

Exmoor National Park State of the Park Report

Key facts and figures

Draft

September 2017



Purpose of the State of the Park Report

- To provide an overview of the National Park
- To identify the positive or negative trends and the issues affecting the National Park
- To measure whether work that is being done is having a positive effect
- To identify any new issues or priorities
- To feed into the Partnership Plan review 2017

Structure of the State of the Park Report

The State of the Park Report is organised around the nine special qualities identified for the National Park:

- Open moorland, remoteness, wildness and tranquillity
- Distinct and diverse landscapes
- Timeless landscapes and dark skies
- A mosaic of habitats and diversity of wildlife
- A complex and rich historic landscape
- A deeply rural community and local traditions
- A farmed landscape
- An exceptional rights of way network
- A landscape that provides inspiration and enjoyment

& the National Park Authority's duty to promote the economic and social well-being of Exmoor's communities in pursuing National Park purposes

Key forces for change

There are many forces for change affecting Exmoor's landscapes, some of them global, others very localised in effect. The UK faces a period of unprecedented change as it leaves the European Union. The future direction of national policy and funding is still to be determined. While this brings uncertainty, it also provides great opportunities. While we may not have control over all of these impacts, we need to understand and be aware of these changes so that we can respond and adapt to them for the future:

- *Natural processes and climate change*
- *Changes in farming, forestry and land management*
- *Development-led change*
- *Tourism and recreation-led change*
- *Growth and development outside the National Park*
- *Incremental and cumulative change*
- *Understanding and valuing Exmoor's natural and cultural capital*

State of the Park Report - summary

- The following sections provide a summary of the key information relating to each special quality
- This has been used to feed into preparation of the draft Exmoor National Park Partnership Plan
- The draft Partnership Plan is being consulted on from 18 September to 30 October 2017, for details go to www.Exmoor-nationalpark.gov.uk

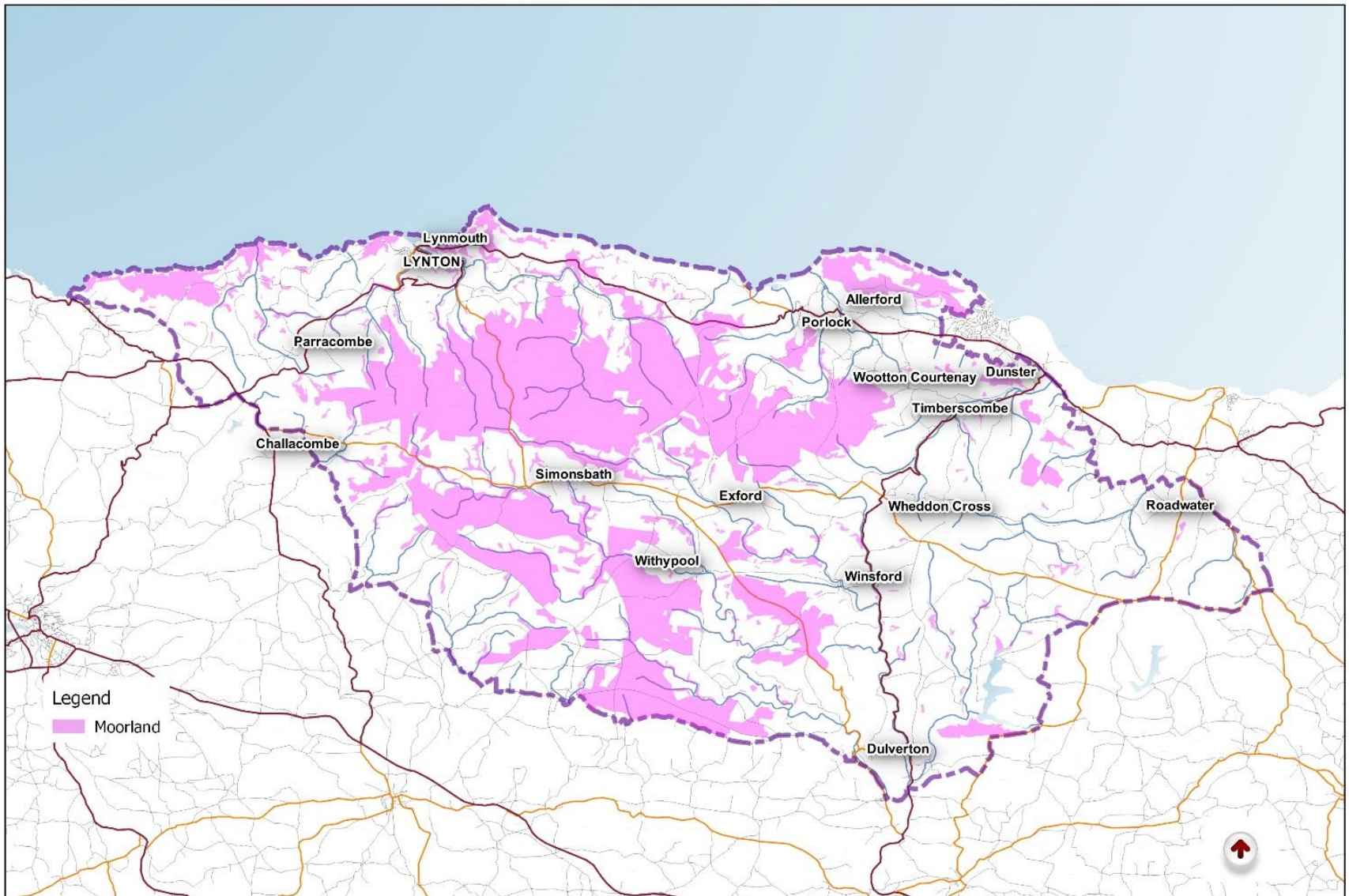
Special Quality: Large areas of open moorland providing a sense of remoteness, wildness and tranquillity rare in southern Britain

60% of people surveyed thought that there has been little change to this special quality in the past 5 years

56% of people surveyed want Exmoor's moorlands to be retained as open landscapes

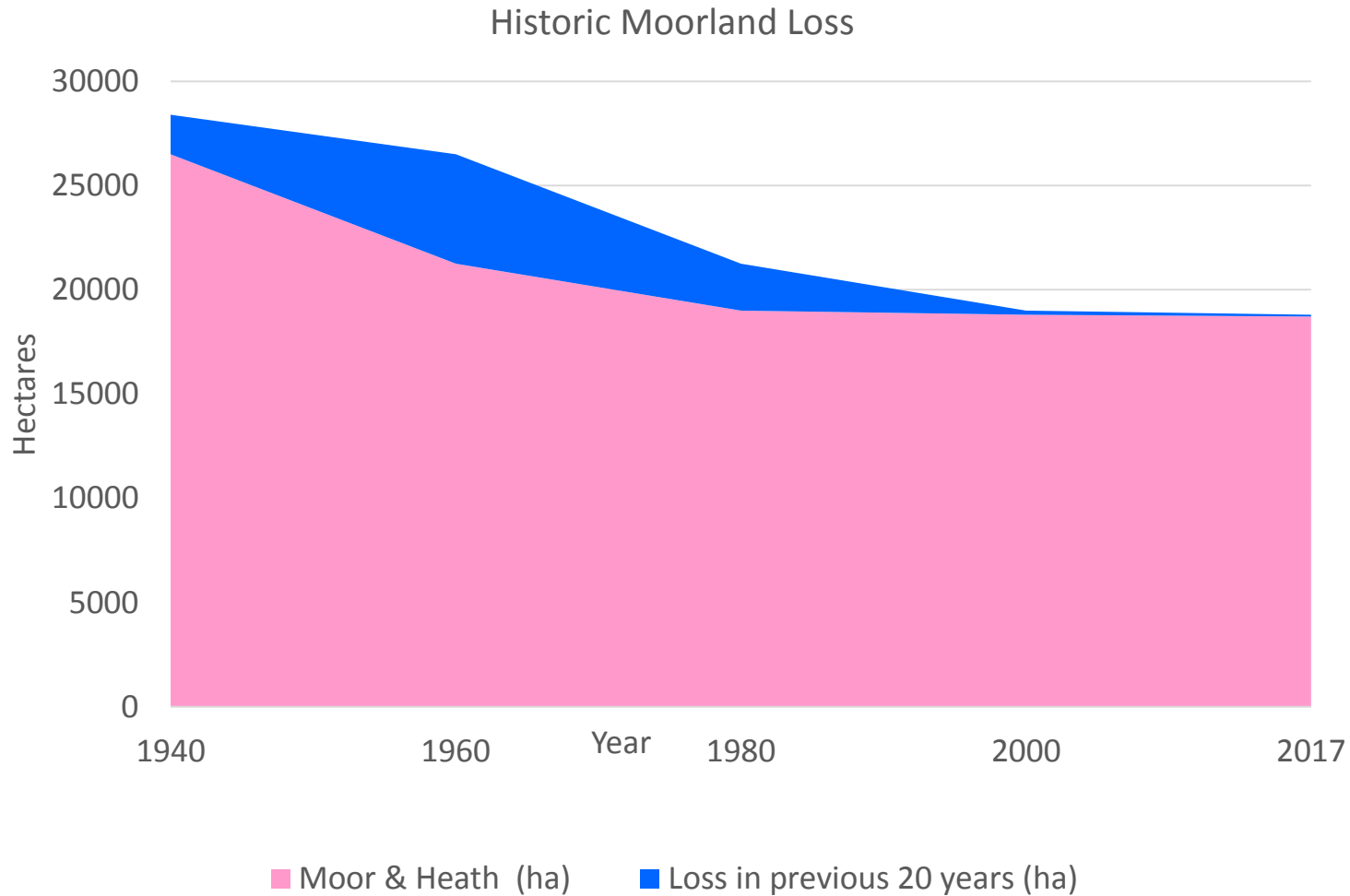
- 27% of the National Park is moorland (18,711 ha)
- The majority of this is designated as Section 3 moor and heath (16,591 ha) which are areas of natural beauty considered particularly important to conserve
- 83% of moorland is designated as nationally important Sites of Special Scientific Interest (15,548 ha)
- 57% of moorland is internationally important and designated as Exmoor Heaths Special Area of Conservation (10,705 ha)
- 37 moorland Principal Archaeological Landscapes (4,434ha) have been designated covering 24% of moorland
- 94% of moorland is access land giving people a right of access on foot (17,595 ha)

Exmoor's moorland



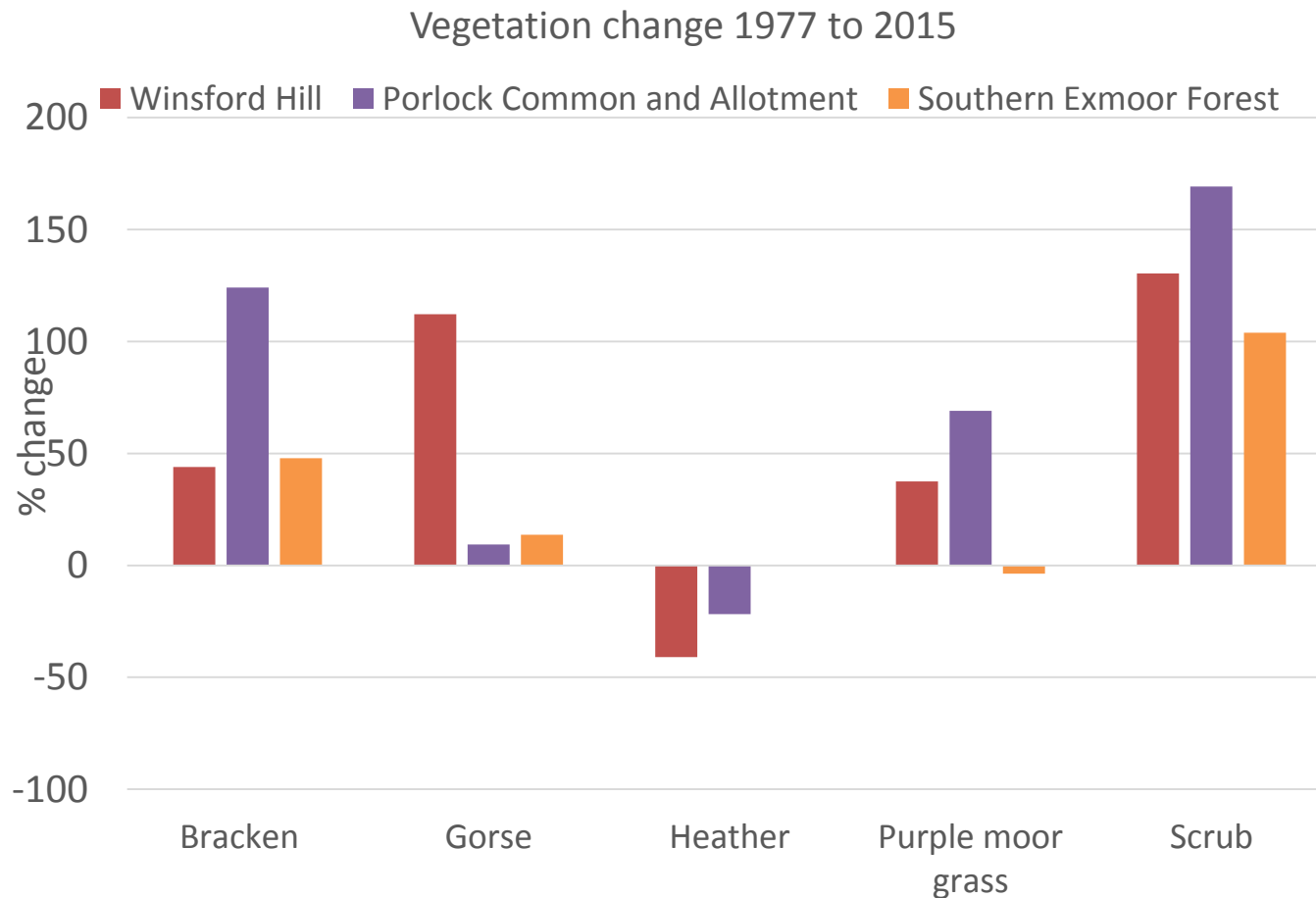
Historic moorland loss

29% of moorland has been lost since 1940, primarily in the 1960s



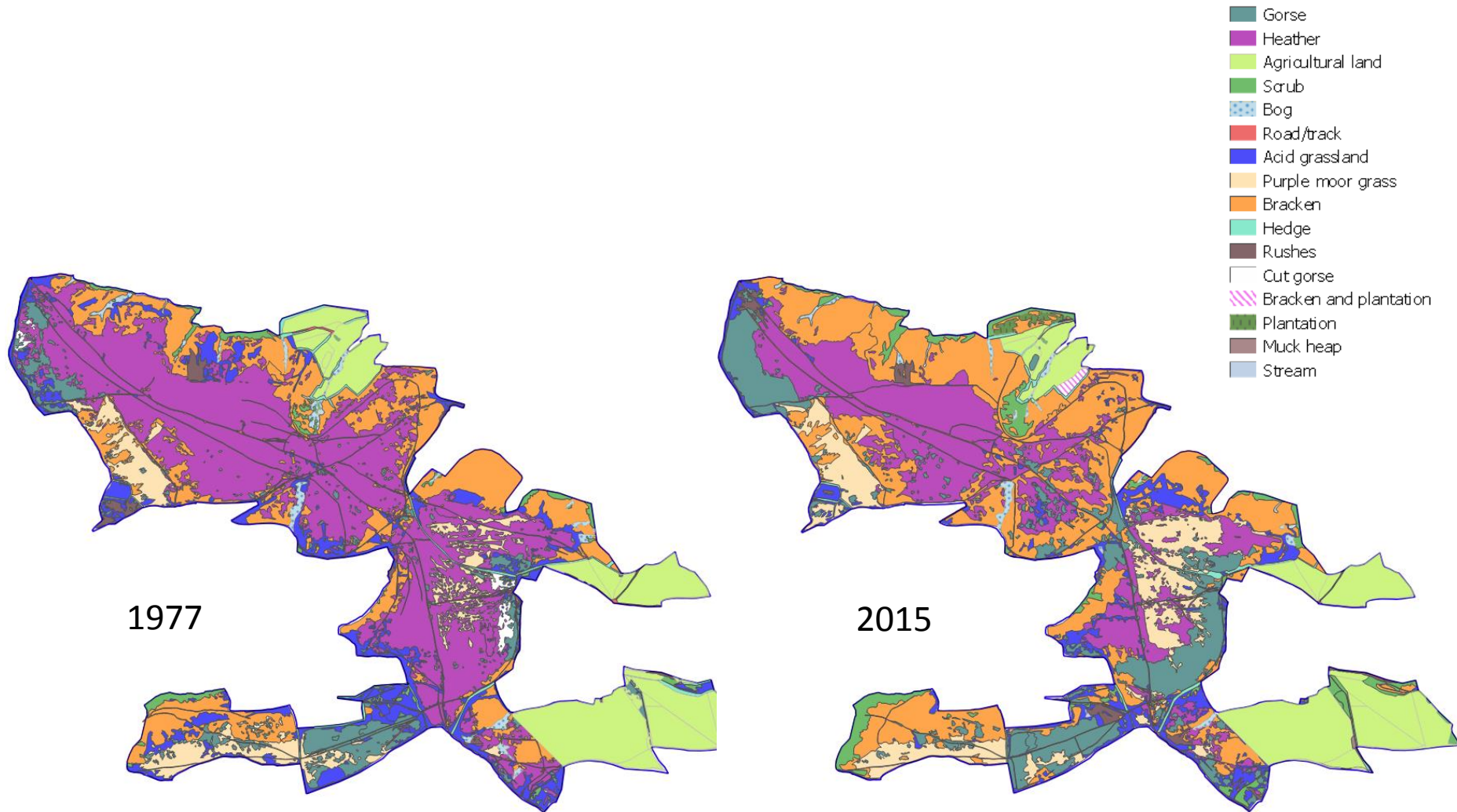
Vegetation change

There has been significant vegetation change on the moors over the last 40 years. The area of heather has reduced by 20-40% on sample moors, replaced by bracken, scrub, gorse and purple moor grass (*Molinia*)



