



The Economic Benefits of a Dorset National Park

Report for

Dorset National Park

November 2018

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Introduction

Dorset is an outstanding candidate for National Park status. It has an internationally renowned geodiversity, varied landscapes of outstanding natural beauty, exceptional biodiversity, a “gold standard” heritage, and unrivalled and inclusive recreational opportunities. As well as the spectacular 90 miles long UNESCO World Heritage “Jurassic” Coast, the county has much of England’s surviving lowland heaths including what remains of Thomas Hardy’s “Egdon Heath” along with a wide range of landscapes and wildlife habitats that are among the most species-rich in the UK.

These features are highly valued by residents and visitors and recognised as a major asset for the county’s economy. They provide recreational opportunities, enhance the health of local people, including inhabitants of its fast-growing conurbation, and help to attract some 29 million visitors annuallyⁱ. However, Dorset’s outstanding environment and heritage are under pressure, its natural capital is being eroded, and landscapes and biodiversity need to be better conserved and enhanced. The economy is characterised by low productivity, low wages and low GVA per head compared to regional and national averagesⁱⁱ. There is a need to improve management of visitor and recreational pressures, facilitate more sustainable rural development, provide more homes for local people, and promote Dorset as an outstanding location for international as well as national business investment and tourism.

In response to these challenges, a widely based partnership has proposed a Dorset and East Devon National Park, covering the World Heritage coastline, and much of Dorset’s iconic rural area. This would significantly enhance England’s National Park network, almost doubling the length of coastline it currently includes, while Dorset would potentially be the first National Park to have a significant offshore role.

This report outlines the benefits that National Park designation could deliver for Dorset’s economy, and its potential contribution to the county’s vision and strategy, including helping to drive forward a Rural Economic Strategy for the county. It also aims to inform the Glover Review, which is currently investigating the benefits of National Parks and designated landscapes and the case for extending them. The report has been prepared by Cumulus Consultants Ltd for the Dorset and East Devon National Park CIC and draws on a range of existing studies and local documents.

The following sections explain how **Dorset National Park would:**

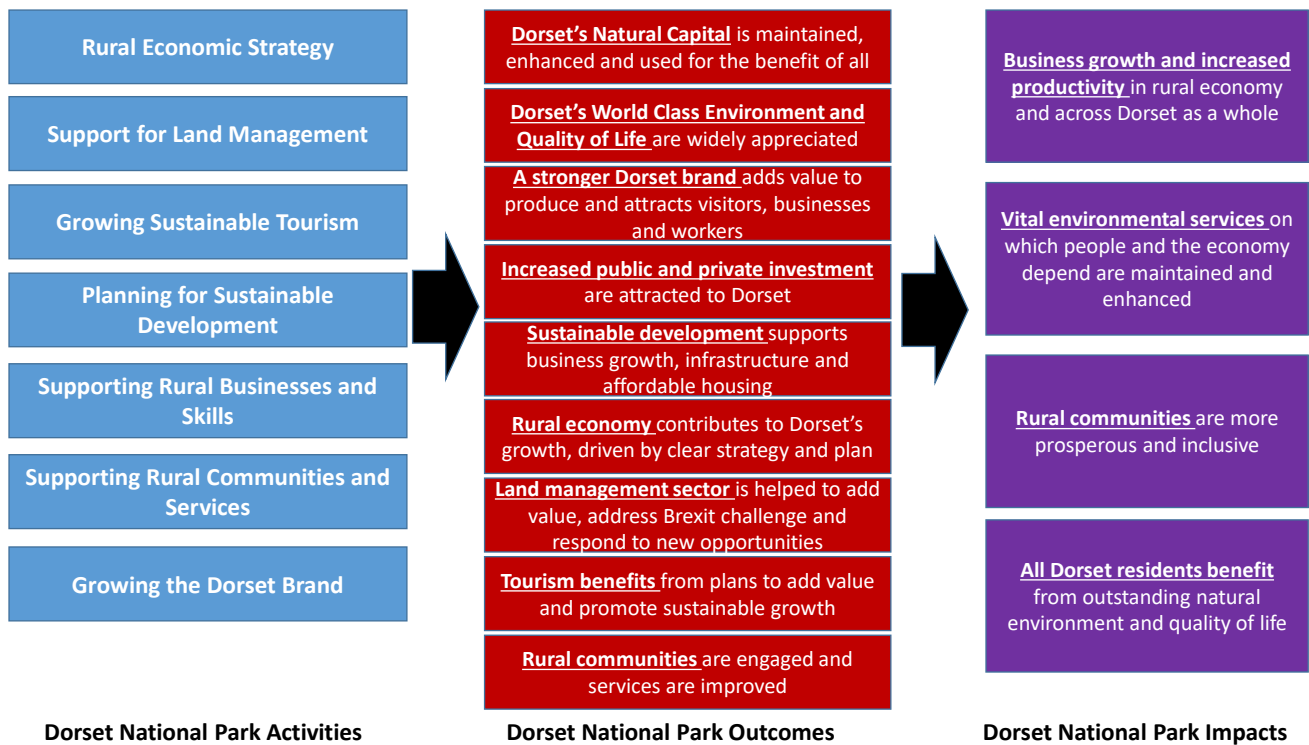
1. **Strengthen and invest in Dorset’s natural capital**, recognised as a major asset for growing a strong and resilient economy;
2. **Strengthen Dorset’s brand**, providing major opportunities for a range of businesses across the economy;
3. **Help Dorset to attract investment** from government and the private sector;
4. Play a leading role in defining and implementing a **Rural Economic Strategy** for Dorset;
5. Boost and sustainably manage the growth of Dorset’s **tourism sector**;
6. **Add value to Dorset’s land-based industries** and the other sectors that depend on them, enhancing their productivity and resilience;
7. Take the lead in **planning for sustainable development** of the rural economy;
8. Contribute to the delivery of **better rural services** and the **development of stronger rural communities**;
9. **Benefit the whole economy and population** of the county.

These benefits are summarised in Figure 1.

