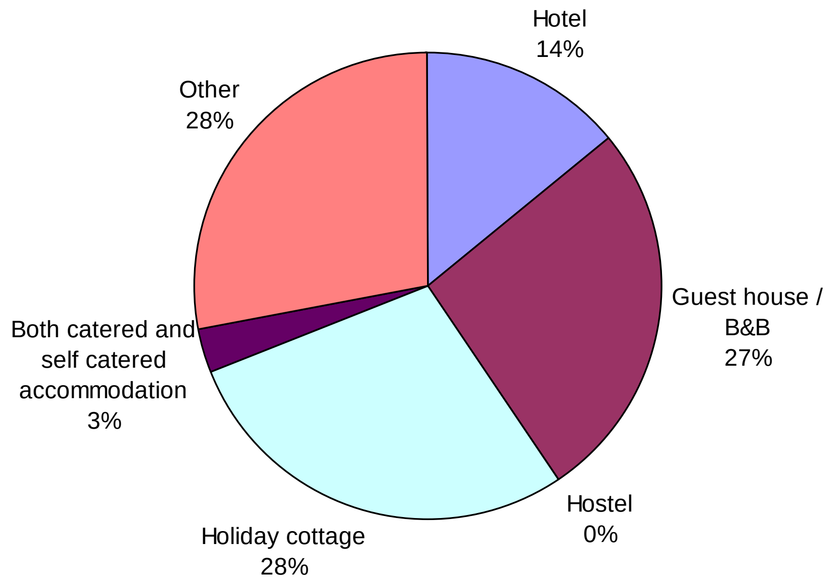


Fig 14 Respondents Make Up

5.40 The majority of tourism respondents stated that they operate in the mid-market sector. This again reflects the character of the National Park which is dominated by small-scale land based activities. It is clearly not a mass-tourism destination. However, the fact that a third of respondents indicated that they cater (partly or wholly) for the higher end of the market suggests that there might be some potential to promote this form of tourism and to seek to attract higher spending visitors.

5.41 Despite the seasonal nature of tourism, over three quarters of respondents stated they operated on a year round basis. This period of operation provides an important platform to support the increased promotion of Exmoor as a year round tourist destination and in reducing the levels of seasonality that presently characterise the market.

5.42 It is apparent from the results that the majority of tourism accommodation providers in Exmoor are small businesses. The majority of accommodation units contain less than 20 bed spaces and the average occupancy rate is slightly over 50%, which highlights that in general terms there is considerable potential for increased numbers of visitors to be accommodated without the need for additional accommodation. However, it is likely that occupancy levels during the peak summer period are considerably higher and that the level of accommodation that is required to service this period would result in greater levels of vacancy during the shoulder and off-peak months. This seasonal imbalance in visitor levels does create a challenge for the provision of sufficient facilities to meet peak needs but without resulting in an unacceptably high level of vacancy during the off-peak months.

5.43 The scale of tourist attractions within Exmoor is generally limited, reflecting the nature of the environment and the market which supports small-scale activity based tourism facilities and serves to restrict the opportunity for large scale activity or development.

5.44 In terms of business expansion, 13.3% of all respondents stated that they had expanded their business in the last 5 years and, whilst the majority of these were able to accommodate this expansion within their existing premises, 25% of those who had expanded found that they needed to relocate either part or all of their business elsewhere. Looking forward, 50% of respondents stated that their business was likely to expand over the next 5 years and over half of those businesses that do expect to expand do not consider that this would be possible in their present location. They would therefore seek to relocate to alternative premises.

5.45 A matter of some concern is the fact that almost 60% of all respondents felt that their business could not expand even if they wanted to. The following issues were perceived as being obstacles to growth:

a Planning restrictions;

b The current economic climate;

c The sensitive environment;

d Lack of promotion of the National Park as a visitor destination;

e Insufficient level of visitors; and,

f Lack of support from the National Park Authority.

5.46 Despite these perceptions, the majority of respondents believed that the changing nature of tourism towards more short breaks was having a positive impact at the local level and that the opportunities that this creates should be identified and exploited wherever possible.

Agricultural Businesses

5.47 Exmoor National Park Authority collated a list of 250 farms to which questionnaires were sent. 41 responses were received, a response rate of 16.4%.

5.48 The survey highlighted the significant importance of agricultural diversification within Exmoor. 34.1% of respondents said that they undertake operations other than farming from their farm premises. The main reason for this is to generate additional income although other reasons also include personal enjoyment of a particular activity. The fact that the premises are suitable for the activities undertaken was also highlighted as an important basis for undertaking non-farming purposes although this does not represent a reason for diversification but rather creates the opportunity for it. The level of income generated from these additional business activities was shown to vary considerably: in some cases, the non-farming activities are very much ancillary to the main farm business, whilst for other farms they represent the main source of income. The issue of farm diversification is considered in more detail in Section 9.

5.49 The majority of farms in Exmoor have been established for a long period of time (almost 90% of respondents stated that that they had been operating the farm for over 10 years) but over 60% have not expanded their operations within the past 5 years and an even greater proportion of respondents suggested that they do not anticipate expanding their operations in the next 5 years. This supports evidence relating to changes in farming to Exmoor, particularly in respect of the relatively high average age of farmers and the overall decline in employment in this sector.

5.50 There were varying views regarding the strengths and weaknesses of being located within the National Park. Whilst the natural environment was seen as a strength, it was apparent that people perceived that there are more weaknesses associated with the location, including:

a Tighter planning restrictions;

b Lack of encouragement of young people into farming;

c Intrusion of tourists / walkers; and,

d Accessibility difficulties.

5.51 However, despite these concerns and although the majority of people felt constrained in terms of achieving their aspirations, there was a general consensus that farm businesses would not be any more successful if they were located outside the National Park. The availability of funding is viewed as a major factor for the success of farming and is instrumental in facilitating the expansion of the business. From the consultation process, it is apparent that a range of local, national and international factors are impacting upon the success of farming in the National Park and that many of these issues cannot be solved either on a local level or by a change in local planning and economic development policies. However, given the importance of this sector in Exmoor, it is vital that it is promoted and supported so that its contribution to the local economy and its role in the management of the local environment might be enhanced.

Previous Consultation Exercises

5.52 A number of consultation exercises have previously been undertaken in the National Park. Whilst some of these have related to parts of the National Park, others have covered the whole of Exmoor and some have incorporated the National Park within a wider survey area. The previous consultation exercises have been undertaken for a variety of purposes although their findings do provide further insights that are important for this study. The conclusions of these surveys are summarised below.

Affordable Housing Questionnaire

5.53 Exmoor National Park Authority recently undertook a comprehensive Affordable Housing survey across the whole National Park in July and August 2008. This covered a range of issues relating to housing requirements, including a consideration of home working.

5.54 391 out of the 1795 (22%) respondents stated that they worked from home. The types of activity that are undertaken by home workers vary considerably but include:

Agriculture	124
Business and office use	113
Light and general industry – including agricultural and forestry contractors	21
Storage and distribution	6
High technology businesses including research	19
Creative industries	52
Tourism	97
Other:	
Third sector volunteering (2)	Light engineer
Academic	Local government
Accountancy (4)	Management
Animal feeds	Market research
Artist (2)	Music tuition (3)
Builder (3)	Nurse (2)
Carer	Outdoor pursuit
Carpenter / joiner	Post office (2)

Childminder (4)	Pottery
Computing	Printer
Consultancy (4)	Property specialist restoration
Counselling (3)	Pub / Cafe (5)
Design	Public relations
Education (10)	Public services
Equine (6)	Publishing (2)
Farrier	Recruitment
Funeral industry	Retail (3)
Gardener	Secretarial and shop
Healthcare	Social work
Horology	Transport (6)
Horticulture (2)	Veterinary
Hunting (2)	Vicar (2)
Inspector	Workshop
Kennels	Writer (2)

Table 15 Home Working in Exmoor

5.55 The majority of the people who worked from home stated that a home office was the type of workspace used (62%). The second most frequent type of workspace used at home was tourist accommodation (20%) whilst a significant level of respondents indicated that they use a workshop at home (15%) or have agricultural units that are associated with their properties (14%). A smaller proportion of people (9%) operate businesses that use storage facilities at their home.

5.56 The size of floorspace being used by people in their homes is generally very small – almost 80% of the 203 respondents who answered this question use units of less than 40sqm. Two of the sites that occupy more than 1,000sqm were reported in acres, suggesting that these relate to an overall area of farm land rather than to particular buildings or premises.

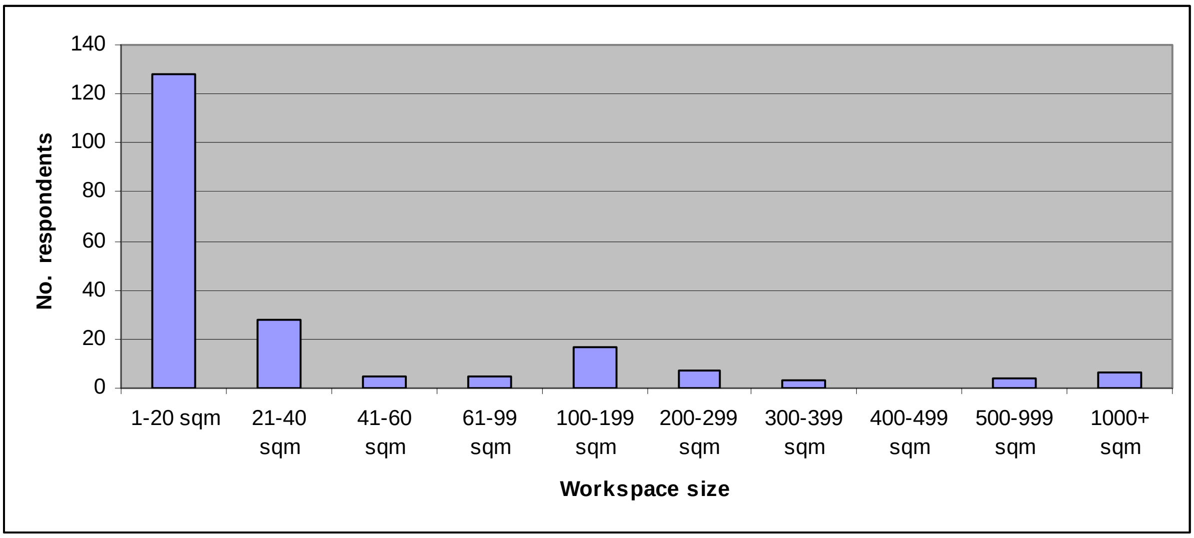


Fig 15 Size of Unit

5.57 In terms of future requirement, 53 respondents stated that they would require additional premises for their businesses. Of these, 36% stated that they would require additional office space, 21% stated that they would require more workshop space and 19% stated that they would require additional space for tourist accommodation. A smaller proportion of respondents indicated that they would require additional space for storage space or agricultural units. The survey did not, however, set out the amount of additional accommodation that would be required. However, it is clear that much of the additional space will be required in the short term: 78% of respondents requiring additional space stated that they would need it between 2008 and 2010 whilst the remaining 22% indicated that they would need it from 2011 or later.

5.58 Only 45% of respondents stated that they have access to broadband internet facilities. This is an important statistic which illustrates the general level of distribution across the National Park. Whilst good quality broadband services are available in some areas, the quality of services are less good in other areas and, in several cases, is not available at all.

Devon Renaissance Business Survey

5.59 3,541 businesses responded to the survey, which took place across the whole of Devon in July 2007. North Devon had the highest respondent rate – 572 which equates to 16.2% of all responses. Almost 60% of the businesses that responded are located in rural areas. These figures can give an indication of the broad trends within Devon and North Devon but whilst they can reflect the overall position within Exmoor National Park, they cannot be taken as necessarily representative of the local situation.

5.60 The table below provides details of the split in the nature of respondents in North Devon. Whilst several of the respondents were employed in B-class sectors, the majority of respondents in North Devon were involved in agriculture, hotels and restaurants or wholesale and retail, a trend that reflects the composition of businesses specifically within Exmoor, as highlighted elsewhere in this report.

	Number	%
Agriculture	82	15.5
Construction	39	7.4
Education	7	1.3
Finance	5	0.9
Fishing	0	0.0
Health	37	7.0
Hotels & restaurants	84	15.9
Manufacturing	32	6.1
Mining & quarrying	0	0.0
Other services	44	8.3
Public administration	1	0.2
Real estate & business	54	10.2
Transport	15	2.8
Utilities	0	0.0
Wholesale & retail	128	24.2

Table 16 Respondent Make Up

5.61 The scale of North Devon based businesses that responded to this survey similarly reflects the position in Exmoor in that they are limited in scale. The number of sole traders and micro-businesses account for 81.4% of the businesses that responded to the survey. Less than 1% of respondents employ more than 250 people whilst less than 5% of respondents in North Devon employ more than 50 people. The local picture in Exmoor is that the businesses are even smaller and that there is an even lower number of larger firms but this evidence does demonstrate how the local position is also reflective of the slightly broader context.

No Of Employees (Size of Business)	Number of Businesses	Percentage
1 (Single Person)	100	19.3
2-9 (Micro)	321	62.1
10-49 (Small)	75	14.5
50-249 (Medium)	18	3.5
250-999 (Large)	2	0.4
1000+ (Corporate)	1	0.2

Table 17 Size of Business

5.62 The pattern of investment across North Devon is shown to be varied in terms of the main types and proposed timescales for investment. A summary of the responses in North Devon shows that:

a 51.3% of businesses have invested in new equipment recently;

b 23.2% of businesses plan on investing in new equipment in the next 12 months;

c 9.7% of businesses plan on investing in new equipment in the next 3 years;

d 15.9% of businesses are not planning to invest in new equipment;

e 40.8% of businesses have invested in improving their premises recently;

f 18.6% of businesses plan on investing in improving their premises within 12 months;

g 12.1% of businesses plan on investing in improving their premises within 3 years; and,

h 28.5% of businesses are not planning to invest in improvements to their premises.

5.63 In addition, a large proportion of businesses in North Devon have undertaken product development recently (23%) and a further 22.4% are planning to develop within the next 12 months. An additional 9.6% are planning to develop in the next 3 years, although almost half of respondents (45%) have no plans to undertake product or service development.

5.64 Whilst over 30.6% of respondents report that they are presently undertaking internet trading, almost half of all respondents were not planning to do so. Of those who responded that they wanted to trade on the internet but had not yet, 16.2% stated that they planned to within the next 12 months and 6.6% stated that they planned to in the next 3 years. The achievement of this aspiration will, however, depend upon the quality and extent of local internet services.

5.65 In general, the evidence of businesses from North Devon appears to be more positive than those from within Exmoor in respect of business expansion – a larger proportion of companies in North Devon have expanded or expect to expand in the near future. This reflects the slightly broader market area that is enjoyed by businesses operating in North Devon and the presence of larger towns such as Barnstaple and better links to other key centres.

5.66 The following table sets out what businesses in North Devon perceive to be the main constraints facing their businesses. Overall, lack of alternative modes of transport other than by road was perceived to be the most significant constraint. This is likely to be due to both the nature of the road network, which is a single carriageway in many areas, and also the lack of public transport services. However, it is important to note that 75% of respondents saw the lack of alternatives to road transport as either not being a constraint or only representing a slight constraint to business activity. Similarly, over 85% of respondents did not view the distance from their customer base as any more than a slight constraint.

	Distance from Market Customers	Alternatives to Road Transport	Availability of Appropriately Sized Premises	Availability of Good Quality Premises
No Constraint	49.4	57.4	60.3	61.3
Slight Constraint	29.4	17.7	16.4	18.1
Constraint	12.1	11.3	14.7	12.5
Significant Constraint	9.1	13.7	8.6	8

Table 18 Constraints

Lyn and Exmoor Vision Business Survey

5.67 This survey was undertaken in the Parishes of Brendon, Challacombe, Countisbury, Kentisbury, Lynmouth, Lynton, Parracome and Trentishoe in November 2006. The majority of these areas are within the National Park, although approximately half of Kentisbury lies outside of the National Park and one farmstead in Challacombe parish also lies outside of Exmoor.

5.68 The questionnaire, which was sent to local businesses and was designed to establish a clear understanding of the local make up of businesses, including the type, size, future outlook, development plans, skills and business advice, constraints, markets, strengths and weaknesses and working with other businesses.

5.69 There were 78 responses to this survey (26% response rate). The businesses who replied comprise:

a	Retail outlets	21%
b	Tourist attractions	9%
c	Accommodation providers	41%
d	Restaurants	3%
e	Services	14%
f	Farms	6%
g	Category not stated	6%

5.70 92% of those who responded to the survey stated that they were affected by the number of visitors to the area. This is unsurprising given the level of businesses involved in the hotel and restaurant and retail sectors and the importance of Exmoor as a tourist destination. It serves to emphasise the importance of ensuring that the local area can adequately cater for visitor demands in a manner that supports the economy but without undermining the quality of the natural environment.

5.71 In terms of business type and size it was found that:

a 81% were small businesses operating as partnerships or sole trader status;

b 94% employ less than 5 people;

c 60% of businesses turned over less than £100,000 per annum;

d 56% of businesses operate within the leisure / tourism sectors; and,

e 61% of businesses were established in the last 10 years (42% of these were in the last three years).

5.72 This reflects other evidence regarding the local economy which is dominated by small scale businesses and particularly by the tourism sector. It also highlights the level of entrepreneurial activity, both in terms of the number of sole traders and partnerships and the high proportion of new businesses. This is an important strength of the local area and will be important in sustaining the long term well-being of Exmoor's economy.

5.73 However, views regarding the economic outlook and the potential for development in the area was not particularly strong; 34% of businesses failed to grow in the last 3 years and a further 5% suffered from a decline in turnover. No reasons were given for this but it will be important to assess the opportunities to enhance the strength of local businesses and to promote their longer term development in order to maintain the vitality of the local economy.

5.74 Similar to the work undertaken by Devon Renaissance, this survey examined the constraints within the area and 60% of respondents stated that their top 3 constraints were:

a Poor road access to the area / business;

b Local parking; and,

c Poor transport links / services.

5.75 These three points are broadly similar to the most significant constraint cited in the North Devon survey. Other constraints included IT and mobile phone availability and the fragmented nature and quality of the local market. Whilst issues relating to accessibility are not unexpected in the National Park, they highlight clear opportunities for future action.

Summary

5.76 Overall, a substantial amount of consultation has been undertaken in the National Park to date. The majority of this work has not covered the whole of the National Park and the information available is biased towards the North Devon portion of the National Park. Therefore, whilst this information is useful in gauging general trends in the area, it cannot be relied upon as representative of Exmoor as a whole. Whilst the affordable housing questionnaire did cover all of the National Park and therefore does provide a more representative view of Exmoor, its relevance to this study is limited just to the topic of home working.

Conclusion

5.77 It is clear from the extensive consultation that has taken place that the B-class sector in Exmoor tends to be small scale and that other sectors of the economy are relatively more significant. It is generally recognised that this trend will continue in the future and that the long term vitality of the National Park will rest upon the enhancement of existing key sectors and activities.

5.78 Rather than developing more business space, it would appear that there is a perceived need to enable business to develop in different ways. For example, improvements to the road network and broadband facilities would be important in aiding the development of businesses and the strength of the local economy. The respondents emphasised the importance of sustaining and enhancing the strength of the local economy and highlighted an appreciation of the role of the natural environment in stimulating and supporting well-being.

6.0 Qualitative Assessment of Existing Employment Sites

6.1 This chapter assesses the characteristics of the existing B Class employment sites within Exmoor National Park. This assessment has been based upon desktop analysis and site visits.

6.2 The DCLG guidance note on employment land reviews recommends that only ‘significant’ employment sites should be assessed and sets a general standard of 0.25 hectares as an appropriate size threshold upon which decisions can be made regarding which sites should be assessed by the study. However, as has been demonstrated throughout this Study, the National Park represents a unique case. Its economy is dominated by non-B Class activities and the employment sites are generally of a small scale. The implication of this is that it has been appropriate for our analysis to consider sites that fall below the recommended threshold contained within the DCLG guidance. No minimum site threshold was set for the assessments and, in many cases, individual business units were surveyed.

6.3 The National Park Authority identified the employment sites for assessment and members of the study team undertook the site visits and assessments based upon the criteria set out in Table 19. They are based upon those set out in the DCLG guidance, albeit that they were adapted to ensure that they can be relevant to the local situation in Exmoor. Only the B-class sites identified by the Authority were surveyed. It is recognised that not all premises within the National Park have been reviewed but the analysis contained within this chapter does provide a clear overview of the current issues and themes relating to the portfolio of sites and premises in Exmoor.

MATTER	CRITICA	ASSESSMENT CRITERIA		EXAMPLE
Location / Access	***Access to strategic road network***	*Proximity to A roads and good quality B roads.*	*5*	*Within 2 km of A road junction via good quality and unconstrained roads.*
			1	*Over 5 km from A road junction/over 2km from B road junction.*
	Local road access including congestion and quality of roads	*Quality of local access, ease of movement, congestion, movement through residential area, suitability of junctions and access.*	*5*	*Local access via free moving good roads avoiding residential areas/areas that are prone to congestion and/or difficult junctions.*
			1	*Difficult/narrow road access, via residential roads, sloping/bending access road, difficult site junction, congested roads (mainly due to parked cars).*
	Access to services and labour	*Proximity to rural centre (Dulverton, Lynton / Lynmouth and Porlock); or identified villages (Allerford; Barbrook; Bridgetown; Brompton Regis; Brendon; Challacombe; Cutcombe; Dunster; Exford; Exton; Luccombe; Luxborough; Monksilver; Parracombe; Roadwater; Simonsbath; Timberscombe; Winsford; Withypool; Wheddon Cross and Wootton Courtenay).*	*5*	*Near (within 1 km) rural centre (Dulverton, Lynton / Lynmouth and Porlock); good access to residential areas and services.*
			1	*Remote site; no services or residential areas nearby.*
Quality of Site	***Proximity to incompatible uses***	*Proximity to residential areas and other incompatible uses (where the business could potentially have an impact).*	*5*	*Within larger employment area, and/or no incompatible adjoining land uses.*
			1	*B2/B8 adjoining sensitive uses on all boundaries.*

	Site characteristics	*Gradient, shape and potential for expansion.*	*5*	*Generally level site, regular shape, potential for expansion.*
			1	*Steeply sloping/uneven site, very irregular/narrow shape and no opportunities for business expansion.*
	Flood risk / Development constraint	*Element of the site at risk from flooding that would be a future constraint on development for employment purposes.*	*5*	*No part of the site in Flood Zone 3b*
			1	*Site entirely within Flood Zone 3b*
Market Factors	***Market attractiveness***	*Quality of the appearance, vacancy, profile / prominence of the location; ability to let premises; market activity.*	*5*	*High quality appearance and environment; no vacancy; attractive and high profile location.*
			1	*Low profile; poor/run-down unattractive appearance/location; over 25% vacant space/buildings; difficult to let premises; low level of market activity/investment; low profile location.*
Local Context	***Planning/Sequential factors***	*Site's relationship to identified settlement and presence of existing restrictive designations, such as Conservation Area, Listed Building, Scheduled Ancient Monument, historic settlement core, historic park / garden, sites and monument record, historic farmstead.*	*5*	*Site within settlement and no restrictive designations.*
			1	*Site outside defined settlement, with three or more existing restrictive designations.*
	Image of wider area	*Attractiveness of the wider local area, quality of surrounding buildings; tidiness of surroundings.*	*5*	*Attractive and very high quality surroundings; neat / tidy.*
			1	*Unattractive, poor quality surrounding area; untidy.*

Under each criteria, score 5 = very good; 1 = poor   Full site scorings are set out in Appendix 1.

Table 19 Site Assessment Criteria

6.4 These criteria were agreed with Exmoor National Park Authority in advance of undertaking the survey. The outcome of this review was that each site was scored on a scale between 1 (poor) and 5 (very good), for each individual category. They were then categorised as being of 'very good'. 'good', 'average' or 'poor' quality. The purpose of these rankings is to indicate the better performing sites relative to others in Exmoor National Park. Although this comparative assessment is helpful in understanding the relative qualities of different employment sites in Exmoor, it is important to note that those sites that are identified as being of poor quality can nevertheless still make an important contribution to the local economy and it should not be assumed that they should necessarily be released for alternative purposes. Indeed, as has been shown, a key strength of Exmoor in recent years has been the retention of existing employment space, a characteristic that will be important to its long term economic well-being.

Findings

6.5 A total of 45 employment sites were assessed. Based upon their scoring against the criteria detailed above, the employment sites were ranked in terms of their quality, as follows:

a Very good (score 35 or above);

b Good (score 30-34);

c Average (score 25-29); and,

d Poor (score 24 or below).

6.6 The groupings have been based upon an overall view of the sites in the context of the National Park. The scoring did not highlight any distinction about what should be considered very good, good, average or poor and so logical judgements have been made in respect of the scoring boundaries for each category, i.e. the good and the average categories both have a range of 5 points. As demonstrated below, commonalities can be seen between sites in each category. For example, the sites categories as very good tend to be located in the largest settlements and benefit from good strategic access to 'A' roads, whilst 'poor' sites tend to be more dispersed and suffer from problems relating to their strategic and local access.