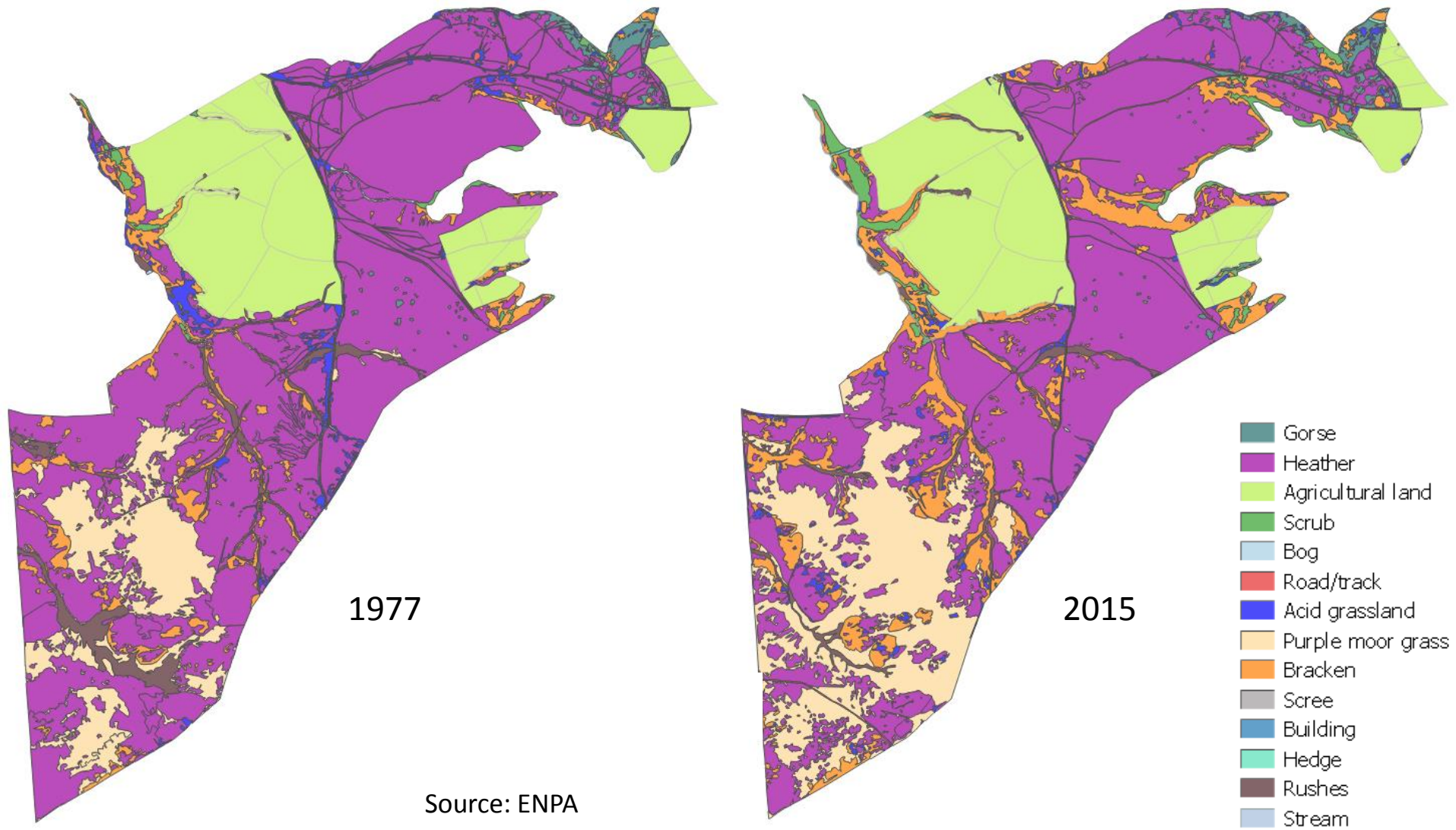
Vegetation change 1977 to 2015

Winsford Hill

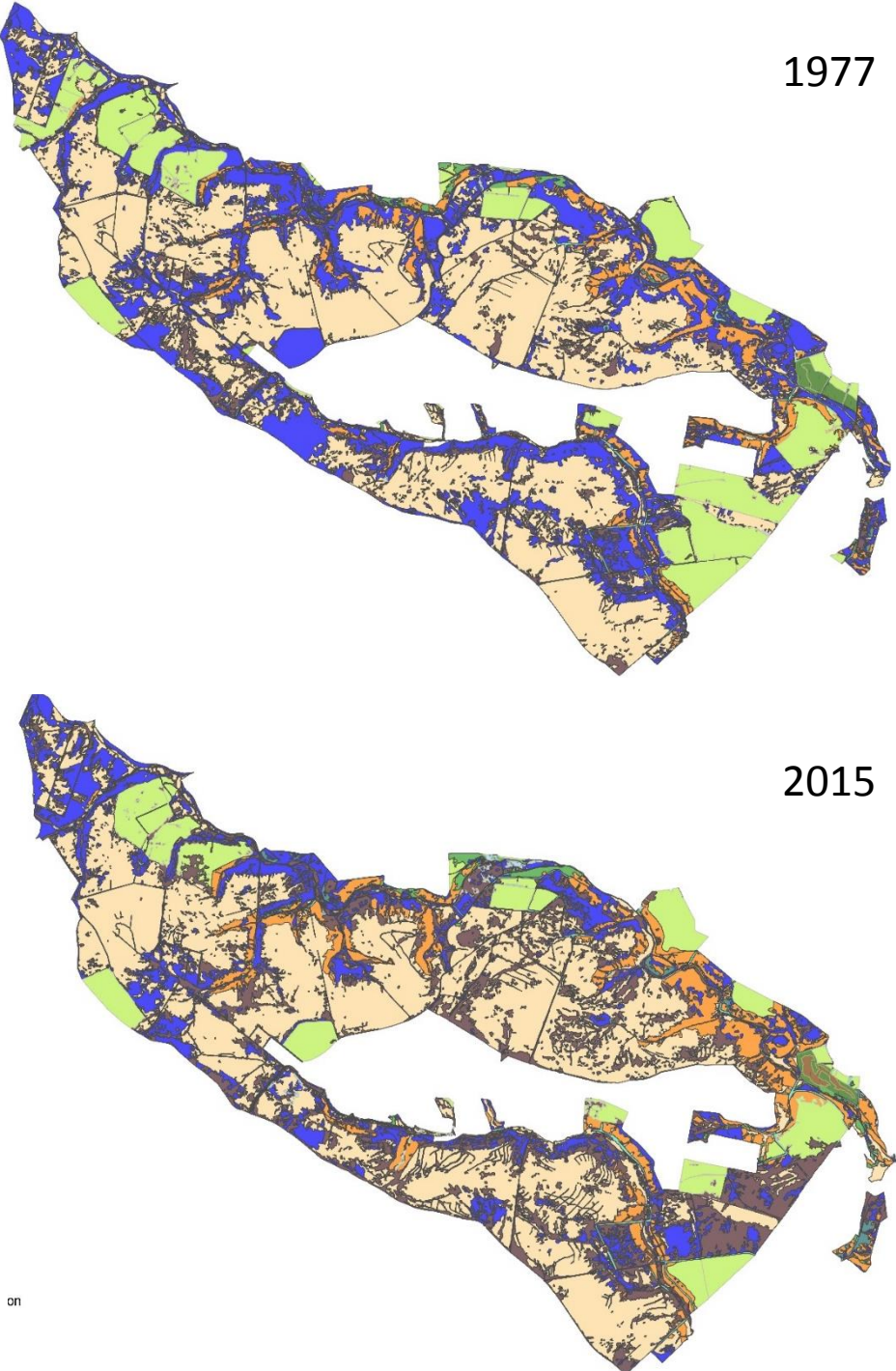


Vegetation change 1977 to 2015

Porlock Common and Allotment



**Vegetation change
1977 to 2015
South Exmoor Forest**



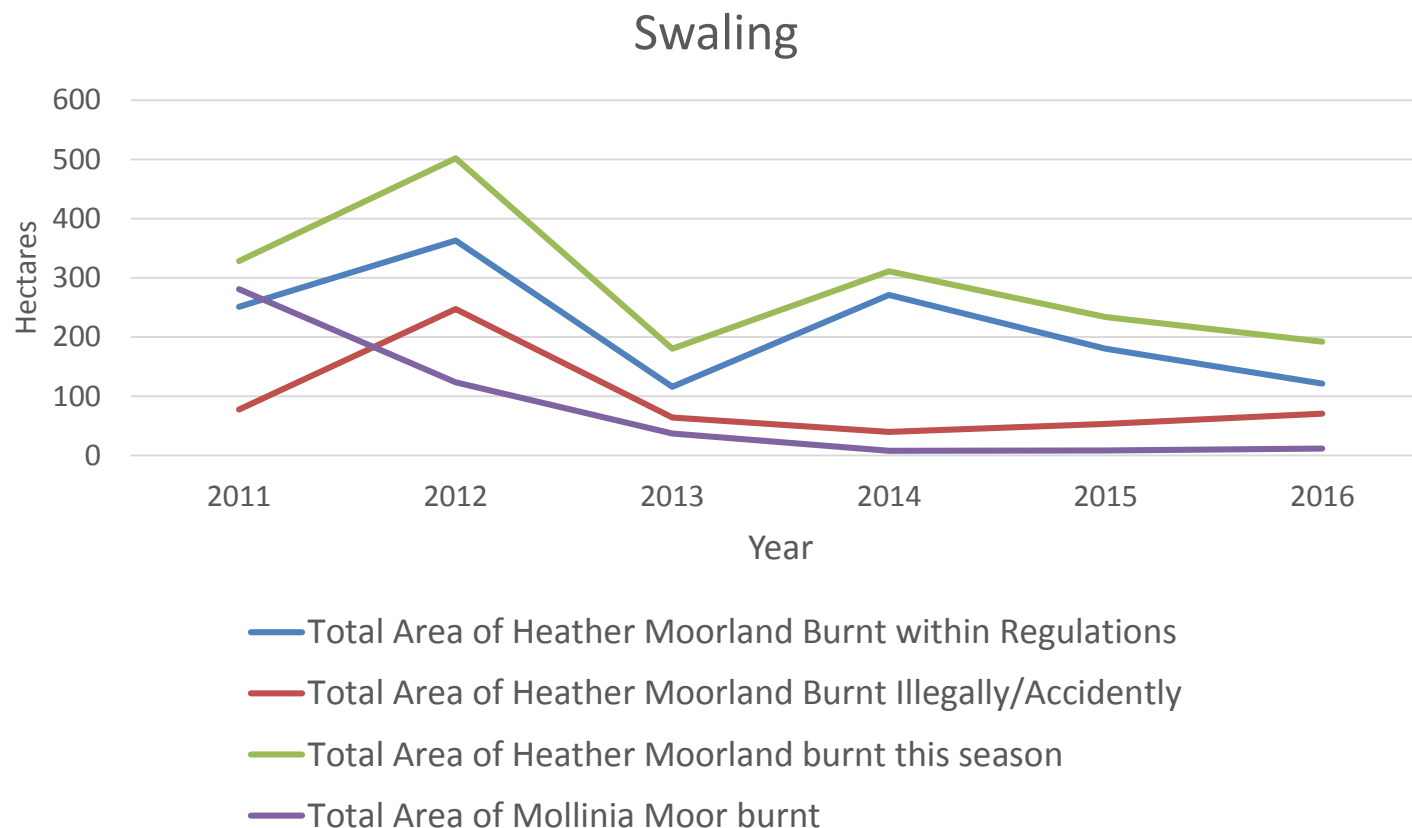
1977

2015

- Key**
- Gorse
 - Heather
 - Agricultural land
 - Scrub
 - Bog
 - Road/track
 - Acid grassland
 - Purple moor grass
 - Bracken
 - Scree
 - Hedge
 - Rushes
 - Cut gorse
 - Watercourse
 - Plantation
 - Plantation deforestation
 - Boundary
 - Building
 - Garden

Swaling & Grazing

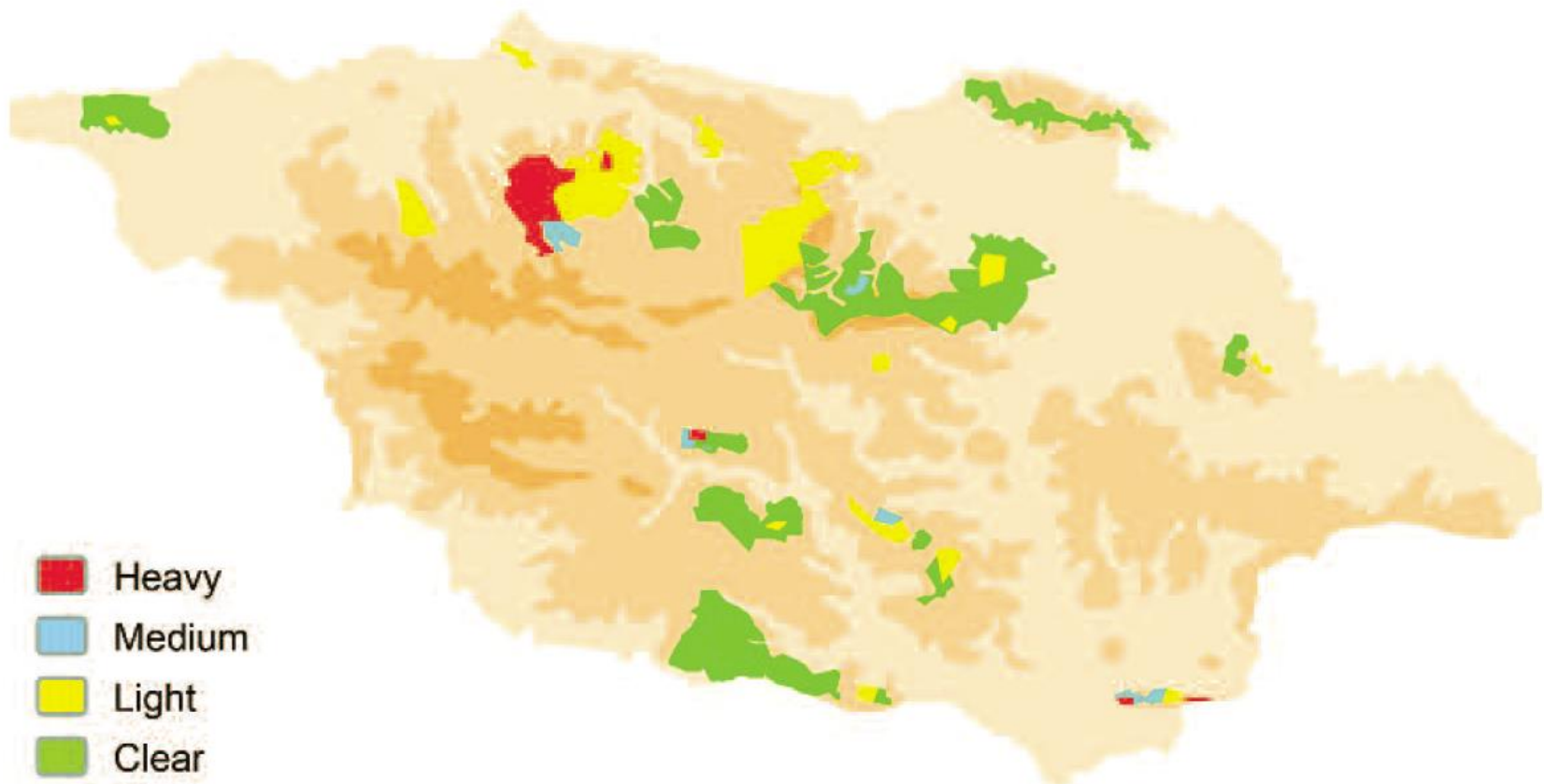
The open moorland has traditionally been managed through grazing and swaling. The number and size of burns is insufficient to maintain a 20 year rotation needed for heather. Grazing levels continue to be an issue for moorland areas, with several suffering from a lack of sufficient grazing.



Heather beetle and Molinia

There has been a build up of 'old-growth' heath which has some benefits for wildlife, but on Exmoor many of these areas have been invaded by Molinia and are susceptible to heather beetle. Heather now seems to be recovering in the areas first hit by heather beetle but Molinia has taken hold on many sites.

Heather beetle infestation 2014



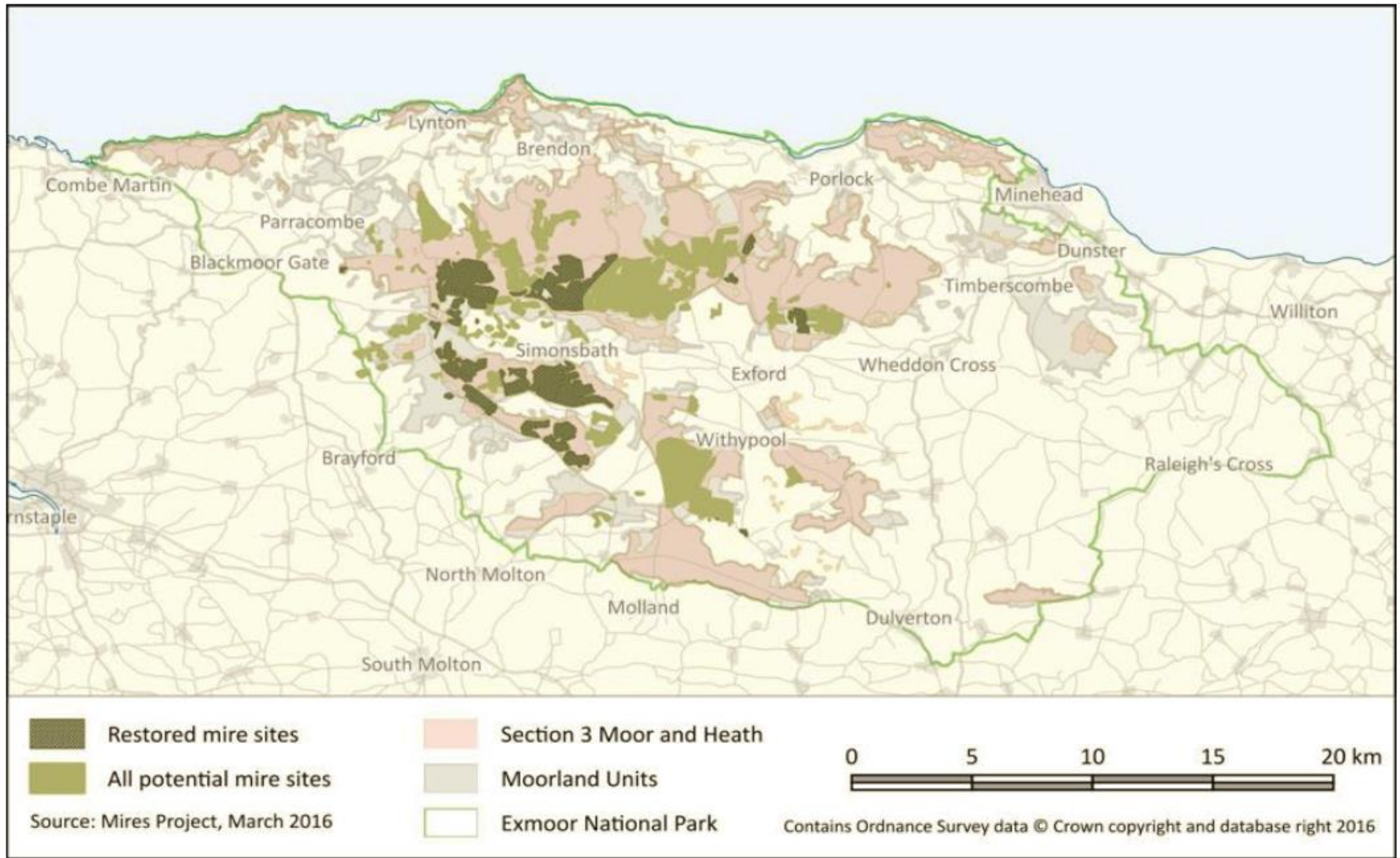
Exmoor Mires restoration

The Exmoor Mires Project aims to restore areas of blanket bog by rewetting the peat in areas where it has been degraded from past land use.