The Economic Benefits of a Dorset National Park

20 November 2018

Figure 1: Summary of Economic Benefits of Dorset National Park



A map of the National Park area suggested in 2013/14 is shown in Figure 2. This suggested area is subject to discussion and evaluation. Further areas and communities have said they wish to be included in the National Park. This report focuses on the economic benefits of the National Park for Dorset. However similar types of benefit would apply to East Devon.

Figure 2: 2013/14 suggested coverage of a Dorset National Parkⁱⁱⁱ



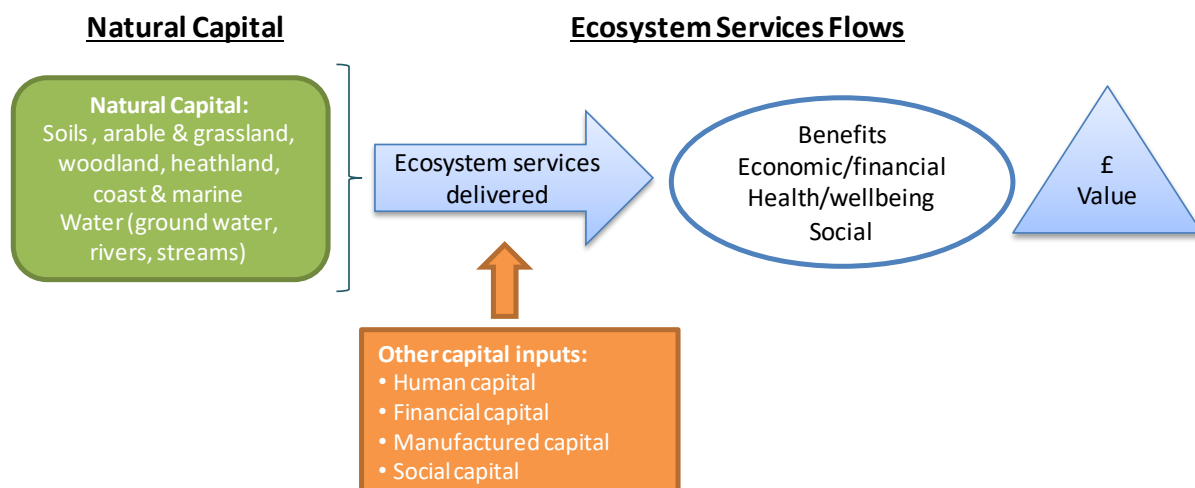
1 Strengthening Natural Capital

Dorset’s natural capital is its greatest economic asset. A Dorset National Park would recognise the value of this natural capital and provide a focus for conserving and investing in it. This would help to enhance the delivery of a range of vital services on which people and the economy depend and provide new opportunities for economic growth for the county as a whole.

The natural environment is recognised as Dorset’s greatest economic asset. A report in 2016^{iv} estimated that Dorset’s environmental economy is worth £1.5 billion per year, supporting 30,000 jobs, and accounting for between 8% and 10% of the county’s overall economy, twice the size of manufacturing. These are central estimates of the range of figures derived from different methods^v. A survey found that 63% of residents believed that environmental quality was very important or critical to their decision to live in Dorset, while 90% believed it contributed to a premium in house prices. 97% of visitors surveyed cited the natural environment as the reason for visiting Dorset, with the majority recognising the importance of environmental designations as contributing to this.

The Dorset Environmental Economy report defines natural capital assets as “the foundation of all wealth, consumption and production”, supporting flows of materials and energy that are vital for the economic process, underpinning employment and productivity, driving growth and living standards, and promoting wellbeing. It is now widely recognised that natural capital is fundamental for our sustained prosperity and that investing in the protection, restoration and enhancement of natural assets alongside other forms of capital can generate substantial economic returns and play an important role in underpinning economic development^{vi} (Figure 3).

Figure 3: Natural capital, ecosystem services and prosperity



Natural capital delivers a range of essential ecosystem services on which people and the economy depend. These include the provisioning of food, timber and clean water; regulating services such as pollination and the maintenance of climate, soils, water and air; and cultural services such as recreation, tourism, sense of place and aesthetic and cultural values. Failing to protect natural capital would threaten the delivery of these services, creating risks for economic development by impacting on natural resources, increasing floods and natural hazards, and adversely affecting biodiversity and landscape. This would have potential

negative impacts on the availability of food and raw materials, human health and well-being, and the quality of the living, working, business and tourism environment. On the other hand, investing in the restoration and enhancement of natural capital offers opportunities for Dorset to grow its green economy, add value to products and services (including in the food and tourism sectors), and promote itself as one of the best places in Britain to live, work, visit and invest in.

Dorset's Natural Capital Investment Strategy^{vii} recognises that the environment is vital for the county's economic prosperity and development and sets out proposals to protect and invest in it in order to facilitate development such that business ventures become more reliable and more likely to succeed, and to allow further sustained development within sensible limits. The Strategy emphasises the importance of maintaining the environmental resource base and living off what it produces, rather than eroding the base itself and thereby restricting future opportunities.

Similarly, the Dorset Local Economic Partnership (LEP) Strategic Economic Vision emphasises the importance of the county's world class environment and quality of life in attracting and retaining high skilled workers, businesses and investment, and supporting growth. Economic growth will be achieved by making the most of the natural environment and quality of life, and by protecting and harnessing natural assets.

A Dorset National Park, working in close partnership with the Dorset Council and the LEP, could play a major role in conserving, investing in and maximising the value of natural capital to complement investment in built and human capital through the LEP strategy. By helping to maintain natural capital and ecosystem services, and harnessing them in support of sustainable development, the National Park would play an important role in helping to make Dorset's economy, communities and environment more prosperous and resilient.

Experience from other National Parks demonstrates their important role in sustaining the natural and cultural capital on which local, sub-regional and regional economies depend (Box 1). A great strength of National Parks is their focused purposes and duty. Other local authorities have a wide range of responsibilities and the Dorset Council is very occupied in addressing these, including the challenges presented by a rising social care budget. Partnering with a National Park to deliver much of the natural capital agenda, which would benefit from central Government funding, would help to free resources for other priorities.

Box 1: Role of National Parks in investing in Natural Capital for economic prosperity

National Park Authorities (NPAs) take action to protect and enhance natural capital through:

- Supporting land-based industries such as farming and forestry through sustainable land management advice and agri-environment payments
- Collaborating with water companies and farmers to improving water quality
- Promoting sustainable use of resources, sustainable tourism and public transport.