6.7 Table 20 below sets out details of each of the sites that were reviewed, ranked in order of their overall quality:

Site Reference	Site	Use	Settlement	TOTAL	
DVT12	Dulverton Town Council	B1	Dulverton	40	
DVT09	League Against Cruel Sports	B1	Dulverton	40	
DVT04	ENPA (Small building)	B1/B2	Dulverton	39	
LYN03	Candlemaker	B2	Lynton and Lynmouth	39	
DVT11	Dulverton Ross Campbell Architecture	B1	Dulverton	38	
DNS02	Fowler Timber Products	B2	Dunster	38	
PK05	Miles Tea Co.	B2	Porlock	38	Very Good
DVT03	ENPA (Tourist centre)	B1	Dulverton	37	
DVT13	Units 1a – 1d	B2/B8	Dulverton	37	
EX03	ENPA / Atkins	B1	Exford	37	
LYN04	Office and Store	B1	Lynton & Lynmouth	36	
DVT08	JC Stanbury & Sons	B2	Dulverton	35	
LYN01	Garage	B2	Lynton	35	
DVT06	Exmoor National Park Authority	B1	Dulverton	35	
PK04	JJ Polard	B2	Porlock	33	
RW01	Singer Instruments	B2	Roadwater	33	
DVT10	Ridler's Garage	B2	Dulverton	32	
LYN02	Artists Studio & Store	B1	Lynton & Lynmouth	32	
LYN06	Town Council	B1	Lynton & Lynmouth	32	
PK01	A&P Farmer	B2	Porlock	32	
PK03	Gerald David Abattoir	B2	Porlock	32	Good
DVT05	Exclusive Cake & Catering	B2	Dulverton	31	
WC02	Exmoor Livestock Farmers	B1*	Wheddon Cross	31	
WC03	Garage	B2	Wheddon Cross	31	
BG01	Exmoor Livestock Auctions Plc.	B1*	Blackmoore Gate	30	
DVT01	Brett Wright Carpenter	B1	Dulverton	30	
WC01	Arc ATL	B2	Wheddon Cross	30	
TS02	G. Delbridge	B2	Timberscombe	29	
WC04	Shearwell Data	B8	Wheddon Cross	29	
DNS01	Dunster Water Mill	B1/B2	Dunster	29	
EX04	Exford Service Station	B2	Exford	29	
EX06	Dunkery Services	B2	Exford	28	
EX02	Dunkery Ales Ltd.	B2	Exford	28	
LYN05	T Parker Carpenter/Joinery/Workshop	B1	Lynton & Lynmouth	28	Average
RH01	Styles Farmhouse Ice Cream	B2	Rodhuish	28	
TS01	Bernard Dru Oak	B2	Timberscombe	28	
WY01	GH Burnell	B2	Wootton Courtnay	27	
LX01	J & JE Henson & Son	B2	Luxborough	26	
PK02	Forge Studios	B2	Porlock	26	
EX05	Forge (Farrier)	B2	Exford	25	
AL01	Allerford Forge	B2	Allerford	23	Po

EW01	Workshops & Offices	B1	Elworthy	22	
PW01	Exmoor Glass	B1/B2	Porlock Weir	21	
EX01	D Skinner and Sons	B2/B8	Exford	20	
PM01	Two Rivers Paper	B2	Pitt Mill Farm	18	

* site is also sui generis

Location plans for these Sites are contained in Appendix 2.

Table 20 Ranking of Employment Sites

Overview of Sites

6.8 **Very good** sites mainly have good access to the strategic road network which, due to the distance from the M5 motorway, has been classed as the 'A' roads. The majority of sites were within 2km of an A road. Those that were located further away from an A road were within 3km of the strategic road network or, in the case of Exford, were close to a good quality B road. The local roads were generally good for these sites and were generally free-moving and free from congestion.

6.9 The very good sites were generally located in areas that are highly attractive to the market, primarily due to their location within the largest settlements. These sites are mostly located in prominent areas and there was no apparent vacancy, suggesting that there is a demand for this type of employment space. Furthermore, the sites and their surrounding context are generally of a high quality and the premises provide an attractive location for business activity.

6.10 As detailed below, of the 14 sites that have been classed as 'very good', 12 of them are located within the three larger settlements of Dulverton, Porlock and Lynton and Lynmouth. As such, they enjoy the best access to labour and services and are most attractive to the market. The other sites are located in Dunster and Exford. These are smaller but locally important settlements that also benefit from a high level of services and facilities and are easily accessible via the strategic road network.

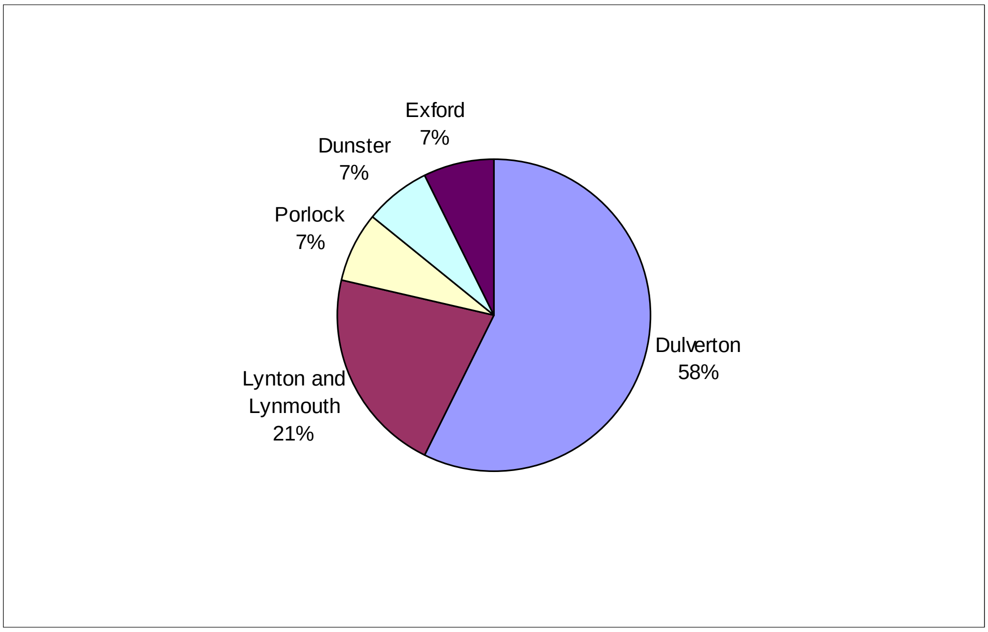


Fig 16 Very Good Sites

6.11 The majority of the very good sites are located outside of areas that are highlighted in Exmoor National Park Authority's Strategic Flood Risk Assessment as being constrained by flooding. None of the sites are wholly located within Flood Zone 3b areas. The majority of the sites in this category also suffer from limited constraints related to planning and sequential factors. The surrounding land uses are generally compatible with the current employment purposes and do not restrict activities on the sites in this category. Whilst the majority of sites in this category have some capacity to expand in the future, four are constrained due to their location within densely developed village centres.

6.12 **Good** sites also generally benefit from good access to the strategic road network, are all within at least 3km of an A road or a good quality B road. They also have relatively good access to services and labour, being mostly located within the rural centres or larger settlements. Local access to these sites is generally not as good, however, and many of them are constrained by the quality and nature of their access roads. In some cases, these comprise single tracks which may be steeply sloping or in a poor state of repair.

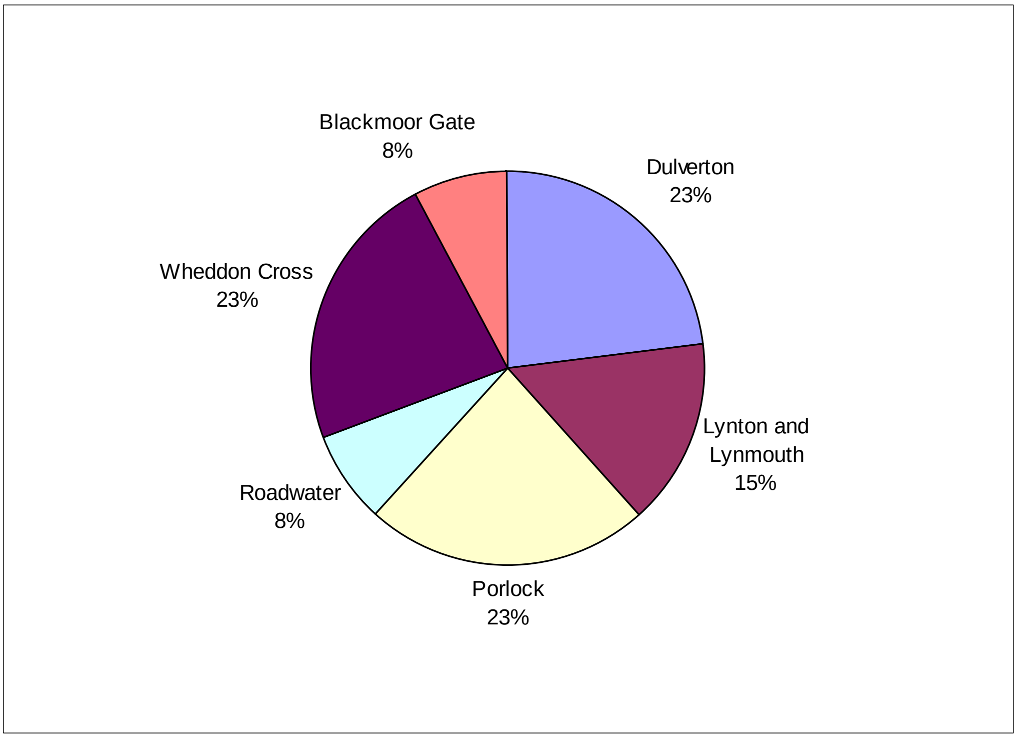


Fig 17 Good Sites

6.13 Whilst some of these sites tend to be attractive to the market, many are viewed as slightly less attractive due to their location, prominence or the presence of other constraints. The majority of the sites in this category are free from flooding constraints, although three of them are located entirely with Flood Zone 3b. However, the sites tend not to have any major physical constraints and they generally do have the potential to accommodate future expansion.

6.14 The employment sites that have been identified as being **average** quality generally have good access to the strategic road network – 10 of the 12 sites in this category are within 3km of an A road or good quality B road, although the remaining 2 are quite remote. However, the local access for these sites is rather more problematic as the majority of sites in this category suffer from problems relating to the quality and nature of their access routes. Whilst one site in this category is located in Lynton and Lynmouth and one is located in Porlock, the majority are located in smaller villages and hamlets which, due to their location, tend to be less attractive to the market and benefit from a smaller pool of potential labour. Some sites in this category (Shearwell Data, Dunkery Ales ltd, Styles Farmhouse Icecream, Bernard Dru Oak and J&JE Henson) are located in the open countryside and appear to have been established as a result of farm diversification.

6.15 In spite of the issues relating to the location and market attractiveness of these sites, there was no evidence of vacant premises in any of the sites.

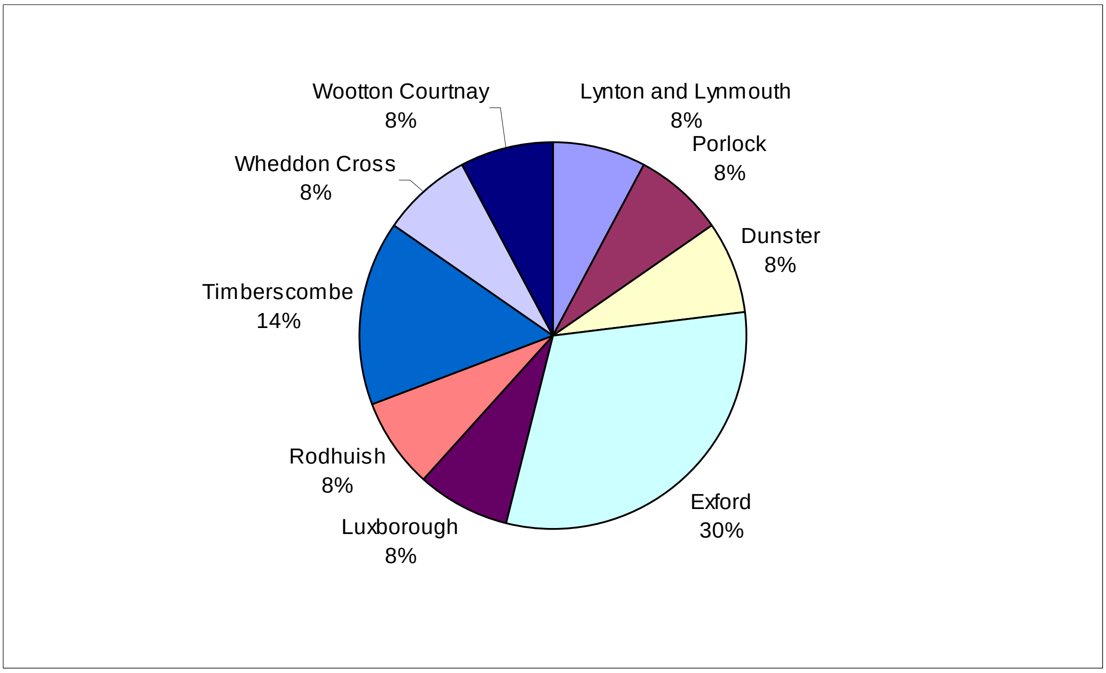


Fig 18 Average Sites

6.16 In terms of development constraints, the sites in this category tend not to be any more vulnerable to the more significant flood risk areas than those in the very good and good categories. Only 1 site (Dunster Water Mill) is entirely located within Flood Zone 3b. However, 10 of the 12 sites are adjacent to incompatible uses to some degree and there is much variance in the quality of these sites. This demonstrates that these sites do not necessarily have any less development potential than higher scored sites in terms of their physical characteristics, but that they tend to be more constrained in terms of planning and sequential factors.

6.17 None of the sites which were classed as **poor** were located within the three larger settlements. Only 6 sites are in this category and, of these, 4 are within 3km of the strategic road network. However, these sites generally have poor local access and many of them are constrained from future expansion due to flood risk and physical constraints. Four of the sites are entirely within Flood Zone 3b and only one is entirely outside of this zone. They all suffer from problems relating to gradient, topography or a limited potential to expand. These sites also tend to be constrained by planning and sequential factors relating, for example, to their location within a Conservation Area or the presence of listed buildings on the sites.

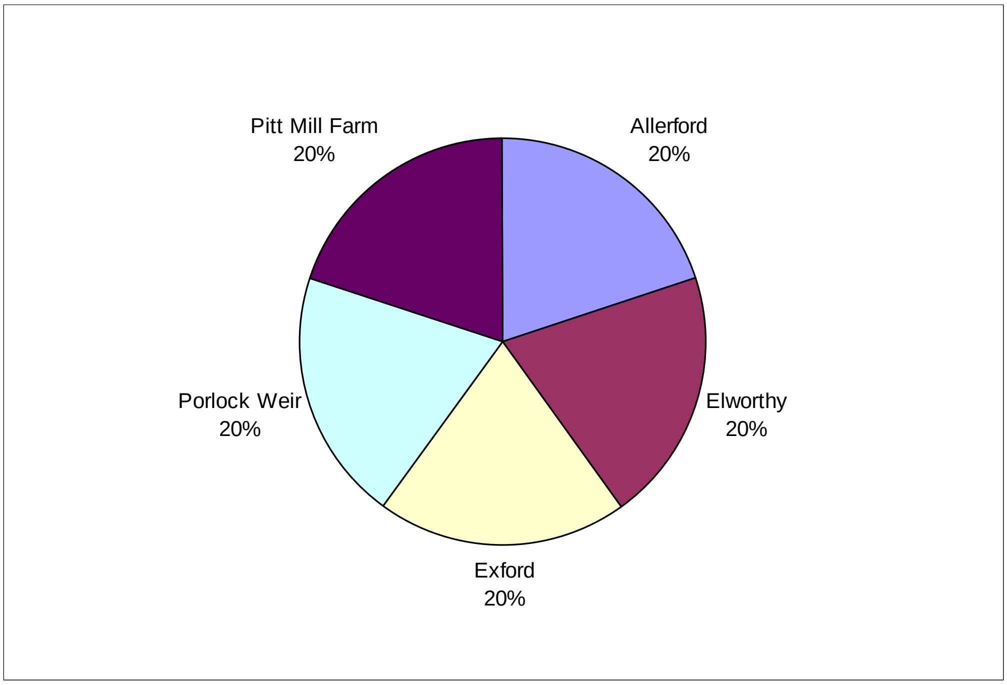


Fig 19 Poor Sites

6.18 Their location away from the largest settlements also means that the poor sites tend to suffer from limited access to services and labour and tend to be less attractive to the market than the other sites. Significantly, the only sites in which there was any apparent vacancy fall within this category, demonstrating that perhaps they are less attractive to the market.

6.19 Overall, the poor sites are more constrained, have poorer access and are located in more remote areas than the sites classed as average or above.

Conclusion

6.20 This assessment has provided an overview of Exmoor's employment sites, identifying 14 that are of 'very good' quality, 13 of 'good' quality, 12 of 'average' quality and 6 of 'poor' quality. This indicates that 86.6% of the sites within the National Park are of average quality or better, with 31.1% being classed as very good, whilst only 13.3% of sites were classed as being of poor quality.

6.21 There is a clear link between the location of sites and their quality. 19 of the 26 very good and good sites are located within the three largest settlements (Dulverton, Lynton and Lynmouth and Porlock) whilst only 2 of the 12 average sites are located in these centres. None of the poor sites are located in the three largest settlements.

6.22 The key advantages of those sites that are located within the larger settlements include their accessibility, market attractiveness and access to services and labour. By contrast, the sites classed as 'poor' tend to be located in more remote and inaccessible areas, which are limited in respect of their access to services and labour.

6.23 Whilst the majority of existing employment sites within Exmoor are not significantly constrained by environmental factors such as flood risk, some do suffer from planning and sequential constraints which might limit their potential to expand (and accommodate additional business accommodation) in the future.

6.24 Interestingly, many of the better quality sites are occupied by Class B1 activities. This reflects the nature of the office based businesses and their tendency to have more demanding space requirements. It also reflects the fact that (in line with patterns of demand) many offices are located within the larger settlements where the buildings tend to be of better quality.

6.25 Overall, it is clear that a very high proportion of the existing employment land supply in Exmoor is of a good or very good standard. The market attractiveness of the sites can be viewed from the generally high level of occupation (particularly in the very good, good and average quality sites). Even those sites that are of a lesser quality do perform an important function and contribute towards the local economy. The sites within the National Park serve an important role which should be encouraged and supported in the future. It is not considered that any of the existing sites should be released for non-B Class purposes. Instead, consideration should be given as to how the viability of these sites might be maintained and enhanced in the future so that they might continue to make an important contribution to the local economy. To this end, it is recommended that the LDF should retain the existing policy position relating to the protection of existing employment land for business purposes. Policies should seek to resist the inappropriate redevelopment of existing business premises for alternative purposes unless there are clear reasons to justify any such loss.

7.0 # The Future Economy of Exmoor National Park

7.1 Before assessing the future employment land needs in Exmoor, it is important to review its future economic role. This will reflect its economic strengths and weaknesses and the character of the National Park, as well as the economic aspirations for the area and the surrounding region.

Establishing an Economic Strategy

7.2 Chapter 1 considers the implications of Exmoor's National Park status upon the delivery of development and the achievement of economic objectives. It highlights the opportunities that are associated with its high quality local environment and the importance of ensuring that any future development or activity does not undermine the quality or character of the area. In seeking to direct the future economic well-being of the National Park, it will be important to recognise the interconnections and the potential mutual benefits between environmental protection and sustainable economic growth. The Greater Exmoor Sustainable Economic Development Strategy recognises this by stating that the National Park cannot achieve its purpose if those living and working within the local area cannot experience an increased sense of well-being.

7.3 In seeking to establish a basis for the future economy within Exmoor, it will be important to establish and maintain a resilient economy which:

a Reflects and respects the local context within the National Park;

b Draws upon and recognises the economic potential of the environmental qualities of Exmoor as an attractive, high quality area;

c Takes account of the economic linkages between Exmoor and the rest of Devon and Somerset, the South West and the UK more generally;

d Recognises the character of the local economy and the particular dominance of non-B class sectors; and,

e Takes account of and responds to all issues relating to the need to build capacity within key economic sectors.

7.4 The importance of capacity building is central to the delivery of an economic strategy within Exmoor and will have implications that extend beyond the planning system. Key considerations that are to be taken into account in this regard will be:

a The enhancement of skills within the local area through training and support initiatives;

b The promotion of businesses through support schemes such as the availability of funding and marketing initiatives; and,

c The promotion of improved accessibility and communications into and within the National Park.

7.5 A detailed consideration of these matters will be central to the achievement of the economic strategy for Exmoor but fall beyond the scope of this study.

Influences upon the Economy

7.6 The current recession represents a dominant influence upon the economy of Exmoor. In preparing its employment forecasts, Experian has taken account of the current economic conditions and the potential impact of this upon different economic sectors within the National Park. Although the limited scale of Exmoor's economy might enable it to be relatively resilient to the economic recession, it will not escape.

a Declining levels of consumer spending are expected to have an impact upon retailing, leisure and tourism services and catering – resulting (as has been identified elsewhere in this report) in a particular impact upon local agricultural and tourism sectors.

b Exmoor's housing policies will mean that it may not experience the full impact of the reduced capacity of the housebuilding sector. Yet house prices and the number of the transactions have been affected and have had an impact upon the local economy.

7.7 The full scale of impact upon Exmoor will depend upon the length of recession, the timing and rate of the subsequent recovery and the extent of its likely impact upon different sectors.

7.8 Over the LDF period, it is anticipated that the economic future of Exmoor will reflect its current character in that it will continue to be dominated by small scale activities which are focused upon the local context rather than serving a regional or national role. Within this context, it is anticipated that non-B Class activities would continue to be of particular importance within the local area and will set a basis for its continued well-being. This will have important implications in respect of the anticipated employment land needs – both in terms of the amount and the type of land that is required to meet local needs in the longer term. We consider the future employment land and space requirements in detail in Chapter 8.

7.9 The existing and future levels of economic activity in any area are dependant upon the availability of suitably qualified people. The attractiveness of Exmoor as a destination for people who choose to take early retirement is a key explanation for the high level of economic inactivity within the area. The number of early retirees within Exmoor is expected to increase in the future and will have implications both upon the potential levels of economic activity and the demand for key services such as healthcare. In both respects, this important demographic trend will have a bearing upon the future character of economic and employment activity within the National Park.

7.10 In addition, Exmoor is a very attractive location for those wishing to purchase second homes. A survey carried out by Exmoor National Park Authority in 2000 showed that 23% of new dwellings permitted between 1980 and 2000 were immediately used as second or holiday homes whilst a further 30% were occupied by retired people. Although this survey is now rather dated, there is no evidence to suggest that its conclusions are any less relevant. A very large number of people would also choose to buy older properties for holiday homes, thereby further adding to this pattern of activity and homeownership. The presence of a large number of second homes within the National Park will have an impact upon the demand for services (both in terms of the total demand and the distribution of demand over the year) and also upon the number of economically active persons that are available to work locally.

7.11 This, together with a lack of affordable housing for local communities has resulted in increased competition within the property market and has meant that there has been a trend of younger people moving away from Exmoor to find housing and increased levels of commuting in from the larger towns outside of the National Park.

7.12 Provision of more affordable housing to meet the needs of local communities will ensure that any new housing permitted will be occupied as permanent rather than as second homes and help those who are unable to access existing housing but who have strong connections with the area. It is important that, as now, affordable housing policies ensure that ‘local connection’ definitions include those who need to live close to their place of work in the area as well as those with long term residency connections.

7.13 In the context of normal housing market conditions, restrictions upon the level of open market residential development might have positive implications for employment development by reducing the level of competition for land and thereby controlling land prices. This might result in land being more affordable for employment related development and might thereby create the opportunity for an increased supply of commercial property. However, regardless of the value of land and the cost of development, new B class employment space is unlikely to come forward if there is no market demand for it. It is not expected that current patterns of limited demand for B Class employment space will change substantially in the future.

7.14 Whilst the natural environment in Exmoor provides substantial opportunities for the economy and for the wellbeing of residents and visitors, it is important to ensure that a mutual complementarity between economic prosperity and environmental qualities can remain. The existing planning policies provide a basis by which this objective can be achieved, principally by:

a Focusing new employment development within existing settlements;

b Ensuring that the scale of any development is appropriate to the local context; and,

c Supporting the conversion or adoption of existing buildings where this would be suitable.

7.15 It is important that this approach should continue in the future, in order to maintain and enhance the vitality of the settlements, protect the qualities of the natural environment and provide a sufficient basis for sustainable economic development.

Key Sectors

Non-B Class Sectors

7.16 The importance of non-B Class sectors as a component of the local economy in Exmoor has been emphasised throughout this report and it is anticipated that this important characteristic will be maintained in the future. Recognising this, it will be important for the National Park Authority to seek to promote and encourage key sectors such as agriculture, forestry and woodland management, tourism and leisure.

7.17 Although Experian Business Strategies forecast that employment levels in the agriculture sector will decline over the period from 2006 to 2026, it will continue to be a major economic sector and should be supported because of its employment capacity, its contribution to the viability of the local area and its role in the management of the natural environment. Opportunities exist to add value to agricultural and forestry products by encouraging increased levels of processing activities. Such processing activities should be undertaken in a manner that is compatible with the local area and so very large scale facilities would not be appropriate. However, whilst the scale of such activities is likely to be small, their development would be instrumental in retaining value within the National Park and in sustaining the wellbeing of the local agricultural and forestry sectors. In some parts of the country, the local processing of local produce has resulted in the development of a unique brand which has had added benefits, for example, in encouraging increased levels of tourism.

7.18 The tourism sector is, and is expected to continue to be dominant within Exmoor. It is forecast by Experian Business Strategies that by 2026, the hotels and catering sector will employ 1,750 people in the National Park – a 26.8% increase from the 2006 employment level. This equates to almost a third of employment in the National Park. Given this scale of importance, it is important that all appropriate efforts are made to sustain and to encourage this sector. The provision of a sufficient level of accommodation that is of an appropriate quality to meet the needs of visitors will be central to encouraging staying visitors and increasing the local value of tourism. In addition, the enhancement of existing and the encouragement of new activities and facilities for tourists and local people will play an important role in stimulating further growth in this sector. Visitors to Exmoor are attracted by its natural environment and the opportunity to engage in outdoors activities. New and improved visitor facilities should be based around this existing model but should be supported by high quality food and drink and arts and cultural venues.