- 1,948 ha has been restored so far out of a total target of 3,000 ha
- This includes 22,345 ditches that have been blocked, totalling 195,097m in length
- Monitoring has demonstrated increased water storage and some water quality improvements following restoration. Also some improvements in the base flow down-stream
- 5 out of the 7 earliest restoration sites have changed from *purple moor grass* dominated areas before restoration to significantly improved mire vegetation
- Species richness of invertebrate fauna has increased at 5 out of 6 sites following restoration



Restored mires sites on Exmoor



Source: Exmoor's Moorland – Where to Next? Rural Focus Ltd for Exmoor Society 2016

Special Quality: A distinct and diverse landscape of softly rounded hills and ridges, with heather and grass moors, spectacular coast, deeply incised wooded valleys, high sea cliffs, fast flowing streams, traditional upland farms and characteristic beech hedgebanks

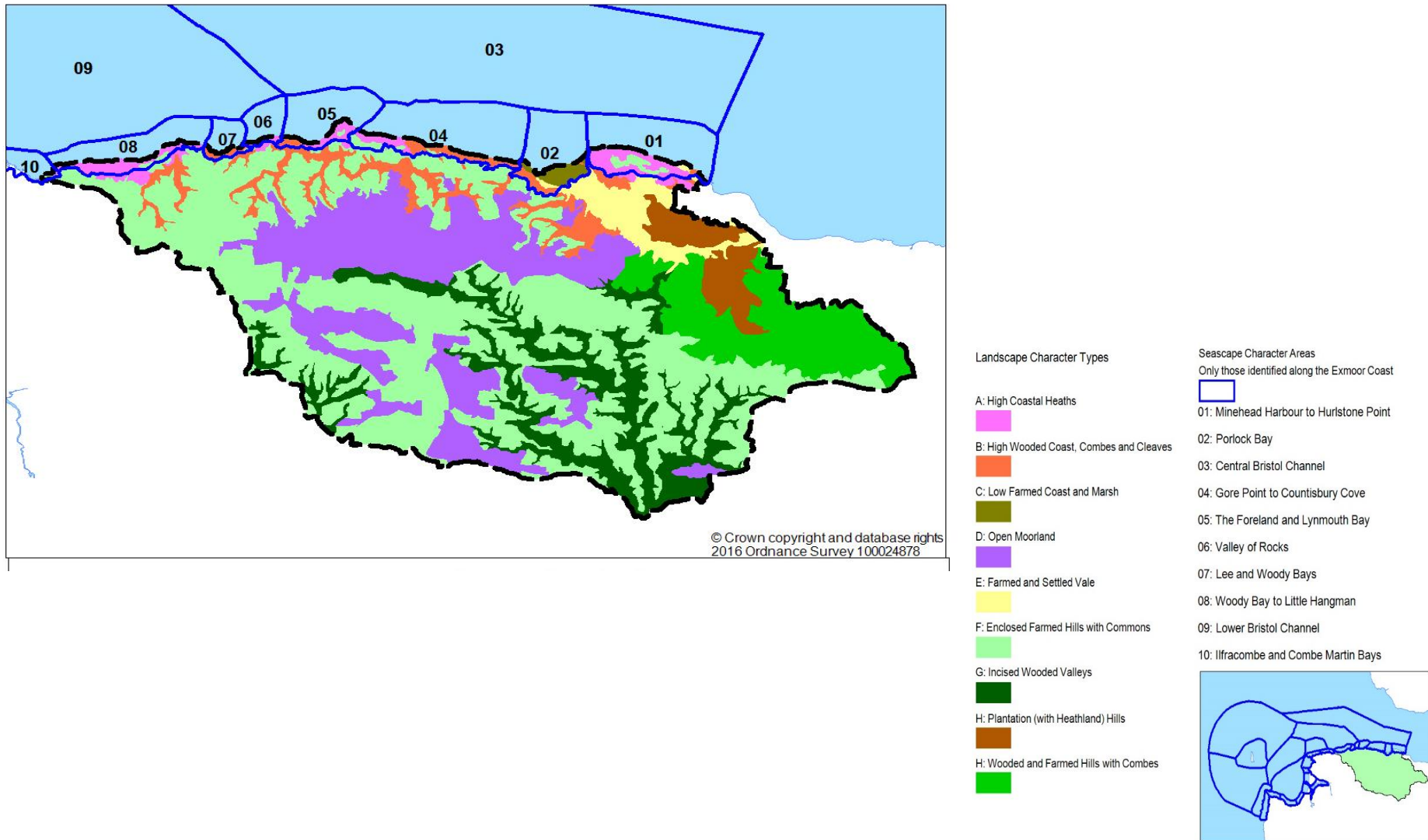
Overall, landscape character is being maintained and there are no major threats

64% of people surveyed thought that there has been little change to this special quality in the past 5 years

- The majority of visitors to Exmoor are attracted by the landscape (85%) and tranquillity (68%)
- There has been some historic loss of distinctive landscape features (e.g. hedgebanks, stone walling, orchards)
- There have been a number of projects to enhance landscape character e.g. Valley of Rocks, Hoar Oak Cottage, undergrounding schemes at Hawkcombe, Porlock Marsh and Dulverton Conservation Area

Landscape Character Types and Seascape Character Areas

Exmoor has 9 distinct landscape character types and 26 character areas - this diversity of landscape is part of Exmoor's character. There are also 10 seascape character areas along Exmoor's coast



Assessment of LCT strength of character and condition 2017, compared with 2007

The main forces for change are encroachment of gorse, scrub and bracken; invasive species; neglect of traditional features; and development and recreation-led change

Landscape Character Type	Strength of character			Condition		
	2007	2017	Change	2007	2017	Change
A: High Coastal Heaths	Strong	Strong	→	Moderate	Good	→
B: High Wooded Coast Combes & Cleaves	Strong	Strong	→	Good	Good	→
C: Low Farmed Coast & Marsh	Strong	Strong	→	Moderate	Good	→
D: Open Moorland	Strong	Strong	→	Moderate – good	Variable	→
E: Farmed & Settled Vale	Strong	Strong	→	Moderate – good	Good	↗
F: Enclosed Farmed Hills with Commons	Moderate	Moderate – strong	↗	Moderate	Variable	→
G: Incised Wooded Valleys	Strong	Strong	→	Moderate – good	Moderate – good	→
H: Plantation (with Heathland) Hills	Moderate – strong	Moderate – strong	→	Moderate – declining	Variable	→
I: Wooded and Farmed Hills with Combes	Strong	Strong	→	Moderate	Good	↗

Exmoor's geology

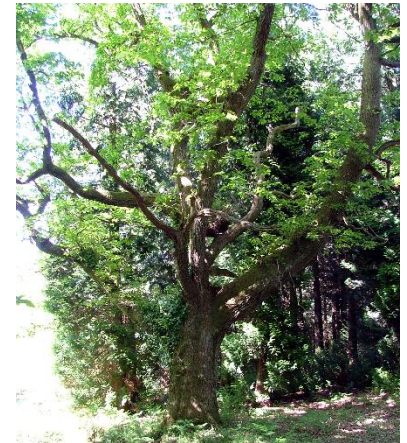
- Exmoor's geology forms an important basis for the landscape
- There are 29 Sites of Special Scientific Interest units (SSSIs) designated for their geological interest. The majority are active geomorphological or coastal sites
- 90% of the geological SSSIs are in favourable condition, with the remaining 10% in unfavourable condition with no change
- In addition, there are 87 local geological sites on Exmoor, no updated information on their condition is available but a survey is underway

Distinctive landscape features

Hedgerows are a strong landscape feature on Exmoor, particularly the ancient mixed species hedge banks and the typical beech hedge banks on the farmed hills and vale. Exmoor has around 4000km of hedgerows and boundary features. Changes to agri-environment schemes resulted in loss of payments for hedgerow management. The Exmoor Landscape Conservation Grant scheme is helping to address this: since 2011 over 70km of hedgerow has been traditionally managed supported by funding from the scheme. 77% of people surveyed felt that the maintenance of traditional landscape features such as hedgerows should be a priority.

There are over 1,600 ancient (veteran) trees, found throughout the countryside, and often in more formally designed parkland and wood pasture landscapes. 484 in-field trees are protected by Environmental Stewardship schemes (2016).

Traditionally orchards would have surrounded farmsteads and villages, but over the last century 80% of Exmoor's orchards have been lost due to development, neglect or change in land use. This long term trend has continued, with 65 orchards recorded in 2013 compared to 146 in 1982. There have been more encouraging signs recently, with 5 new orchards established.



Special Quality: A timeless landscape mostly free from intrusive development, with striking views inside and out of the National Park, and where the natural beauty of Exmoor and its dark skies can be appreciated

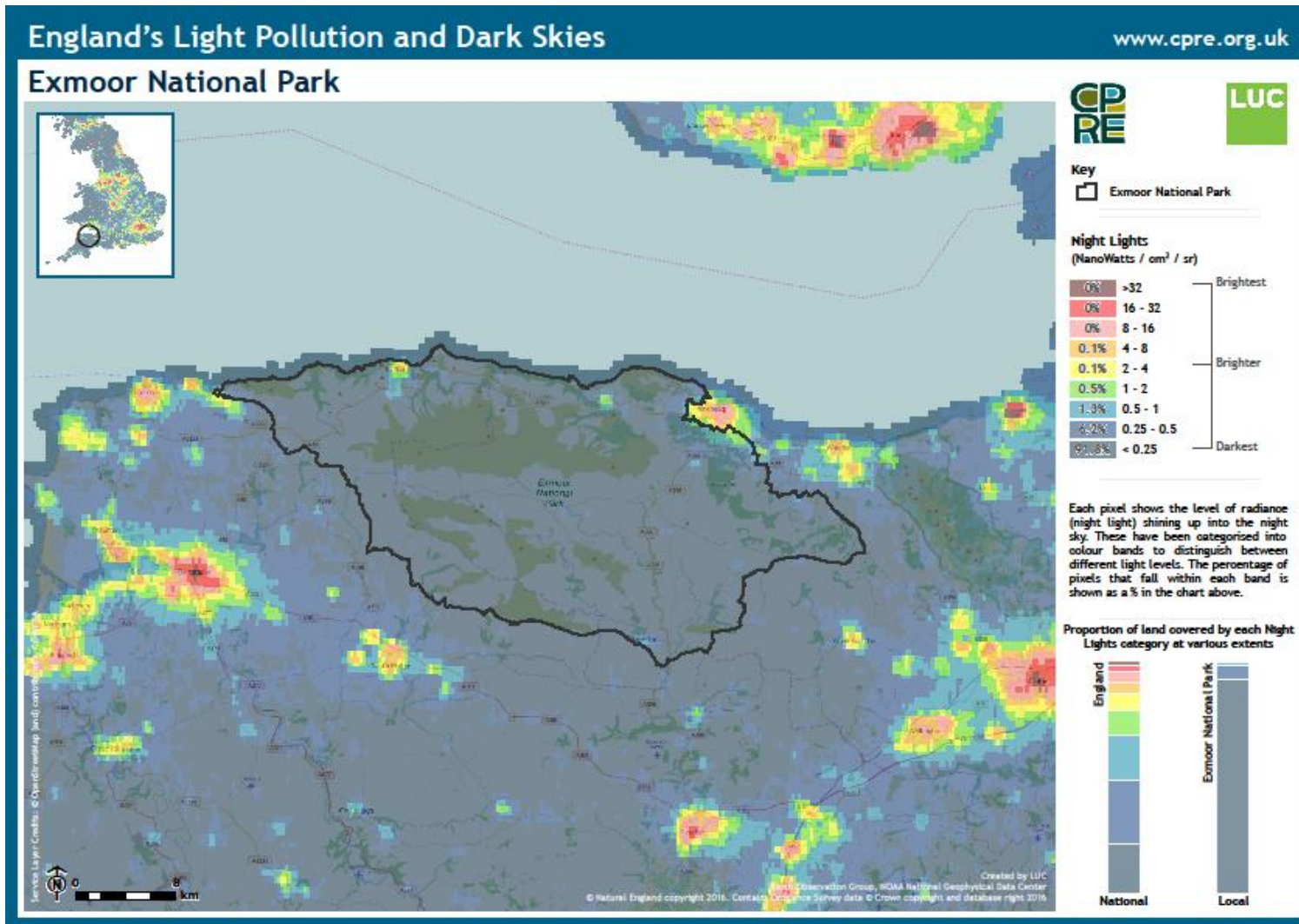
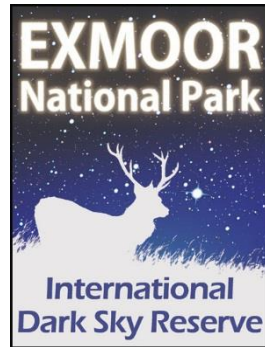
58% of people surveyed thought that there has been little change to this special quality in the past 5 years

54% of people surveyed believe that a priority should be given to ensuring that the Exmoor landscape is as free as possible from modern intrusive development

- Exmoor remains one of the most tranquil areas in England
- There are relatively few developments that detract from the landscape despite significant numbers of new developments, although there is potential for cumulative impacts in some areas e.g. along the A39 corridor. Inappropriate scale and massing of developments also potentially impact the landscape
- There is increasing development outside Exmoor which can impact on views to and from the National Park and its setting

Dark Sky Reserve

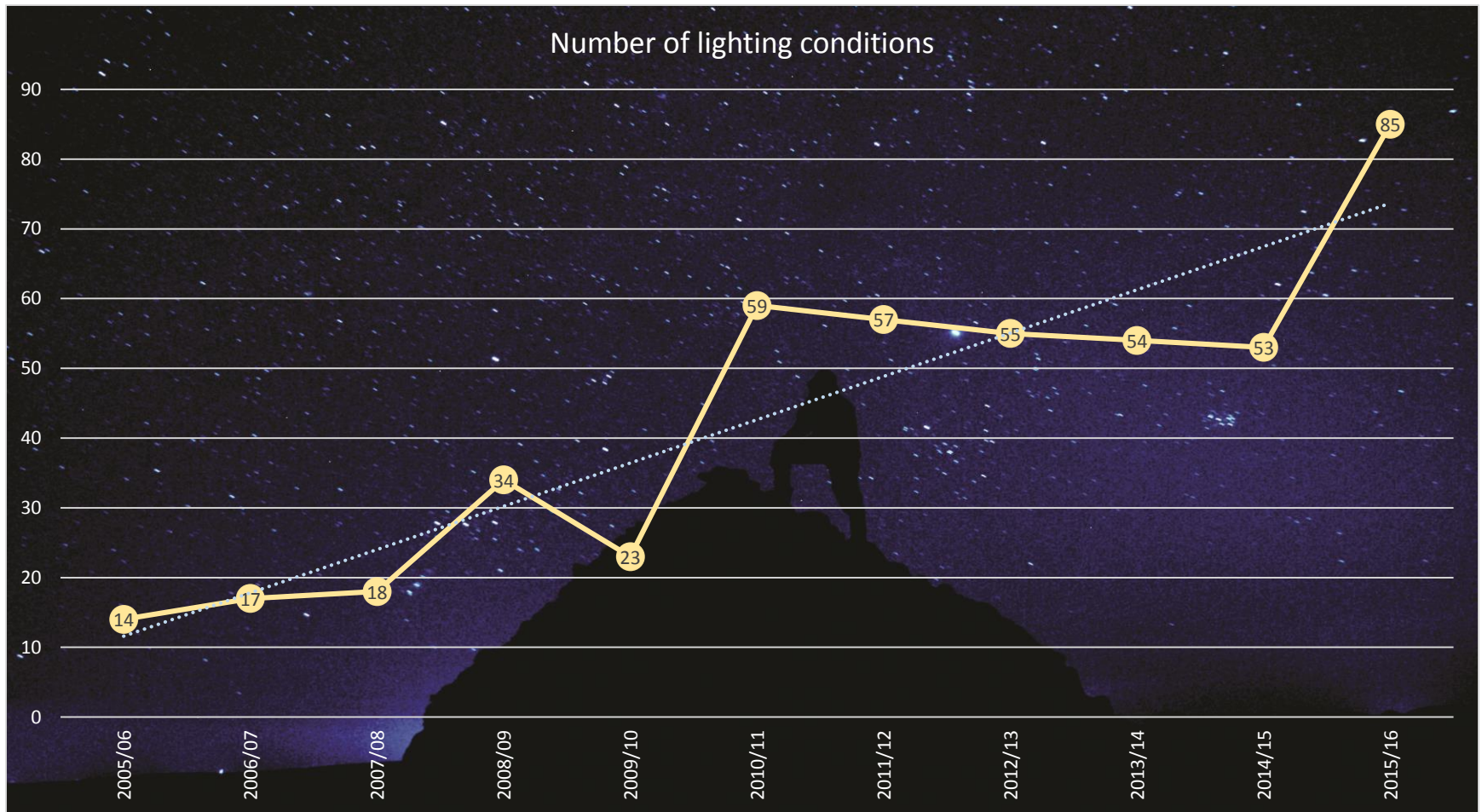
Exmoor was designated the first International Dark Sky Reserve in Europe in 2011. It has 92% of pristine dark skies and minimal light pollution. 14% of visitors are attracted by the Dark Sky Reserve status