For example, the South Downs NPA (SDNPA) has undertaken a range of initiatives to invest in its natural capital, including:

- **Farm Clusters.** SDNPA has worked with Game and Wildlife Conservancy Trust (GWCT) to promote the concept of Farm Clusters whereby local farmers work together to enhance the environment at a landscape scale. In the Selborne Farm Cluster, for example, farmers have worked with SDNPA to create new hedgerows and expand a network of species rich meadows. Volunteers from the local community have been helped to carry out nest surveys of the threatened field mouse in hedgerows and field margins. Over the last three years they have found more than 550 nests, most of which can be directly credited to habitat improvements delivered through the Higher Level Environmental Stewardship scheme.
- **Chalk grassland conservation.** SDNPA has collaborated with landowners, local communities, local authorities, utility companies, statutory authorities, and conservation charities to conserve and enhance chalk grassland to deliver benefits for people and wildlife.^{viii} This endangered habitat is vital to the survival of rare and endangered wildlife (e.g. Duke of Burgundy butterfly, Burnt-tip orchid and Skylark). Chalk downland is a managed landscape which provides a range of benefits to people including the provision of clean drinking water (supplying as much as 75% of the public water supply in the area), as well as an access and recreation resource (there are more than 40 million visits to the South Downs National Park (SDNP) each year).

Protected landscapes provide a wide range ecosystem services with significant market and non-market values. For Dorset Area of Outstanding Natural Beauty (AONB), in 2013, these values included: recreation at £20.7m per year; drinking water at £2.4m; carbon sequestration £5.4m; air quality £31.6m; and crop and livestock production £1.7m.^{ix}

2 Developing the Dorset Brand

A Dorset National Park would strengthen Dorset's brand, providing major opportunities for a range of businesses. This would enhance productivity by adding value to local produce and tourism and would help Dorset to attract and retain more high value businesses, workers and visitors.

Dorset's brand – based on the quality of its natural and built environment – already plays a major role in the marketing of food and rural produce, tourism and recreation, and helps in attracting workers and small business owners to the county. This is recognised by the LEP which emphasises that the quality of the environment gives the area a competitive advantage attractive to businesses, employees and visitors^x. The LEP Vision is that by 2033, Dorset's competitive economy, world-class environment and high quality of life would help to attract and retain high-skilled workers and employers^{xi}. However, in spite of its outstanding landscapes, heritage and quality of life, the county has yet to develop a coherent tourism strategy or to promote itself effectively to national and international visitors, mobile businesses or investors.

The outstanding quality of Dorset's coast is recognised internationally through the designation of the Jurassic Coast World Heritage Site in 2001. This is complemented by the Dorset AONB, which covers almost half of Dorset and is part of a family of nationally important protected landscapes, and numerous designations covering nature conservation sites and the built environment. Together, these assets and designations provide superb opportunities for Dorset to market itself to investors, consumers, visitors and workers.

Dorset LEP's Vision is that the high-quality natural environment enhances the quality of life for people throughout the county, attracting people to live there and businesses to relocate and develop locally. It notes that the urban, rural and coastline areas are inter-dependent, and that maintaining the quality of the environment is critical to all. It aims to make the most of the natural environment and quality of life by protecting and harnessing natural assets.

The natural environment is already central to Dorset's brand and is used to market the county to visitors, consumers and investors. For example:

- **Visit Dorset** markets the county as *a beautiful and welcoming destination, brimming with things to do, with a fantastic playground of beaches and miles of unspoilt countryside to explore.*^{xii}
- **Dorset Food and Drink** promotes products *which celebrate their connection to this beautiful county.* Dorset is home to many widely recognised brands such as Jordans Dorset Ryvita, Dorset Cereals, Hall & Woodhouse Badger Beers, Palmers Brewery, Thomas J Fudge, Purbeck Ice Cream, Dorset Teas, Olives et al and Moores Biscuits, who mention their links to Dorset's countryside, heritage and environment in their marketing. The area also prides itself on its wealth of local and artisan food and drink producers creating everything from fantastic cheeses and breads to gins and chutneys. Dorset proudly boasts two breweries in long-established family ownership and on traditional, historic sites.
- Dorset LEP's **Invest in Dorset** web pages promote Dorset as *a great place to live, invest and grow* and add that *the local environment provides the opportunity of living and working in one of the most desirable locations in the UK, featuring the Jurassic Coast World Heritage Site, vast areas of outstanding natural beauty and award-winning sandy beaches.*

A Dorset National Park would further strengthen the Dorset brand and support economic development efforts across the county. The 'National Park' brand is internationally recognised as representing the places of the highest national importance for natural and cultural heritage, including landscape, wildlife and recreation. It is used by the Great Britain Campaign and by Visit Britain in promoting the country internationally^{xiii}. Business surveys show that National Park status can be an attractor for business providing an attractive setting, high quality environment for employees to enjoy and an association that has demonstrable benefits to business bottom line (see Box 2).

Box 2: Examples of National Park branding activities

Dartmoor National Park created a unified brand to raise the profile of Dartmoor as “a quality destination and as a quality provider of local produce”.^{xiv}

Exmoor National Park created the Exmoor brand as the official tourism brand for the Greater Exmoor area and they encourage businesses to make use of it. They have also developed a rural tourism toolkit with useful information and advice for rural tourism businesses. It is designed to help with market identification, effective communication and marketing, and to encourage initiatives that offer great visitor experiences, whilst nurturing the environments that create them.^{xv}

The Lake District National Park’s brand supports their vision to be “an inspirational example of sustainable development in action”.^{xvi}

The South Downs National Park is “a shared identity” designed to give the place itself an identity all of its own, as well as supporting the brands of business partners and stakeholders. It allows businesses, partners and communities to benefit from being associated with the National Park, and is free to use for businesses, partners, communities within the National Park who want to use it in support of the National Park’s purposes and duty.”^{xvii}

A branding initiative backed by the resources of a National Park could help all Dorset based businesses, including farmers, to extend their reach and better market their products. It could also help to strengthen the county’s offer to inward investors and, by presenting the county as the natural place to do business, be used to encourage more mobile and enterprising businesses, skilled workers and their families to locate to the area, attracted by the health, well-being and recreational benefits that Dorset offers.