7.19 Exmoor’s settlements have considerable qualities and offer important benefits to local people and visitors. In the interests of sustainability, the provision of food and drink and arts and cultural venues should be principally focused upon the settlements, an approach that would be important in maintaining their viability, well-being and in enhancing their attractiveness to visitors.

B Class Sectors

7.20 Not only do the largest settlements offer considerable advantages for tourism and leisure purposes, they also represent the most appropriate locations for future B Class business activities. Whilst the forecast level of increase in employment in B Class sectors – and the resultant land requirements – is very limited, opportunities do exist for the development of some B Class activities.

a The opportunity for increased levels of processing activity has already been identified by this report. Depending upon their location and scale, some processing functions would provide important benefits in terms of sustaining agricultural and forestry activities, retaining value within the local economy and increasing levels of activity. The potential to develop a local Exmoor brand of produce would further enhance the potential value of such functions and the benefits to the local economy. Although the overall scale of processing activities is likely to be limited, consideration should be given to the ways in which this might be promoted, for example through the encouragement of cooperation between operators, the development of skills and knowledge and the establishment of appropriate levels of physical capacity for these activities.

b Exmoor benefits from a very high quality environment and, as a National Park, the promotion of an understanding of its special qualities is a statutory requirement. This, together with the National Park Authority's objective to *'move towards a carbon-neutral National Park and help to tackle the global challenges to climate change'* (Exmoor National Park Management Plan objective) creates an important basis for the development of the environmental sector of the economy. Potential opportunities might include the promotion of more sustainable forms of energy (including renewable energy sources), carbon stores and pollution control mechanisms. Whilst this sector is again expected to remain relatively limited in scale its promotion would accord with the vision of the National Park Authority and could reflect the quality of the natural environment.

c The promotion of environmental technologies might also provide benefits to the local building sector. Whilst the level of new development is not expected to be substantial, a continuation of past trends in respect of conversions and changes of use is anticipated. This will provide opportunities for the local building sector and, in particular, those involved in specialist restoration of traditional buildings so that new employment premises might reflect the character of the local area. In addition, the specialist restoration/maintenance of traditional buildings (including housing) could become a larger part of the Exmoor economy if a pool of skilled labour was available locally. The enhancement of this sector would also be important in helping to enhance the attractiveness of the built environment in Exmoor. Although the building sector has been particularly hard hit by current economic conditions, it will be important to the provision of future capacity within Exmoor.

d The continued development of ‘lifestyle businesses’ is expected to be important in the future. These might include those that promote a certain lifestyle and also activities that are driven by a certain lifestyle, such as the preference for remote working which might be driven by a personal preference to live and work in Exmoor. This preference might result in a need to improve communications infrastructure (such as broadband connections) and to provide flexible work space, particularly for those people that chose to work from home. Increased levels of activity by people that are based elsewhere but work from within Exmoor will have the potential to deliver considerable advantages in terms of the dissemination of information, ideas, skills and a wider range of employment opportunities. A positive approach should be taken in order to encourage such activities and to realise the benefits that they might offer.

e Opportunities might also exist for the promotion of knowledge based and creative business activities within Exmoor. These opportunities would stem from the potential for the promotion of environmental technologies and lifestyle businesses, as well as the considerable opportunities that are associated with the quality of the natural environment. These activities are likely to start on a very small scale, possibly from people working from home, but might develop over time. The National Park Authority should seek to promote the enhancement of these sectors through the encouragement of cooperation between businesses, the development of skills and knowledge and the establishment of appropriate levels of physical capacity.

Conclusion

7.21 A number of important economic opportunities exist within Exmoor and, whilst it is anticipated that the local economy will continue to be dependant upon non-B Class uses such as agriculture and tourism, the potential does exist to promote new business sectors. It is expected that businesses in these sectors will reflect the general pattern within the National Park of small scale businesses which are focused upon the local area and which have limited space requirements. Indeed, the demand for home working space is likely to be an important characteristic as some of these new sectors emerge. In terms of specific business space, changes of use and conversions of existing premises is likely to be considerably more substantial than new build premises. The implications of this in terms of the need to allocate additional land for B Class development are considered in Chapter 8. The LDF should contain policies that reflect this local economic reality.

7.22 In seeking to promote an economic development strategy for Exmoor, it is important to accept and build upon links with the environment – viewing the local context as an opportunity and not a constraint. Consideration should also be given to the importance of promoting activities that would retain value within the local economy and reduce leakages to surrounding areas. This will require consideration to be given to the ways in which local barriers to growth might be overcome and improvements might be achieved in terms of communications and physical accessibility, skills, business mentoring and support and in the promotion of Exmoor as a high quality and successful location for business activities.

7.23 In seeking to enhance well-being within Exmoor, it will be important not to view the National Park in isolation. Consideration should be given to how it relates to the wider economies of West Somerset and North Devon. To this end, attention should be given to the ways in which experiences might be shared and stronger links might be developed at all levels – by the authorities, businesses and communities.

7.24 The analysis contained within this chapter has identified a number of key sectors that have the potential for expansion in Exmoor and which may provide the basis for a stronger and more diverse local economy. Many of these sectors also have potential for expansion in the adjoining districts and collaboration between the three authorities would enable a firmer platform to be established for long term sustainable development. Indeed, the potential benefits for Exmoor are particularly significant as it could realise the benefits that are associated with its proximity to larger centres such as Barnstaple and Minehead in addition to the benefits associated with its National Park status.

8.0 # Future Need for Employment Space

8.1 This chapter assesses the amount and type of employment space that is likely to be required in Exmoor over the period to 2026. Although our analysis in this report has demonstrated the greater significance of non-B Class sectors as a component of the local economy, this chapter considers changes in employment levels and the resultant space requirements of B Class sectors alone. This approach reflects the ODPM guidance, which requires employment land studies to focus upon the future requirements for B Class activities. Other work (that falls beyond the scope of this commission) could be undertaken to appraise the need for land for non-B Class purposes.

8.2 To estimate the future employment land requirements in Exmoor, a number of different factors and indicators have been considered, including:

a Forecasts of future employment growth in the area;

b Past trends of employment development and the take-up of employment space; and,

c Market demand, growth in the needs of local firms and future labour supply.

8.3 Some of these factors can pull in different directions and so a balance must be drawn between them.

Employment Growth

8.4 The starting point for our assessment of the future need for employment space in Exmoor National Park is an understanding of the likely changes in the job requirements of different sectors.

8.5 Forecasts of employment growth in Exmoor have been prepared by Experian Business Strategies Limited (Experian) specifically for this study. This analysis shows the changing levels of employment in 30 different economic sectors over a 20 year period from 2006 to 2026. These relate to the UK Standard Industrial Classification (SIC) code groups (UK SIC, 1992), as detailed in Appendix 3.

Forecast Methodology

8.6 The Experian forecast that has informed this study is based upon the latest macro-economic assessments (November 2008) and therefore takes account of the current economic decline and the changes in circumstances that have occurred since the previous set of data was prepared earlier in the year.

8.7 It is important to recognise that employment and economic forecasts tend to be more reliable at regional and national levels rather than at the local economy level – particularly in this case where the numbers associated with individual employment sectors are generally limited and a typically acceptable margin of error might result in a greater than average impact upon the forecast data. However, they can indicate the broad scale and direction of growth in different economic sectors over the longer term and do offer a valuable and reliable source of information upon which employment land reviews can rely.

8.8 At this current time of economic instability it can be particularly difficult to achieve reliable economic forecasts. Uncertainty regarding the need for and the implications of different intervention strategies can result in an inability to predict the scale or direction of change with any reliability. Although there is no clear intelligence on the likely severity or duration of the current recession the cyclical nature of the economy means that a future upturn is guaranteed. In this context, long term economic forecasting would have a greater reliability than short term forecasts as it would assume – and take account of – longer term cyclical trends which can even out individual periods of growth and decline.

8.9 Separate data on employment growth is not normally available at National Park level but rather on a local authority level as the lowest output area. However, Experian was able to prepare specific forecasts to inform our analysis for this study. The approach that was adopted in the preparation of employment forecasts for the National Park is set out below:

a The share of employment in each lower layer super output area falling inside the Exmoor National Park boundary was determined by Experian through the application of its spatial analysis software;

b These shares were applied to ABI workplace based employment data (30 standard industry divisions), giving an indication of employment in Exmoor National Park split between that in North Devon and that in West Somerset;

c Whilst the ABI is the most reliable source of workplace based employment data, one trait is that it can underestimate employment in the agricultural sector – one that is of particular significance in Exmoor. To correct for this, the ABI data was supplemented with data from the DEFRA survey of agriculture and horticulture, which provides more specific employment data for the sector.

d Experian local authority forecasts for North Devon and West Somerset were then applied to this data; and,

e Finally the data was constrained to total employment in Exmoor reported in the Census 2001.

8.10 In delivering the data, Experian have highlighted two points of note:

a Employment in the agriculture sector is shown by the forecast to fluctuate by around 750 jobs over the period. While this is still significantly less than the 1,300 jobs cited in ENPA's Statement on the Economy of Exmoor, it does suggest that agriculture, forestry and fishing accounts for approximately 15% of employment in the area, a level consistent with that reported in the 2001 Census.

b Still comparing to the 2001 Census, manufacturing accounts for notably less of total employment in the ABI data. The reason for this is that the ABI possibly misses out some very small scale light manufacturing operations.

8.11 In spite of these issues, Experian states that the ABI is generally the most reliable source of workplace based employment figures and that this, combined with the DEFRA agriculture data, provides the most accurate picture of current employment in Exmoor.

Employment Growth in Exmoor

8.12 In terms of overall growth, the number of jobs is expected to rise by 5.3% from 5,070 to 5,340 between 2006 and 2026. This limited level of change can be understood in the context of the current economic profile and the reality that the National Park is not expected to experience a significant increase in population or workers over the LDF period.

8.13 Adopted policies provide for new housing to meet the needs of local communities. The definition of 'local' includes people who may not meet the residency requirements but who need to live close to their place of work in the National Park. Those workers who can afford to do so have the opportunity to buy or rent existing housing within the National Park. In spite of this, and depending upon the scale of housing development, the anticipated increase in the number of jobs within the National Park might result in increased levels of in-commuting from surrounding centres.

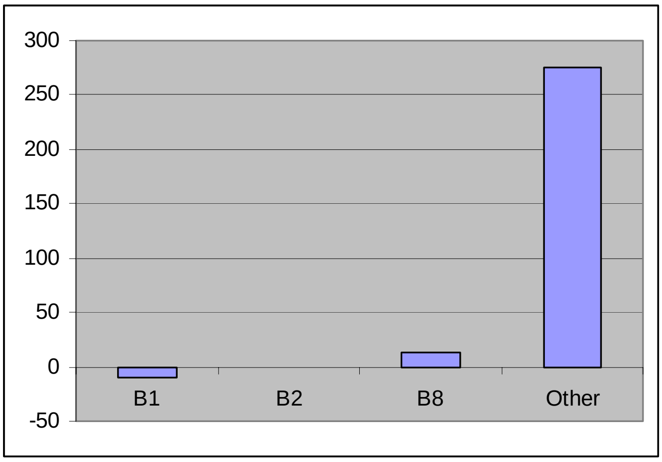
8.14 The achievement of economic growth is dependant upon being able to attract and retain suitably qualified workers. Consideration will therefore need to be given to the relationships between jobs in Exmoor and workers that live in the surrounding areas and the potential to ensure sustainable economic growth that respects the character of the National Park.

8.15 The expected level of change in each employment sector is set out below:

	2006-2016	2006-2026
Office (B1)	*0*	*-10*
Manufacturing (B1c/B2)	*7*	*0*
Warehousing/Distribution (B8)	*-26*	*13*
Total B Class Jobs	***-19***	***3***
Non-B Class	*189*	*276*
Total Jobs	***170***	***279***

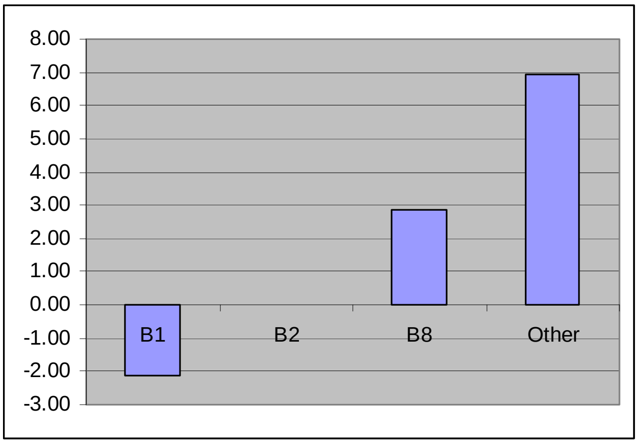
Source: Experian Business Strategies Limited/NLP, 2008

Table 21 Employment Change in Exmoor, 2006-16 and 2006-26



Source: Experian Business Strategies Limited/NLP, 2008

Fig 20 Employment Change in Exmoor, 2006-26



Source: Experian Business Strategies Limited/NLP, 2008

Fig 21 Percentage Change in Exmoor Employment, 2006-26

8.16 The employment forecasts demonstrate the extent to which the number of jobs within Exmoor National Park will remain very low and that the economy is expected to continue to be dominated by non-B Class sectors.

8.17 In the short term, overall employment is expected to fall from 5,300 in 2008 to 5,230 in 2009 and 5,190 in 2010. Over this short term period, it is forecast that 68 B Class jobs will be lost (a loss of 5.9%), compared to 52 non-B Class jobs (a loss of just 1.3%). Whilst the losses will be felt throughout the economy (as consumer expenditure falls), this demonstrates that, as will be the case in other areas, the B Class sectors are expected to be harder hit by the impacts of the current recession.

8.18 By 2016, it is expected that 19 jobs would have been lost from the B Class sectors (a loss of 1.7%) and that by 2026 just 3 new jobs would have been created in B Class sectors (an overall increase of 0.3%) compared to the number of jobs that exist in 2006.

8.19 By contrast, over the period from 2006 to 2026, a total of 276 jobs are expected to be created in non-B Sectors (an increase of 6.9%). This accounts for 95% of all job growth within Exmoor and is dominated by two sectors:

a Hotels and catering (tourism) – a broad indication of the expected continued importance of Exmoor as a holiday destination; and,

b Health and social care – an implication of the expected substantial increase in the elderly population.

8.20 These forecasts will have important implications upon the space requirements which we discuss in more detail below.

Comparison with Regional Forecasts

8.21 The employment forecasts for Exmoor are substantially lower than the level of employment growth that was forecast for the *South West Region in the Demand and Supply of Employment Land, Sites and Premises in South West England* document of January 2007. This suggested that the number of jobs in the region would increase by 464,000 to 3,077,000 – an increase of 17.8%.

8.22 The regional analysis shows that that the growth will be particularly dominated by an increase in office based employment (169,000 additional jobs – 26.91% increase) and non-B Class employment (295,000 jobs – 21.25% increase). The implication of these figures is that by 2026, non-B class sectors are expected to account for 54.7% of total employment in the South West region (up from 53.1% in 2006) whilst office based employment is expected to account for 25.9% of regional employment (up from 24.0% in 2006).

8.23 By contrast, the relative regional importance of B8 activities is expected to decrease over this period from 8.4% of regional jobs to 8.1% whilst the B2 sectors are expected to contract from their current position of accounting for 14.5% of the region's jobs to the future position of accounting for 11.3% of jobs.

8.24 In seeking to understand these regional figures and their relationship to the growth forecasts for Exmoor, it is important to bear in mind the following considerations:

a The South West regional figures were published in January 2007 – a time at which the national economic prospects were still viewed as being strong and recession was not expected. They are therefore based upon now out-dated figures and assumptions which do not reflect current conditions. This is likely to have a bearing on their ability to point to the likely level of economic change over the period to 2026.

b Notwithstanding the differences in the forecast levels that are due to the changes in the national economy, it is reasonable to expect that the growth figures for the South West region would be substantially higher than those for Exmoor National Park. The figures reflect the greater strength and diversity of the region, particularly when compared to the Exmoor economy and the stated aspirations of the Regional Economic Strategy (RES). Whilst the RES does reflect the importance of seeking to secure growth within acknowledged environmental limits in order to bring prosperity to the region, it focuses upon the role of the key centres in helping to deliver growth. This approach is also set out in the RSS which emphasises the role of Strategically Significant Towns and Cities as the most appropriate locations for growth. Major centres such as Swindon, Bristol, Exeter and Taunton will be particularly important in helping to deliver the growth in B1 office employment that is anticipated by the forecast figures.

c The higher growth figures for the South West are more deliverable in the context of past economic and development trends. The regional economy has consistently grown at a faster rate than that of Exmoor. This is due to a number of factors including the greater opportunities for development and investment in a broader range of sectors and the higher profile of many other parts of the South West region. Whilst the employment forecasts for the South West region must now be viewed in the context of changing global circumstances, it is entirely reasonable to anticipate that the regional economy will continue to grow at a faster rate than that of Exmoor National Park.

National Economic Growth

8.25 As set out in the introduction to this section, economic forecasts tend to be more reliable at a national level, although the current economic recession does make (particularly) short term forecasts problematic. However, against this context and in the light of the expectation of future recovery, it is noteworthy that the April 2009 Pre-Budget Report suggested that the UK economy will by 3.5% in 2009 but that the economy will grow by 1.25% in 2010 and 3.5% annually from 2011.

8.26 Whilst these figures represent a downward revision of those contained within the 2008 Pre-Budget Report, other forecasts have predicted a deeper and longer-lasting recession. The Bank of England anticipates a 2% decline in GVA during 2009 and consumer spending is expected to decrease throughout this year and even once recovery starts, lending is expected to remain tightly controlled. Unemployment is expected to increase to over 3 million in 2009.

8.27 The reality of this forecast and its implications upon the local economy in Exmoor (and elsewhere) must be the subject of on-going review and scrutiny.

Employment Based Space Requirements

8.28 An appreciation of the future employment requirements for each broad category is important in understanding the nature and scale of changes within the local economy. However, the translation of job forecasts to land requirements in the manner detailed in the DCLG Employment Land Review Guidance Note represents an important basis by which the implications of growth might be fully recognised.

8.29 As has been shown, the level of growth in Exmoor is expected to be very small. Reflecting the current profile of the National Park, a key future trend is expected to be the continued dominance of non-B Class employment sectors, the limited role of traditional B Class employment activities and the on-going significance of small scale business activities.

8.30 The consequence of this is expected to be a limited requirement for future B Class employment development within Exmoor. The purpose of this section is to appraise the level of growth that is likely to be required. In seeking to quantify the employment land requirement, a number of considerations should be taken into account, as follows:

a The relative proportion of B Class and non-B Class jobs within a local area is a key characteristic of the Exmoor economy and demonstrates that the future economic well-being of the National Park will rest to a very large extent upon those activities that do not generate a specific employment land requirement.

b Within any employment sector, additional staff can often be accommodated within existing premises and so a growth in B Class activities would not necessarily generate a requirement for additional employment land.

c In addition, within an existing employment area, there may be potential for new infill buildings that would satisfy an employment land demand but without having any impact upon the strategic land requirement.

d Different business sectors will have very different employment land requirements even though they might employ the same number of people. This will have a substantial impact upon the overall employment land requirements and shows that this is dependant upon the type of jobs as well as the number of jobs that are to be created.

e Similarly, the amount of land for a particular economic activity will vary according to location. For example, the density and land requirement of town centre offices will differ to that of a more isolated, free-standing development.

f The reuse of vacant land and premises may contribute towards a reduction in the amount of new employment land that may be required, albeit that a certain level of vacancy (typically about 10%) is necessary to ensure the efficient and effective operation of the market.

g New employment premises might be provided by the reuse or conversion of existing buildings rather than through the development of new sites. This type of development has been a key characteristic of past trends in Exmoor and is expected to continue. It will have a bearing upon the approach that is taken to the identification of sites for employment development within the LDF as it is not normally appropriate to allocate land for conversion and such uses tend to therefore come forward as windfall releases.

h Conversely, the loss of employment land in a particular sector may not necessarily result in the release of land. Job losses might arise as a result of the automation of a particular process or changes in the economic circumstances of a company (which may in turn be affected by macro-economic trends). This would not necessarily result in less land being required or, therefore, in the release of surplus premises or land. The release of land might only be possible through the reconfiguration of operations and the redevelopment of the site, something that would not necessarily be appropriate and may not be viable at a time of economic difficulty. A more typical implication of job losses (where the business remains in operation) would be a slightly less efficient use of land in terms of employment density. Even where a business closes entirely, the site would not necessarily be expected to be released for alternative land uses. For this reason, our analysis does not allow for the release of land in response to the projected slight reduction in Class B1 office employment. Indeed, the protection of employment land is likely to be particularly important in Exmoor in the future and regard should be given to ensuring that the existing policy framework that provides for the retention of B Class employment spaces is maintained so that the long term economic well-being of the National Park might continue to be based upon its existing portfolio.

8.31 The land requirements associated with the forecasts set out in the first part of this chapter can be ascertained by using typical ratios of jobs to floorspace for the different B Class uses. NLP has prepared a set of ratios, drawing upon various sources including published studies, operators' reports and information obtained directly by operators. These ratios have been applied in a range of different locations and have been found to be reliable and robust.

8.32 The ratios that we apply are set out below:

Use	*Ratio*	*Notes*
Offices	*1 job per 20 sqm*	*This ratio takes account of the expectation of smaller-scale office units rather than larger, business park or City Centre headquarters facilities.*
Manufacturing	*1 job per 35 sqm*	
Distribution	*1 job per 50 sqm*	*Larger-scale strategic distribution would have a ratio of 1 job per 80sqm, although this type of activity is not suited to Exmoor National Park.*

Source: NLP

(The DCLG guidance assumes 1 office job requires 18sqm floorspace, 1 manufacturing job requires 31 sqm and 1 warehousing job requires 40sqm).

Table 22 Jobs to Floorspace Ratios

8.33 Floorspace requirements can be translated into land requirements by applying average plot ratios. In this case, an average plot ratio of 0.4 is used so that a 1ha site would be required to accommodate 4,000sqm of employment floorspace. No specific allowance has been made for higher density office developments as this is not considered appropriate or feasible within the context of the National Park.

8.34 In view of the very small changes in job levels, it follows that the floorspace and land implications will also be very limited. The forecasts indicate that by 2026, 0.05ha less land would be required for office purposes and that an additional 0.16ha would be required for (small scale) distribution purposes. No additional land is likely to be required for manufacturing uses.

Use Class	*Job Change*	*Floorspace Density (sqm/job)*	*Floorspace Requirement (sqm)*	*Plot Ratio (sqm/ha)*	*Land Requirement (ha)*
B1	*-10*	*20*	*-200*	*4,000*	*-0.05*
B2	*0*	*35*	*0*	*4,000*	*0*
B8	*13*	*50*	*650*	*4,000*	*0.1625*
Net	***3***	***-***	***450***	***-***	***0.1125***

Source: Experian Business Strategies Limited/NLP

Table 23 Gross Employment Floorspace/Land Requirements in Exmoor, 2006-2026

8.35 As set out in paragraph 8.31, a proportion of job growth can be accommodated within existing premises whilst the loss of jobs would not necessarily translate into an equivalent loss of employment land.

8.36 Despite an anticipated loss of some Class B1 jobs in Exmoor, we would not anticipate that there would be a substantial net release of office premises over the study period. This is not to say that there will be no reduction in the level of demand for office premises, nor that there will be no new office development activity within the National Park (either by way of changes of use, conversions or new buildings) but that there should be no requirement to plan for a strategic reduction in the amount of office land within the National Park. It is not anticipated that there will be an increase in the demand for B1 offices and for this reason, we have adjusted the B1 floorspace and land requirement to show that there will be no requirement to provide for any additional land.

Safety Margin

8.37 For planning purposes, it is normal and prudent to apply a fairly generous allowance for additional land to come forward to:

a Provide for a margin of error in the forecasting process;

b Allow developers and occupiers a reasonable choice of sites;

c Enable normal market movement with relocations and turnover of firms;

d Give some flexibility whilst old premises are redeveloped and new premises are coming forward;

e Allow for some limited release of existing employment sites to other uses;

f Allow for some sites not coming forward; and,

g Allow for the implementation of policy objectives relating to growth of particular economic sectors.

8.38 In many employment studies, it has been common to allow an allowance of up to 50% above the estimated land needs figure to provide this safety margin. In this case, however, such a high safety margin is not considered to be necessary. This is because of the nature of the local economy and the limited level of anticipated growth and demand for development which mean that many of those factors which would ordinarily necessitate a high safety margin are not likely to be particularly prevalent within the National Park. For example, in the context of a small level of economic activity, there may not be much need to identify a large amount of additional land to provide for choice or to provide flexibility whilst premises are being redeveloped.

8.39 Our analysis ordinarily allows for approximately 10% of new jobs to be accommodated within existing occupied premises or as spaceless growth. This figure is likely to vary according to the specific nature of any local economy and is considered to be a conservative estimate. A 10% allowance would equate to 1.3 jobs. In view of the very small land and floorspace requirements that are anticipated in Exmoor, the importance of allowing for an element of spaceless growth within the National Park would run against the application of a safety margin and might suggest that the land requirements may actually over-estimate the floorspace and land requirements associated with job growth in Exmoor. The nature of business activity in Exmoor is that a large amount of activity is undertaken by micro-business from small premises, including people's homes. The idea of home working would support the concept of spaceless growth whilst the very small number of additional jobs that are expected to be created in Exmoor suggests that these might be accommodated by businesses within their existing premises.

8.40 In the light of this, we have adopted two scenarios – one in which no safety margin is applied and an alternative scenario which applies a 25% safety margin. The implications of these alternative scenarios are set out below. The resultant land requirements are very limited in each case.