Source: CPRE Night Blight maps

Light pollution

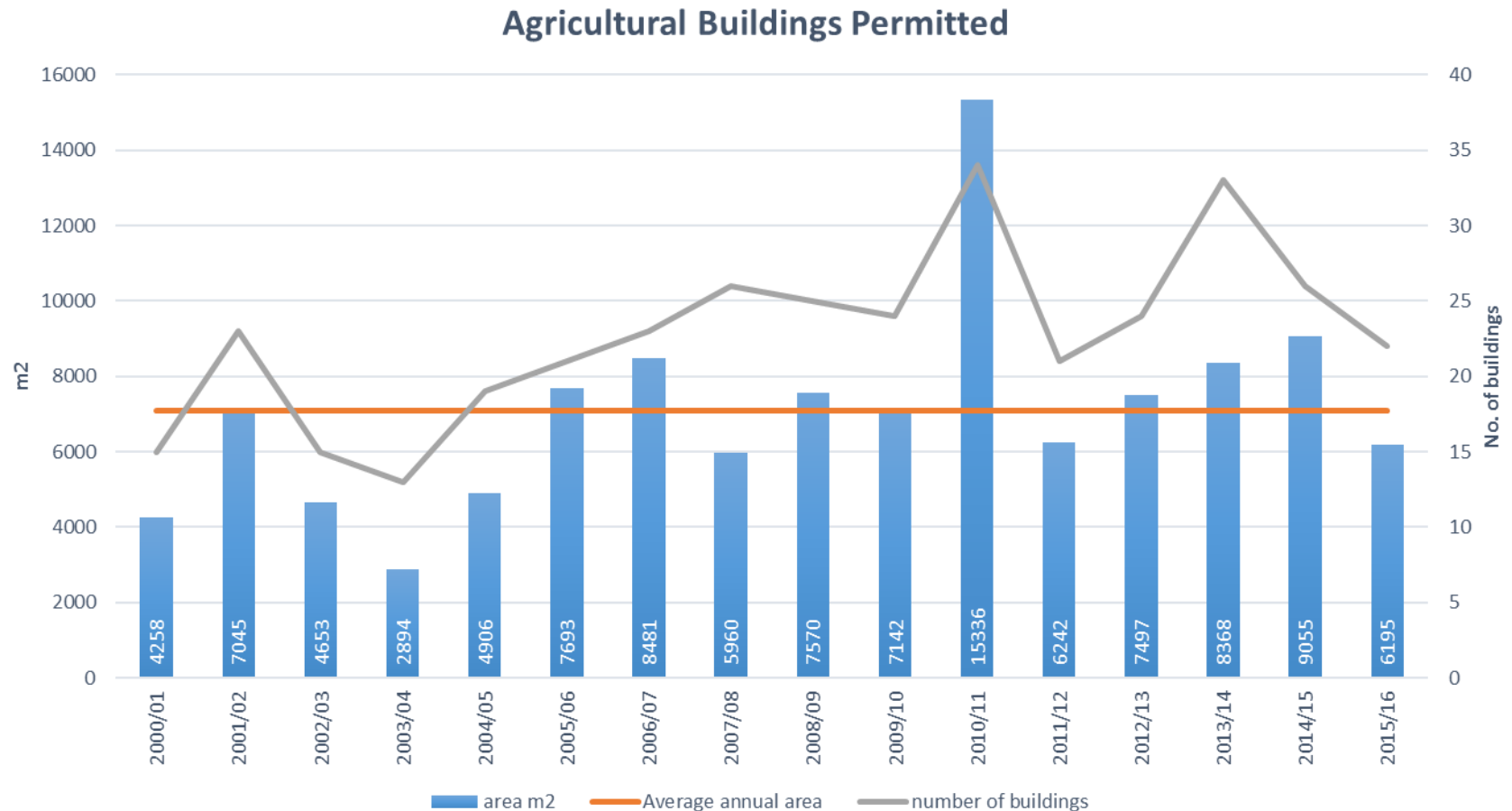
The number of lighting conditions attached to planning permissions has increased significantly since designation of the Dark Sky Reserve in 2011. This helps to avoid light pollution within the National Park



Source: Exmoor National Park Authority Local Plan Monitoring

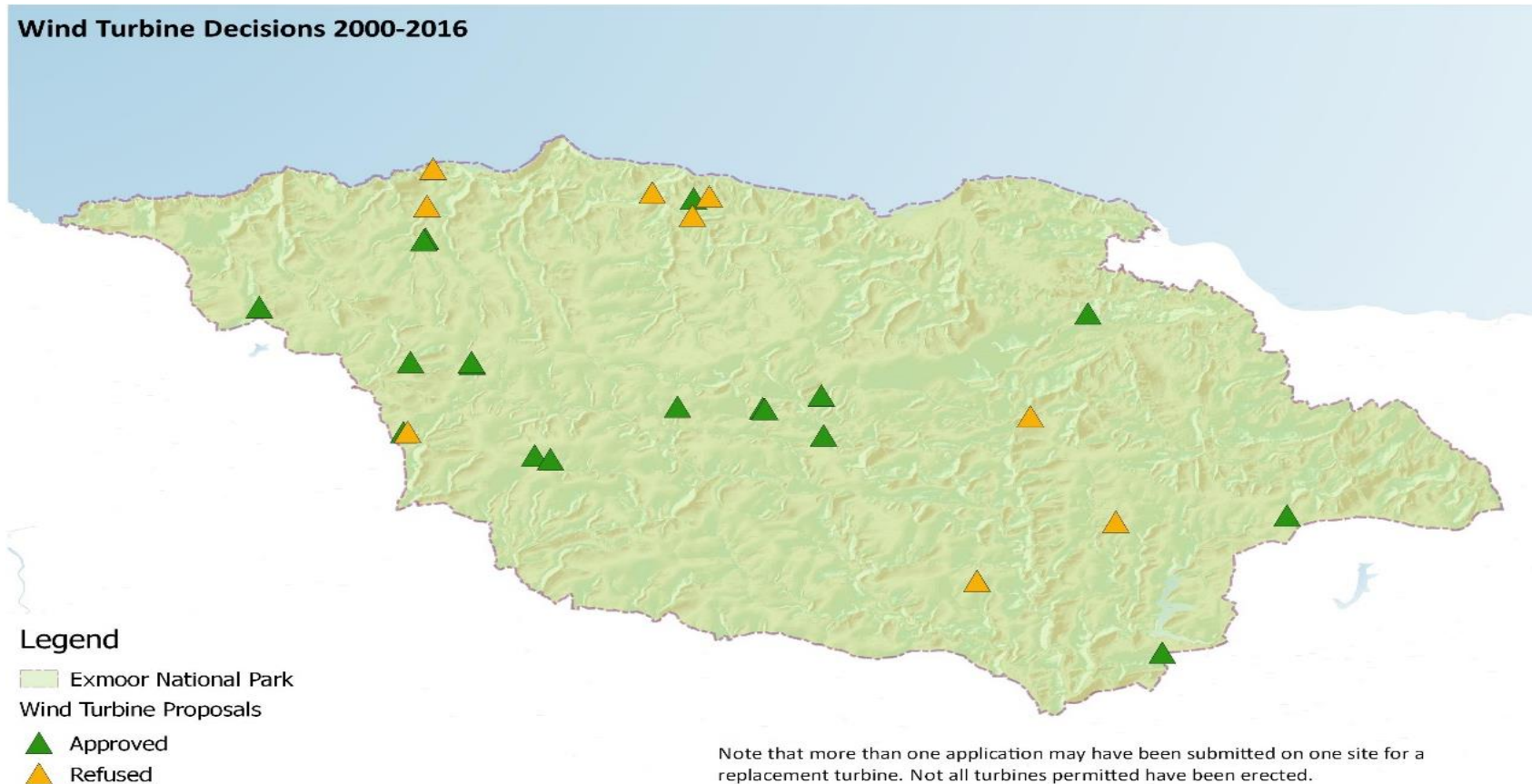
Agricultural Development

Since 2000, 364 agricultural buildings have been permitted, totalling 113,295m². This is important to support modern farming systems, but needs to be carefully managed to avoid impacts on Exmoor's special qualities



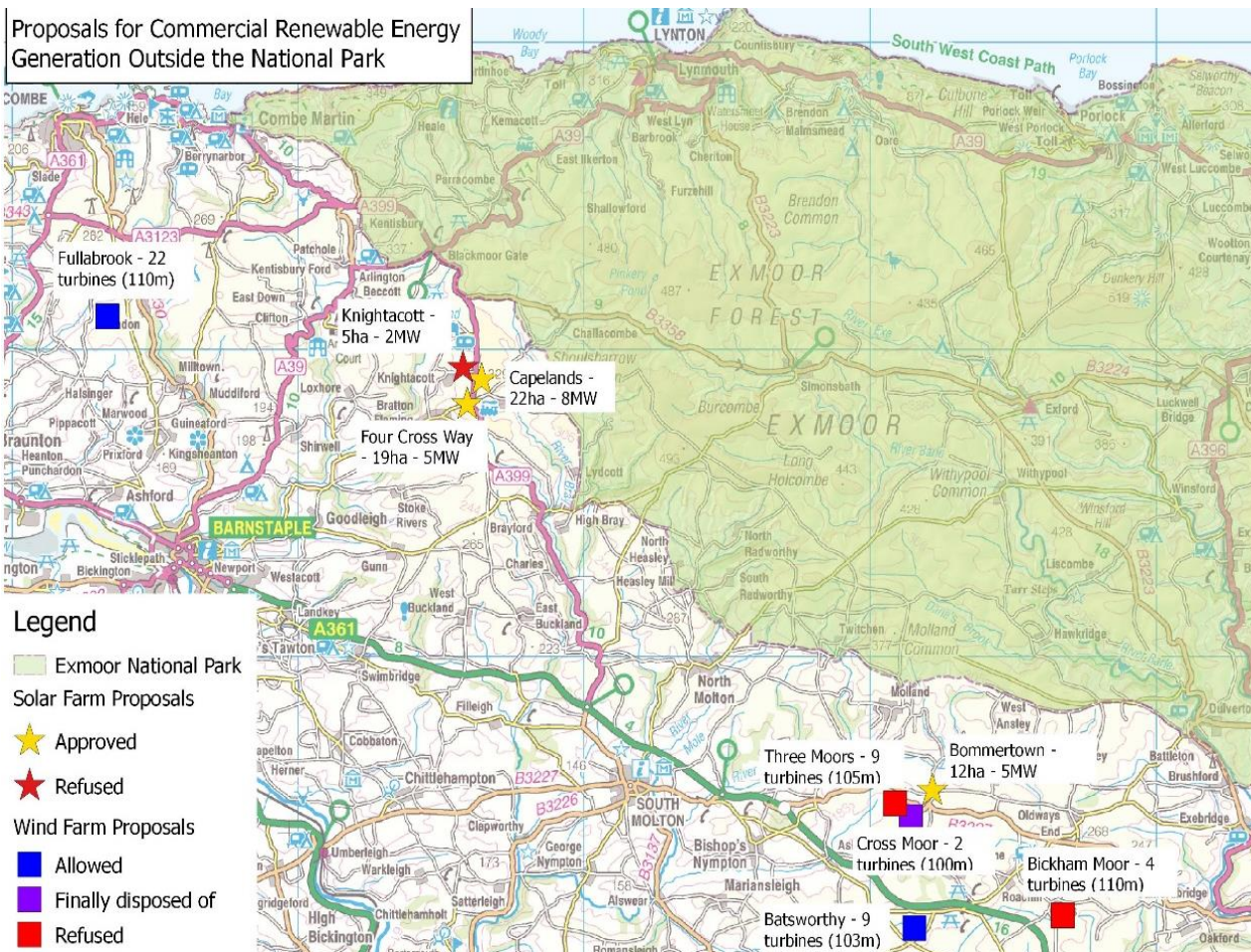
Vertical structures

19 small-scale wind turbines (less than 20m to rotor tip) have been permitted since 2000. Permission has also been granted for 40 telecommunications masts, antennae, poles or associated equipment since 2005. A further 46 applications have been submitted during 2016-2017, reflecting ENPA's work to improve fixed wireless access for improved broadband speeds and coverage



Development affecting National Park views and setting

A number of commercial renewable energy proposals have come forward for wind and solar farms in areas which are visible from the National Park. The Fullabrook and Batsworthy Cross wind farms have been erected. Proposals for commercial wind farms at Bickham Moor, Three Moors and Cross Moor to the south of the National Park were dismissed following public inquiries



Undergrounding

Since 2005 there have been 67 planning applications with a requirement to underground new service lines for electricity or telecommunications. Almost 10km of overhead lines have been placed underground by Western Power Distribution at Hawkcombe and Porlock Marsh. A further 10 poles have been removed and associated cabling has been placed underground in Dulverton Conservation Area

Case study

Going underground

A number of locations within the Exmoor and Pembrokeshire National Parks have recently had their overhead lines placed underground. Hawkcombe Head near Porlock on Exmoor, which was designated a National Park in 1954, saw 28 wooden poles and 7,200 metres of three-phase power line removed.

It is imperative that we work closely with the park authority from the outset – in this instance, doing so meant that we had the right people overseeing the work on site at every stage. We also employed a National Parks surveying team to undertake a geophysical survey on the areas which are renowned Neolithic flint settlements.

Specialist equipment – a Thunderbird 5 – which digs a trench, lays the cable, applies the bedding and marker tape, and reinstates the ground in one go, drastically reduced the six-week excavation to three days! Commitment from a number of teams, including wayleaves specialists and overhead technicians now means stunning countryside looks even better.



Before



After

Special Quality: 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

50% of people surveyed thought that there has been little change to this special quality in the past 5 years; 25% thought it was getting better

Very high levels of support for eradicating non-native invasive species (84% of people surveyed) and conserving rare species that are declining on Exmoor (82%)

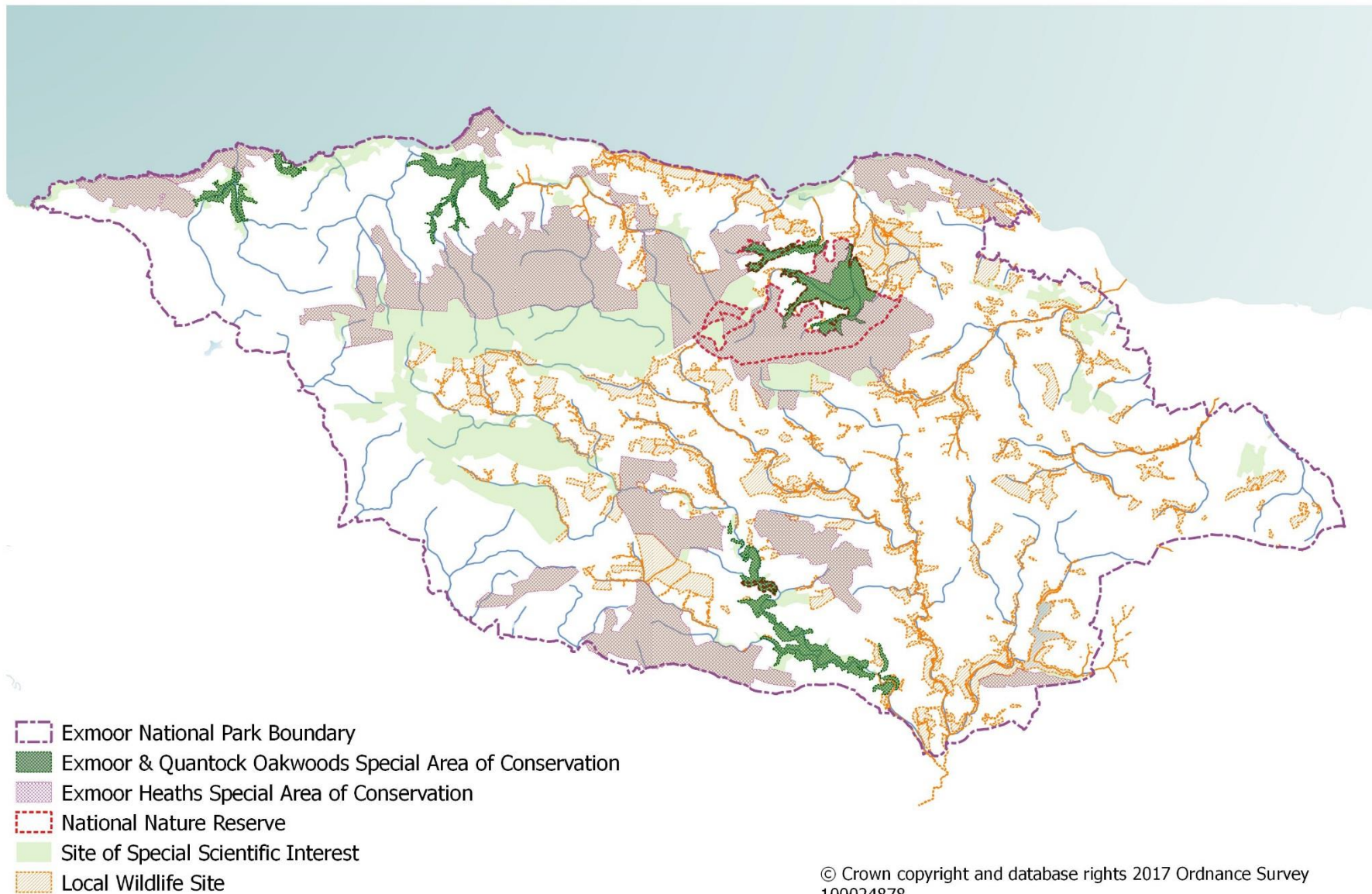
Wildlife on Exmoor:

- 2 Special Areas of Conservation (SACs) – 18% of the National Park
 - 14 Sites of Special Scientific Interest (SSSIs) – 28% of the National Park
 - 3 National Nature Reserves (NNRs) – 2% of the National Park
 - 519 Local Wildlife Sites – 12% of the National Park
 - Exmoor has 29 Priority Habitats and 207 Priority Species.
- some of these designations overlap – SACs and NNRs are all SSSIs*