3 Attracting Investment

Dorset National Park would strengthen efforts to attract private sector inward investment as well as attract increased government investment to the county.

National Parks receive dedicated grant funding from Government. A comparative analysis found that NPAs in England receive, on average, income equivalent to £409 per resident, compared to only £9.93 per resident for AONB Partnerships (2013 data)^{xviii}. On average, core DEFRA funding accounts for 70% of the income of National Parks in England.

Defra funding alone supported 885 direct FTE jobs across England's 10 National Parks in 2013. In total, and including the benefits to the local economy resulting from purchases of goods and services and the effects of employee expenditures, it has been estimated that total expenditures by England's 10 National Park Authorities support more than 1,500 Full Time Equivalent (FTE) jobs and Gross Value Added (GVA) of £50 million in 2013^{xiv}. The economic impacts of expenditures associated with tourism and other businesses which benefit from the NPAs' activities and the quality of the natural environment are much larger than this^{xix}.

It is estimated that a Dorset National Park could receive core funding of £10 million annually from Government and employ perhaps 85 FTE staff^{xx}. Including direct, indirect and induced effects, it is estimated that a National Park could support employment of 124 FTE jobs and increase Gross Value Added in Dorset by £6.5 million annually^{xviii}. The same report estimated that Government funding for a National Park would free up around £100,000 of current expenditure by Dorset and Devon County Councils on managing the current AONBs, at a time when local authority funding is increasingly vulnerable to ongoing budgetary cuts.

National Park status would also strengthen Dorset's bids for funding from a range of other sources, including agri-environment and rural development funds, economic development and business support programmes, and Heritage Lottery Fund grants. It has been estimated that the South Downs NPA has secured over £100m in core and project funding since 2011 (see Box 3).

Box 3: Extra investment attracted by South Downs National Park

SDNPA has been working with New Forest NPA and Hampshire County Council on sustainable transport plans, unlocking £10.3m of funding from the Department of Transport towards implementing their cycling and walking strategy.^{xxi}

SDNP currently attracts an estimated £7.88 million annually through agri-environment schemes^{xxii}

Examples of extra investment attracted by SDNP in 2017/18^{xxiii} include:

- £1.44 million from the Heritage Lottery Fund (HLF) to restore and reunite areas of rare heathland^{xxiv}
- £46,000 from Southern Water to protect and improve the quality of groundwater in the Brighton chalk block; £30,000 from the Woodland Trust to fund forestry work; and £27,000 to fund heathland restoration work. This is in addition to agri-environment scheme funding.
- Contributions from developers and stakeholders via Section 106 agreements for community development across the Park.
- A wide range of other contributions, donation and sponsorships.

The National Park would also provide opportunities to develop new and innovative sources of funding linked to investment in natural capital, such as through payments for ecosystem services and visitor giving. National Park status would also be a major addition to the county's offer to inward investors, helping to increase private sector investment. Some examples of new sources of funding in other National Parks are given in Box 4.

Box 4: Examples of new sources of funding developed in National Parks

'Upstream thinking' Payments for Ecosystem Services where water companies collaborate with farmers and land managers and pay for improved land management practices to enhance the water quality of groundwater, streams and reservoirs. Such schemes are operating in Exmoor and Peak District National Parks amongst others.

Visitor giving: during 2017-18, the Lake District Foundation (previously 'Nurture Lakeland' visitor giving scheme) raised £396,512 from visitors and businesses who 'give something back' to the Lake District for maintaining and enhancing the National Park. Part of this money was raised by accommodation guests adding a small voluntary contribution (perhaps 50p, £1 or £2) to their bill. The Lake District Foundation supports small projects (up to £5,000 each) across the Lake District. SDNPA has also developed a visitor giving scheme. Since the launch nearly 3 years ago, £92,000 has been generated by this scheme towards the upkeep of the South Downs Way.

Private investment: SDNPA has collaborated with the Wiston Estate in Sussex to develop a pioneering Whole Estate Plan which simultaneously seeks to achieve the ambitions of the Estate and the purposes of the National Park^{xxv}. Wiston Estate has a diverse mix of businesses making use of raw materials and assets to add value and create an enterprising local economy, including an in-hand arable farm, a vineyard, a woodland management business and a shooting and conservation enterprise. The most recent estate business, supported by the Plan, is Wiston Winery, producer of award winning English Sparkling Wine from grapes grown both on the estate and in the local area. It is a growing business, selling to many of the UK's best restaurants and has recently begun to export to the US, Australia, Norway and Ireland. Recent investment proposals include expansion of the winery facility to accommodate wine tours and a new event space, together with visitor facilities, café, shop, commercial floorspace and holiday lets that provide overnight accommodation.

4 Building a Rural Economic Strategy

A Dorset National Park would cover a significant part of the rural area of the county and provide a focus for meeting the distinctive needs of the rural economy, within the overall economic strategy for Dorset defined by the LEP. The National Park Authority can be a strategic partner and delivery agent for both the LEP and the Dorset Council.

It has been suggested that Dorset needs a strategy for its rural economy which builds on the LEP strategy for the county as a whole and on the Dorset Rural Enterprise Priorities Paper 2016^{xxvi}. A rural economic strategy would focus on the specific needs of Dorset's rural economy and set out the actions needed to address them. It would define the approach to sustaining and growing rural sectors such as the digital economy, the green economy and related R&D and investment opportunities, agriculture, food, tourism and renewable energy, which provide the potential to contribute to balanced and distributed economic growth across the county. It would aim to address the specific challenges facing rural businesses and communities, including rural broadband, affordable housing and sustainable transport, while seeking to promote business start-ups and enhance skills, productivity, value added and wages in rural sectors.

These challenges reflect those set out in the Dorset LEP Vision, which include enhancing business start-ups; delivering a competitive, sustainable and resilient sector mix; developing a world class workforce; enhancing access to markets; making the most of the natural environment; and delivering growth across Dorset.