Use Class	Scenario 1: 0% Safety Margin		Scenario 1: 25% Safety Margin	
	Floorspace Requirement (sqm)	Land Requirement (ha)	Floorspace Requirement (sqm)	Land Requirement (ha)
B1	0	0	0	0
B2	0	0	0	0
B8	650	0.1625	812.5	0.2
Net	**650**	**0.1625**	**812.5**	**0.2**

Source: Experian Business Strategies Limited/NLP

Table 24 Gross Employment Floorspace/Land Requirements in Exmoor, 2006-2026

Scenario Testing

8.41 The very low levels of employment land requirement in Exmoor are due to the nature of the local economy, the dominance of non-B Class sectors and the limited level of anticipated B Class job creation.

8.42 In order to test the employment land implications detailed above, we have established an alternative growth scenario. This assumes a slightly greater level of B Class job growth. Rather than losing 10 jobs over the period to 2026, it is assumed for the purposes of this scenario test that 10 new jobs will be created in B Class sectors over this period. It is furthermore assumed that this accounts for 50% of B Class job growth and that the remaining 50% of growth is split equally between B2 and B8 activities. This 'B1 led' scenario is based upon the recent pattern of employment land development which has been oriented towards a greater proportion of small scale office space. It is also based upon our analysis of the potential key B Class growth sectors in Exmoor which tend to be include more B1 sectors than other activities.

8.43 The employment land implications of this scenario are set out below:

Use Class	Job Change	Floorspace Density (sqm/job)	Floorspace Requirement (sqm)	Plot Ratio (sqm/ha)	Land Requirement (ha)
B1	10	20	200	4,000	0.05
B2	5	35	175	4,000	0.04
B8	5	50	250	4,000	0.0625
Net	**20**	**-**	**625**	**-**	**0.1525**

Source: Experian Business Strategies Limited/NLP

Table 25 Alternative Scenario Employment Floorspace/Land Requirements in Exmoor, 2006-2026

8.44 The assumed (very small) additional employment land requirement can be set in the context of the two safety margin scenarios set out above. The implications of this are set out below and the resultant land requirements are very limited in each case.

	Scenario 1: 0% Safety Margin		Scenario 1: 25% Safety Margin	
Use Class	Floorspace Requirement (sqm)	Land Requirement (ha)	Floorspace Requirement (sqm)	Land Requirement (ha)
B1	200	0.05	250	0.0625
B2	175	0.04	218.75	0.055
B8	250	0.0625	312.5	0.08
Net	**625**	**0.1525**	**781.25**	**0.1975**

Source: Experian Business Strategies Limited/NLP

Table 26 Alternative Scenario Employment Floorspace /Land Requirements in Exmoor, 2006-2026

8.45 Although it is based upon an assumption that slightly more B Class jobs will be created in Exmoor over the LDF period, this alternative scenario actually results in a lower B Class employment requirement. The difference is not, however, materially different and serves only to support the conclusion set out below that there is no need to allocate any land for employment development in Exmoor.

Assessment of Past Trends

8.46 Long term take-up rates of employment land can also provide a good basis for informing future land needs, particularly where there have not been any undue constraints on the supply of or demand for land.

8.47 The very small level of employment development in Exmoor over the period between 2000 and 2008 is not considered to have been the result of structural problems relating to the availability of land or any abnormal demand-side difficulties. Rather, the patterns of activity that have taken place over this period can be viewed as typical for Exmoor – a small amount of development, relating to small scale premises and primarily focused upon the conversion of existing premises rather than new building activity.

8.48 No land has been allocated for employment development over this period and the development that has occurred has thereby been the result of windfall releases. There is no evidence to suggest that these patterns of development have in any way served to constrain the levels of economic activity within Exmoor. Similarly, there is no evidence to suggest that the future pattern of demand for premises or activity would necessitate a step change in the identification or delivery of land for B Class functions.

8.49 The evidence that is presented by an analysis of past trends supports the future employment forecasts set out in this chapter and points towards a continuation of a limited release of land for small scale developments and a continued reliance upon the conversion of existing buildings. This evidence all highlights the continued reliance upon windfall releases of land and premises rather than to a need to specifically allocate large amounts of land for new development.

Planning Requirement for Employment Land

8.50 Drawing together the above considerations, it is evident that the level of future employment development within Exmoor will be very limited. The forecasted small level of employment growth translates to a small requirement for additional business space, a trend that is clearly supported by the evidence of what has happened in the past.

8.51 It is likely that much of the new employment space that will be created within the LDF period will result from the conversion of existing buildings. At this stage, it is not possible to ascertain which premises are most likely to be converted and so the allocation of sites that are likely to come forward for employment purposes cannot be achieved with any acceptable degree of accuracy.

8.52 In this context, there is a concern that the allocation of land or premises for employment purposes would not serve a positive economic function as there could be no realistic assurance that such land would come forward for development within the Plan period. In this context, additional (non-allocated) land might also be required to come forward for employment purposes, resulting in an inefficient pattern of development and land use.

8.53 Accordingly, given the character of the local area, the nature of the economy, the scale of past trends and the forecasts of future employment growth, it is not considered that there is any need to allocate land for employment development.

8.54 Rather than allocating land for development, the Local Development Framework should contain policies that provide a basis for the release of appropriate sites and premises for development in response to emerging needs. This approach would enable small sites to come forward throughout the National Park in a manner that reflects the character of the local economy and emerging requirements. It will reflect the reality of local circumstances and the fact that a continuation of past trends is expected to occur. In so doing, it will provide an appropriate response to the character of the National Park.

9.0 # The Role of Non-B Class Sectors in the Local Economy

Introduction

9.1 An important characteristic of the Exmoor economy is its reliance upon non-B Class sectors. Although the DCLG guidance requires Employment Land Reviews to examine only the B Class sectors, the local importance of 'other' sectors necessitates a broader approach to be adopted by this study. Not only is this approach rooted in an appreciation of the local context in Exmoor, it also reflects the strategy contained within the emerging RSS for the South West which emphasises the economic importance of non-B class employment sectors such as health, leisure, tourism and education.

9.2 This chapter considers three main non-B sectors: agriculture, the public sector (which incorporates the National Park Authority, education and health) and retailing. Given the importance of tourism as the key economic sector within the National Park, we consider it separately in the following chapter. In reviewing these sectors, this chapter does not seek to quantify the amount of land that is required to meet future development needs.

Agriculture

9.3 Farming is a dominant land use on Exmoor and it plays an important role in helping to manage and enhance the quality of the landscape and the environment. It is also a major contributor to the local economy and accounts for almost 15% of all jobs within the National Park. However, despite a history of intervention and support, the farming industry on Exmoor and across the Country is facing increasing challenges. In recent years, these have included increasing levels of competition, interest rate fluctuations, changing levels of subsidy and a number of major health difficulties such as Foot and Mouth Disease, BSE and bovine TB.

9.4 The consequence of these challenges has been a decline in traditional forms of farming on Exmoor. Employment levels within the farming industry have fallen, a trend that is expected to continue in the future such that Experian Business Strategies forecast that by 2026, it is expected to account for less than 12% of local employment. Of particular concern is the fact that the average age of farmers on Exmoor is now more than 55 and that less than 4% of farmers are under the age of 35 (The State of Farming on Exmoor, University of Exeter, 2004). This raises substantial concerns about the future well-being of this important sector, although the employment trends do show that it is expected to continue to be a major provider of jobs in Exmoor and that the agricultural sector will continue to be substantially more important locally in Exmoor than at the national scale.

9.5 These employment trends in Exmoor can be set against changes in agricultural employment on a national level. In 2007, only 1.7% of the UK working age population was employed in agricultural activities (Agriculture in the United Kingdom, DEFRA, 2007). There is clear evidence to show that this figure is declining, demonstrating that this primary industry is facing a period of considerable difficulty. Despite evidence of its ongoing contraction, these national trends highlight the relative importance of agriculture to the local economy in Exmoor and the need to ensure that it can be protected, so as to safeguard the wellbeing of the wider economy.

9.6 In addition to changes in the number of people employed in agricultural activities in Exmoor, another important recent structural change has been a decline in medium sized farms and an increase in the number of smaller (residential) holdings. *The State on Farming on Exmoor* report, which was produced in 2004 by the University of Exeter's Centre for Rural Research states that many of these smaller farms have a relatively low dependency upon agriculture as a source of income. This trend of farm break-ups and a lower dependency is recognised to have implications for the scale and nature of the contribution of agriculture to the local economy in Exmoor. This research has also highlighted the importance of agricultural diversification, both as a mechanism by which farm-related incomes can be increased and also in further decreasing the direct importance of the agricultural industry as a component of the local economy.

9.7 At the other end of the scale, it is recognised that a relatively small number of operators of large farms are responsible for the management of a very large proportion of agricultural land in Exmoor. Many of these large scale agricultural operators enjoy considerable wealth and high levels of income.

9.8 The importance of agriculture and other land-based activities is recognised in the Exmoor National Park Management Plan which establishes a vision that :

"By 2020, profitable and competitive farming, forestry and land management enterprises in Exmoor National Park are playing a lead role in conserving and enhancing Exmoor's landscape, wildlife and cultural heritage, and are making a major contribution to achieving a carbon-neutral National Park".

9.9 In order to achieve this desired outcome, the Management Plan sets four objectives that aim to:

a Contribute to conservation of the landscape;

b Support sustainable and profitable farming;

c Ensure that the effects of climate change are mitigated; and,

d Ensure the existence and viability of native farming animals.

9.10 These aims highlight that the Management Plan is seeking to further develop farming as a viable component of the local economy and as a key activity in the on-going management of the natural environment.

9.11 An associated sector which can be considered alongside farming is woodland management and forestry. Employment levels in this sector are included within the broader category of agriculture but it is an important local sector in its own right which makes a contribution to environmental management and to the promotion of the landscape and the diversity of habitats. It also makes a contribution to leisure and tourism activities as woodland environments can be used for a range of outdoor recreational purposes. In addition, the output from Exmoor's forestry sector is used for a range of purposes including wood fuel and manufacturing. As with farming in Exmoor, the opportunity exists for the longer term development of processing activities so that a greater return might be generated from the woodland resources. However, in seeking to promote this type of activity, it will be important to ensure that the scale and type of activity is appropriate to the local context.

Barriers to expansion

9.12 In spite of these aspirations for the enhancement of the local agricultural economy, our consultation of those involved in the agriculture industry in Exmoor has highlighted that many farmers have not expanded in the past 5 years and that they do not envisage that they will expand at any point over the next 5 years. Almost three quarters of the respondents stated that they consider that their potential to expand in the future is constrained by a number of barriers such as:

a **Income constraints**. A concern regarding the existing and future viability of farm businesses was highlighted as the principal barrier to expansion and a primary concern amongst those involved in the farming sector. Rising costs, together with falling incomes and increased levels of competition means that many farmers could not afford the additional investment associated with growth. The significance of this as a concern and a potential barrier to growth is recognised to be even more severe at this time of economic decline.

b **Disease**. Past experiences of disease within animal herds and concern regarding the future health of animal herds represents a major concern in the farming community and is one consideration that is taken into account by those that are considering possible farm expansion. In many cases, the possible financial and other implications of disease are viewed as so substantial as to militate against any potential benefits of growth.

c **Environmental constraints**. Agriculture serves an important land management function and has the capacity to contribute towards the improvement of landscapes, biodiversity and public access. However, whilst this suggests a positive role for the farming industry, a number of respondents noted that sensitivity of the natural environment does represent a constraint that can serve to limit the potential for growth.

d **Bureaucracy**. The level of additional work relating to the administration of larger farm holdings was recognised by a number of respondents as a significant constraint and a potential barrier to growth. This concern relates both to the work involved in running the firm and in engaging with regulatory and other bodies.

e **Planning restrictions**. The use of land for agriculture and forestry purposes does not constitute development and does not require planning permission and certain agricultural developments benefit from Permitted Development Rights. For those actions that do fall within the scope of the planning process, the existing Local Plan contains policies relating to the promotion of agriculture and forestry in appropriate locations and farm diversification. Against this context, it is a matter of some concern that planning restrictions have repeatedly been identified as a barrier to farm growth. This is an issue that should be considered as part of the LDF preparation process and it might be appropriate to seek to increase the awareness and understanding of the planning system amongst those involved in the farming sector.

9.13 Despite these concerns, it is noteworthy that the consultation revealed a general perception that the farm business would not be any more successful if it was located outside the National Park. This is important in demonstrating that the statutory implications associated with Exmoor's status as a National Park are not seen to have created any specific impacts upon the well-being of farms.

Diversification

9.14 Farm diversification has been an important trend within the farming sector in Exmoor and is permitted by Policy A3 of the Exmoor Local Plan, subject to a range of criteria that seek to ensure that the proposals are appropriate to the local context. Although farms have diversified into a wide range of different activities, tourism has been a particularly important source of activity. This has included accommodation, and restaurants / tea rooms. A large number of farmers have also diversified into game shooting activities – a sector that serves both local people and tourists.

9.15 A report into the role of Game Shooting in Exmoor was prepared by PACEC in 2006. This highlighted the economic importance of this sector – stating that game shooting on Exmoor contributes £18 million to the UK economy – and that it accounts for a 'substantial' number of jobs in the local area. The report indicated that there were 100 gamekeepers (70 full-time equivalents) employed on Exmoor, that 1,600 direct jobs in Exmoor are supported by shooting activities (260 full-time equivalents) and that game shooting on Exmoor supports 680 full-time equivalent jobs across the UK.

9.16 The game shooting sector is recognised to be particularly important in providing an economic return to upland farms and woods where farming margins are lower and alternative sources of income might be more difficult to identify. It can also be significant in providing a source of income for other local activities such as accommodation, particularly during the winter months, thereby demonstrating the potential opportunities for links between different economic sectors in Exmoor. Although recreational shoots are generally considered to be ancillary to agricultural activities it is important that they do not detrimentally affect the special qualities of Exmoor National Park, which include a sense of tranquillity, as these underpin the environmental economy.

9.17 Farm diversification has also led a number of farmers to become involved in the provision of stables and dog kennels. This type of activity provides a clear link back to the land and can often be provided relatively easily within existing farm premises. A final form of activity that has been related to farm diversification is small scale manufacturing. In many cases, this comprises the processing of produce from the farm and has the capacity to be important in providing added value to agricultural and forestry activities, thereby offering a substantial economic benefit. This represents a major opportunity for future economic development although it is important to ensure that any manufacturing activities that do take place on farms do not have a detrimental impact upon the character of the local environment or the viability of the farm itself.

Conclusion

9.18 It is clear that the issues facing farming today are not generally planning issues and that they are mostly wider ranging matters that have an impact at the national and international levels. To this end, factors such as the trade cycle, reduced demand for goods, volatility in prices for goods and increased costs are also impacting upon farming in Exmoor National Park. However, in spite of this and whilst the planning system does not control many agricultural activities, planning policy does have a role to play in farming at the local level, particularly when it comes to the implementation of the some of the objectives set out by the Management Plan, such as protecting the landscape. In particular, planning policy impacts on how the farming community can diversify into other areas of business.

9.19 Diversification has a major role in farming in Exmoor today and whilst the majority of diversification relates to the tourism sector (in particular tourism accommodation), other activities also have an important role to play. There are many options for the continued growth in diversification, for example to encourage more tourism, perhaps for niche markets or to promote a greater level of processing activity. These might be important in helping to increase the viability of farm businesses and the local economy. However, there is a concern that, if not adequately controlled, diversification could actually perpetuate the decline of the agricultural sector rather than helping its survival. It is therefore clear that a balance must be struck between encouraging diversification and maintaining the traditional farming base in Exmoor.

9.20 Undertaking a comprehensive review of the farming industry in Exmoor is essential and must be undertaken in order to truly realise the impacts of national trends at the local level and also to realise the impact diversification has had and its role in the future.

9.21 In addition, it will be important to ensure that policies within the LDF support and help to enhance the agricultural economy within Exmoor. In particular, consideration should be given to the establishment of policies that seek to:

a Continue to recognise and to encourage the role of agriculture as a manager of the natural environment;

b Facilitate appropriate farm diversification schemes, subject to criteria relating to the site and the proposal;

c Encourage the development of value-added processing activities at an appropriate scale and in appropriate locations; and,

d Ensure that farm diversification represents a positive response to changes in the farming sector and that it does not serve to undermine the sector itself. This important aim can be achieved through the monitoring of changes in output, employment, incomes, farm size, and the range of activities undertaken by farmers.

Public Sector Services

9.22 The public sector is a relatively important provider of jobs within Exmoor National Park. According to figures provided by Experian Business Strategies, 950 people were employed in the public administration and defence, health and education sectors in 2006. Whilst there might be some health and education jobs within the private sector, these are not expected to be particularly substantial in number and so these sectors are viewed as a reliable proxy of public sector employment. A small proportion of public sector jobs are included within the B1 category of employment growth but the majority of jobs in the public administration, health and education sectors fall within the category of non-B class jobs.

9.23 Experian Business Strategies show that public sector employment in Exmoor accounts for 18.7% of all jobs within the National Park and that the number of public sector jobs is expected to rise by 8.4% to 1,030 by 2026. This level of increase is greater than the average rate of increase for all jobs within the National Park (5.3%).

Exmoor National Park Authority

9.24 The National Park Management Plan recognises that the Authority is relatively small in terms of budget and staffing – *"approximately equivalent to a medium sized secondary school"*. Despite being relatively small in comparison to many local authorities, the National Park Authority is a major employer within the National Park (although it is important to note that a proportion of National Park Authority jobs are categorised within Class B1 rather than as non-employment land related jobs) and it performs a very important role in achieving the statutory requirements for the National Park and in delivering the vision for the maintenance and enhancement of the natural and cultural qualities of the National Park.

9.25 Given its small size and the statutory requirements that flow from its status as a National Park, ENPA does not perform the same functions as District or Borough Councils. Its relationship with West Somerset and North Devon District Councils and Somerset and Devon County Councils means that many 'typical' local authority services are provided by these principal authorities.

9.26 The key functions undertaken by the National Park Authority relate to the management and preservation of the Park. They include:

a Planning services;

b Farm and countryside services;

c Recreation and access services;

d Ranger services;

e Wildlife, woodland and landscape management and advice;

f The provision of environmental education in school and on field visits; and,

g The provision of National Park Centres throughout the National Park which are there to help local people as well as visitors.

9.27 According to the forecasts of employment growth in Exmoor that have been prepared by Experian Business Strategies for this study, the level of employment within the Public Administration and Defence Sector (i.e. Exmoor National Park Authority) is not expected to change over the LDF period to 2026. However, there is no doubt that the Authority will continue to be critical to the wellbeing of the National Park and to the continued enhancement of the natural beauty, wildlife and cultural heritage of the area and to the achievement of greater levels of the understanding and enjoyment of its special qualities by the public.

Education and Healthcare

9.28 Approximately 90% of public sector jobs within Exmoor National Park fall within the education and healthcare categories. It is important to recognise that ENPA is neither a local education authority nor a local health board and so the provision of these services falls outside of its remit. As such, the policies of ENPA will not influence these sectors and so a precise forecast of likely changes can be difficult to achieve.

9.29 The forecast of employment growth in Exmoor that was undertaken by Experian Business Strategies identifies the following changes in the number of jobs in the education and healthcare sectors over the period from 2006 to 2026:

	2006	*2026*
Education	*350*	*330*

Healthcare and Social Care	*500*	*600*

Source: Experian Business Strategies Limited/NLP, 2008

Table 27 Employment Change in Healthcare and Education Sectors in Exmoor, 2006-26

9.30 Future changes in the provision of education and healthcare facilities (and in the level of employment in each of these sectors) are dependant upon changes in policy. Over the LDF period, potential changes in Government and in political priorities in respect of investment in public sector services may have a bearing upon the availability of funding that is available for education and health facilities at the local level. Changing policy aspirations within the local education authority and local health board might also impact upon the level of service provision within Exmoor in the future. The decisions of the local education authority and local health board may flow from or might be independent of Central Government considerations. Although it is important to recognise the potential issues arising from policy changes, it is obviously not possible to gauge the direction or likely implications of any changes to national or local policies or the extent to which these might result in a deviation away from the employment forecasts that are detailed above.

9.31 The level of provision of education and healthcare over the period to 2026 will also be influenced by the need for services. This is determined by demographic changes over time. The changing employment levels within the education and healthcare sectors accord with the trends that would be expected in view of the anticipated ageing of the local population. It is a matter of fact that older members of the population have a greater requirement for healthcare services than younger people. Although Exmoor-specific population projections are unavailable, the ONS, 2006 based sub-national population projections show that the number of people that are over 65 years in age in West Somerset and North Devon is likely to increase by over 50% between 2006 and 2026. Given the popularity of Exmoor as a retirement destination, an increase in the retirement population of this order (or a greater level of magnitude) would be expected. This is likely to place increasing pressure upon local health facilities, necessitating an increased staffing requirement.

9.32 By contrast, a much lower level of anticipated change in the number of children in Exmoor is likely to have a much smaller impact upon the staffing requirement within the education sector. Interestingly, the forecast change in the number of people aged between 0 and 19 is very different in North Devon and West Somerset:

	0-4	5-9	10-14	15-19
North Devon	21.28	26.00	13.8	12.3

West Somerset	0.00	0.00	-10.5	-9.5

Source: ONS, 2006 based sub-national population projections

Table 28 Projection - Percentage Change, 2006-2026

9.33 In the context of these figures, the anticipated reduction in the number of jobs in the education sector in Exmoor can be understood.

9.34 In considering the changing demand for health and education services within Exmoor, it is also important to recognise that the catchment areas will not respect administrative boundaries. In the same way that people will travel into and out of Exmoor for employment purposes, health and education facilities within Exmoor might serve people that live outside of the National Park whilst people that live within the National Park might use facilities that are located elsewhere in North Devon, West Somerset, Mid Devon or Taunton Deane (or beyond). Such complexities in the consumption of public services are important in understanding future levels of demand and the resultant job requirements.

Conclusion

9.35 The public sector in Exmoor accounts for a relatively large proportion of total employment. Even accounting for the fact that some public sector jobs fall within Class B1, it employs more people than all of the activities within Class B2 and B8 sectors. At 8.4%, the anticipated scale of employment growth within public sector activities between 2006 and 2026 exceeds the overall level of employment growth within Exmoor (5.3%) and the actual number of new jobs that are expected within the healthcare sector (100) is second only in scale to that of the tourism sector.

9.36 Despite uncertainties in the direction of policy and public sector finances in the longer term, the public sector is expected to remain an important element of Exmoor's economy. The forecasts of an increased number of jobs in the public sector demonstrate the continued importance and buoyancy of this sector and its contribution to the local economy. In addition to its economic function, public sector services should also be encouraged in order to provide a robust basis for the provision of essential services to the local population and also in order to ensure that the important qualities of the National Park might be protected and enhanced for future generations. The LDF should contain policies that seek to protect and enhance the provision of key public services that are required over the Plan period.

Retail

9.37 Whilst this employment land study is not intended to forecast the floorspace requirements for new retail facilities, the forecasts of employment growth that have been prepared by Experian are helpful in providing a broad indication of the anticipated levels of likely change within this sector and its contribution to the long term direction of the Exmoor economy.

9.38 Experian Business Strategies forecast that over the period from 2006 to 2026, employment levels in the retail sector in Exmoor are forecast to fluctuate around the current level and are due to increase by just 10 (from 290 to 300 jobs). This equates to a level of increase of just 3.4% – less than the 5.3% increase in all jobs in Exmoor between 2006 and 2026. The Experian forecasts therefore anticipate very little change in employment within the retail sector in Exmoor over the LDF period and show that its share of total employment is expected to remain broadly steady – falling slightly from 5.7% in 2006 to 5.6% in 2026. However, to put this in context, it is noteworthy that in terms of employment levels, the retail sector is – and is forecast to remain – approximately 2/3 the size of all of the sectors that fall within Class B1.

9.39 The relatively modest scale of the retail sector – and the limited forecast level of change – reflects the context of Exmoor National Park. There are no large towns within the National Park and its larger centres – Dulverton, Dunster, Lynton and Lynmouth and Porlock – largely contain low order shops and services which are oriented towards serving the needs of local people and tourists. Save for small convenience stores in Dulverton and in Lynton, there are no supermarkets within the National Park. The nearest stores are in Minehead, Ilfracombe, Williton, Tiverton and South Molton.

9.40 The characteristics of the retail facilities within the National Park and the distribution of provision in the wider area tends to support the evidence contained within the Experian forecasts regarding anticipated future growth in retail employment. Based upon this information, large scale expansion is not considered to be likely. The proximity of larger, higher order centres and the level of demand arising from the local population within Exmoor would reduce the attractiveness of Exmoor to potential developers or retailers and would therefore not be likely to support a substantial growth in retail provision.

9.41 Given the importance of ensuring that appropriate retail functions are made available to local residents, it will be important to ensure that the LDF provides a policy platform for the maintenance and promotion of this key activity area. In particular, consideration should be given to the establishment of policies that encourage the vitality and viability of settlements and maintain the quality of the surrounding environment.

10.0 # The Role of Tourism in the Local Economy

10.1 Tourism is of fundamental importance to the Exmoor economy. It represents the largest single employment sector in Exmoor and is a key source of income and activity. In view of its dominance and following on from the review of other non-B sectors in Chapter 9, this chapter considers the tourism sector in Exmoor.

10.2 Tourism in Exmoor tends to be focussed upon outdoor activities, with a large proportion of visitors attracted by the natural environmental qualities of the National Park and the leisure activities that are available. The Exmoor State of Tourism Report (2008) recognises that the main attractions for visitors are the scenery, the tranquillity, the area's status as a National Park, the opportunities available for outdoor activities and the coast and wildlife.

Policies and Strategies

10.3 The promotion of tourism in Exmoor can be understood in the context of relevant (planning and other) policies and strategies that have been prepared on a national, regional and local level. The key implications of these policies upon tourism development in Exmoor are considered below.