Exmoor's wildlife: a rich diversity of habitats and species

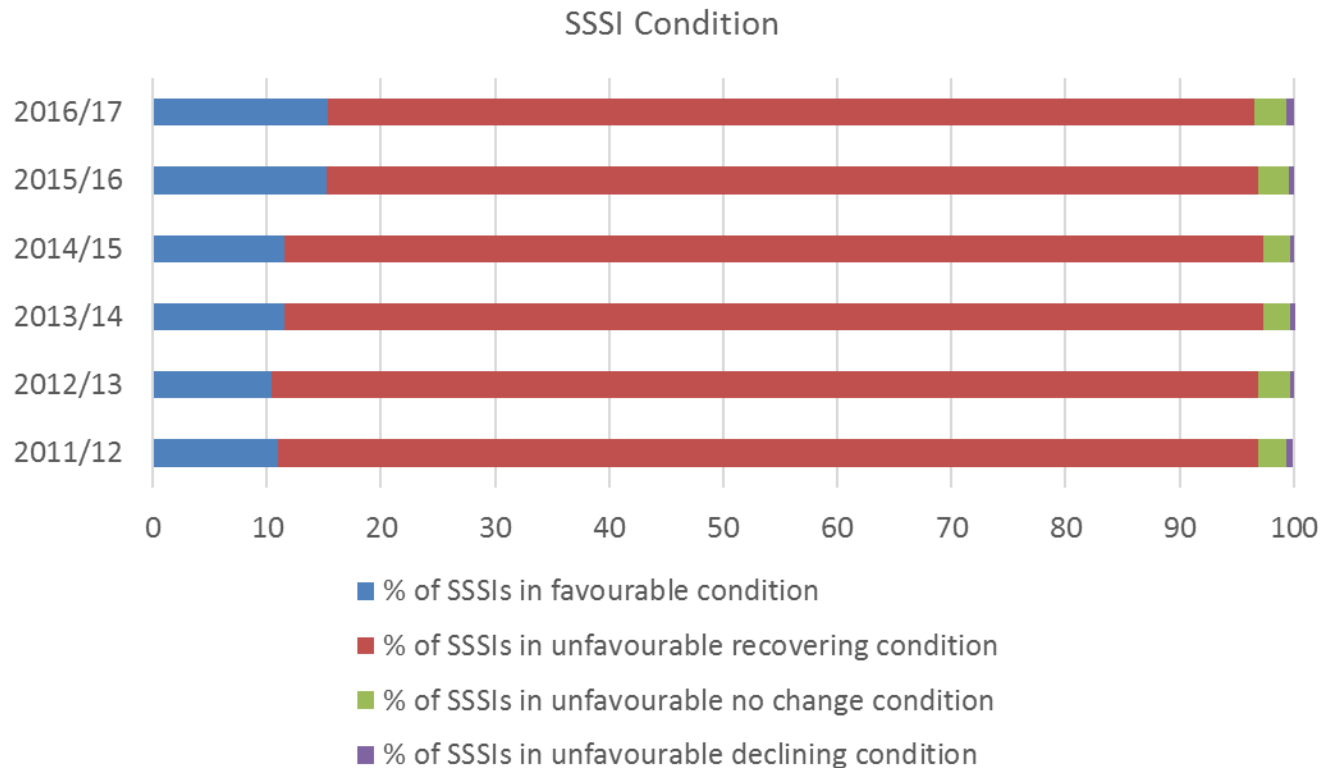
- Exmoor's spectacular moorland, rich oak woodland, rolling farmland, clear streams and dramatic coastline form a mosaic of habitats including upland and lowland heath, blanket bog, ancient woodlands, species-rich grassland, and high quality freshwater and marine habitats
- Exmoor's wildlife is one of the key attractions for people visiting the National Park, and is also highly valued by people living & working here
- Notable species include 16 of the 17 breeding British bat species found in the UK, otters, dormice, and some of the UK's rarest butterflies including the heath and high brown fritillary
- A wide range of birds can also be seen on Exmoor, both common and rare species, many of which are national conservation priorities including moorland, woodland and farmland specialists, birds of prey, and seabirds off Exmoor's coast

Exmoor's wildlife designations



Habitat condition

- 15% of Sites of Special Scientific Interest are in favourable condition, with 82% in unfavourable recovering condition
- In general the state of Local (County) Wildlife Sites is good. 81% have remained unchanged since the 1990s but 2% have been lost

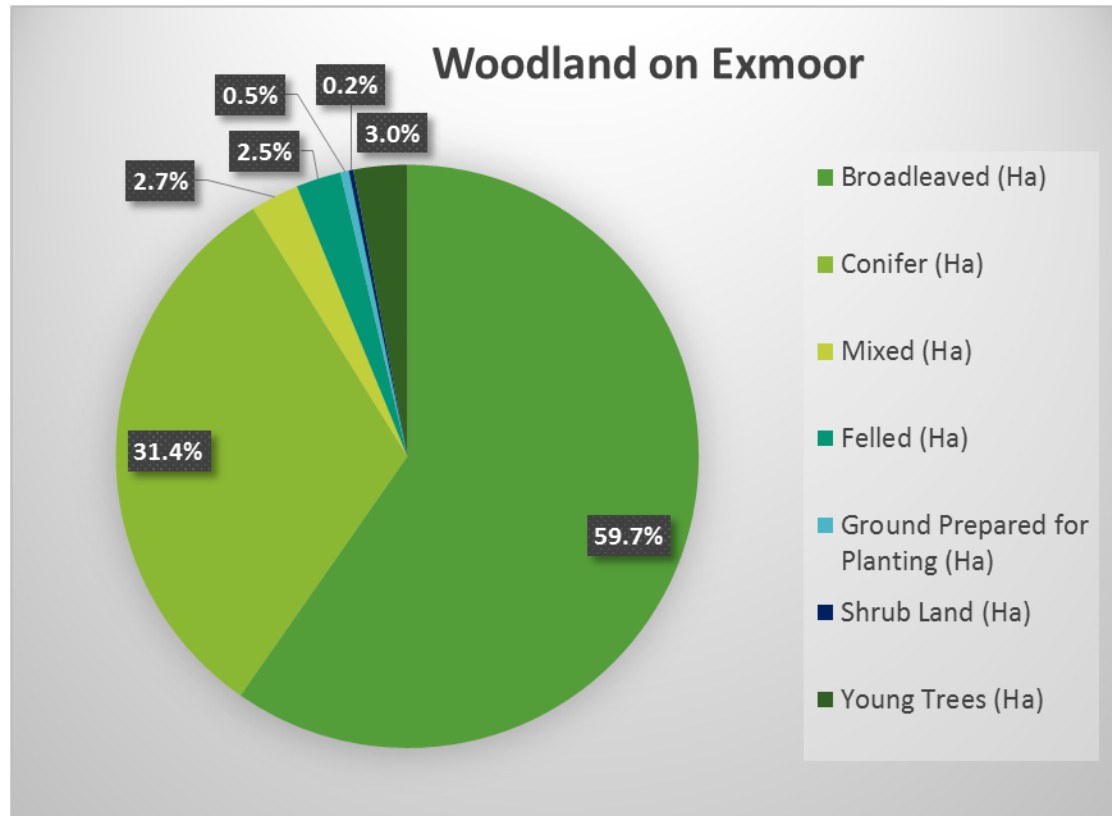


Moorland habitats

- Exmoor's moor and heath represents 23 out of the 82 nationally recognised moor and heath vegetation types
- It includes roughly 7,000 ha of upland heath, 4,600 ha of upland grass moor, 3,900 ha of bracken, 1,500 ha of lowland heath (including coastal heath) and 3,000 ha of blanket bog
- It is nationally important within England and Wales for the presence of a wide combination of upland heath types, including two rare types of heathland - bristle bent (*Agrostis curtisii*) / western gorse (*Ulex gallii*) heath and ling (*Calluna vulgaris*) / western gorse heath - which are of international importance
- It is also at least regionally important for the extent of its upland and coastal heaths, upland grass moor and blanket bog, with the second largest area of moorland in southern Britain
- Exmoor's moors and heaths support nationally important populations of whinchat, stonechat, Dartford warbler and heath fritillary butterfly
- About 83% of Exmoor's moor and heath is legally protected through SSSI status and a large area of this is included within the Exmoor Heaths Special Area of Conservation

Trees and Woodland

- 13.5% of the National Park area is woodland (9,340 ha)
- 1,971 ha is ancient woodland, with an additional 1,207 ha that is Plantations on Ancient and Semi-natural woodland (PAWS)
- 4,772 ha is section 3 woodland designated as areas of natural beauty that are considered particularly important to conserve
- 149 Tree Preservation Order (TPO) areas have been designated, covering 584 ha, and 210 individual TPOs
- The ancient sessile oak woodlands contain rare lichens and one of the densest collections of veteran trees in Europe, with a total of 1,649 veteran trees
- Since 2000, 36 new woodland sites have been planted totalling 128 ha



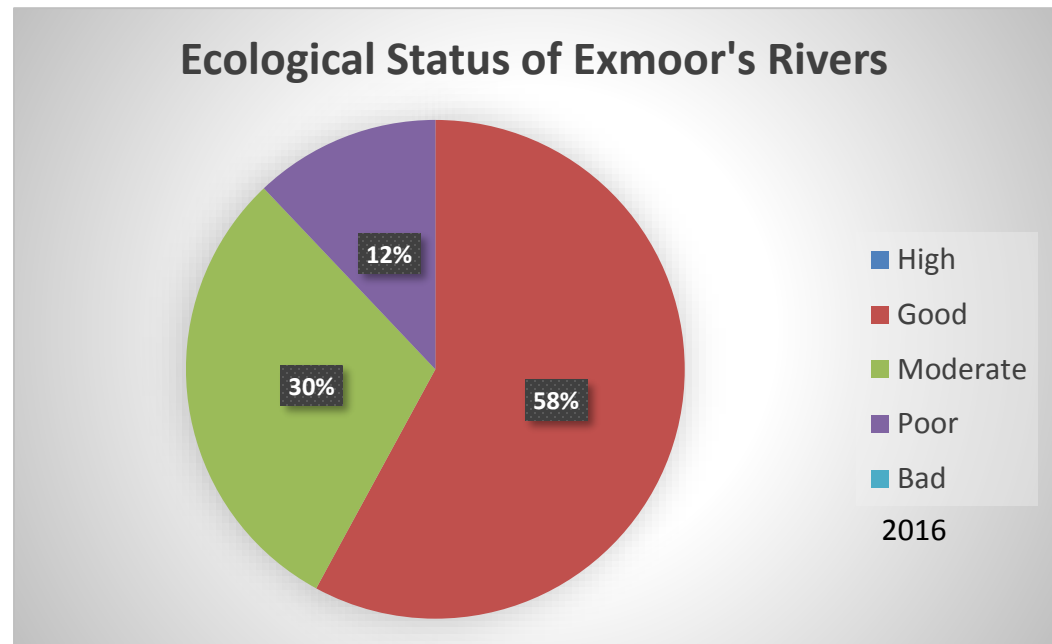
Source: Forestry Commission

Farmland

- Exmoor's less-intensively used farmland is valuable for wildlife
- The remaining small areas of unimproved meadows and pastures support a great variety of wild plants including the scarce mountain pansy and adder's tongue and moonwort ferns
- Unploughed grassland supports ant hills of the yellow meadow ant, butterflies, the scarce hornet robber fly and rare waxcap fungi, plus bats, which feed on the insects
- An important habitat in farmland is provided by boundary features such field margins, hedgerows, hedgebanks and verges, providing refuges for wild plants and shelter and nest sites for birds, mammals and invertebrates
- These farmland habitats are often un-designated, and are consequently under greater threat of being lost

Rivers and streams

- Exmoor's clean, fast flowing waters support a rich and varied community of wild plants and animals including luxuriant growth of algae, aquatic mosses and lichens, such as the rare river jelly lichen. There are also several internationally rare mosses and liverworts
- The river Barle is a SSSI because it is considered the best example in Britain of an acidic upland stream grading into a richer river on sandstone
- The East Lyn, Exe and Barle rivers are very important for the spawning of migratory Atlantic salmon and sea trout
- 58% of monitored rivers are achieving 'good' status
- Many of Exmoor's bird species are found along river valleys, as well as the characteristic species of fast flowing rivers such as the dipper, grey wagtail and kingfisher
- Otters seem to be generally faring well on Exmoor, although the 2016 survey figures were down on previous years



Source: Environment Agency

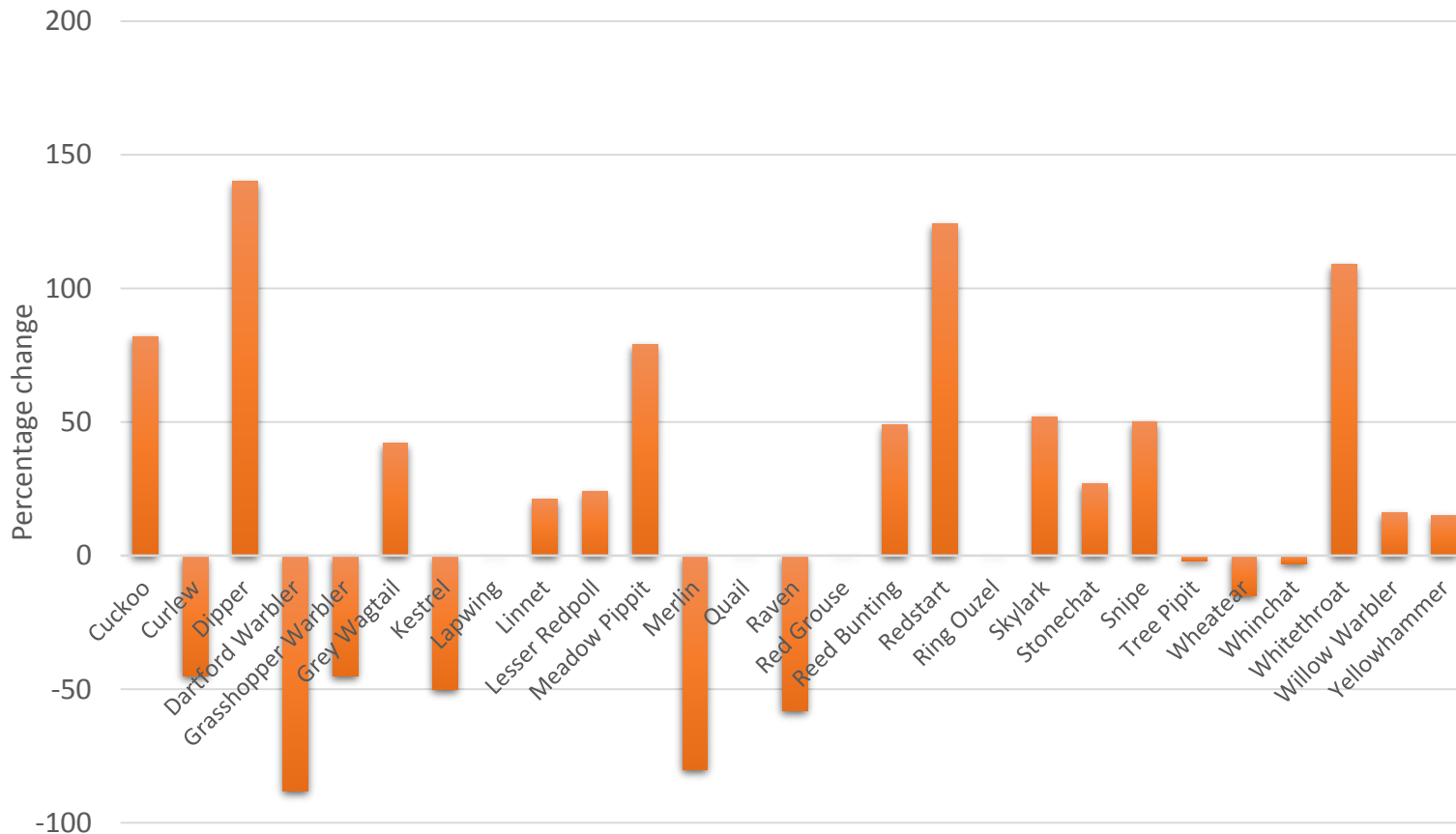
Coast and foreshore

- Much less is known about the wildlife of Exmoor's coast and foreshore although recently there has been an upsurge in interest in coastal and marine survey and monitoring
- The Shoresearch project funded by Exmoor National Park Authority recorded 15 out of 22 indicator species across eight sites
- Much of the coast is designated as Sites of Special Scientific Interest (SSSI) including coastal heath and woodlands which are also Special Areas of Conservation.
- The saltmarsh establishing at Porlock Marsh following the breach in the shingle ridge in 1996 is also a SSSI, designated for its active coastal geomorphological processes, saltmarsh and coastal vegetated shingle habitats
- The whole of Exmoor's coastline was defined as Heritage Coast in 1991. Nearly 8km is designated as Section 3 Coast and Foreshore areas of natural beauty that are considered particularly important to conserve
- The coast off the western part of the National Park from Foreland Point is part of a Marine Conservation Zone protecting a wide range of habitats including beaches of inter-tidal sand to sub-tidal sediment and rock habitats

Moorland birds

Many species of moorland birds are faring well such as cuckoo, dipper and whitethroat, with noticeable increases in populations of 14 out of the 27 target species, many of which are declining nationally. Nine other species are declining on Exmoor, and four species are no longer found at all: lapwing, quail, ring ouzel and red grouse. Species typically associated with lowland areas are increasing on Exmoor including linnet, reed bunting and yellowhammer