NPAs have a statutory duty to seek to foster the economic and social well-being of local communities within their area. To do so, they provide a range of business support activities, which include advice on planning and development, employment space provision, environmental economy initiatives, business networking initiatives and support for local infrastructure, including broadband and mobile phone coverage, affordable housing and transport services. They support land-based industries such as farming and forestry through land management advice services, agri-environment scheme advice and support, farm diversification advice and grants, local food and drink initiatives, and renewable energy advice and support (see Box 5).^{xiv}

Working in partnership with the LEP, the Dorset Council and local businesses, a Dorset National Park can play a significant role in formulating and implementing a rural economic strategy for the county; in developing and delivering rural business support initiatives; and in helping to ensure that economic development plans and programmes take account of the specific needs and opportunities of rural business.

Evidence shows that England's ten National Parks are performing well in economic terms and that National Park designation has strong support from local businesses (Box 6).

Box 5: National Park Authorities working in partnership with LEPs

In January 2015, National Parks England issued an open offer to LEPs in England, entitled National Parks – Open for Business^{xxvii}. This estimated that there are more than 22,000 businesses in England's National Parks, with twice the number of businesses per unit of population than the national average, including many ambitious entrepreneurs and innovative start-ups. The National Parks proposed to partner LEPs in addressing rural economic challenges and opportunities, offering: access to rurally dispersed businesses (including through networks and supply chains); access to strong community partnerships; capacity, expertise and a track record in delivering sustainable development; and a strategic partnership role as a voice and champion for rural businesses and investment. The NPAs pledged to align National Park Management Plans and Local Plans with LEP strategies, and to work with the LEPs as delivery partners. It argued that by working together, NPAs and LEPs could create more, good quality jobs; improve infrastructure and skills; help entrepreneurs and local businesses to become more sustainable and resilient; grow a high quality, more resilient visitor economy; boost the land-based industries; enhance local quality of life and attract new businesses and skilled workers; and demonstrate how distinctive high quality environments can be a driver and inspiration for thriving businesses.

For example, the Heart of the South West LEP has been active in working with Exmoor NPA and Local Nature Partnership colleagues across the region on how best to recognise and represent the value and potential of the region's unique environmental assets as natural capital for input into future economic development strategies and plans.

The Yorkshire Dales and North York Moors NPAs have developed strong, clear relationships with LEPs and their Strategic Economic Plans. The NPAs are taking a lead to support jobs and growth through schemes for the tourism sector, through the Dales and Moors Farm Innovation Project and latterly looking to develop schemes for young apprenticeships.^{xxviii}

Box 6: Economic performance of National Parks and business support

England's National Parks generally perform well economically:

- The overall unemployment rate in England's National Parks is half the national rate (2% compared to 4% nationally).
- There are higher levels of self-employment (19%, compared to 10% nationally)^{xix}.
- Total GVA in England's 10 National Parks is between £5.5 billion and £8.7 billion per annum, equivalent to a small city such as Plymouth, Coventry, Swindon or Sunderland^{xxix}.

A range of surveys^{xxx,xxxi,xxxii} of businesses in protected landscape areas have found strong business support for designation, showing how environmental quality and the National Park brand support a significant proportion of local economic activity:

- over 55% of businesses in National Parks believe that the quality of the landscape and environment has a positive impact on business performance;
- over 60% of businesses state they are directly or indirectly dependent on the landscape and environment;
- over 55% of businesses felt that they would be seriously or to some extent affected by a deterioration in the landscape and environment; and
- over 50% of businesses felt that the National Park designation has a positive impact on their business.

5 Adding Value to the Tourism Sector

Tourism is a major sector in Dorset's economy. A Dorset National Park would provide a major boost for the sector, helping to add value to the county's tourism offer and facilitate sustainable growth across the county.

Tourism and leisure is a leading sector in Dorset's economy. Research for the Dorset Tourism Partnership in 2015 estimated that tourism supports 34,000 FTE jobs in the county (12% of all employment) and that total visitor-related spending amounts to £1.8 billion a yearⁱ. It is identified as a priority sector by the LEP, and in Dorset County Council's Economic Strategy 2018-2020, which emphasises the need to improve productivity and competitiveness through smarter destination management. Challenges facing the sector include: low paid work; seasonal employment; poor perception of the sector for career development; the fragmented nature of the sector; and the high degree of competition on a global scale^{xxxii}.

A Dorset National Park, working in partnership with the Dorset Council, LEP and other relevant stakeholders, has the potential to play an important role in helping to deliver Dorset's tourism vision, by:

- **Developing Dorset's brand and profile**, with National Park status expected to provide a major boost to visitor spending by encouraging people to stay longer and spend more;
- **Developing a Dorset-wide tourism strategy**, leading on innovative destination management to increase visitors' length of stay and spending, and putting more of unexplored Dorset on the tourist map;
- **Encouraging higher value, year-round tourism including heritage and eco-tourism**, thereby enhancing productivity, skills and wages;
- **Supporting tourism businesses**, helping to promote skills development and growth;
- **Providing tourism information**, helping to increase visitors' awareness, enjoyment and appreciation of the National Park and surrounding areas;
- **Promoting sustainable transport**, including strengthening the business case for additional investment in rail and other sustainable transport services, and thus enhancing Dorset's accessibility by public transport for visitors and business people throughout the UK; and
- **Facilitating sustainable tourism management**, ensuring that visitors are able to enjoy and appreciate the National Park, and better managing pressures in certain hot-spots, without impacting negatively on the county's environment or cultural heritage.

The South Downs provides an example of how designation as a National Park can promote sustainable growth of the tourism economy (Box 7).

The Government's Plan for National Parks^{xxxiv} highlights their unique role in growing international tourism and announced plans to promote National Parks as world-class destinations to visitors from overseas and the UK, working with NPAs, VisitBritain, VisitEngland and the GREAT Britain Campaign to make the nation's most inspiring landscapes more accessible to visitors from the UK and the rest of the world. Being part of these plans would bring substantial benefits to Dorset's tourism economy.