Good Practice Guide for Tourism, 2006

10.4 The Good Practice Guide sets out the national guidance for developing suitable tourism policies in LDFs. Specifically relating to rural areas, paragraph 3.24 recognises that the provision of essential facilities for tourism is vital for the development of the industry and identifies the key benefits of tourism activity in rural areas as being to:

a Facilitate rural and farm diversification;

b Help to revitalise villages;

c Support important rural services and facilities; and,

d Underwrite environmental schemes and improvements to the built and natural environment.

10.5 The Guidance emphasises the importance of protecting and enhancing nationally designated areas such as National Parks and recognises that the special quality of the landscape is an important feature of National Parks that attracts visitors into the area. In the light of this, the Guidance requires National Park Authorities to adopt a positive approach towards tourism development whilst also conserving and enhancing the special qualities and features that justified their designation. This means that whilst it is important to ensure that sufficient accommodation of a suitable range of types is provided for visitors, particular care must be taken to ensure that the number, scale and location of such accommodation facilities are not detrimental to the qualities of the area.

10.6 Ensuring that tourism facilities are accessible and that they benefit from sustainable transport connections is a key theme throughout the Good Practice Guide. However, it nevertheless acknowledges that the nature of public transport connections in many rural areas means that a large proportion of tourism developments will be car dependant. In this context, the challenge is to ensure that the most sustainable – and locally appropriate – approach can be adopted.

10.7 In order to conserve the environment, the Guidance requires developers of tourism projects to consider whether new developments can:

a Protect and enhance the visual quality of the site and the surroundings;

b Respect the historic interest of the surrounding buildings and areas;

c Protect and improve biodiversity; and,

d Achieve small-scale improvements to sustainability.

PPS7: Sustainable Development in Rural Areas, 2006

10.8 Similar to the best practice guide, PPS7 promotes sustainable tourism development in rural areas. Whilst indicating that tourist accommodation and attractions should be located within or adjacent to existing settlements in the first instance, it is recognised that the re-use of rural buildings for serviced accommodation and tourist attractions may be appropriate. The re-use of rural buildings for self-catered holiday accommodation is also seen as appropriate where it accords with sustainable development objectives.

Regional Tourism Strategy: Towards 2015

10.9 Tourism is one of the most important sectors across the whole of the South West region. The purpose of the strategy is to ensure that its contribution to the well-being of the region can be maintained and that any potential threats might be addressed and overcome. In so doing, it emphasises the potential role of the following solutions and initiatives:

a **Meeting the customers needs**: There will be a shift in focus towards marketing 'customer experiences'. This reflects the changes in the way customers are more likely to choose a holiday – they first decide what they want, e.g. adventure holiday, and then choose the destination that will provide this experience.

b **Brand clusters**: This again focuses on the experience by clustering similar activities together. It will bring together a wide range of tourism business, such as food and drink and retail businesses as well as accommodation and activity providers.

c **Destination management organisations (DMOs)**: This proposes the creation of a more efficient structure to the management of tourism across the region.

d **Sustainability and quality**: The priority in the strategy is for quality over quantity and to achieve a balance between the needs of the community, the tourist industry and the natural environment.

e **A regional centre for tourism expertise**: It is proposed that new units will be established to cover marketing, product data and information, quality development, sustainable tourism, research and intelligence, e-tourism and information, skills and business support.

10.10 Each of these solutions and initiatives is relevant to Exmoor and clear opportunities exist for their local implementation to provide further benefit to the tourism sector within the National Park.

Exmoor National Park Management Plan 2007-2012

10.11 Recognising the extent to which tourism and recreational activities overlap, the Management Plan considers them in conjunction. The vision for recreation and tourism on Exmoor is that:

"By 2020 there is a warm welcome and high quality experience for everyone who visits Exmoor seeking inspiration, tranquillity and active outdoor recreation, provided by a sustainable tourism and recreation economy in harmony with local communities and the environment, and contributing to the achievement of a carbon neutral National Park".

10.12 In order to achieve this aim, the Management Plan sets a number of specific objectives which are to:

a Develop and maintain the recreation infrastructure of the National Park (particularly the rights of way and open country access) to a high standard;

b Promote active recreation, particularly activities utilising the rights of way infrastructure and access to open country, avoiding adverse impact on the special qualities of the National Park;

c Ensure that opportunities for recreation on Exmoor can be enjoyed by people from all backgrounds and of all abilities;

d Ensure that Exmoor provides a high quality experience for visitors from all backgrounds and of all abilities and that tourism is environmentally sustainable, deriving value from the special qualities of the National Park and not detracting from them; and,

e Maximise the economic and social benefits to the economy of Exmoor that recreation and tourism bring and to spread these benefits across as wide a range of people and businesses as possible.

Strategic Action Plan for Sustainable Tourism within the Greater Exmoor Area 2004-2009 (2005)

10.13 This document provides a means through which a common approach to tourism development in the Greater Exmoor Area can be taken. The Greater Exmoor Area is defined as the area covered by the National Park and its area of economic dependence, which is roughly 10 miles from the National Park boundary.

10.14 The document establishes a vision for the Greater Exmoor Area to be a quality tourism destination that:

a "Delivers a consistently high quality visitor experience;

b Maintains a vibrant and economically successful and sustainable tourism industry; and,

c Brings benefits to the environment and local communities".

10.15 The document sets out an action plan which specifically relates to each of these objectives. Importantly, it identifies where the responsibility for each action lies, sets targets and provides a basis for the monitoring of progress.

Summary

10.16 The policy and strategy documents are all focused upon the delivery of quality and sustainable tourism development that respects and protects the sensitive National Park environment. It is clear from the strategies that a significant level of research and work has gone into achieving this and it will be apparent over time whether or not the strategies that have been put in place will be a success.

10.17 It is evident that the principal aim for tourism in Exmoor is for it to be developed in a manner that will foster greater levels of sustainability wherein matters relating to environmental, economic and community well-being are promoted and enhanced. This is fully in accordance with the vision set out in the 2004 report, '*Beyond the Picturesque. Principles for Sustainable Tourism in National Parks and AONBs*'.

The Importance of Tourism

Visitor Levels in North Devon and West Somerset

10.18 The '*Value of Tourism*' Report has been produced on an annual basis by South West Tourism since 2001. The most recent data that is available is for 2006. As indicated below, the level of tourism in Devon is significantly higher than that in Somerset. The difference in the number of trips and level of expenditure for day visits between the two Districts is significantly less than that for staying visits. Whilst this data is not specific to Exmoor, it does reflect the trends in the area, i.e. that there is a higher level of day visits than staying visits and that these are less valuable to the local economy. This issue of volume versus value is central to an understanding of the existing tourist economy and the options for its long term promotion and enhancement.

	Staying Visitors			*Day Visits*	
	Trips (million)	*Nights (million)*	*Spend (£m)*	*Trips (million)*	*Spend (£m)*
Devon	*5.63*	*24.29*	*1,069.5*	*19.75*	*842.73*
Somerset	*2.66*	*10.12*	*383.1*	*13.7*	*568.4*

Source: South West Tourism, Value of Tourism 2006

Table 29 Length of Visitor Stay and Spend

		Domestic Tourists			Overseas Tourists		
		Trips	Nights	Spend (£)	Trips	Nights	Spend (£)
North Devon	Holiday	630,000	2,992,000	130,514,000	31,000	204,000	7,221,000
	Business	54,000	121,000	8,952,000	9,000	46,000	4,158,000
	VFR*	63,000	165,000	9,305,000	15,000	121,000	3.523.000
	Other	11,000	29,000	2,046,000	2,000	40,000	871,000
	Total	**758,000**	**3,307,000**	**150,818,000**	**58,000**	**411,000**	**15,733,000**
West Somerset	Holiday	319,000	1,225,000	50,574,000	21,000	102,000	5,388,000
	Business	6,000	19,000	1,391,000	1,000	3,000	317,000
	VFR*	19,000	71,000	1,788,000	7,000	49,000	1,587,000
	Other	3,000	12,000	440,000	1,000	9,000	288,000
	Total	**346,000**	**1,327,000**	**54,193,000**	**30,000**	**163,000**	**7,579,000**

VFR = Visiting Friends and Relatives

Source: South West Tourism, Value of Tourism 2006

Table 30 Value from Domestic and Overseas Tourists

10.19 There are common patterns between both North Devon and West Somerset. Whilst there are differences in the level of visitors in each category for each area, they are proportionally the same, i.e. visiting friends and relatives (VFR) is the second highest category in both areas. Although these figures are not specific to Exmoor the similarities in the trends provides a clear indication as to the trends in the National Park.

Visitor Numbers and Expenditure in Exmoor

10.20 The importance of tourism in Exmoor can be understood in terms of visitor numbers, expenditure and employment levels. The Exmoor State of Tourism Report states that the National Park receives approximately 2 million visitor days each year and the most recent figures show that visitors spend over £80 million in the local area each year.

10.21 Whilst the visitor numbers to Exmoor decreased slightly between 2006 and 2007, the actual spend increased each year, demonstrating that there was an increase in the value of tourism rather than the volume. This increasing value of tourism represents a very important trend which will be important in helping to enhance the sustainability of this economic sector.

	2004	*2005*	*2006*	*2007*
Visitor days (millions)	*1.97*	*2.00*	*2.13*	*2.08*
Visitor spend (uninflated figures, millions)	*71.18*	*74.24*	*81.89*	*83.12*
Visitor spend (2007 indexed, millions)	*78.37*	*79.23*	*85.36*	*83.12*

Source: Exmoor National Park State of Tourism Report (2008)

Table 31 Estimates of Visitor Numbers and Expenditure in Exmoor National Park

10.22 The majority of trips taken in the Exmoor area, for both domestic and overseas tourists, were for holiday purposes. This is unsurprising given the nature of the area. The second highest category of visitors was visiting friends and relatives (VFR), whilst smaller numbers were cited as visiting for business purposes or other. There were no visitors in the area for study purposes. This pattern of visitation reflects that of West Somerset and North Devon, proving that, despite differences in the overall level of tourism in each area and the fact that West Somerset and North Devon include larger settlements and other attractions, the pattern of broader tourism levels does apply at the local level in Exmoor.

10.23 The figure below considers the breakdown of visitors and tourist expenditure in Exmoor in terms of their chosen category of accommodation. Although day visitors represent the majority of visitors to Exmoor (54%), a very large proportion of visitors do stay overnight. This is partly because of the location of Exmoor in relation to major population centres which means that for many, visiting for a single day might not give them sufficient time in Exmoor. The number of people that do stay overnight in Exmoor is important as it serves to increase the value of tourism and the overall benefit to the local economy. Promoting a greater proportion of overnight stays will be central to enhancing the well-being of the tourism sector and its contribution to the Exmoor economy in the longer term. By increasing the value of tourism without significantly increasing the number of visitors, it would help to achieve the aspirations for more sustainable patterns of tourism activity.

Category	***Number of Visitor Days***	***%***	***Expenditure (£ million)***	***%***	***Average Expenditure per Visitor per Day (£)***
Serviced Accommodation	*329,050*	*15.79*	*25.6*	*30.8*	*77.82*
Non-serviced Accommodation	*595,260*	*28.57*	*25.01*	*30.1*	*42.03*
Staying with Friends and Relatives	*40,880*	*1.96*	*1.49*	*1.8*	*36.59*
Day Visitors	*1,118,680*	*53.68*	*31.00*	*37.3*	*27.71*
Total	***2,083,880***		***83.10***		***39.89***

Source: Exmoor National Park State of Tourism Report 2008

Table 32 Estimated Breakdown of Visitor Numbers and Expenditure in Exmoor National Park in 2007 (Global Tourism Solutions (UK) Ltd)

Employment growth in Hotels and Catering in Exmoor

10.24 Whilst forecasting data is not available for all tourism jobs, the *'hotels and catering'* category is considered to be representative of employment in the tourism industry in Exmoor.

	2006	***2011***	***2016***	***2021***	***2026***	***% Change, 2006-26***
Number of jobs	*1,380*	*1,490*	*1,640*	*1,730*	*1,750*	*26.81*
% of total	*27.2*	*28.8*	*31.4*	*32.6*	*32.8*	

Source: Experian Business Strategies Limited, 2008

Table 33 Employment Growth in Hotels and Catering

10.25 The forecasting data provided by Experian Business Strategies shows that there will be a 26.8% increase in people employed in tourism in Exmoor between 2006 and 2026. This is substantially greater than the overall level of employment growth in Exmoor of 5.3% over the same period. However, the majority of this growth is shown to be in the first 10 years, with a much lower proportion taking place between 2016 and 2026 – a pattern that reflects that of job growth generally in Exmoor over the LDF period.

10.26 These growth figures correspond with the current trends in the National Park. The implication is that by 2026, the tourism sector is expected to account for almost 33% of jobs in Exmoor, compared to 27% of jobs in 2006. This demonstrates its increasing significance as an employment sector and the importance of ensuring that adequate policies and provisions are in place to support the sector and to assist it in realising its increased significance in a sustainable manner.

10.27 Tourism in Exmoor is seasonal, with the peak visitor season falling between Easter and October, although an increase in other activities such as game shooting has helped to increase tourism levels in the shoulder and off-peak periods. The seasonality of tourism has a great impact on the take up of bed spaces in both catered and self-catered holiday accommodation in the National Park. This creates a challenge of ensuring that peak season demands can be met whilst also ensuring that accommodation businesses can remain viable on a year-round basis so that they can continue to operate. The evidence shows that visitors to Exmoor tend to favour self-catered accommodation and that there has been a resultant decline in the provision of serviced facilities. Any such changes should be carefully monitored in order to ensure that there is no mismatch between what people want and what is on offer.

Past Initiatives

10.28 Although tourism is a dominant sector within Exmoor and its importance is growing rapidly, issues relating to seasonality, the requirements of visitors and the type of jobs that are provided create challenges for service providers and policy makers. A review of past initiatives is helpful in providing a clear guide to the options for future development and activity.

10.29 A number of initiatives have been established in the past in order to develop and enhance the tourism offer of Exmoor. The pilot scheme of the *'European Charter for Sustainable Tourism'* (ECST) ran in 1999 and 2000 and has now ended. More recently, the QUEST project (Quality Underpins Exmoor's Sustainable Tourism) began in 2003 in order to being people together to deliver a consistently high quality visitor experience and maintain a vibrant and sustainable tourism industry which is beneficial to the environment and the local community. Its funding arrangement ended in 2007 but its main achievements to date have included:

a The preparation of the Strategic Action Plan for Sustainable Tourism in Greater Exmoor;

b The establishment of the Visit Exmoor partnership – this has now ceased and whilst some of its responsibilities have been taken by other agencies, the transition has been a relatively slow process;

c Undertaking an economic assessment on the value of tourism; and,

d The establishment of training programmes.

10.30 The key commonality between these projects was a focus upon the businesses with local tourist operators participating in and managing the projects. This demonstrates an appreciation of the role of local tourist businesses in the local economy and provides a basis for support to be given to new businesses, subject to the continued involvement of the tourism community. Although the success and longevity of these initiatives have varied, the continued growth of the tourism sector – in terms of visitor numbers, income and employment levels – does testify to their general success.

10.31 The *'Strategic Action Plan for Sustainable Tourism in Exmoor'*, which was produced as part of the QUEST project sets out a number of key issues relating to tourism in Exmoor. These are still relevant and continue to provide a basis for action and enhancement. The issues are:

a **Co-ordination**: There is a need for a single authority to undertake the management and promotion of tourism in Exmoor in order to reduce fragmentation. Whilst this role was initially met by the Visit Exmoor partnership, this has now ceased and there is a need for another agency to take its place.

b **Marketing**: There is a need to identify and effectively market the Exmoor brand and to define the unique selling points.

c **Improvement of infrastructure**: There is a need to improve the transport provision in Exmoor as, at present, both the roads and the public transport networks are seen as being insufficient. Importantly, the Rights of Way networks and their signage also need to be improved.

d **Quality of delivery**: There is a perceived need to enhance the tourism offer in Exmoor, through the introduction of themes, events, festivals and activities and also through ensuring quality in the products, services and delivery.

e **Business support**: Different forms of business support are required. In some areas there is a perception that one-stop-shops providing information are important. Broadband and financial support for business improvements and business development incentives were also seen as important.

f **Protecting the environment and local communities**: Visitor management policies and practices to deal with visitor pressures and the development of sustainable tourism are essential in an area as sensitive as the National Park and the overall desire is to ensure that visitors contribute to the environment and local communities of Exmoor.

10.32 It is clear that there is capacity for growth in the number of visitors and the main issue seems to be finding an appropriate means of attracting people to come to the National Park and also encouraging them to stay longer, whilst ensuring that the environment is protected and the communities benefit from visitors.

Comparative Analysis

10.33 In addition to considering policies, past initiatives and emerging themes within the tourism sector in Exmoor, an understanding of the various approaches that are being undertaken in other National Parks can provide a basis for the identification of objectives for future actions and changes and the establishment of policy platforms for their achievement.

10.34 There are nine National Parks in England – Exmoor, Dartmoor, Lake District, New Forest, Northumberland, North York Moors, Peak District, the Yorkshire Dales and the Broads. Each of the National Park Authorities has a responsibility to manage and maintain their unique high quality environment. Like Exmoor, the other National Parks are all major tourist destinations and the opportunity exists for the National Park Authorities to capitalise upon their status and character in order to attract more visitors. However, they are required to ensure that the achievement of this aspiration is not detrimental to their main asset – the environment.

10.35 In this section, we briefly consider how some National Park Authorities manage tourism in their area. The purpose of this is to consider the implications and possible lessons for Exmoor. Our analysis considers:

a Dartmoor National Park – the only other National Park in the South West and the closest geographically to Exmoor;

b Peak District National Park – an area that has seen mass tourism; and,

c Lake District National Park – an area that has also seen mass tourism.

National Park Name	Year of Designation	Population (2001)	Area (square miles)	Visitor Days Per Annum (Million)
Exmoor	*1954*	*10,873*	*267*	*1.4*
Dartmoor	*1951*	*33,552*	*368*	*4*
Peak District	*1951*	*37,937*	*555*	*22*
Lake District	*1951*	*41,831*	*885*	*22*

Source: www.nationalparks.gov.uk/ONS

Table 34 National Park Facts and Figures

10.36 Each of these four National Parks are different in their make up. Not only is Exmoor the smallest National Park geographically, it also has the smallest population and the lowest level of tourism. Unsurprisingly, the larger National Parks have greater numbers of visitor days but it is unlikely that the size of the National Park is solely responsible for the number of visitor days and that other factors such as accessibility, marketing and the types of activities and visitor attractions that are available are major factors that contribute towards the relative popularity of each area.

10.37 The location of each of the National Parks in relation to major population centres and the strategic highway network is likely to contribute towards their popularity as tourism destinations. Exmoor's location in the UK and in relation to major towns and cities means that its catchment area is smaller and journey times for those wishing to visit would be longer. These are important (and linked) challenges that might serve to undermine its relative attractiveness to visitors. In the context of these challenges, it is even more important to ensure that the quality of the tourism product is sufficient to meet the needs of prospective visitors and to encourage them to travel further and longer to visit Exmoor.

National Park	City	Road	Nearest Railway Stations
Exmoor	Exeter (Population 106,772) Bristol (Population 551,066)	M5	Taunton, Tiverton
Dartmoor	Exeter (Population 106,772) Plymouth (Population 243,795)	M5 / A38 – adjacent to eastern boundary	Exeter, Newton Abbot, Totnes, Plymouth
Peak District	Manchester (Population 2,241,931) Sheffield (Population 640,720) Stoke-on-Trent (Population 259,252) Derby (Population 236,738) Rotherham (Population 117,262)	M1, M6, M60	Derby, Buxton, Glossop
Lake District	Carlisle (Population 71,773)	M6 (adjacent to eastern boundary)	Oxenholme, Penrith, Windermere

Table 35 Strategic Relationships

Dartmoor National Park

10.38 Dartmoor has the closest relationship to Exmoor, both in terms of location and offer. Located in the South West of England, the area also has a vast area and moorland and outdoor activities make up its key visitor attractions. Like Exmoor, Dartmoor has seen an increase in visitor numbers recently, although this increase has been far more substantial with a 25% increase in the number of staying visitors between 2003 and 2006.

10.39 STEAM analysis was undertaken for Dartmoor and the wider area of influence in 2003 and the results were published in 2007. The analysis quantifies the tourism sector in Dartmoor in terms of its 4.5 million visitors and its total value of £122.56 million in 2003. However, the data highlights a distinct seasonality with 79% of tourist days occurring between April and September and 82% of visitors being day visitors – this is substantially above the level of day visitors in Exmoor as a proportion of the total level of tourism (54%). Of the visitors who did stay in the area, twice as many people stayed in serviced accommodation as in non-serviced accommodation – the opposite of the situation in Exmoor where the number of people staying in non-serviced accommodation exceeds the number in serviced accommodation by almost two to one.

10.40 The issues surrounding tourism are examined in the *'Dartmoor Management Plan 2007-2012'* and the Dartmoor Charter for Sustainable Tourism. It is evident from the Management Plan that Dartmoor National Park Authority seeks to capitalise on the National Park status when promoting tourism in the area, encouraging tourism that sustains and enhances the natural and cultural environment of the area and making use of the joint National Park brand *'Britain's' Breathing Spaces'*. This marketing service has its own website on which information is contained on all the National Parks in Great Britain and Dartmoor makes use of the brand in promoting tourism in the area.

10.41 The Dartmoor Management Plan states that one of the key challenges is to find ways of achieving an increase in the value of tourism without a significant increase in visitor numbers. Central to this is the aspiration of achieving increasing numbers of staying visitors, a particularly important issue in Dartmoor where less than 20% of visitors stay overnight.

10.42 The *'Dartmoor Charter for Sustainable Tourism'* sets out a series of 'partnership principles' which are designed to work towards the common aims of:

a Promoting sustainable development;

b Conserving and enhancing the natural beauty, wildlife and cultural heritage of the Dartmoor area;

c Promoting environmentally sustainable business practices;

d Enhancing the quality of tourism on Dartmoor;

e Increasing the social and economic well-being of local communities; and,

f Maximising socially inclusive visitor enjoyment.

10.43 The Charter sets out the principles that have been agreed by all partners and the ways in which the area can be conserved and enhanced. The importance of business development and the marketing of the local tourism product are recognised in the document as is the extent to which the involvement of local businesses lies at the heart of the future for the industry and for the local economy in Dartmoor.

10.44 The key focus for activities in Dartmoor is the promotion of tourism in order to gain more value rather than an increase in the number of visitors, principally by seeking to increase the proportion of visitors that stay overnight in the National Park. This would achieve the main goal of sustainable development that does not detract from the natural beauty of the area.

Peak District National Park

10.45 Tourism is also important to the local economy in the Peak District. Whilst STEAM analysis has been undertaken for the Peak District and Derbyshire, no exact details are available for the Peak District. However, these figures give an indication of the importance of the sector. In 2007 the economic impact from tourism was £1.4 billion and a total of 3.61 million visitors stayed overnight (a total of 9.95 million staying visitor nights). These staying visitors spent a total of £504.4 million – an average spend of £50.69 per visitor night – marginally less than the average daily expenditure per staying visitor in Exmoor. In comparison, there were a total of 32.46 million day visitor trips, which had a total spend of £899.657 million – an average spend of £27.72 per day visitor – almost exactly the same as for Exmoor. Whilst it is evident that the Peak District is substantially more popular than Exmoor as a tourist destination, it is noteworthy that over 75% of visitors to the Peak District are day visitors, a figure that is broadly similar to Dartmoor and substantially greater than Exmoor. Not only does Exmoor attract a larger proportion of staying visitors, it also attracts a greater level of expenditure (per night) from each staying visitor. In this context, it is evident that Exmoor is more successful in attracting higher value forms of tourism.

10.46 The *'Peak District Sustainable Tourism Strategy'*, which was published in March 2000, sets out the aims, vision, strategic objectives and suggested actions for tourism. It has been developed and supported by the partners of the Peak District Rural Development Partnership and relates to the 'wider' Peak District. The aims of the strategy are to:

a Increase visitor spend and maximise the local benefits of that spend;

b Encourage visitors to stay longer;

c Encourage visitors throughout the year;

d Attract new visitors (with potential spending power) where appropriate;

e Reduce dependency upon the car when visiting the area;

f Deliver for local people and not just visitors;

g Conserve the landscape, including the towns and villages, and their special qualities;

h Enhance visitor enjoyment and understanding of the market towns and rural areas;

i Ensure that the traditional enjoyment of the Peak District will be more accessible to a wider range of people; and, j Encourage best use of existing resources.

10.47 The strategy promotes a vision covering 11 key strategic objectives and sets out a proposed management structure for each objective. These objectives are designed to help deliver these key aims, most notably through the:

a Improvement of infrastructure for sustainable tourism in their villages and towns;

b Improvement of the opportunities for business innovation, development and marketing of locally produced products;

c Provision of training and career development opportunities in the tourism sector; and,

d Improvement in the quality and range of tourism services and products;

10.48 In order to ensure that the strategy is implemented, a co-ordinated approach has been adopted with the monitoring of progress, action and outputs being key to measuring the impact of the strategy in order to gauge whether or not it is successful.

10.49 It is clear that tourism development in the Peak District is a priority and that considerable effort has gone into the preparation of a strategy for the area. Whilst the exact successes of the strategy are not set out here, the levels of visitors in the Peak District are amongst the highest in the UK. It is likely that this level of success can be attributed to several factors, including the strategic policies and the locational factors.

Lake District National Park

10.50 The Lake District is one of the largest and best known National Parks in the UK. It receives the highest number of visitor days in all the designated National Parks – 22 million, which is equal to that of the Peak District.