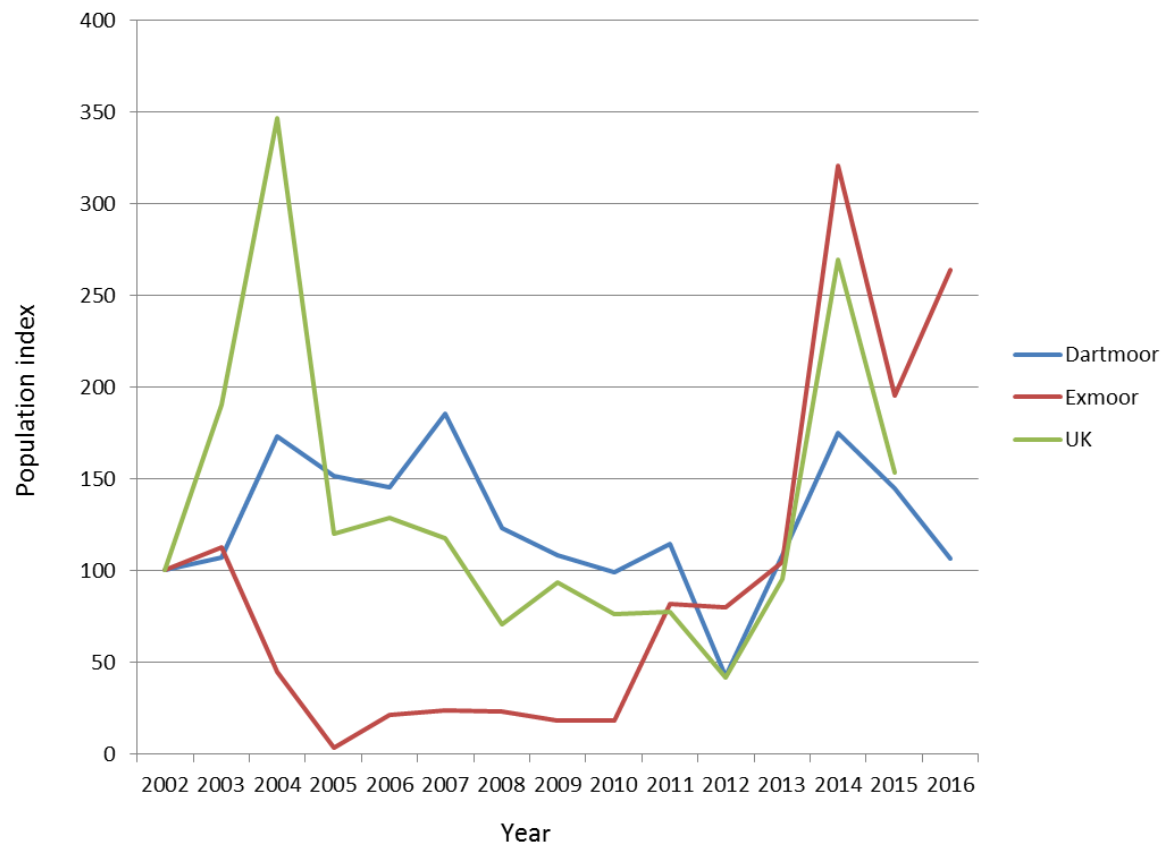
Moorland Breeding Birds Survey
Percentage Change from 2008 to 2014



Butterflies

Exmoor is an important area for heath and high brown fritillaries. The Two Moors Threatened Butterfly project has engaged with 292 sites across Dartmoor and Exmoor (178 on Dartmoor, 114 on Exmoor) and provided advice on the management of over 1,800ha of habitat to improve habitat suitability for fritillary butterflies, increase connectivity between habitat patches and increase the extent of potential breeding patches. The High Brown Fritillary population has increased 646% on Exmoor

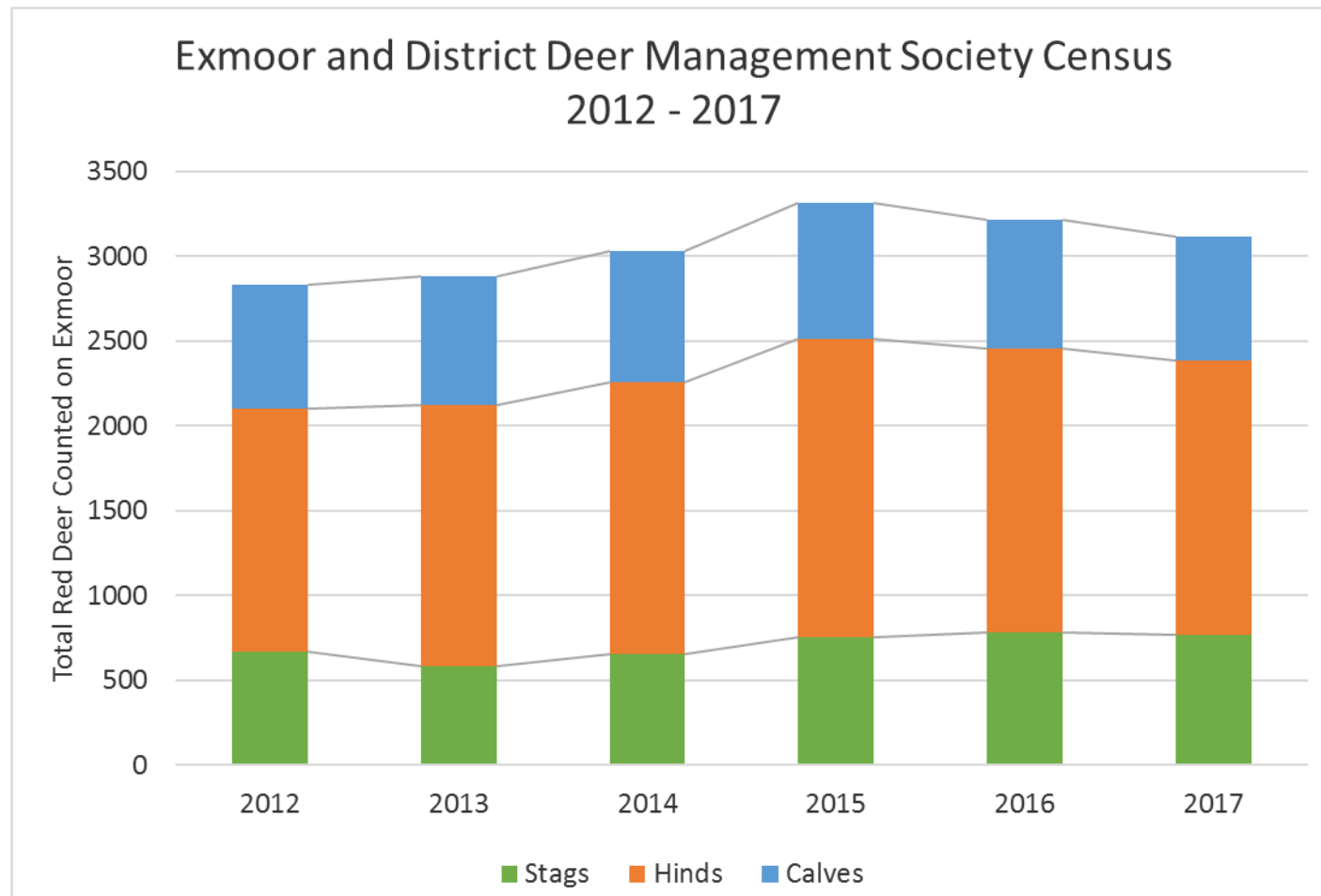
High Brown Fritillary population indices 2002-2016



Source: Butterfly Conservation Two Moors Threatened Butterfly Project

Red deer

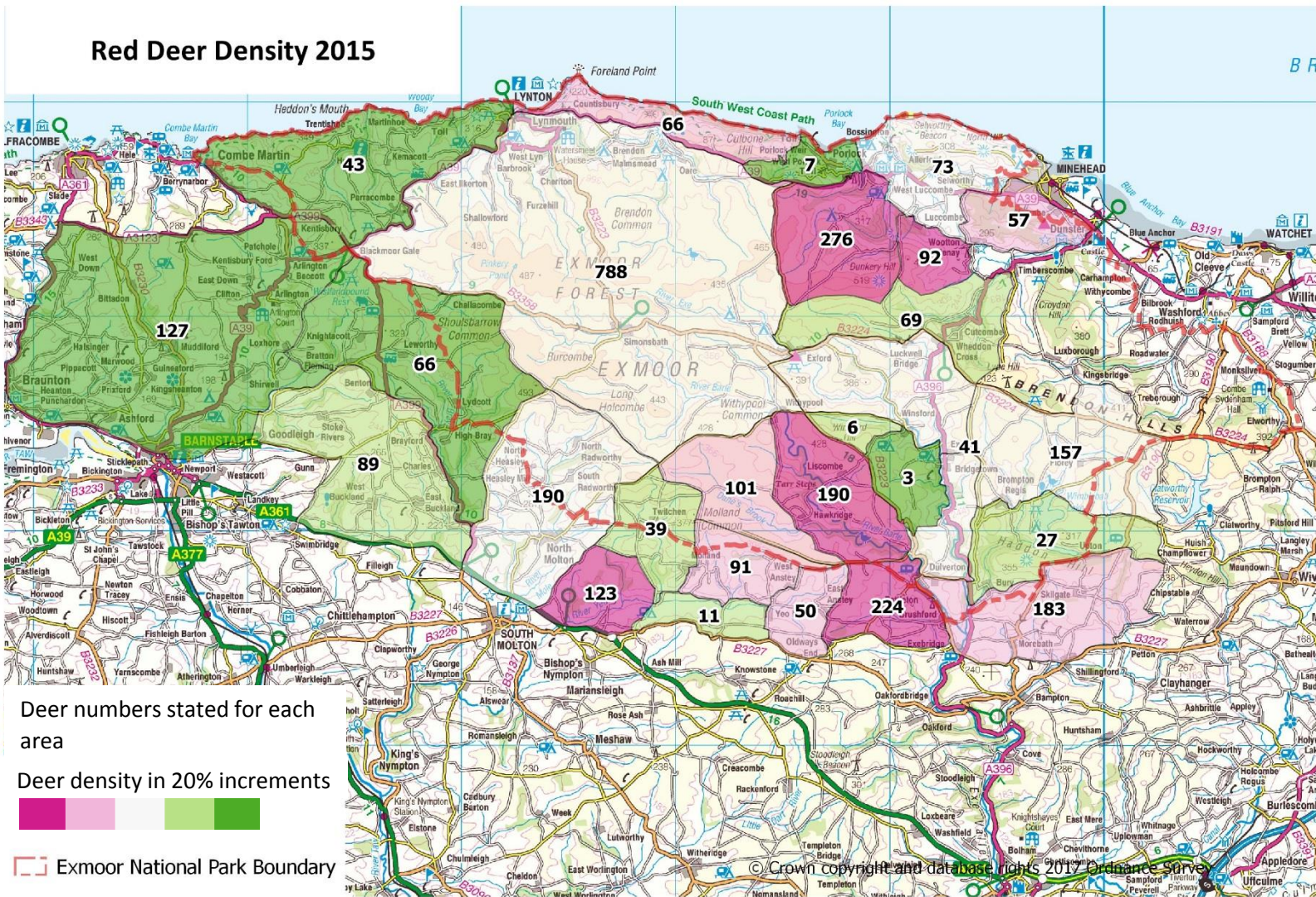
Deer numbers are stable at around 3,000. A study of the health of wild red deer on Exmoor concluded that the herd is generally very healthy with remarkably low incidences of disease across the moor.



Source: Exmoor and District Deer Management Society

Red deer

Exmoor National Park has the highest density of wild Red Deer in England



Increased understanding and engagement with Exmoor's wildlife

- Volunteers contribute a huge amount of time and effort to help monitor Exmoor's wildlife
- 82% of people surveyed support actions that help conserve rare species which are declining within the National Park. 84% support an increase in wildlife safaris and wildlife watching where they help attract visitors and provide income to local businesses (ENPA Public Opinion Survey 2017)
- 72% of visitors say that their understanding of Exmoor's culture and history has increased as a result of their visit (ENPA Visitor Survey 2016)



Volunteers taking part in a lichens, mosses and ferns training event



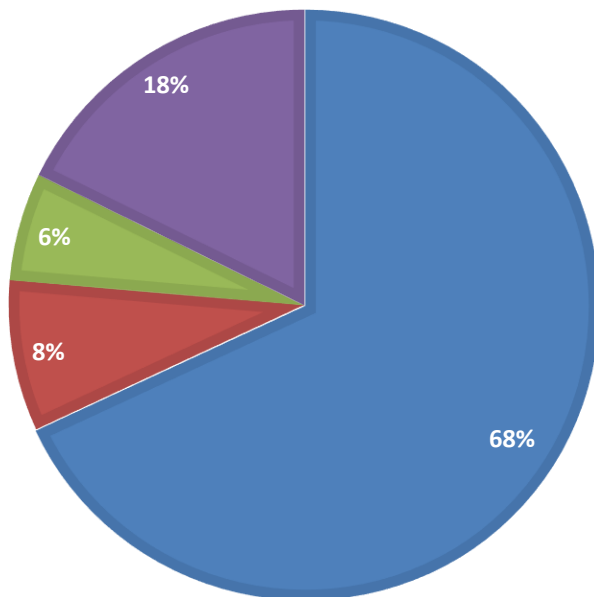
Volunteers taking part in otter survey training before undertaking a two-day otter survey covering the whole of Exmoor National Park

Invasive Species

- Invasive non-native species such as knotweed, Himalayan balsam, signal crayfish and rhododendron continue to be a threat but ongoing control programmes are proving successful on sites where treatment is possible
- 85% of people surveyed supported efforts to eradicate non-native invasive species

KNOTWEED TREATED 2013/14

■ Sites treated by The Knotweed Project ■ Sites treated by other organisations
■ Not treated - organic ■ Not treated - no information



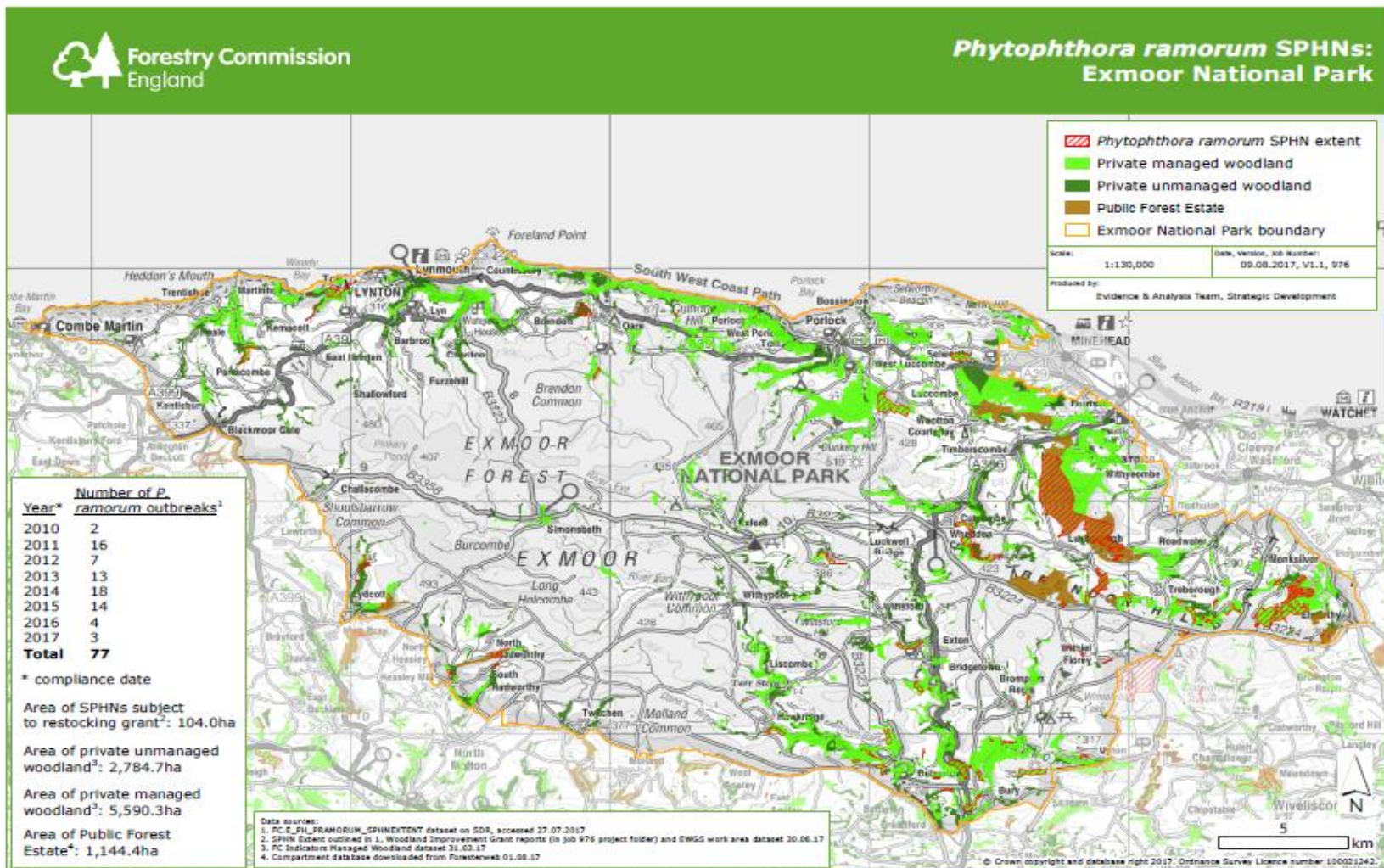
Rhododendron

Between 2000-13

- 331 hectares cut and treated
- 663 hectares of regrowth treated

Plant Health – tree diseases

There have been 77 *Phytophthora ramorum* outbreaks between 2010 - 2017
Statutory plant health notices were issued for a total of 104 hectares of woodland, subject to a restocking grant



Special Quality: A complex and rich historic landscape that reflects how people have lived in, exploited and enjoyed Exmoor over the past 8000 years, including burial mounds on ridges, discrete stone settings, ancient farmsteads and settlements, picturesque villages and historic estates