Box 7: South Downs National Park – benefits to the tourism sector

There has been a 14% rise in the number of businesses in SDNP's visitor economy sector since 2013^{xxxv}

The South Downs has seen visitor spending and bed occupancy rates increase since its designation as a National Park. Research^{xxxvi} shows that total visitor days to the National Park increased from 39.2 million in 2003/04 to 46.3 million in 2011/12, resulting in growth in visitor expenditure from £333 million to £464 million in the same period. This represented a 10.7% increase in real terms, resulting in an estimated 13.5% increase in related employment. During the same period, the value of tourism spend across England declined in real terms. The average occupancy in the South Downs was found to have increased from 42% to 49% for serviced accommodation and from 63% to 65% for self-catering accommodation over the same period. The research also found that the NPA plays a key role in ensuring that tourism remains environmentally and socially sustainable.^{xxxvii xviii}

The research found that just over half (56%) of businesses believe that the fact that the area is a National Park has benefited their business. A quarter of tourism businesses surveyed reported that their future development plans are connected to the National Park designation, seeing this as an opportunity to attract more custom. Tourism in the South Downs has helped preserve rural services like buses, village shops and post offices. In total 97% of visitors either "Agreed" or "Strongly agreed" with this statement (compared to 80% of residents who agreed or strongly agreed).

In fulfilling its remit to help manage tourism pressures, SDNPA has developed a Sustainable Tourism Strategy^{xxxviii} whose aims include:

- To diversify the tourism offer of the National Park, providing sustainable income for tourism service providers, diversifying services and extending the tourism season;
- To share the social and economic benefits of tourism across the entire National Park, ensuring that the scale of tourism to be serviced at sites reflects the sensitivities of the landscape;
- To encourage change in travel behaviour of visitors accessing the National Park e.g. through less reliance on car travel; and
- To raise visitor spend to levels that contribute more widely to the economy of the National Park.

6 Adding Value to the Land-based Sector and Supply Chain

Agriculture and forestry are at the heart of the rural economy, providing jobs and incomes, managing the majority of rural land, and supporting businesses in the food and tourism sectors. They face ongoing economic challenges, including changes in the national policy context, farm funding schemes and market conditions following the UK's exit from the EU. A Dorset National Park would provide opportunities to address these challenges in a strategic way, to attract funding for the provision of public goods, and to add value to rural produce.

As in other parts of the UK, agriculture and forestry have declined in their share of the economy, with agriculture now supporting GVA of £112m and employment of 5,974 jobs^{xxxix}, 1.7% of Dorset's total^{xl}.

As well as supporting economic activity directly, the sector makes an important contribution to Dorset's economy by managing the landscape and providing food and raw materials for local businesses. Agriculture manages 74% of Dorset's land area, and woodland 11%^{xli}, directly influencing the natural capital so important for residents, businesses and the tourism sector. Food processing, retail and catering businesses, amongst others, rely on the sector to provide high quality food and raw materials.

The land-based sectors face significant challenges. Average farm incomes are low, depressing productivity and threatening the future of many businesses. Brexit, and with it the prospect of removal of CAP direct payments, will present significant new challenges, requiring many to adapt their business model and find new sources of income, and to provide environmental services and other public goods in order to receive public subsidy.

Priorities for the sector include:

- Responding to the challenge of providing environmental public goods;
- Diversifying farm businesses by seeking new sources of income;
- Adding value through processing and marketing of local food and other produce;
- Restoring and managing neglected woodlands, to safeguard their future and enhance their commercial and environmental potential;
- Enhancing skills and productivity; and
- Responding to the opportunities provided by new technologies.

A Dorset National Park would play a positive role in working with the sector to address these challenges. By adopting a strategic approach to environmental land management at a landscape scale, it would help to enhance environmental land management funding for the area, following the example of the South Downs (see Box 8). Like other National Parks, it would also respond to opportunities to develop new payments for ecosystem services, add value to local produce and strengthen supply chains, support diversification, strengthen rural skills and enhance wages and productivity, and advise and work closely with the land-based sector to enhance profitability, sustainability and diversification (see Box 9).

Farm funding schemes and incentives have, for some decades, contributed to the loss of landscape diversity and species, the deterioration of water catchments and the quality of rivers and harbours, and the erosion of natural capital. The government's announced changes to the agricultural policy framework and farm funding schemes, including in particular the reorientation of farm support towards payment for public goods and ecosystem

services, provide a major opportunity for National Parks to work with and support farmers and land managers to restore and enhance the natural capital of these nationally important areas. Some National Parks, such as the South Downs, are already showing what can be done to enhance landscapes, biodiversity, water quality and natural capital, for example through farm clusters working on a landscape-scale. Reports and case studies about the work with farmers and land managers in the South Downs are presented on the Dorset National Park website^{xiii} and in Box 8.

A Dorset NP, in partnership with farmers and landowners, can proactively ensure that Dorset is in the forefront of such investment and support, enhancing the county's outstanding landscapes, biodiversity, rivers and harbours, and natural capital, and economically benefitting farmers, land managers and other agribusiness. A Dorset National Park can work with other designated areas to promote landscape-scale conservation and enhanced resilience. It has the potential to grow Dorset's green economy, including R&D and associated investment, with opportunities and benefits also for Dorset's universities and colleges.

The Government's Plan for National Parks^{xxxiv} sets out a vision for National Parks to promote the best of British food, and be known for, and visited as, great food destinations. Through its Great British Food Unit and the Great British Food campaign, DEFRA pledges to work with NPAs and their food producers to develop a strong programme to promote food tourism and build food as a core part of the tourism offer, and to help consumers to identify premium local produce from National Parks. Government will also work with NPAs and the Great British Food Unit to increase the number of Protected Food Names from National Parks and increase exports; it will also showcase National Park products at Government events and receptions. Dorset would benefit greatly from being part of this movement, helping to develop its local food brand and to make the most of the links between the land management, tourism and food sectors.

Box 8: South Downs National Park – enhancing Environmental Land Management

The South Downs Pilot Scheme^{xliii} is designed to test how payments for public goods could work in a populated lowland landscape. The National Farmers Union (NFU) and Country Land and Business Association (CLA) support the pilot schemes, working with farmer led clusters, which explore new ways of providing public support for the public goods that can be delivered across the countryside. It will focus on the following two linked elements:

- Incentivising farm clusters to achieve enhanced benefits through joint working at a landscape scale. This would be over and above the national universal level.
- Streamlining the process of applying for, managing and monitoring schemes via the innovative 'Land App'.