10.51 In 1999, a partnership of Cumbria Tourism, Cumbria's County and District Councils and the Lake District National Park Authority first commissioned a STEAM analysis. Since then, this economic impact assessment has been undertaken on a yearly basis and the most recent data available is for 2007. The analysis shows that tourism revenue was £659.53 million. In terms of visitor type and spend, the analysis does not examine this for each area but does detail the make up of Cumbria as a whole. The percentage spend per visitor type in the area is as follows:

a Serviced accommodation - 39.1%;

b Non serviced accommodation – 30.4%;

c Staying with friends and relatives – 2.5%; and,

d Day visitors – 28%.

10.52 This demonstrates a different trend than the other National Parks, in that the expenditure by staying visitors is actually higher than that of day visitors. Whilst Exmoor has been more successful than Dartmoor and the Peak District in attracting higher value forms of tourism, this evidence shows that the Lake District has enjoyed an even greater level of success in this respect.

10.53 The Lake District Management Plan sets out five aims that will make the Lake District a *'unique world-class destination'*. These are to:

a Encourage all sectors of society to enjoy the lakes, countryside, towns and villages in ways that respect the environment and other visitors, and benefit the local community;

b Encourage visitors to explore by means of transport other than the private car - bicycle, boat, horse, on foot or by public transport;

c Encourage visitors to stay longer and to return;

d Develop more ways in which the tourism industry can be sustainable, contributing directly to the conservation and enhancement of the environment on which it relies; and,

e Encourage young people to stay in the area and have the opportunity to work in tourism-related jobs.

10.54 *'Promoting Sustainable Tourism'* was published in November 2005 and sets out how the local economy, community and environment can benefit from sustainable tourism. It details how tourism in the Lake District National Park is undergoing significant change, with research showing an increasing number of short breaks and out-of-season breaks – again, highlighting success in increasing the value from tourism and in overcoming the problems associated with seasonality. It also shows that visitors to the Lake District are seeking out different types of holiday and different experiences, for example, through an increase in active sport and recreation activities.

10.55 As a result of the changing face of tourism, the study notes that the Lake District National Park Authority is receiving an increased number of planning applications for extended periods of opening, improvements to properties, conversions and changes of use. In response to the changing tourism sector, it is implementing more organised events and broadening the offer, for example through implementing the new public rights of access.

Summary

10.56 It is apparent that the four National Parks examined here are working towards the principles of sustainable development, as set out in *'Beyond the Picturesque. Principles for Sustainable Tourism in National Parks and AONBs'*. Whilst there are some similarities in how tourism is being developed across the National Parks – with a particular focus on outdoors activities, overcoming seasonality and the encouragement of value rather than volume, it is evident that the different areas have had different levels of success in achieving these aspirations.

10.57 Accessibility and proximity to urban areas have been important factors in determining the level of tourism, although these are not the only controlling factors and can be taken as offering opportunities to present an image of a tranquil destination that is ‘away from it all’. This issue of image demonstrates the extent to which promotion and marketing are also important tools in attracting more tourists into an area.

Analysis

10.58 It is clear from the consultation that visitors, those involved in the tourism industry and policy makers all recognise the value of the natural environment as the central component of the local tourism sector and the need to protect it through restrictive policies. Moreover, it has been demonstrated that, given the importance of tourism in the Exmoor economy, the current Local Plan policies are generally and appropriately supportive of tourism development.

10.59 The protection of the local environment will be important in ensuring that the long term viability of the tourism sector can be maintained and enhanced. To this end, there is a clear desire to enhance the value of tourism, rather than focusing solely upon the volume. A review of the experience in other National Park Authorities is helpful in showing the extent to which Exmoor has enjoyed some considerable success in this respect – the large proportion of overnight visitors (in comparison to day visitors) has helped to increase the value of tourism. Whilst it might be possible to further increase the proportion of staying visitors, future consideration might be more beneficially focused upon increasing the relative attractiveness and popularity of serviced accommodation.

10.60 Another key area for future improvement will be the promotion of greater levels of year-round tourism. Whilst it is generally considered that the season is being extended through the growth of activities which can take place throughout the year such as game shooting, opportunities exist to further reduce the impacts of seasonality upon tourism activities. This might necessitate additional marketing of the existing tourism offer to show that these can be enjoyed throughout the year or the promotion of additional cultural and heritage elements which might be less weather dependant. However, whilst there might be the potential to provide additional (small scale) arts, cultural, and heritage facilities, it is not considered that there is any particular need or demand for a large indoor facility within the National Park.

10.61 Exmoor’s image as a high quality destination for outdoors activities is supported by its location away from large urban centres and its relative inaccessibility. However, whilst this can enhance its appeal as a place to ‘get away from it all’, this can also act as a deterrent to some visitors, particularly those that do not have access to a car. The inadequacy of public transport facilities was highlighted in our consultation processes as a particular concern, both in restricting access into and around the National Park and also in resulting in a reliance upon the private car which can cause major disruptions in some of the more popular villages at peak times. It is recognised that this is not necessarily an issue that can be resolved particularly easily, but consideration should be given to the ways in which the National Park might be made more open and accessible to all.

10.62 In general, Exmoor is recognised as a high quality tourist destination. It has been successful in attracting staying visitors, although more action is required to further increase the value of tourism – particularly though the encouragement of year-round tourism. However, there is a perception that Exmoor suffers from competition from domestic and foreign destinations in the short break / weekend market. Many consultees commented on the need to develop the local offer and to market the area more effectively in order to respond to this competition more effectively. Marketing initiatives are already in place within Exmoor but need to be maintained in order to increase its attractiveness and to change an awareness that Exmoor is a good place to visit into actual visits. This additional marketing activity should be associated with increased levels of support for tourism businesses and the encouragement of activities and facilities that would encourage year-round tourism. As part of this, consideration should be given to the ways in which the niche role of Exmoor's tourism offer might be further supported so that it is less vulnerable to competition from other areas. This niche role could be associated with some of the existing and emerging key economic sectors – for example, food and drink, arts and culture and agriculture and forestry.

10.63 Overall, tourism is recognised as one of the main contributors to the Exmoor economy and the natural environment of the area is acknowledged as being central to the prosperity of the sector. The importance of tourism in Exmoor is expected to continue – and increase – in the long term, a trend that can be supported through the implementation of specific strategies as identified above and also through appropriate LDF policies that seek to:

a Recognise the importance of tourism to the local economy;

b Promote the establishment of tourist accommodation and facilities (which also benefit local communities) in appropriate locations;

c Encourage a diversification of tourism experiences - focused principally on outdoors activities but also recognising the potential tourism role of the local towns and villages;

d Encourage increased tourism expenditure and more year-round tourism and to build upon the high proportion of overnight visitors (i.e. to ensure that this continues and is increased);

e Recognise the link between leisure facilities that are provided for local communities and tourism facilities that are provided for visitors;

f Ensure that the potentially negative impacts of tourism can be managed and mitigated where necessary; and, g Seek to ensure the continued management and protection of the local environment as the key attraction to visitors.

11.0 Conclusions and Recommendations

11.1 This Employment Land Study has been commissioned by Exmoor National Park Authority to inform its forthcoming Local Development Framework (LDF). It is intended to assist the National Park Authority in its assessment of the anticipated future direction of the economy and, in so doing will inform its decision making process regarding the identification and development of land to achieve its economic aspirations and to meet future employment purposes.

The Local Context

11.2 Exmoor is a small, rural area that forms part of North Devon District and West Somerset District. In 2001 the population of Exmoor was 10,873, about 50% of which live in its small towns and villages. An important characteristic of the local population is the high proportion of older people – a trend that is shaped by its attractiveness as a retirement location but one that has a major impact upon the promotion and maintenance of economic activities and key public services.

11.3 In 2001 there were 8,000 people of working age within Exmoor National Park, of which 63.1% were economically active. This low level of economic activity can be partly explained by the large number of people that chose to move to the area for early retirement. However, the National Park has a very high number of self-employed people, a characteristic that reflects the nature of the economy which is dominated by small scale businesses and which also reflects the entrepreneurial nature of workers within the National Park.

11.4 Not only is Exmoor's economy dominated by small scale businesses, it is also focused upon a number of key non-B Class sectors – tourism, agriculture and public services. These account for over 50% of employment within the National Park and make a critical contribution to local viability and well-being. Traditional employment (B Class) sectors are substantially less significant within the local area than elsewhere in the South West and the UK as a whole. It is anticipated that this trend will continue in the future and that it will exert a considerable influence upon the requirements for B Class employment land in the future.

11.5 The nature of the local economy – which is dominated by non-B Class uses and small scale activities – is reflected in the current supply of employment land in Exmoor. Although the level of B Class employment space and the rate of new B Class employment development has been relatively limited, there is no clear evidence to suggest that the nature or range of local employment facilities has undermined the economic wellbeing of the National Park but rather that a balance has been achieved between the supply of and demand for space.

11.6 An important characteristic of recent development patterns has been that the vitality of the local economy has been preserved without the need for large levels of new development. Much of the development that has occurred has been changes in use or conversions of existing premises. Another key recent trend has been the retention of the existing employment portfolio. It is likely that, subject to the LDF containing appropriate policies to support the existing employment portfolio and permitting appropriate changes of use and conversion activity, these recent characteristics will be maintained and will continue to shape the portfolio of B Class employment land within the National Park.

Existing Employment Locations

11.7 An assessment of 45 B Class employment sites in the National Park has provided an overview of the quality of the existing portfolio. It highlighted that 60% of the sites that were reviewed were of good or very good quality. Only 13% of the sites were classed as being of poor quality. However, these poor sites do perform an important function and contribute towards the local economy. It is not recommended that any of the existing sites should be released for non-B Class purposes. Instead, consideration should be given as to how the viability of these sites might be maintained and enhanced in the future so that they might continue to make an important contribution to the local economy.

11.8 There is a clear link between the location of sites and their quality. 19 of the 26 very good and good sites are located within the three larger settlements (Dulverton, Lynton and Lynmouth and Porlock) whilst only 2 of the 12 average sites are located in these centres. None of the poor sites are located in these three settlements.

11.9 The key advantages of those sites located within the larger settlements include their accessibility, market attractiveness and access to services and labour. By contrast, the sites classed as poor tend to be located in more remote and inaccessible areas, which are more limited in respect of their access to services and labour. Given the fact that the activities are focused upon the local area, this may not be perceived as a problem for many businesses in Exmoor.

The Future Economy of Exmoor

11.10 The economic future of Exmoor will reflect the current economic climate and the length, severity and sectoral impact of the recession. Whilst Exmoor's economy might not be so severely affected as that of other areas, it will not escape from the impacts of recession. In the longer term, it is expected that its economy will continue to be dominated by small scale activities which are focused upon the local area rather than serving a regional or national role. Within this context, it is anticipated that non-B Class activities would continue to be of particular importance within Exmoor and will set a basis for its continued well-being.

11.11 Whilst the natural environment in Exmoor provides substantial opportunities for the economy and for the wellbeing of residents and visitors, it is important to ensure that a mutual complementarity between economic prosperity and environmental quality can remain. The existing planning policies provide a basis by which this objective can be achieved, principally by focusing new employment development within existing settlements and by ensuring that the scale of any development is appropriate to the local context. It is important that this approach should continue in the future, in order to maintain and enhance the vitality of the settlements and to protect the quality of the natural environment. It would also provide a basis for sustainable economic development and the opportunity to recognise and take advantage of the opportunities that exist within the National Park.

11.12 The importance of non-B Class sectors as a component of the local economy in Exmoor has been emphasised throughout this report and it is anticipated that this important characteristic will be maintained in the future. Recognising this, it will be important for the National Park Authority to seek to promote and encourage key sectors such as agriculture, forestry and woodland management, tourism and leisure.

11.13 Opportunities exist for increased activity in the following key sectors in the National Park:

a Agriculture;

b Tourism;

c The processing of agricultural / forestry products;

d Traditional building;

e Environmental sector / environmental technologies;

f Lifestyle businesses; and,

g Knowledge based and creative business.

Future Employment Levels

11.14 The starting point for our assessment of the future need for employment space in Exmoor National Park is an understanding of the likely changes in the job requirements of different sectors. Forecasts of employment growth in Exmoor have been prepared by Experian Business Strategies for this study. This analysis shows the changing levels of employment in 30 different economic sectors over a 20 year period from 2006 to 2026. In preparing these forecasts, Experian has taken account of current economic conditions which are expected to have an impact upon the scale of future job growth.

11.15 In terms of overall growth, the number of jobs is expected to rise by 5.3% from 5,070 to 5,340. The expected level of change in each employment sector is set out below:

	2006-2016	2006-2026
Office (B1)	0	-10
Manufacturing (B1c/B2)	7	0
Warehousing/Distribution (B8)	-26	13
Total B Class Jobs	**-19**	**3**
Non-B Class	189	276
Total Jobs	**170**	**279**

Source: Experian Business Strategies Limited/NLP, 2008

Table 36 Employment Change in Exmoor, 2006-16 and 2006-26

11.16 The employment forecasts demonstrate the extent to which the number of jobs within Exmoor National Park will remain very low and that the economy is expected to continue to be dominated by non-B Class sectors. By 2016, it is expected that 19 jobs would have been lost from the B Class sectors (a loss of 1.7%) and that by 2026 a total of 3 new jobs would have been created in B Class sectors (an increase of 0.3%) compared to the number of jobs that exist in 2006.

11.17 By contrast, over the period from 2006 to 2026, a total of 276 are expected to be created in non-B Sectors (an increase of 6.9%). This accounts for 95% of all job growth within Exmoor and is dominated by the hotels and catering (tourism) and health sectors.

Employment Based Space Requirements

11.18 The implication of the employment forecasts is that there is expected to be a very limited requirement for future B Class employment development within Exmoor, a trend that is clearly supported by the evidence of what has happened in the past.

11.19 The land requirements associated with the employment forecasts can be ascertained by using typical ratios of jobs to floorspace for the different B Class uses. Floorspace requirements can be translated into land requirements by applying average plot ratios.

11.20 For planning purposes, it is normal and prudent to apply a fairly generous allowance for additional land to come forward. We have adopted two scenarios – one in which no safety margin is applied and an alternative scenario which applies a 25% safety margin. The implications of these alternative scenarios are set out below and are minimal in terms of the resultant land requirement.

	Scenario 1: 0% Safety Margin		Scenario 1: 25% Safety Margin	
Use Class	Floorspace Requirement (sqm)	Land Requirement (ha)	Floorspace Requirement (sqm)	Land Requirement (ha)
B1	0	0	0	0
B2	0	0	0	0
B8	650	0.1625	812.5	0.2
Net	**650**	**0.1625**	**812.5**	**0.2**

Source: Experian Business Strategies Limited/NLP

Table 37 Gross Employment Floorspace/Land Requirements in Exmoor, 2006-2026

11.21 Drawing together the above considerations, it is evident that the level of future employment development within Exmoor will be very limited. The forecast small level of employment growth will shape the requirement for additional business space.

11.22 It is evident that some employment development will happen within Exmoor over the LDF period and this should be encouraged in appropriate locations. However, the overall level of development will be modest, as will the scale of individual proposals. In addition, it is likely that much of the new employment space that will be created within the LDF period will result from the conversion of existing buildings. At this stage, it is not possible to ascertain which premises are most likely to be converted and so the allocation of sites that are likely to come forward for employment purposes cannot be achieved with any acceptable degree of accuracy. It is therefore not considered that there is any need to allocate land for development.

11.23 Rather than allocating land for development, the LDF should contain policies that provide a basis for the release of appropriate sites and premises for development. This approach would enable small sites to come forward throughout the National Park in a manner that reflects the character of the local economy and emerging requirements. It will reflect the reality of local circumstances and the expected continuation of past trends.

Recommendations

11.24 This report has set out a series of conclusions about the economy in Exmoor. It has shown that, despite being small and locally focused, the economy is strong and that it has developed a firm basis, taking advantage of the considerable opportunities that exist and that are associated within the high quality environment. As the National Park Authority progresses with its Local Development Framework, we would conclude by setting out the following key recommendations:

a There is no need to allocate land in the LDF for B Class employment development;

b The LDF should contain a clear policy platform which would provide for the development of land in appropriate locations for appropriate employment facilities. This should include a flexible and positive approach to the extension of existing business premises, where appropriate;

c The LDF should adopt a positive approach in respect of homeworking and (where appropriate) the development of live/work units;

d The LDF should seek to protect existing employment facilities unless there are clear reasons to justify any such loss;

e Changes in the use of employment land and in employment levels in different sectors should be carefully monitored;

f New economic sectors should be encouraged to develop in appropriate locations, particularly where they would help to retain value within the local economy;

g Non-B Class Sectors should be promoted and encouraged where they would add to the strength and viability of the economy;

h Agriculture and forestry activities should be promoted as a key economic sector and for their environmental management functions. Consideration should be given to the ways in which any decline in the size of these sectors might be addressed;

i The LDF should encourage farm diversification as a mechanism by which economic opportunities might be identified and promoted. However, the National Park Authority should ensure that diversification activities do not undermine the well-being of the traditional farming sector;

j The value of tourism should be enhanced by reducing the seasonality of tourism and by encouraging greater levels of expenditure by visitors;

k The LDF should retain policies that seek to protect and enhance the quality of the environment;

l The considerable economic benefits that are associated with the quality of the environment and the mutual benefits that exist between sustainable economic development and the promotion of the environment should be highlighted so that it is fully understood by all within the National Park;

m Changes in commuting patterns into and out from the National Park should be monitored and the implications upon sustainability should be carefully considered;

n Consideration should be given to the potential ways in which accessibility problems might be addressed and overcome;

o The coverage of broadband communication systems should be extended throughout the National Park;

p Training, mentoring and business support initiatives should be established and maintained in order to help retain local people and also to sustain the viability of local businesses;

q Consideration should be given to the potential for grants and financial support initiatives to be implemented in order to support local businesses;

r Consideration should be given to the ways in which greater levels of cooperation between existing businesses might be encouraged; and,

s Consideration should be given to the ways in which local issues relating to inactivity, unemployment, underemployment and low wages might be addressed; and,

t Exmoor should be marketed as an appropriate location to visit and to work.

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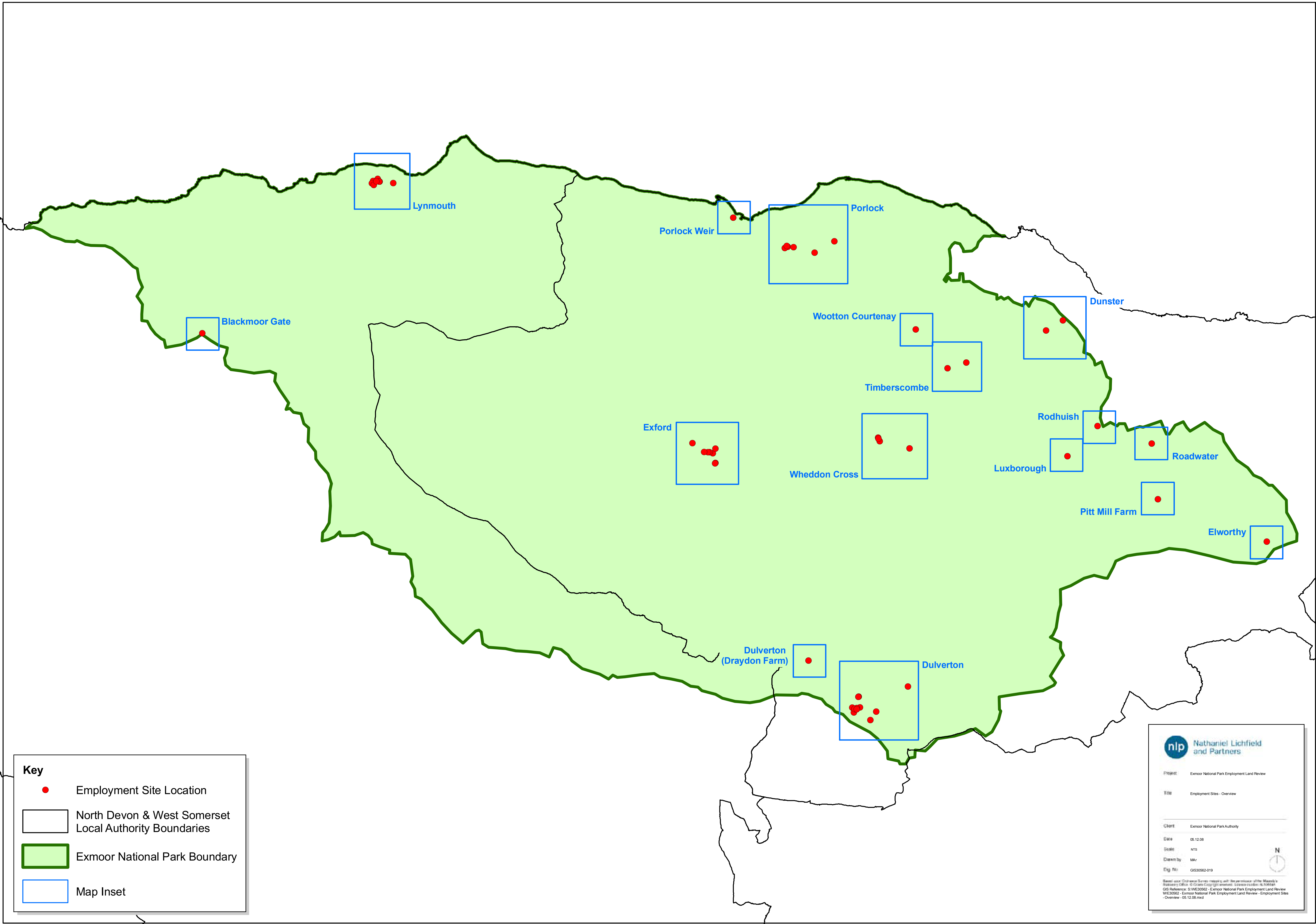
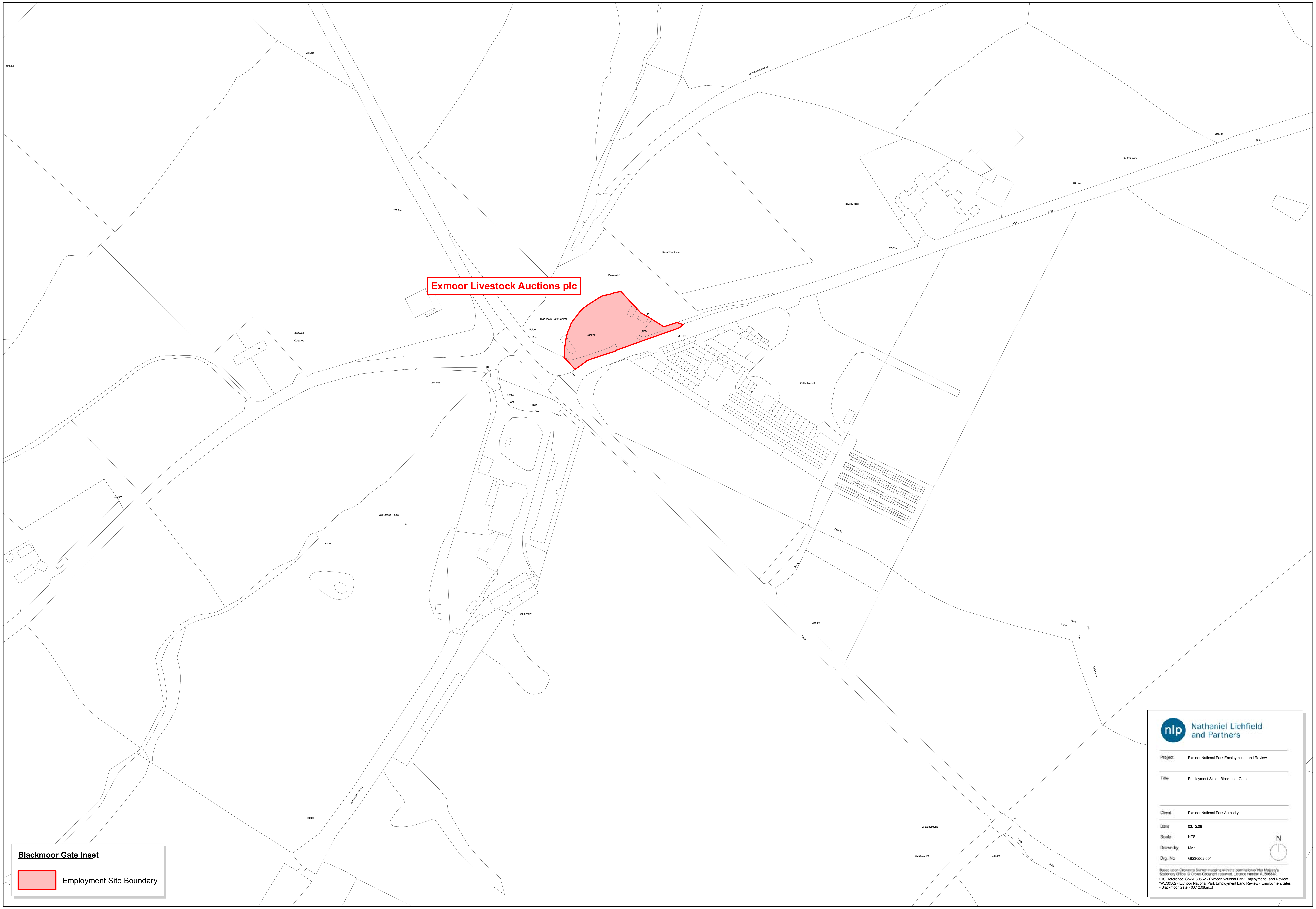
Appendix 1 Site Assessment Scores