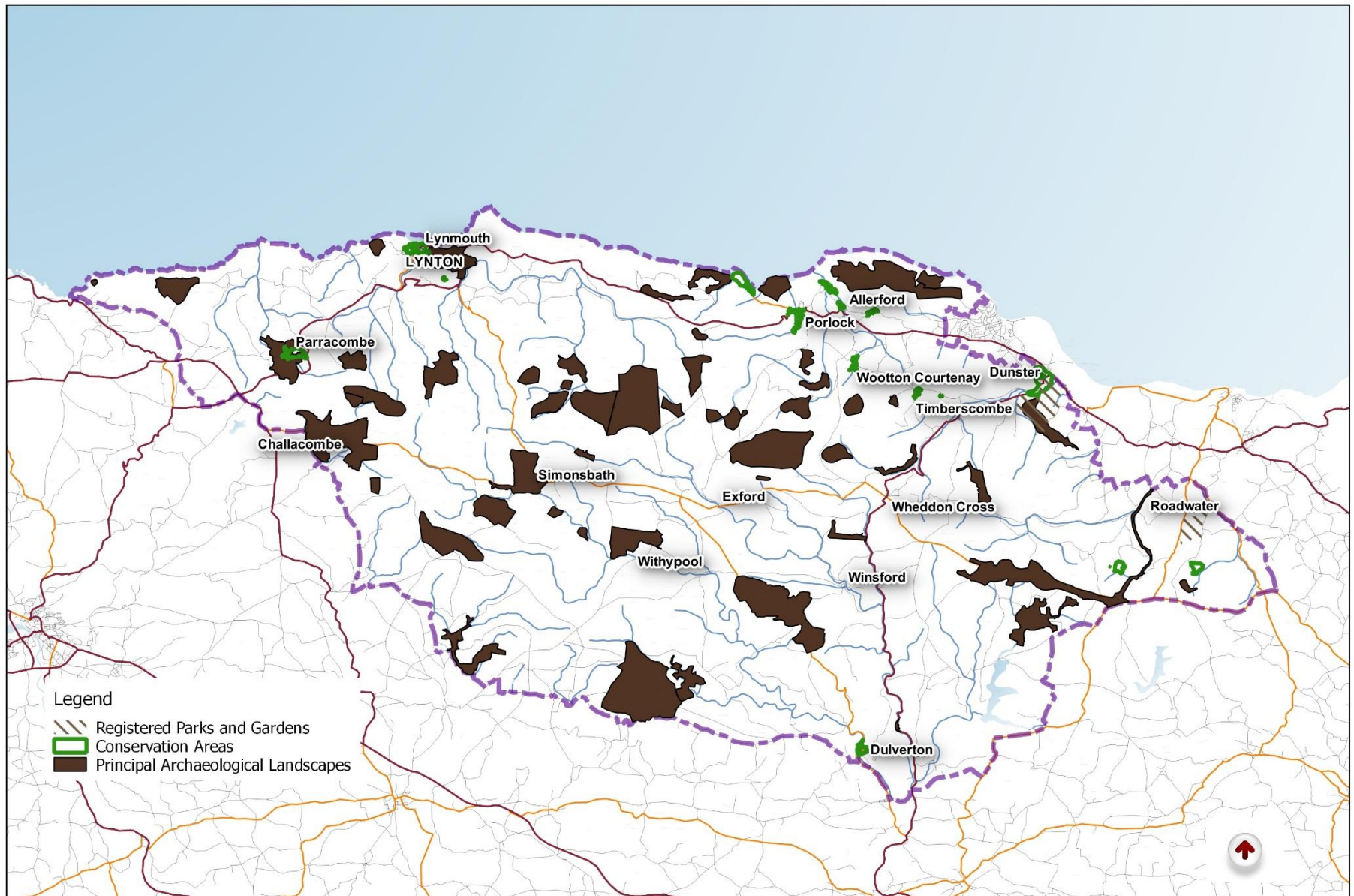
63% of people surveyed thought that there has been little change to this special quality in the past 5 years

65% of people surveyed supported grants for landowners to protect historic monuments

Exmoor's Historic Environment assets:

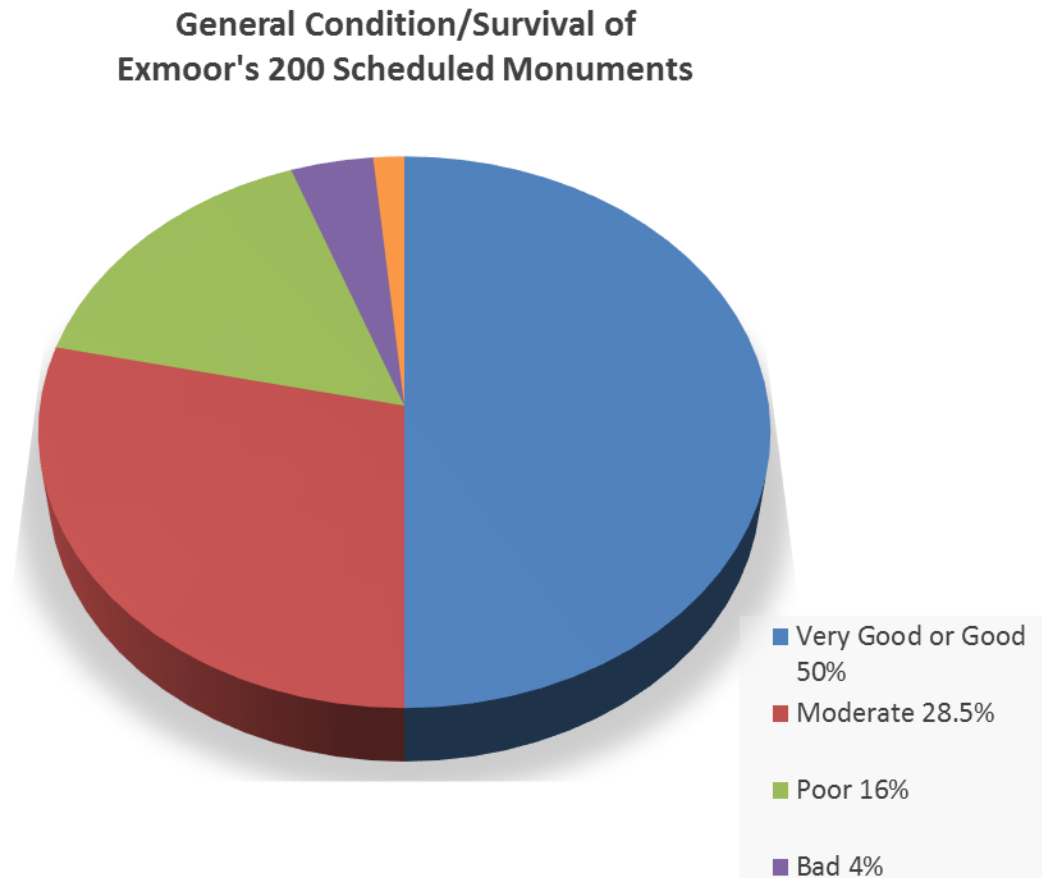
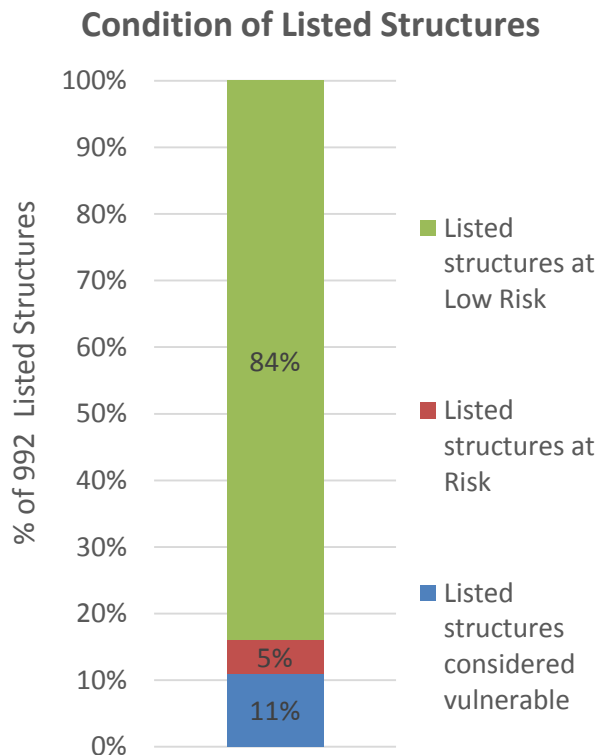
- 200 Scheduled Monuments
- 740 Listed Buildings (comprising 992 separate structures)
- 2 Registered Parks and Gardens
- 16 Conservation Areas (all with up to date Appraisals)
- 53 Principal Archaeological Landscapes covering 7,247 hectares
- 11,241 entries on the Historic Environment Record

Exmoor's Historic Environment assets



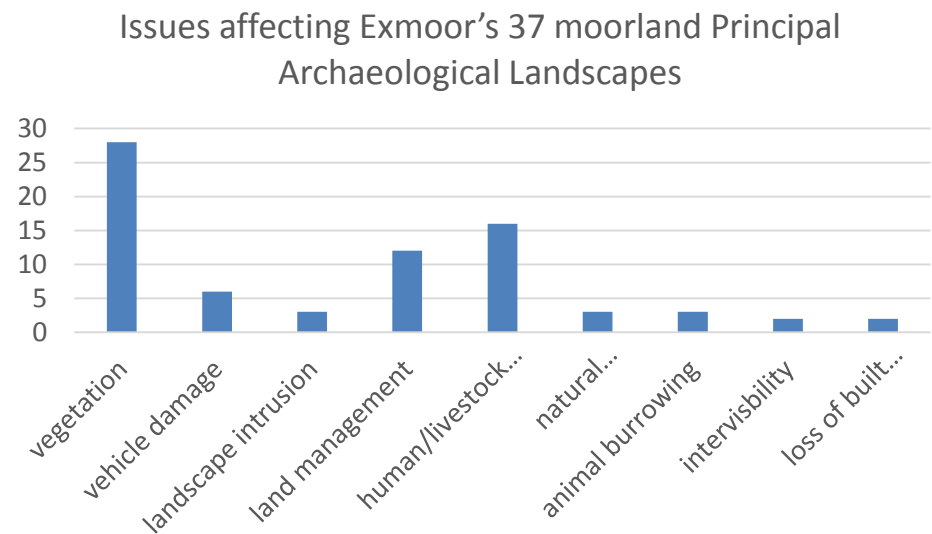
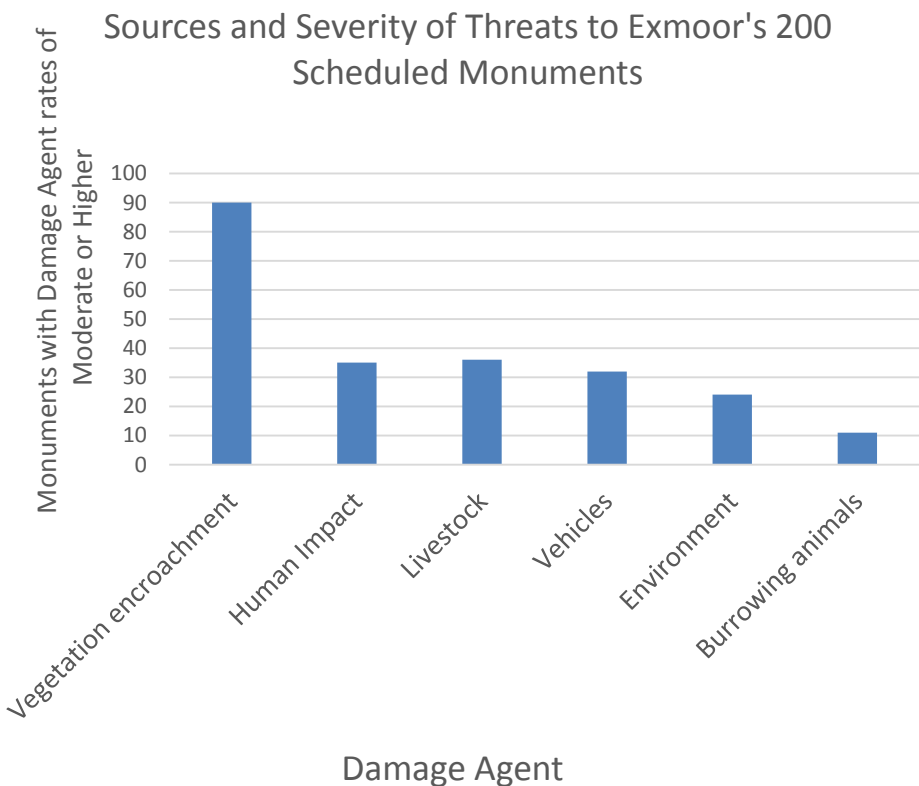
Heritage At Risk

The number of Scheduled Monuments and Listed Buildings at Risk has fallen due to proactive conservation efforts. Currently (2016/17) there are 27 Scheduled Monuments (13.5%) at risk and on the National Heritage At Risk Register. Only 11 listed buildings (1.5%) are considered highly vulnerable and identified in the ENPA 'at risk' report. None of these are included on the National 'At Risk' Register. No Conservation Areas are considered to be 'at risk'



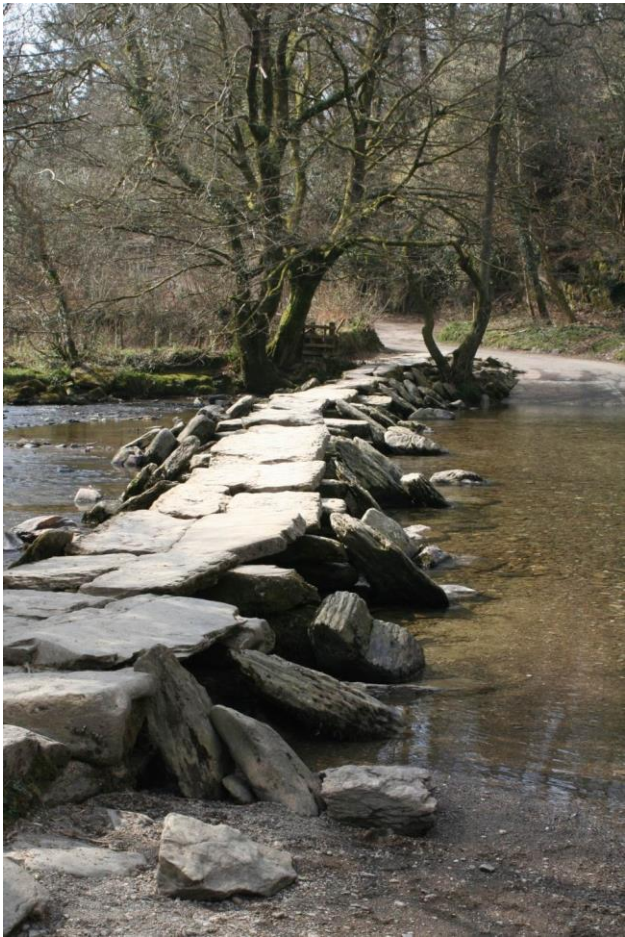
Threats to Exmoor’s heritage assets

Vegetation encroachment is the main threat to Scheduled Monuments and Principal Archaeological Landscapes



Threats to Exmoor's historic environment

Severe weather is a continual threat to some historic sites, particularly bridges such as Tarr Steps, and coastal change



Tarr steps repair work 2012

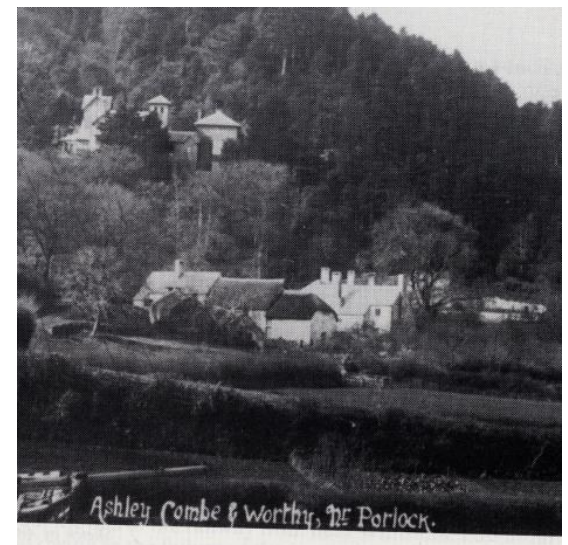
Undesignated heritage assets

There are many sites and buildings on Exmoor that meet the criteria for national designation but remain undesignated. These are vulnerable to negatively impacting change or loss

Locally designated on Exmoor are 53 Principal Archaeological Landscapes (PALs) which identify significant historic or archaeological landscapes. PALs are a material consideration in planning but have no statutory protection

Exmoor is also under-designated in relation to Listed Buildings. There are a number of known buildings which are of equal significance to listed buildings but are not designated and therefore do not receive the same level of protection including for example many traditional farmsteads

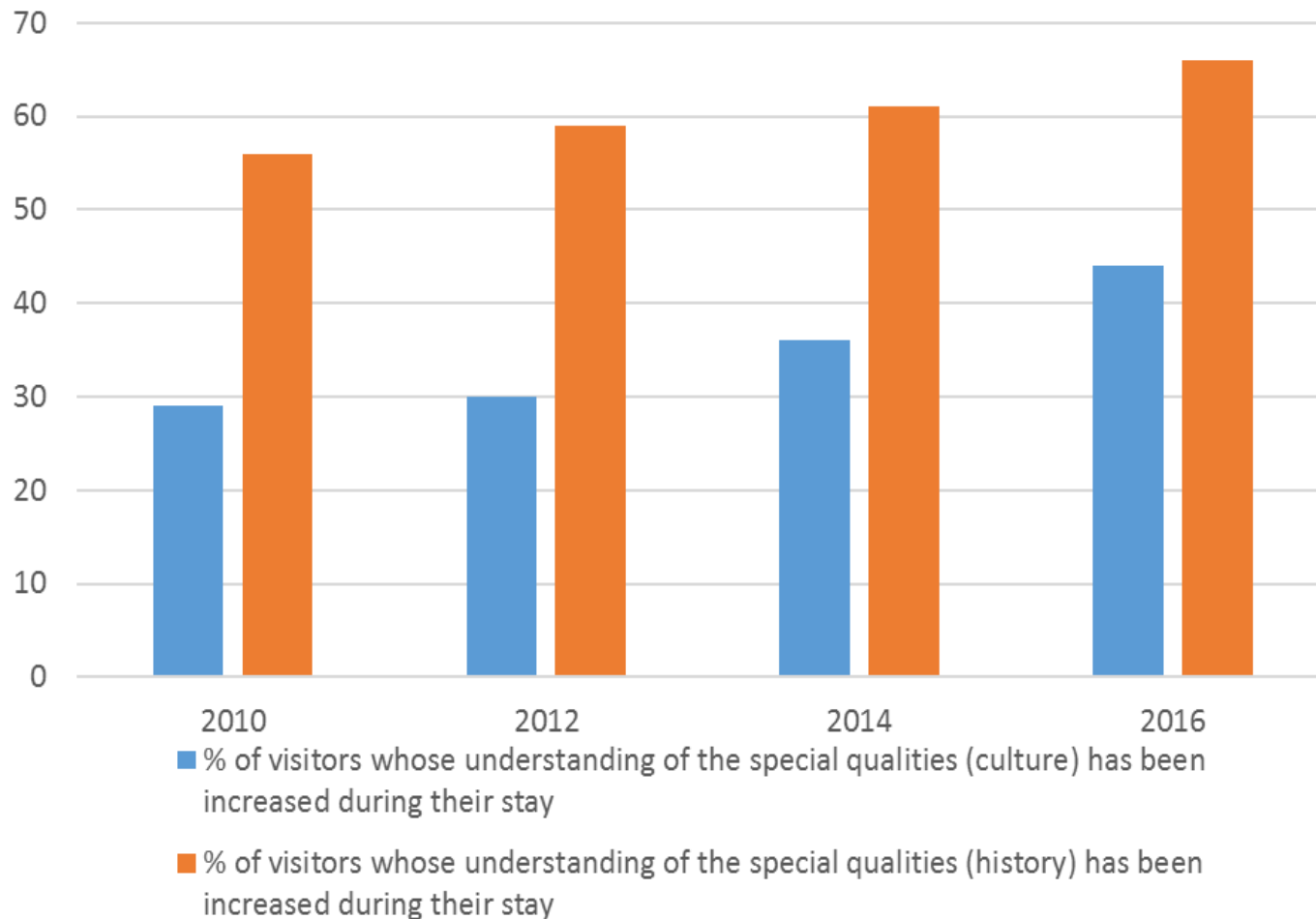
Exmoor's estates and their designed landscapes have profoundly influenced the character of the National Park. At least 25 estates and designed landscapes have been identified, and all require further study