Under the SDNP Local Plan, new policies are supportive of farming, including enabling diversification to increase its long-term viability, construction of new agricultural and forestry buildings, and facilitating the re-use of redundant farm buildings.

The SDNP has helped its farmers secure 20% of Countryside Stewardship funding in the SE region, though the South Downs covers only 10% of the area under agreement. Additional funding has been secured for improved water quality, woodland management, heathland conservation, sustainable transport, heritage tourism and food marketing^{xliiv}.

Box 9: Examples of National Park work to support land-based sector^{xiv}

- Agri-environment scheme advice and support, designed to facilitate access to agri-environment schemes and other grants (including NPA schemes) which provide financial assistance for good conservation management.
- Land management advice service, designed to guide farmers and landowners on environmentally beneficial land management and help integrate this into existing farming systems and enterprises.
- Farm diversification advice and grants, designed to support the development of farm-based enterprises which complement environmentally beneficial land management and contribute to farm viability. This includes enterprises relating to local food and drink production and farm tourism.
- Local food and drink initiatives, designed to support the production and processing of local food and drink, strengthen the supply chain, increase outlets (catering, retail, direct), and grow demand from visitors, residents and others. For example, SDNP identified a strategic aim to support producers and distributors of local food in the region, and partnered with Southern Co-op to jointly promote the marketing and sales of local food through a South Downs Food and Drink portal.

7 Planning for sustainable development

Sustainable economic development depends on a modern, robust yet enabling planning framework that facilitates development while protecting and strengthening the natural capital on which the economy depends. A Dorset National Park would facilitate sustainable development through its planning role.

The Dorset LEP Vision highlights a number of challenges for planning and development, including the need to develop more and affordable housing to accommodate growth, to provide more employment land, to improve transport infrastructure, to support business growth in rural areas and market towns as well as urban areas, and to do all this while protecting designated areas and sites, maintaining and enhancing green space, and without compromising the ability of future generations to meet their own needs.

If Dorset is designated as a National Park, Dorset National Park Authority would become the statutory planning authority for its area, responsible for Local Plan preparation and development management and control. The National Park Team suggests that a Dorset National Park should work with the Dorset Council to create a seamless planning resource, develop plans for rural Dorset and provide a one-stop-shop service for planning advice as part of a streamlined customer focussed approach. The National Park should be proactive in facilitating homes for local people (including truly affordable homes), and help retain and attract young people, families and growth businesses.

NPAs have a strong track record in enabling and facilitating appropriate development in their areas, proving themselves responsive to local needs and able to balance these with their responsibilities to protect natural and cultural assets. Annual planning statistics from the Department for Communities and Local Government (DCLG) show that NPAs consistently approve a higher proportion of planning applications compared to the national average and generally reach decisions as quickly as other local planning authorities (see Box 10).

Box 10: DCLG data on NP performance relating to planning and development control

- Ten NPAs received 7,300 planning applications in the year ending June 2017^{xlv}:
- NPAs granted approval for 90% of all planning applications compared to the English average of 88%.
- NPAs compare well against other LPAs in terms of speed of approval:
 - 87% of major developments were approved by NPAs within 13 weeks, compared to the English average of 87%.
 - 83% of minor applications were approved within 8 weeks compared to the English average of 84%.

House building in National Parks in the decade 2001 to 2011 took place at a faster rate than for England as a whole. During that decade the housing stock increased by 10.4% in National Parks compared to 8.5% in England.^{xlvi}

National Parks have a specific remit “to proactively respond to local housing needs”. A Dorset National Park would help to contribute to the provision of affordable housing, as has been achieved by other National Parks (see Box 11).

Box 11: Providing affordable housing

National Parks, like other attractive rural areas, experience relatively high house prices compared to local incomes. Parts of Dorset, though not a National Park, have the highest ratio of house prices to incomes outside London. Such high prices can mean that some people have difficulty finding suitable and affordable accommodation in the area. This can have a negative impact on the sustainability of local services such as schools and shops, as well as the loss of social networks. As the local planning authority, NPAs are able to provide a strong influence on the location and the number of homes that are to be built, and the proportion of new homes that are affordable to local people. The Government's Circular on National Parks asks them to respond proactively to local housing needs and to promote genuinely affordable homes which continue to be available and affordable to local communities.

Examples of NPA affordable housing initiatives include:

- North York Moors NPA is a partner in the North Yorkshire Rural Housing Enabler Programme which it helps to fund. Rural Housing Enablers work closely with local parish councils to identify land for the development of affordable housing to meet the needs of the local community. All the units are tied through legal agreements to ensure that they remain affordable to local people in perpetuity.
- South Downs NPA approved more new homes in its first four years than the local authorities had approved in the previous four years. Its Local Plan proposes the development of around 4,750 net additional homes at a build rate similar to what has been achieved in recent years. It has a policy that a high proportion of these should be truly affordable. The National Park Authority has launched a new grant scheme, using money paid by developers, to deliver more affordable housing in the South Downs. Grants of between £10,000 and £30,000 are available for affordable dwellings constructed on rural exceptions sites (sites that would not be granted planning permission for open market housing) or for affordable housing delivered through community-led initiatives such as Community Land Trusts.

8 Strengthening local communities and improving rural service delivery

Working in partnership with the Dorset Council and other local stakeholders, a Dorset National Park would contribute to the delivery of rural services, strengthening the development and sustainability of rural communities.

In common with England's National Parks, rural communities in Dorset face a number of significant challenges. These include:

- Demographic challenges, including an ageing population and a significant percentage of second homes and holiday properties in some communities, impacting on the viability of services and businesses, such as local schools, petrol stations, shops, post offices and pubs. Dorset's ageing population presents challenges in meeting the specific needs of the elderly;
- Economic challenges, including retaining young people, providing skilled jobs and attractive wages, training provision and key employability skills, and tackling seasonal unemployment;
- Infrastructure challenges, including the accessibility and quality of broadband and mobile phone reception, and the adequacy of transport infrastructure; and
- Supply of affordable housing, Dorset faces a big challenge to deliver an adequate supply of new, affordable rural housing. Average house prices are particularly high in certain areas such as coastal communities that see high levels of second and holiday home ownership.