			Location / Access			Quality of Site			Market Factors	The Local Area		
Site Reference	Site	Settlement	Access to Strategic Road Network	Local Road Access	Access to Services and Labour	Proximity to Incompatible Uses	Site Characteristics	Flood Risk	Market Attractiveness	Planning / Sequential Factors	Image of Surrounding Area	TOTAL
DVT12	Dulverton Town Council	Dulverton	5	3	5	5	3	5	5	4	5	40
DVT09	League Against Cruel Sports	Dulverton	5	5	5	5	5	5	4	1	5	40
DVT04	ENPA (Small – West)	Dulverton	4	3	5	5	3	5	5	4	5	39
LYN03	Candlemaker	Lynton and Lynmouth	4	4	5	4	5	5	3	5	4	39
DVT11	Dulverton Ross Campbell Architectural Services	Dulverton	5	3	5	5	3	5	3	4	5	38
DNS02	Fowler Timber Products	Dunster	5	4	3	5	5	5	5	1	5	38
PK05	Mikes Tea Co.	Porlock	5	3	5	4	4	4	4	4	5	38
DVT03	ENPA (Small – east)	Dulverton	5	3	5	4	4	5	4	4	3	37
DVT13	Units 1a – 1d	Dulverton	5	4	5	2	5	5	4	5	2	37
EX03	ENPA / Atkins	Exford	4	3	3	5	5	5	4	3	5	37
LYN04	Office and Store	Lynton & Lynmouth	5	3	5	4	4	5	2	5	3	36
DVT08	JC Stanbury & Sons	Dulverton	5	3	5	3	2	5	3	4	5	35
LYN01	Garage	Lynton	5	4	5	1	2	5	4	5	4	35
DVT06	Exmoor National Park Authority	Dulverton	5	3	5	3	5	3	4	3	4	35
PK04	JJ Polard	Porlock	5	3	5	2	4	1	4	4	5	33
RW01	Singer Instruments	Roadwater	4	3	3	3	3	5	4	3	5	33
DVT10	Ridler's Garage	Dulverton	5	5	5	2	4	5	4	5	2	32
LYN02	Artists Studio & Store	Lynton & Lynmouth	5	2	5	2	3	5	2	3	5	32
LYN06	Town Council	Lynton & Lynmouth	4	1	5	1	3	5	5	3	5	32
PK01	A&P Farmer	Porlock	5	1	4	5	4	5	2	1	5	32
PK03	Gerald David Abattoir	Porlock	5	1	5	1	4	5	2	4	5	32
DVT05	Exclusive Cake & Catering	Dulverton	4	3	5	3	3	1	3	5	4	31
WC02	Exmoor Livestock Farmers	Wheddon Cross	5	2	3	4	4	5	2	3	3	31
WC03	Garage	Wheddon Cross	5	3	3	1	5	5	3	3	3	31
BG01	Exmoor Livestock Auctions Plc.	Blackmoore Gate	5	4	1	4	4	5	1	1	5	30
DVT01	Brett Wright Carpenter	Dulverton	4	3	5	3	3	1	2	5	4	30
WC01	Arc ATL	Wheddon Cross	5	2	3	2	5	5	2	3	3	30
TS02	G. Delbridge	Timberscombe	5	1	2	5	2	5	1	3	5	29
WC04	Shearwell Data	Wheddon Cross	4	1	1	5	4	5	3	1	5	29
EX06	Dunkery Services	Exford	4	3	3	1	5	5	3	2	3	29
EX04	Exford Service Station	Exford	4	3	3	1	4	5	4	2	3	29
DNS01	Dunster Water Mill	Dunster	5	1	3	4	4	1	3	2	5	28
EX02	Dunkery Ales Ltd.	Exford	4	1	3	4	4	5	1	1	5	28
LYN05	T Parker Carpenter/Joinery/Workshop	Lynton & Lynmouth	4	2	5	1	2	5	1	3	5	28
RH01	Styles Farmhouse Ice Cream	Rodhuish	4	1	1	4	4	5	4	1	4	28
TS01	Bernard Dru Oak	Timberscombe	5	1	2	3	4	5	2	1	5	28
WY01	GH Burnell	Wootton Courtnay	1	3	3	3	3	5	2	2	5	27
LX01	J & JE Henson & Son	Luxborough	1	1	3	4	3	5	3	1	5	26
PK02	Forge Studios	Porlock	5	1	5	1	1	5	2	2	4	26
EX05	Forge (Farrier)	Exford	4	3	3	3	2	1	4	2	3	25
AL01	Allerford Forge	Allerford	5	2	3	3	2	1	1	2	4	23
EW01	Workshops & Offices	Elworthy	1	1	1	5	1	5	2	1	5	22
PW01	Exmoor Glass	Porlock Weir	4	1	1	2	2	1	4	1	5	21
EX01	D Skinner and Sons	Exford	4	1	3	3	3	3	1	1	1	20
PM01	Two Rivers Paper	Pitt Mill Farm	1	1	1	5	1	1	2	1	5	18

Appendix 2 Site Assessment Location Plans



Lynmouth
Porlock Weir
Porlock
Blackmoor Gate
Dunster
Wootton Courtenay
Timberscombe
Exford
Wheddon Cross
Rodhuish
Luxborough
Roadwater
Pitt Mill Farm
Elworthy
Dulverton
(Draydon Farm)
Dulverton
Key
Employment Site Location
North Devon & West Somerset
Local Authority Boundaries
Exmoor National Park Boundary
Map Inset
Nathaniel Lichfield
and Partners
Exmoor National Park Employment Land Review
Employment Sites - Overview
Exmoor National Park Authority
05.12.08
NTS
N
MAr
GIS30562-019
GIS Reference: S:\WE30562 - Exmoor National Park Employment Land Review
\WE30562 - Exmoor National Park Employment Land Review - Employment Sites
- Overview - 05.12.08.mxd


Exmoor Livestock Auctions plc
Blackmoor Gate Inset
Employment Site Boundary
Nathaniel Lichfield and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Blackmoor Gate
Client Exmoor National Park Authority
Date 03.12.08
Scale NTS
Drawn by MAr
Drg. No GIS30562-004
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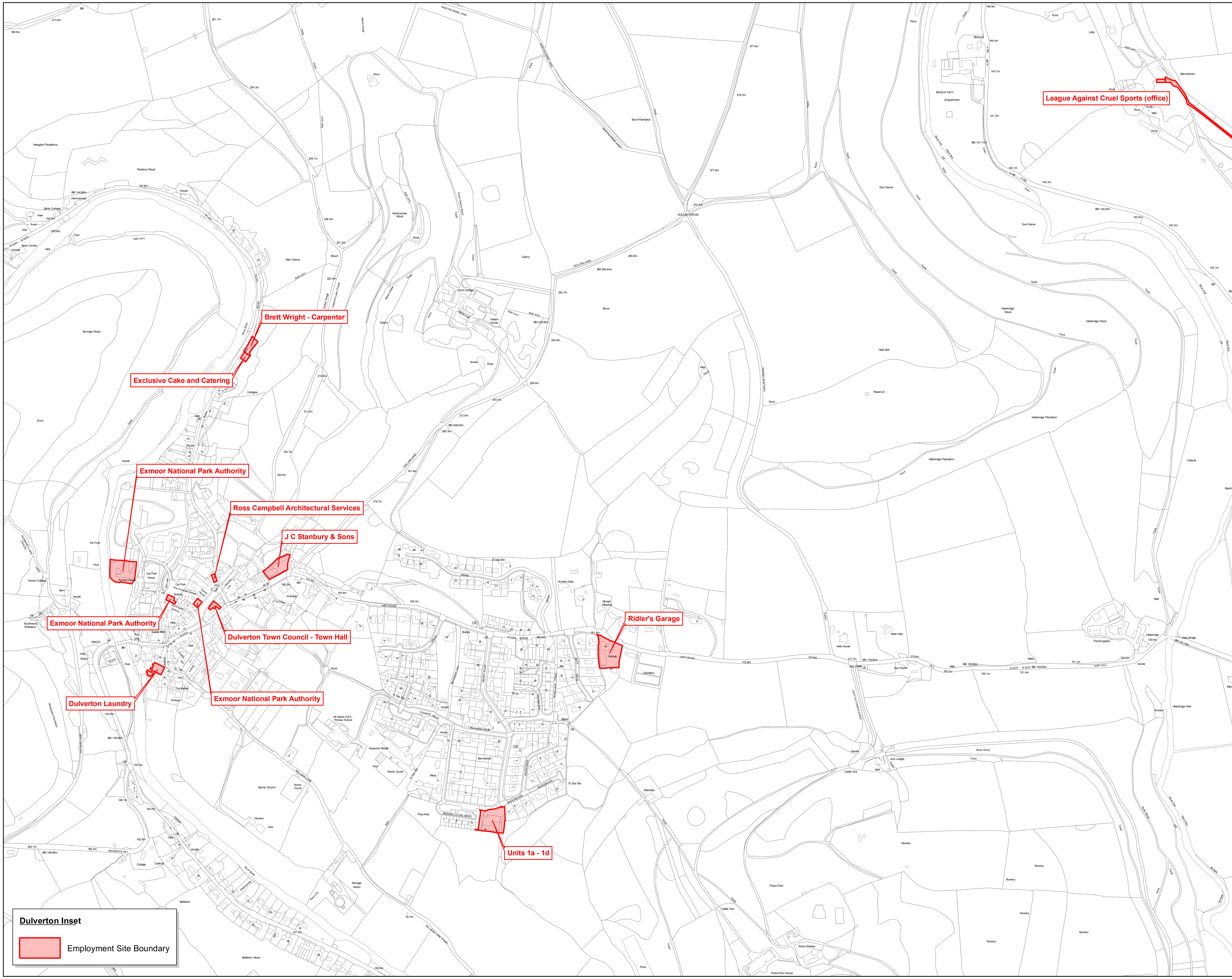

Nathaniel Lichfield and Partners

Project	Exmoor National Park Employment Land Review
Title	Employment Sites - Dulverton
Client	Exmoor National Park Authority
Date	03.12.08
Scale	NTS
Drawn by	MAr
Drg. No	GIS30562-005

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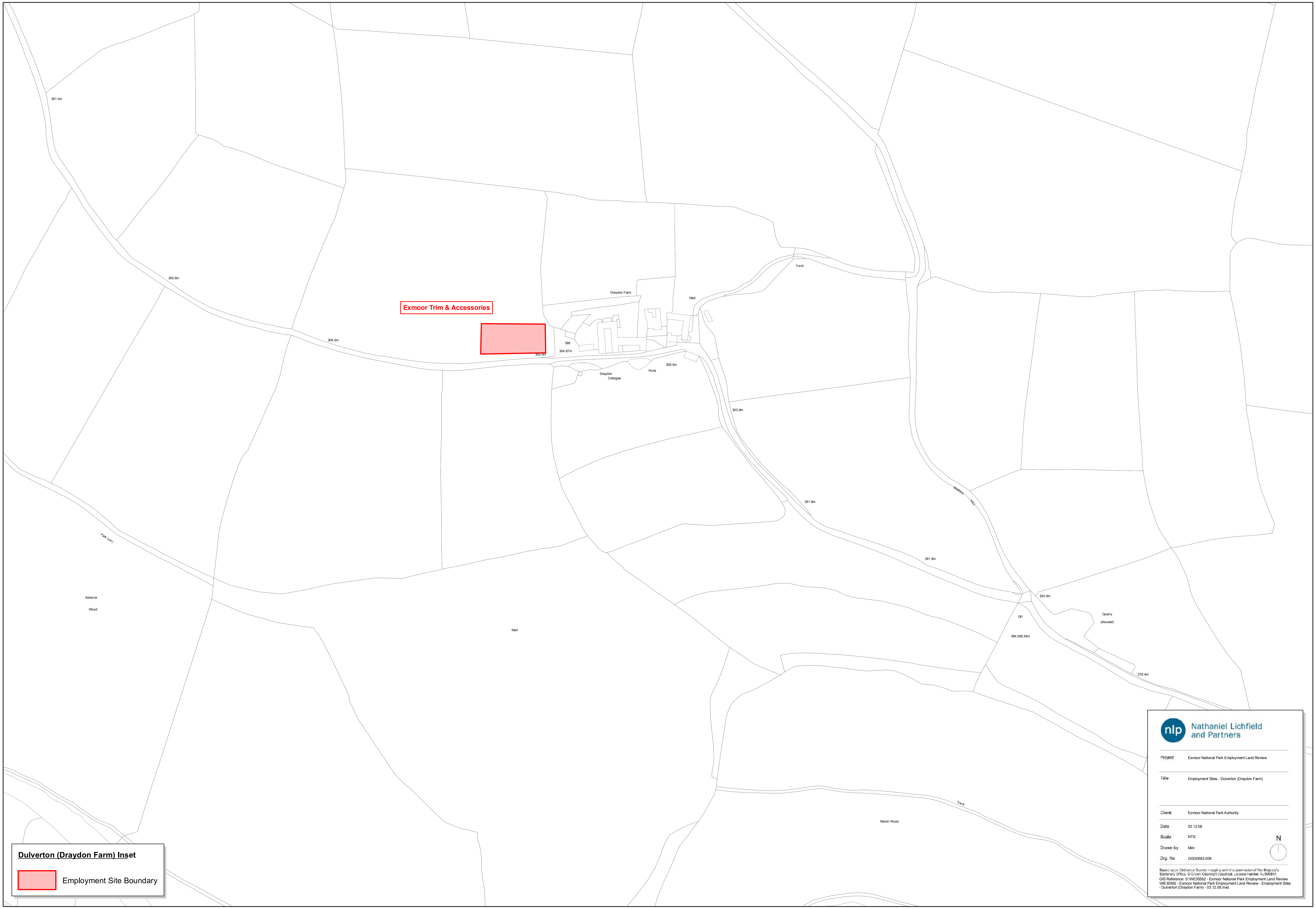
Exmoor Trim & Accessories
Draydon Farm
Well
Track
BM
304.67m
302.5m
306.0m
300.6m
301.0m
Draydon
Cottages
Pond
308.5m
303.9m
291.8m
291.8m
293.0m
GP
BM 288.38m
Quarry
(disused)
276.4m
Ashwick
Wood
Well
Marsh Wood
Track
Dulverton (Draydon Farm) Inset
Employment Site Boundary
Nathaniel Lichfield and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Dulverton (Draydon Farm)
Client Exmoor National Park Authority
Date 03.12.08
Scale NTS
Drawn by MAr
Drg. No GIS30562-006
N
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GIS Reference: S:\WE30562 - Exmoor National Park Employment Land Review \WE30562 - Exmoor National Park Employment Land Review - Employment Sites - Dulverton (Draydon Farm) - 03.12.08.mxd

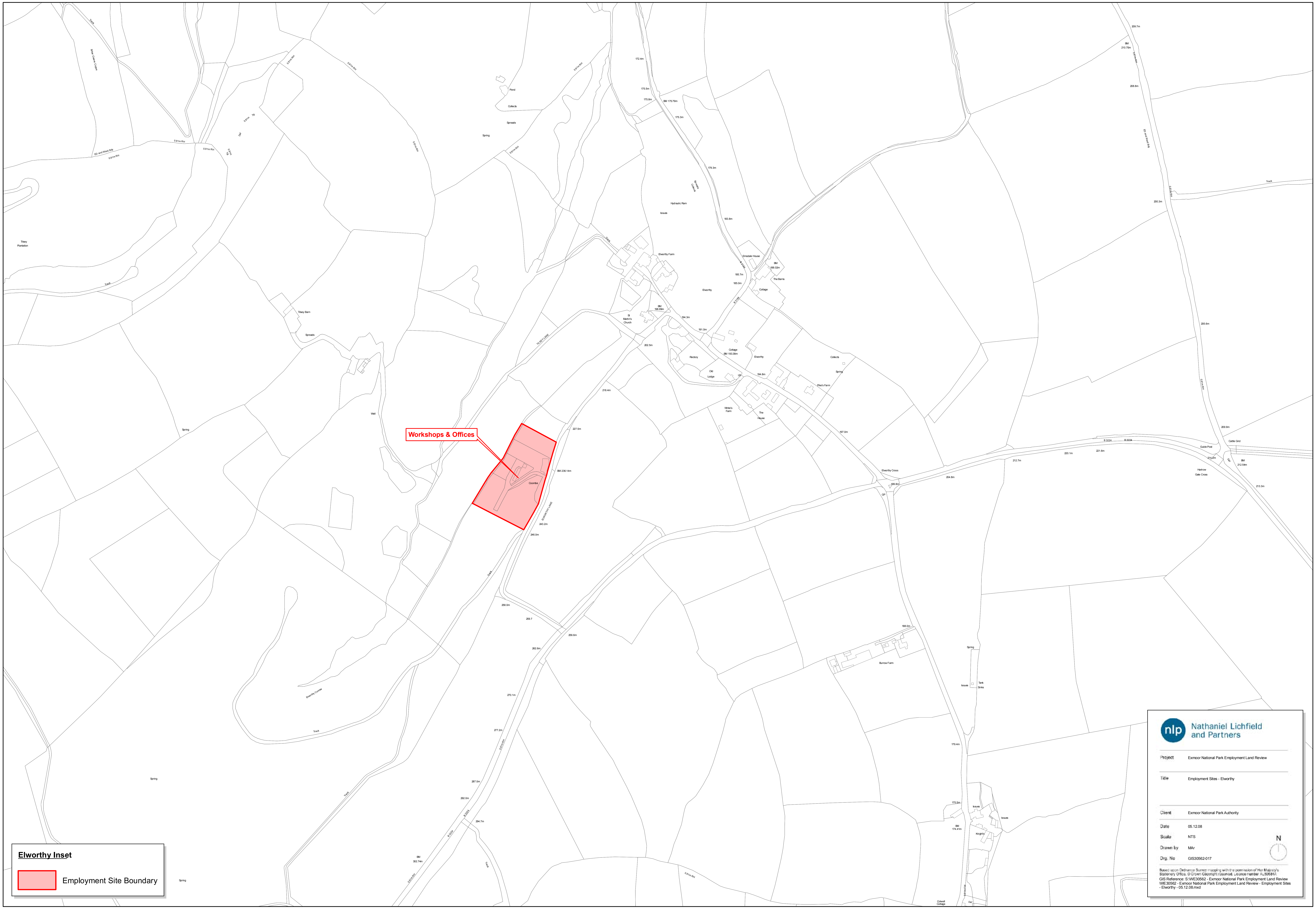
Dunster Inset

Employment Site Boundary

Nathaniel Lichfield and Partners

Project	Exmoor National Park Employment Land Review
Title	Employment Sites - Dunster
Client	Exmoor National Park Authority
Date	05.12.08
Scale	NTS
Drawn by	MAr
Drg. No	GIS30562-013

GIS Reference: S:\WE30562 - Exmoor National Park Employment Land Review \WE30562 - Exmoor National Park Employment Land Review - Employment Sites - Dunster - 05.12.08.mxd



Nathaniel Lichfield and Partners

Project	Exmoor National Park Employment Land Review
Title	Employment Sites - Elworthy
Client	Exmoor National Park Authority
Date	05.12.08
Scale	NTS
Drawn by	MAr
Drg. No	GIS30562-017

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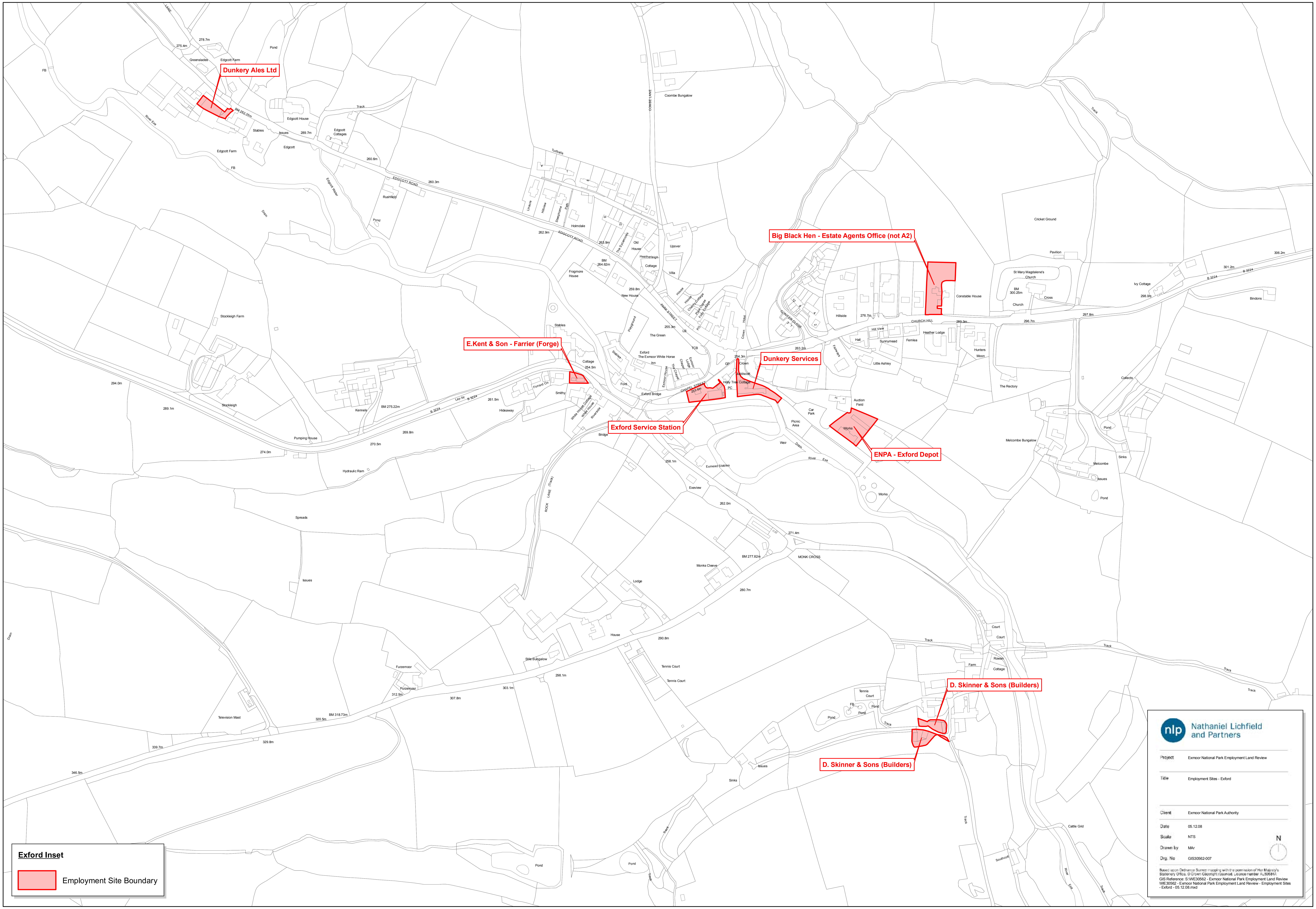

Dunkery Ales Ltd
Big Black Hen - Estate Agents Office (not A2)
E.Kent & Son - Farrier (Forge)
Dunkery Services
Exford Service Station
ENPA - Exford Depot
D. Skinner & Sons (Builders)
D. Skinner & Sons (Builders)
Exford Inset
Employment Site Boundary
Nathaniel Lichfield and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Exford
Client Exmoor National Park Authority
Date 05.12.08
Scale NTS
Drawn by MAr
Drg. No GIS30562-007
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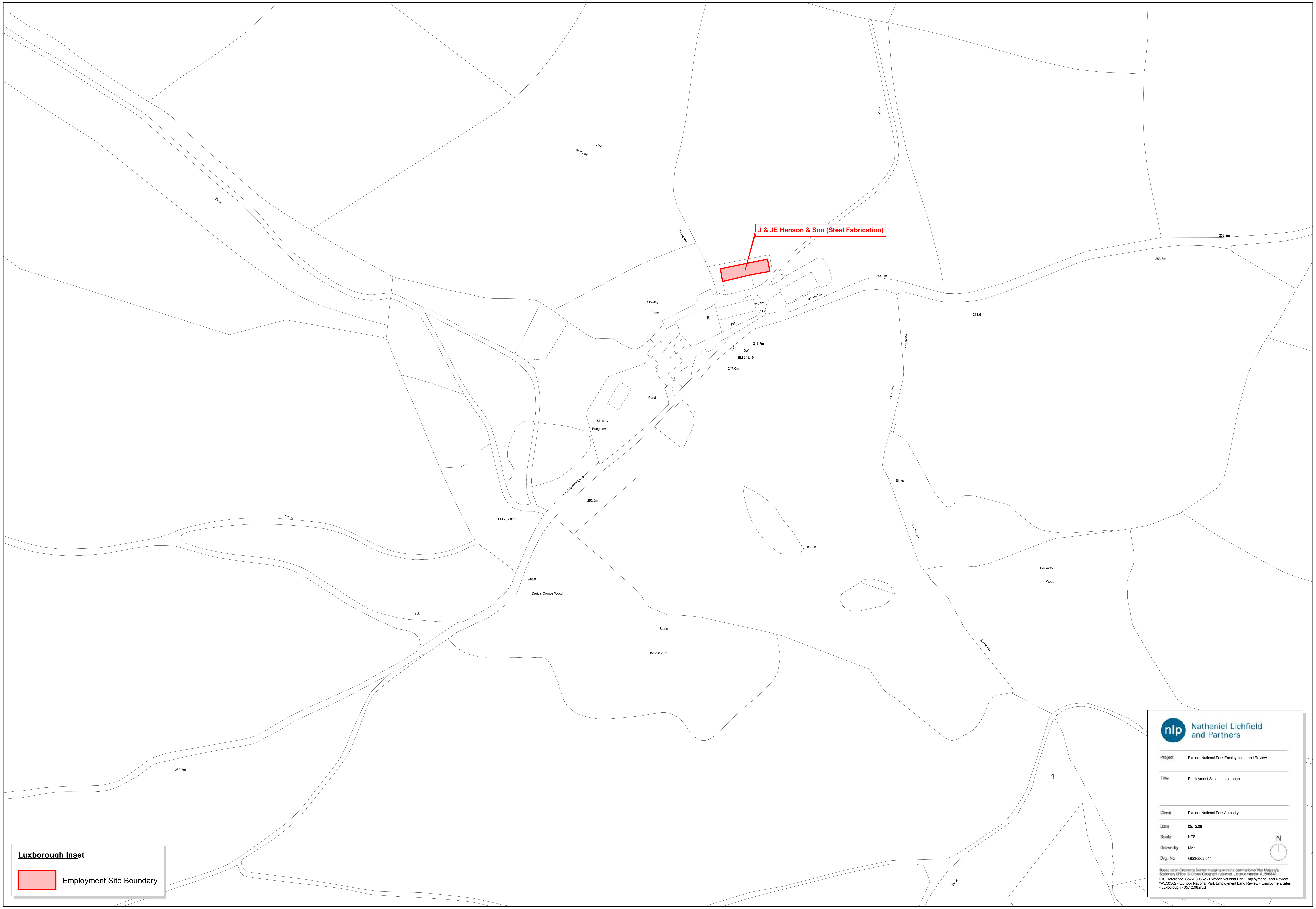