While rural communities in Dorset are relatively prosperous overall, there are significant pockets of deprivation. Improving service delivery would help to enhance the lives of disadvantaged people living in rural areas, and to improve social inclusion.

NPAs lead and support a range of initiatives and projects designed to address the challenges faced by communities living in National Parks. These include: supporting pathways to employment through volunteering and apprenticeships; promoting affordable housing; promoting investment in broadband and mobile communications; promoting sustainable and public transport; supporting community renewable energy projects; investing in community facilities; contributing to awareness and education; promoting healthy outdoor recreation; and enhancing social inclusion (see Box 12). These activities help to strengthen local communities and support local economies, as well as benefiting the wider population and economy. It is estimated that volunteering co-ordinated by NPAs contributes the equivalent of an additional 200 FTE jobs, with a value of over £3 million annually; these figures would be greater if volunteering through partner organisations and the value of the work done by volunteers was also taken into account.

In pursuing its duty to seek to foster the economic and social well-being of local communities, the National Park would work with communities and councils to meet local needs, including improving rural services and communications, promoting affordable housing and strengthening community engagement and resilience.

Box 12: National Parks working for rural communities – e.g. health and social inclusion

NPAs help manage the parks and work with a wide range of people and organisations to contribute to public health outcomes. Examples of this include^{xlvii}:

- supporting local Walking for Health initiatives that allow for gradual, achievable increases in levels of exertion and challenge
- providing dedicated outreach programmes to support people with accessibility needs or other obstacles to accessing National Parks
- working with schools and other education providers to enable young people to benefit from a closer connection with nature and outdoor activities
- providing opportunities for meaningful volunteering experiences
- encouraging and facilitating economic development that supports employment for people living in deep rural areas
- facilitating capital investment in infrastructure and ongoing management for walking and cycling routes, as well as other sporting activities

For example, SDNP has been successful in attracting investment for a range of access projects. One of those projects was a multi-million pound project (£3.8m from the Department of Transport (DfT) and £1.3m from local partners) to create new and improve existing **cycle routes** in the National Park. Analysis for the cycling scheme estimated the benefit cost ratio to be 4.6, i.e. for every £1 of public money spent the schemes are considered to deliver £4.60 worth of social benefit, in terms of health benefits of increased physical activity, improved journey ambience, and reduced congestion.

9 Benefiting the whole economy and population of Dorset

A Dorset National Park would be an asset for the county as a whole, benefiting everyone in rural and urban areas alike. By protecting and enhancing Dorset's green infrastructure, it would benefit all who work in, live in and visit the county. Market towns would benefit as economic hubs and gateways to the National Park, providing goods and services for rural businesses, local people and visitors.

The substantial scale of the National Park would mean that it plays an important role in defining the county as a whole, and providing green infrastructure that would benefit everyone in Dorset. The National Park would cover around 50% of Dorset's land area, with 1.35 million people living within 20 miles of its boundary.

The important connections between Dorset's urban and rural areas are recognised in the LEP vision^{xi}, which notes that urban, rural and coastal areas in the county are interdependent, and that maintaining the quality of the environment is critical to all.

While the National Park's activities would focus on businesses, communities and land managers within its boundary, a Dorset National Park would benefit residents and businesses across the county as a whole. In line with Government policy, it would - where appropriate and with agreement - work beyond its boundaries. It would provide opportunities for outdoor recreation, resources and essential environmental services for the whole population and economy of Dorset. It would help to enhance the quality of air and water, improve public health, and provide a world class environment to support the county's economic development aspirations. It would also deliver services and distribute funds across the whole of rural Dorset.

A Dorset National Park would include market towns such as Lyme Regis, Bridport, Beaminster and Swanage, while others including Weymouth, Dorchester and Blandford Forum would be gateways providing services and accommodation to visitors and local businesses.

Studies of National Parks have demonstrated that they have a positive contribution on the economies of their surrounding areas. Some examples of this economic "halo effect" are given in Box 13.

Box 13: Economic “halo effect” of National Parks ^{xxviii}

- For some National Parks, the impacts on employment are estimated to be much greater in the wider ‘area of influence’ or ‘halo’. For example, the Northumberland and Yorkshire Dales National Parks are both estimated to support nearly three times as many jobs in this wider area of influence as within the National Park boundary itself. This reflects the nature of the designated area, the structure of the local economy and the importance of neighbouring ‘gateway’ towns and villages in providing accommodation and other services for visitors to these Parks.
- Studies commissioned by NPAs have estimated the employment supported by visitor expenditures. Overall, tourism is estimated to support a total of 48,000 FTE jobs within the National Parks and at least 20,000 FTE jobs in the wider areas of influence, making a total of 68,000 FTE jobs within the NPs and their wider areas of influence^{xix}.
- Defra statistics indicate that employment in tourism businesses within protected landscapes represents only a fraction of employment in tourism businesses within a 5 mile buffer (13% for AONBs and 16% for National Parks), although the degree to which these businesses depend on the protected landscapes is unclear^{xlviii}.
- For National Parks in Yorkshire and Humberside, areas within 5 miles of the Park boundaries have higher unemployment rates, less tourism-related employment and less self-employment than the Parks (Council for National Parks, 2006), although the extent of this influence is likely to vary by National Park, and may not exist in some National Parks^{xxxix}.

10 Conclusions

The environment is Dorset's greatest economic asset. It is a major reason why people live in the county, have their businesses there and visit the area. But its outstanding landscapes, biodiversity and heritage are under threat and need to be safeguarded for current and future generations.

The proposed Dorset National Park presents an exceptional opportunity for residents, businesses and investors whether in the county, in neighbouring areas or thinking of locating to Dorset. It will safeguard and enhance Dorset's exceptional natural assets and – as outlined above – will unlock a wide range of economic benefits and opportunities for the whole county and neighbouring areas.

Now is the time - with the ongoing Glover Review - for all those with an interest in and responsibility for growing Dorset's economy to come together and support a **Dorset National Park for the benefit of the county and the country.**

For more information contact Dorset National Park at <https://www.dorsetnationalpark.com/>

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