J & JE Henson & Son (Steel Fabrication)
Slowley Farm
Slowley Bungalow
Pond
STOUT'S WAY LANE
Druid's Combe Wood
Beckway Wood
Track
Issues
Sinks
Stone
BM 248.16m
BM 252.87m
BM 228.25m
244.3m
248.5m
248.7m
247.0m
252.6m
248.9m
252.2m
253.8m
232.7m
Luxborough Inset
Employment Site Boundary
Nathaniel Lichfield and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Luxborough
Client Exmoor National Park Authority
Date 05.12.08
Scale NTS
Drawn by MAr
Drg. No GIS30562-014
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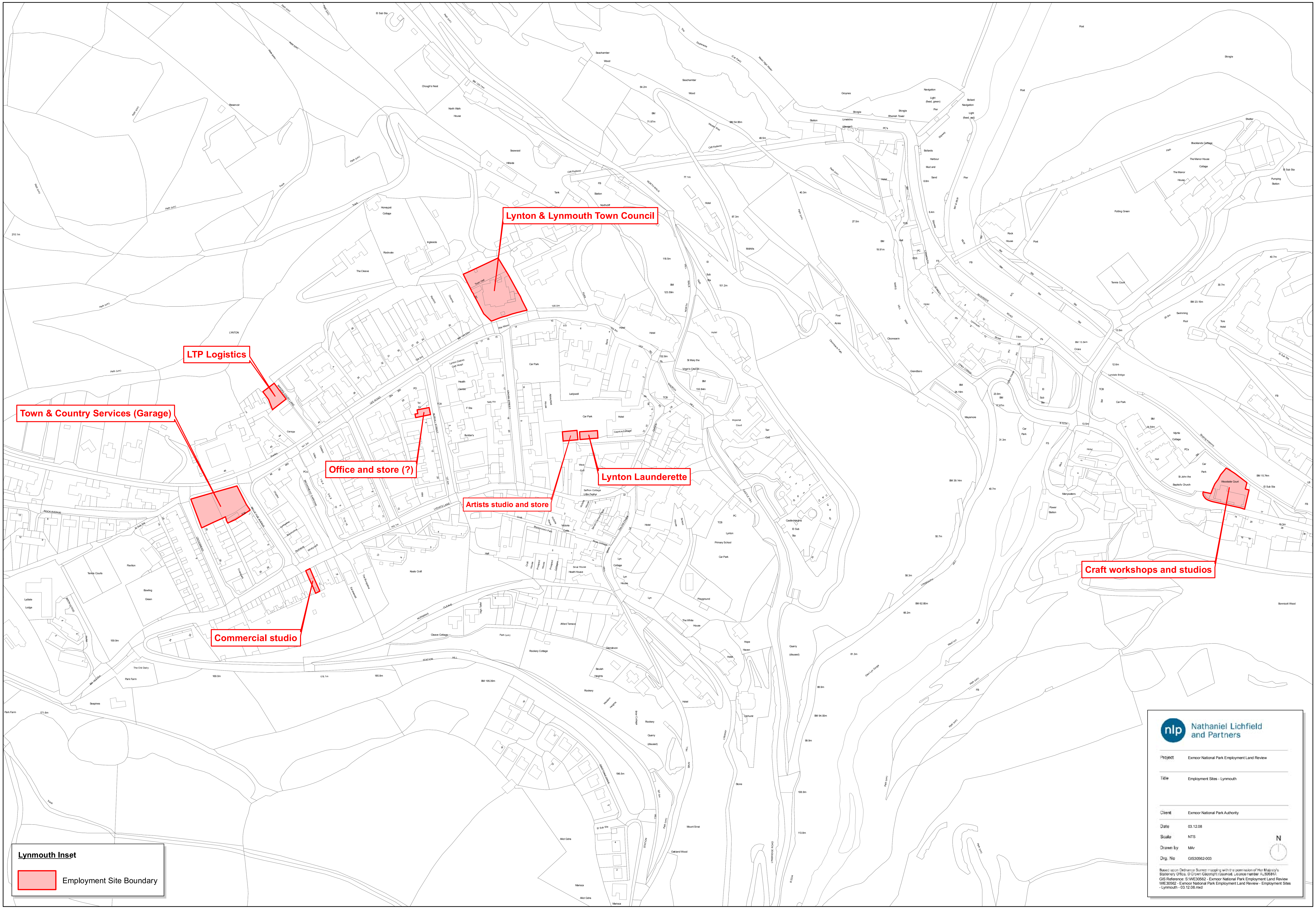
Lynton & Lynmouth Town Council
LTP Logistics
Town & Country Services (Garage)
Office and store (?)
Lynton Launderette
Artists studio and store
Commercial studio
Craft workshops and studios
Lynmouth Inset
Employment Site Boundary
Nathaniel Lichfield and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Lynmouth
Client Exmoor National Park Authority
Date 03.12.08
Scale NTS
Drawn by MAr
Drg. No GIS30562-003
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Pitt Mill Farm Inset

Employment Site Boundary

Nathaniel Lichfield and Partners

Project	Exmoor National Park Employment Land Review
Title	Employment Sites - Pitt Mill Farm
Client	Exmoor National Park Authority
Date	05.12.08
Scale	NTS
Drawn by	MAr
Drg. No	GIS30562-018

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Nathaniel Lichfield and Partners

Project: Exmoor National Park Employment Land Review

Title: Employment Sites - Porlock

Client: Exmoor National Park Authority

Date: 05.12.08

Scale: NTS

Drawn by: MAr

Drg. No: GIS30562-010

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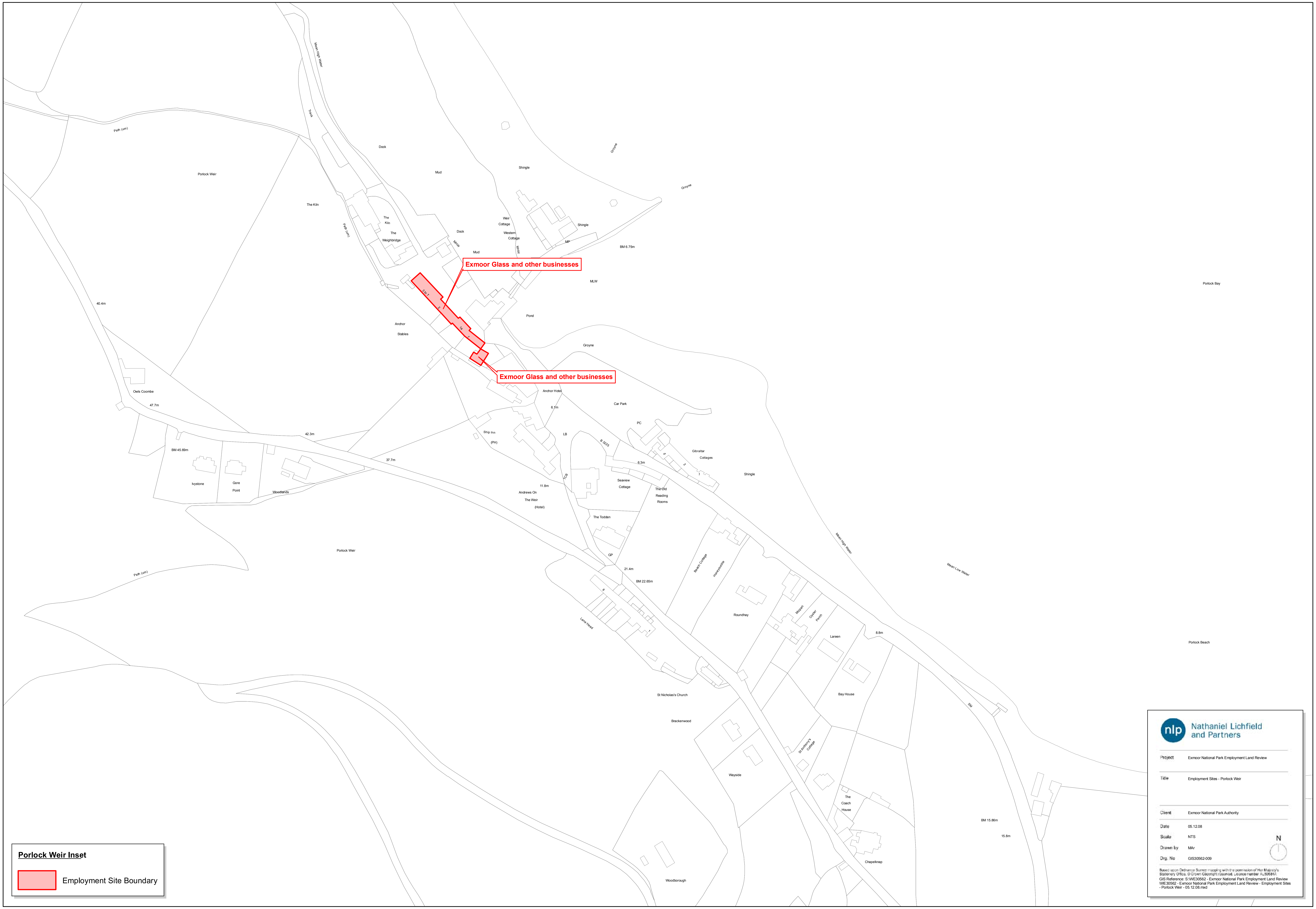

Porlock Weir Inset

Employment Site Boundary

Nathaniel Lichfield and Partners

Project	Exmoor National Park Employment Land Review
Title	Employment Sites - Porlock Weir
Client	Exmoor National Park Authority
Date	05.12.08
Scale	NTS
Drawn by	MAr
Drg. No	GIS30562-009

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GIS Reference: S:\WE30562 - Exmoor National Park Employment Land Review \WE30562 - Exmoor National Park Employment Land Review - Employment Sites - Porlock Weir - 05.12.08.mxd


Singer Instruments Co Ltd
Roadwater Inset
Employment Site Boundary
Nathaniel Lichfield and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Roadwater
Client Exmoor National Park Authority
Date 05.12.08
Scale NTS
Drawn by MAr
Drg. No GIS30562-016
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GIS Reference: S:\WE30562 - Exmoor National Park Employment Land Review \WE30562 - Exmoor National Park Employment Land Review - Employment Sites - Roadwater - 05.12.08.mxd


Styles Farmhouse Ice Cream Ltd
Rodhuish
Higher Rodhuish Farm
Riverside Cottages
Pins Cottage
St Bartholomew's Church
Stiles' Cottages
Stiles' Farm
Jenkin's Farm
Cedar Bungalow
Fern Bank
Park Cottages
Park Steep
Lower Rodhuish Farm
Water Wheel Cott
Quarry (disused)
Tip (disused)
Pond
Sluice
Spreads
Sinks
Issues
Track
STOUT'S WAY LANE
STRINGLAND'S LANE
Rodhuish Inset
Employment Site Boundary
Nathaniel Lichfield and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Rodhuish
Client Exmoor National Park Authority
Date 05.12.08
Scale NTS
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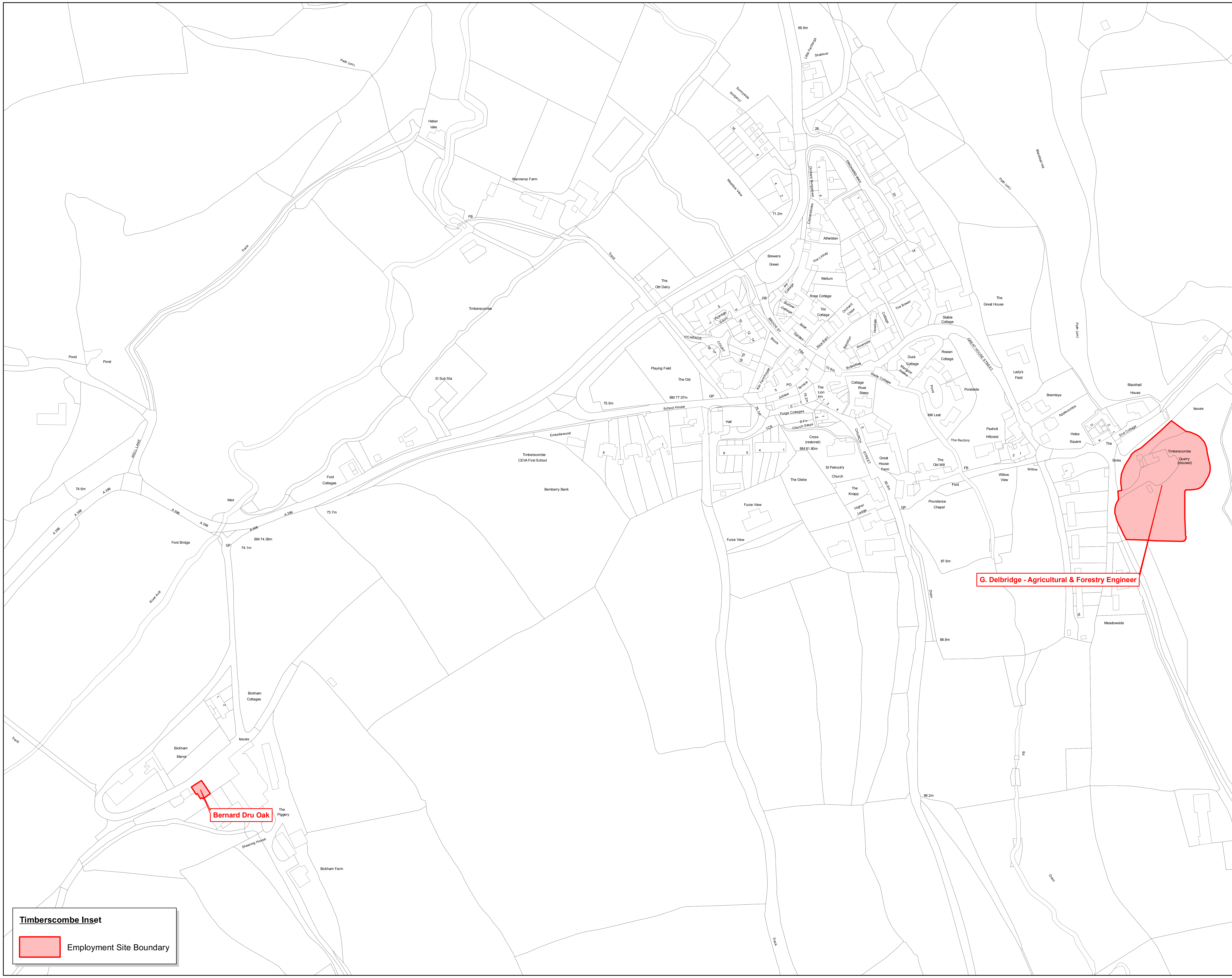

Timberscombe Inset

Employment Site Boundary

Nathaniel Lichfield and Partners

Project	Exmoor National Park Employment Land Review
Title	Employment Sites - Timberscombe
Client	Exmoor National Park Authority
Date	05.12.08
Scale	NTS
Drawn by	MAr
Drg. No	GIS30562-012

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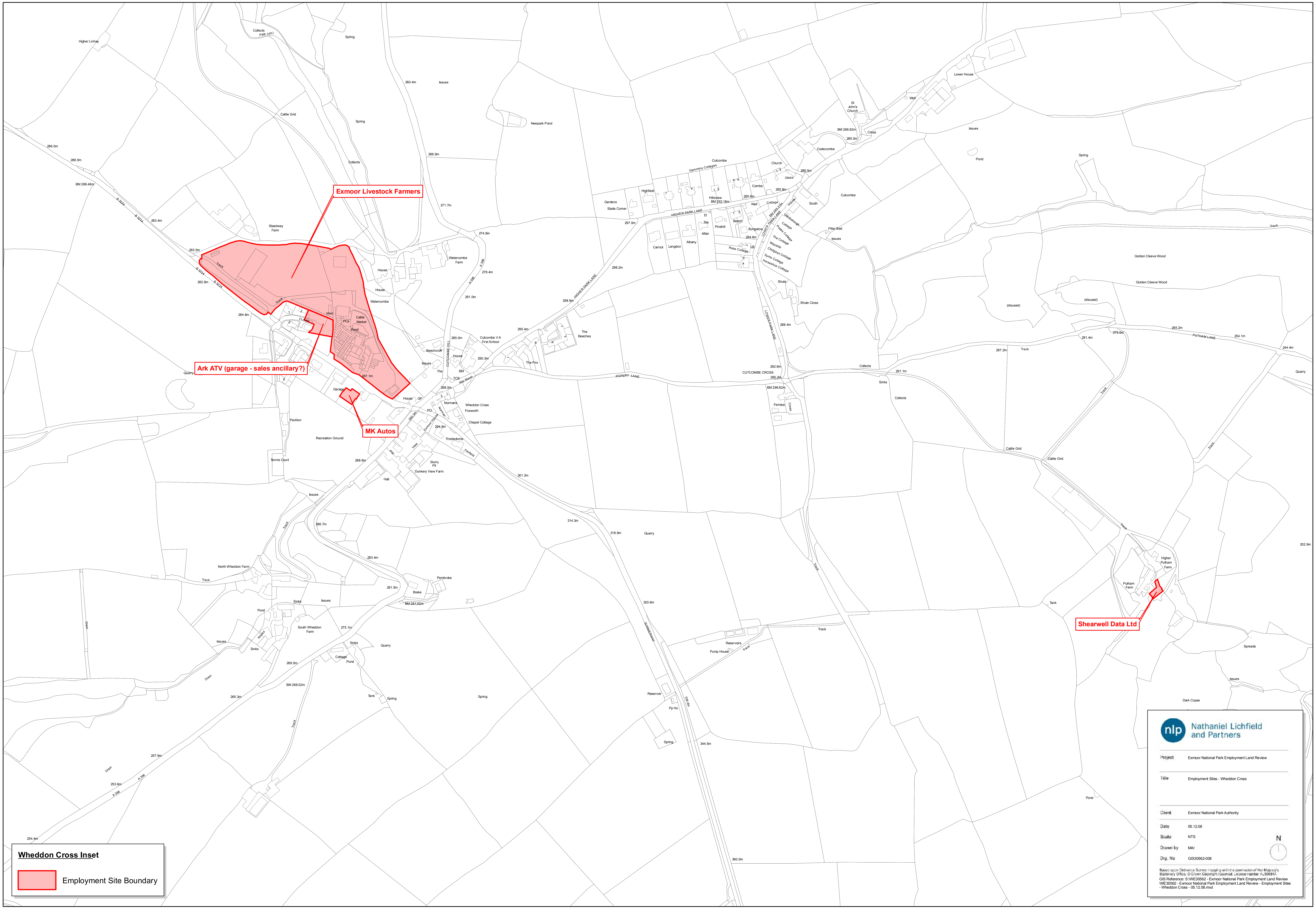

Exmoor Livestock Farmers
Ark ATV (garage - sales ancillary?)
MK Autos
Shearwell Data Ltd
Wheddon Cross Inset
Employment Site Boundary
Nathaniel Lichfield and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Wheddon Cross
Client Exmoor National Park Authority
Date 05.12.08
Scale NTS
Drawn by MAr
Drg. No GIS30562-008
N
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GIS Reference: S:\WE30562 - Exmoor National Park Employment Land Review \WE30562 - Exmoor National Park Employment Land Review - Employment Sites - Wheddon Cross - 05.12.08.mxd

Martins
Crossways
Wooton Courtenay
Village Hall
All Saints' Church
Issues
West
Drayton
Witches
End
The Brambles
Dunkery Beacon
Hotel
Dunkery
Pleck
Lane
End
Stag
Cottage
Manor Farm
Rose
Cottage
Panda's
House
Wills
Mead
Ordesa
Puzzle
Tree
Willsfield
House
Red
Cleeve
Windhover
Stonerush
Woodpeckers
Elm Bank
Dunkery Cottage
Fair View
Little Close
Meadows
Sinks
PO
TCB
Pear Tree
Cottage
The Old
School
The Old
Rectory
G H Burnell
Morton
House
Windrush
Stable
Cottage
Orchard House
Applegarth
Riverside Farm
Riverside
Cottage
Wheddons
Cottage
Bradleys
Forge Cottage
Brookside
Farm
Ford
Waterfall
Track
Crockford
Hanny
Cottage
Bridge
Cottage
Pond
Path (um)

Wootten Courtenay Inset
Employment Site Boundary

Nathaniel Lichfield
and Partners
Project Exmoor National Park Employment Land Review
Title Employment Sites - Wootton Courtenay
Client Exmoor National Park Authority
Date 05.12.08
Scale NTS
Drawn by MAr
Drg. No GIS30562-011
N
GIS Reference: S:\WE30562 - Exmoor National Park Employment Land Review \WE30562 - Exmoor National Park Employment Land Review - Employment Sites - Wotten Courtenay - 05.12.08.mxd

Appendix 3 Experian Economic Sectors by Sic Category

Experian Sector	*SIC Category/code*
Agriculture, Forestry & Fishing	01 Agriculture and Hunting 02 Forestry and Logging Services 05 Forestry and Fish Hatcheries
Oil & Gas Extraction	11 Extract Crude Petroleum and Gas
Other Mining	10 Mining of Coal 13 Mining of Metal Ores 14 Other Mining and Quarrying
Food, Drink & Tobacco	15 Manufacture of Food and Beverages 16 Manufacture of Tobacco Products
Textiles & Clothing	17 Manufacture of Textiles 18 Manufacture of Wearing Apparel 19 Tanning and Dressing Of Leather
Wood & Wood Products	20 Manufacture of Wood and Products of Wood
Paper, Printing & Publishing	21 Manufacture of Pulp Paper and Paper Products 22 Publishing and Printing
Fuel Refining	23 Manufacture of Coke and Refined Petroleum
Chemicals	24 Manufacture of Chemicals and Chemical Products
Rubber & Plastics	25 Manufacture of Rubber and Plastic Products
Minerals	26 Manufacture of Other Non-Metallic Mineral

Metals	27 Manufacture of Basic Metals 28 Manufacture of Fabricated Metal Products
Machinery & Equipment	29 Manufacture of Machinery and Equipment
Electrical & Optical Equipment	30 Manufacture of Office Machines and Computer 31 Manufacture of Electrical Machinery 32 Manufacture of Television and Line Telephone 33 Manufacture of Medical and Optical Instruments
Transport Equipment	34 Manufacture of Motor Vehicles and Trailers 35 Manufacture Of Other Transport Equipment
Other 'Other' Manufacturing	36 Manufacture of Furniture and Manufacturing N.E.C 37 Recycling
Gas, Electricity & Water	40 Electricity Gas Steam and Hot 41 Collect and Distribute Water
Construction	45 Construction
Wholesaling	50 Sale and Maintenance of Motor Vehicle 51 Wholesalers Trade and Commission
Retailing	52 Retail Trade
Hotels & Catering	55 Hotels and Restaurants
Transport	60 Land Transport 61 Water Transport 62 Air Transport 63 Supporting and Auxiliary Transport
Communications	64 Post and Telecommunications

Banking & Insurance	65 Financial Intermediation 66 Insurance and Pension Funding 67 Activities Auxiliary to Finance
Business Services	72 Computer and Related Activities 74 Other Business Activity
Other F&Bs	70 Real Estate Activities 71 Renting Machinery and Equipment 73 Research and Development
Public Admin. & Defence	75 Public Administration
Education	80 Education
Health	85 Health and Social Work
Other 'Other' Services	90 Sewage and Refuse Disposal 91 Activities Membership Organisations 92 Recreational Cultural and Sport 93 Other Service Activities 95 Private Households 99 Extra Territorial Organisations and Bodies

Appendix 4 Experian Business Strategy Forecasts

Use Class	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
B1(a) and (b)	465	475	475	475	465	465	465	465	465	465	465
B1(c)/B2	181	207	206	206	191	191	191	191	191	191	188
B8	455	463	472	446	429	429	429	429	429	429	429
sub total	*1101*	*1145*	*1153*	*1127*	*1085*	*1085*	*1085*	*1085*	*1085*	*1085*	*1082*
Non-B	3979	4045	4157	4123	4105	4115	4135	4135	4155	4155	4168
TOTAL	**5080**	**5190**	**5310**	**5250**	**5190**	**5200**	**5220**	**5220**	**5240**	**5240**	**5250**

Use Class	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
B1(a) and (b)	465	465	475	475	465	465	465	465	455	455
B1(c)/B2	189	189	189	181	171	170	170	180	181	181
B8	438	438	438	446	446	455	455	455	463	468
sub total	*1092*	*1092*	*1102*	*1102*	*1082*	*1089*	*1089*	*1099*	*1099*	*1104*
Non-B	4178	4188	4208	4228	4228	4231	4241	4251	4241	4256
TOTAL	**5270**	**5280**	**5310**	**5330**	**5310**	**5320**	**5330**	**5350**	**5340**	**5360**

Source: Experian Business Strategies / NLP