Ashley Combe designed landscape near Porlock

Increased understanding and enjoyment of the historic environment

More visitors say that their understanding of Exmoor's culture and history has increased as a result of their visit



Increased engagement with the historic environment

A number of successful community and public engagement projects have helped to get local people and volunteers involved in surveys and monitoring



Local groups surveying at Radworthy deserted farmstead continuing work of Longstone Landscape Project, 2015



Recording historic buildings (Somerset Archaeological and Natural History Society Group)

Special Quality: A deeply rural community closely linked to the land with strong local traditions and ways of life

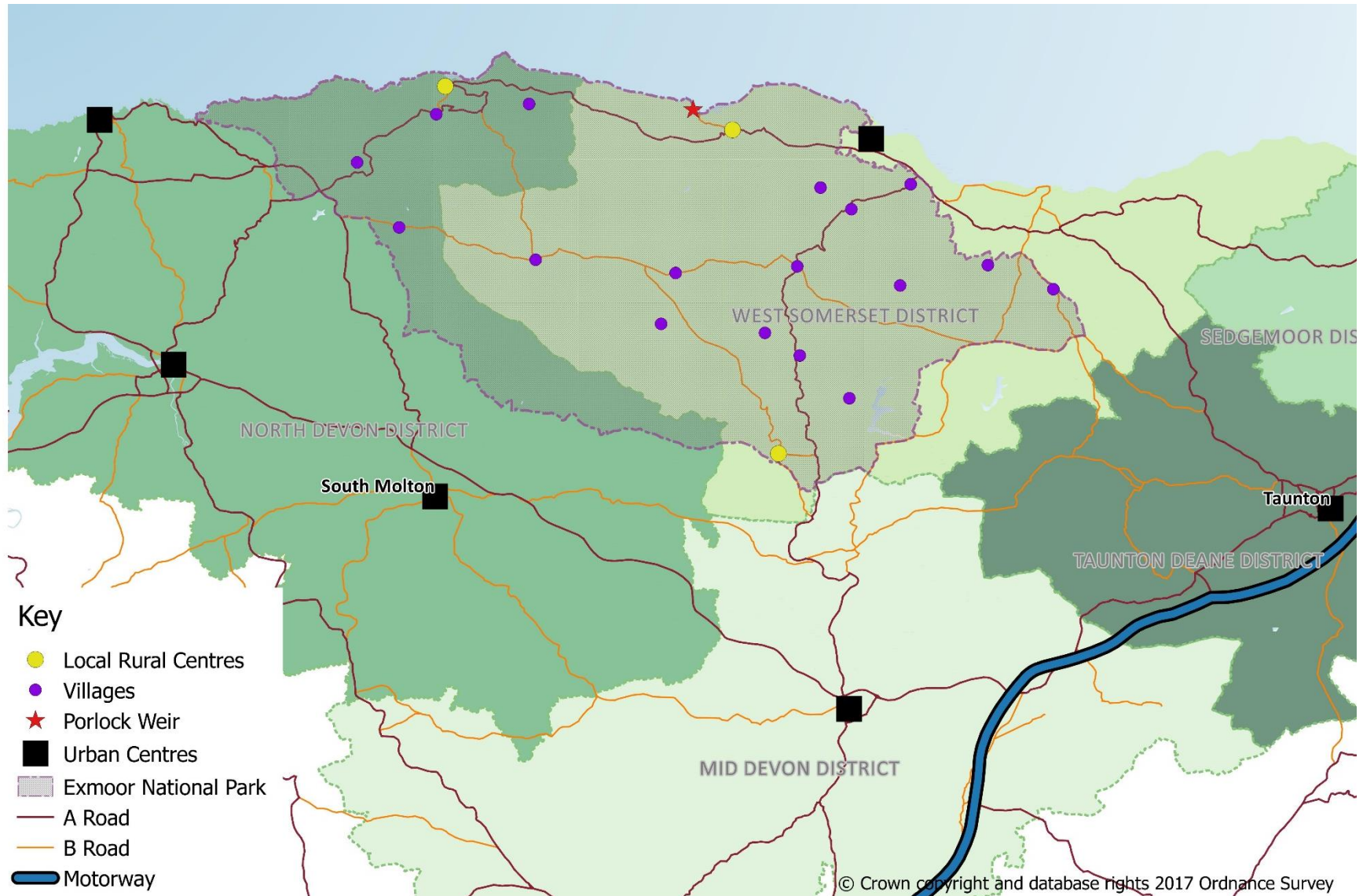
41% of people surveyed thought that there has been little change to this special quality in the past 5 years. 32% thought it was getting worse

73% of people surveyed felt that Exmoor's distinctive way of life and local communities' strong links to the land is important

Exmoor's local communities:

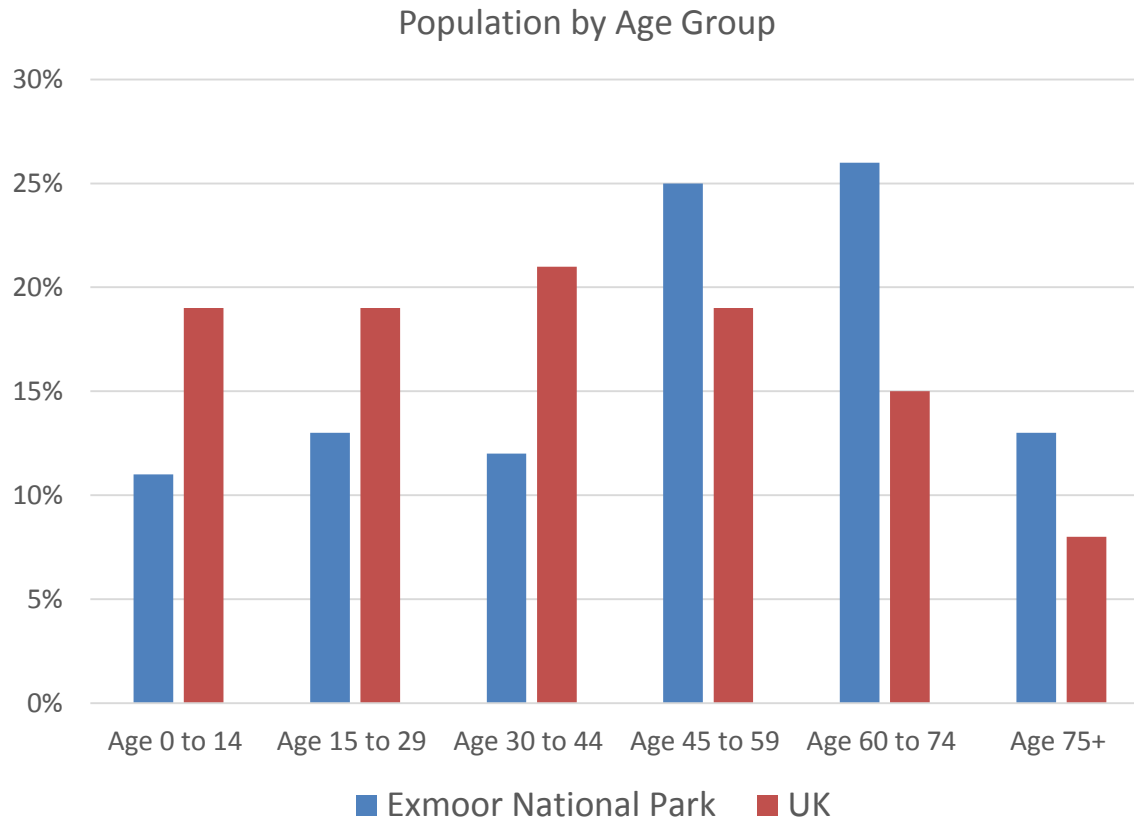
- 10,273 people live on Exmoor
- The number of people living on Exmoor is declining, and ageing
- The majority of Exmoor is a sparse rural area – defined as 'rural hamlets or isolated dwellings in a sparse setting', or 'rural village in a sparse setting'.
- Only 3 settlements have populations of over 1,000 people (Dulverton, Porlock, Lynton & Lynmouth) which fulfil an important role as local service and tourism centres, serving a large catchment area

Map of Exmoor National Park showing its wider context and distance from other larger urban centres and transport networks



Population

- Exmoor has an ageing population and since 2001 has experienced a particularly large decrease (-36%) in the number of people aged between 30 and 44 years
- Overall, the population has declined by -5.5% since 2001



Housing and local services

- The deeply rural nature of Exmoor's communities brings particular challenges including housing affordability, low wages, and difficulty retaining local services and community facilities
- Exmoor's house prices are substantially higher than regional and national averages, driven by demand from in-migration & second home ownership
- Asking prices for housing in the National Park rose by over 300% between 1998 and 2012
- The disparity between household incomes and house prices means there is an affordability gap with the ratio of average house price to average household income being 10:1
- Exmoor has one of the highest levels in the country of second homes and holiday homes (19% of the housing stock)
- Consequently, the majority of properties is well beyond the means of many local people in housing need, especially first-time buyers and families needing larger accommodation
- 95 affordable dwellings have been completed since 2005

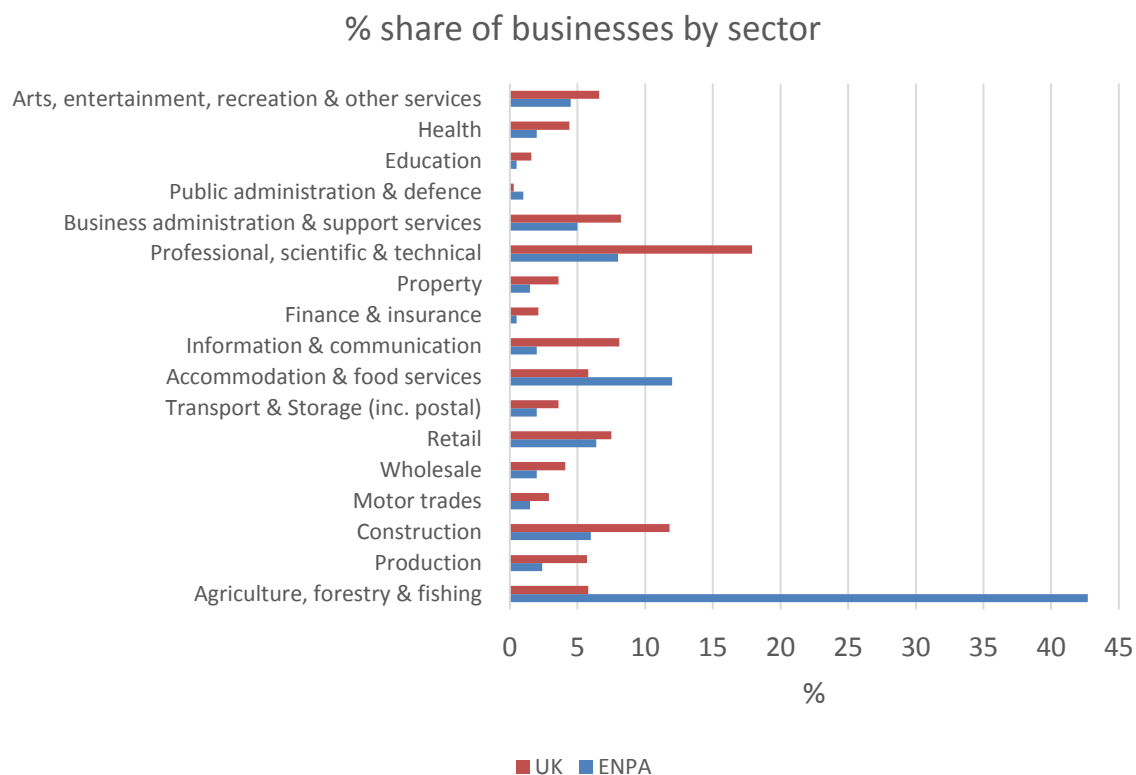
Employment

- Exmoor has a 'working age' population of approximately 7,721 people.
- There are high levels of part-time workers (13%) and self-employment (26% of people of working age)
- Rates of economically inactivity are slightly higher than average as a result of high numbers of retired people
- Given the deeply rural nature of local communities, there are high levels of people working at or from home (37%)
- Around 91% of working age people both live and work within the National Park, representing a high degree of self-containment
- There are low levels of unemployment

Percentage of people in employment working at or from home (2011):	
Exmoor National Park	37.0%
England	10.3%
South West	12.7%
North Devon	16.9%
West Somerset	25.3%

Businesses on Exmoor

- Agriculture, forestry and fisheries and tourism (accommodation / food services) account for over half of businesses and employment on Exmoor
- Over three-quarters of businesses employ less than 10 people
- There are many micro-businesses but data on these is difficult to obtain



Rural traditions

- Rural traditions such as hunting, shooting and fishing continue to be an important part of Exmoor life and contribute to the local economy
- The red deer are an iconic part of what makes Exmoor special. They are estimated to be worth around £3.2million a year to the local economy in terms of the draw for tourists and in relation to stag hunting
- Game shooting participants shooting on Exmoor spent a total of £22 million on game shooting goods and services, of which £9.6 million was spent on shooting sites, and £4 million is ultimately retained in the Exmoor area. The creation of jobs sustained by shooting is substantial for a remote rural area like Exmoor. There are 100 paid gamekeepers (70 full-time jobs) employed on Exmoor shoots and 1,600 jobs in the local area are supported by the provision of shooting activities (260 full-time equivalents – paid and unpaid) (2004 figures)
- 36% of people who responded to the public opinion survey said thought that levels of commercial game shooting in the National Park were about right. 30% supported the increase in commercial pheasant and partridge shooting even if it results in more release pens, game crops, feeders, etc, as it helps the local economy, but 48% disagreed with this. 49% would like to see greater control over commercial game shooting in the National Park to minimise any negative impacts

Special Quality: 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

51% of people surveyed thought that there has been little change to this special quality in the past 5 years.
19% thought it was getting better

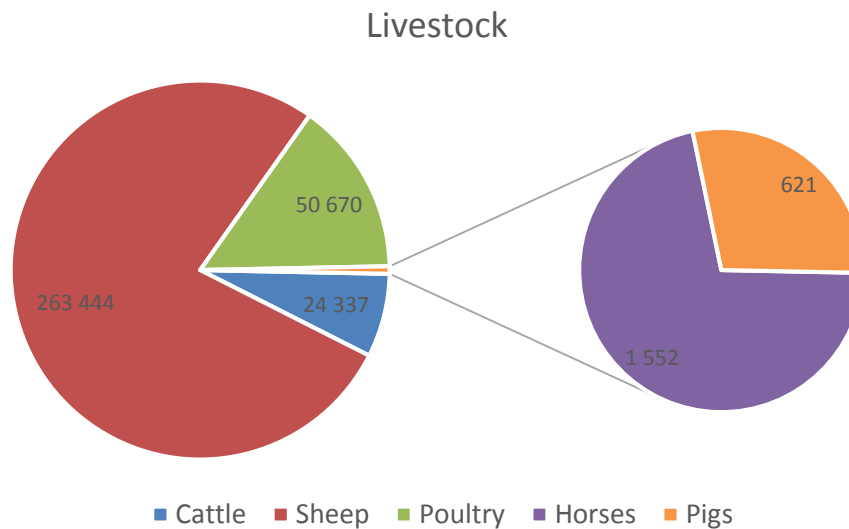
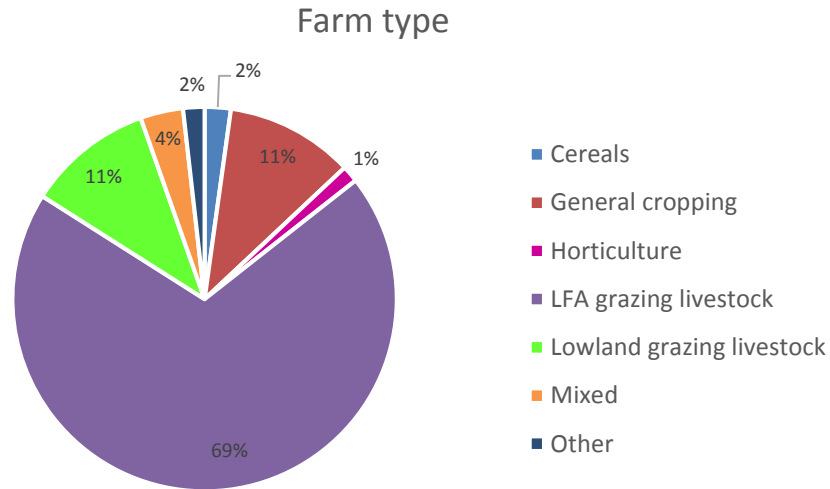
27% of people surveyed thought farming on Exmoor should receive public funding even if it is not linked to caring for the environment. 48% disagreed

Exmoor's farmed landscape:

- Farming is dominated by hill and upland farms. Most farms operate extensive grazing livestock production systems, with a high proportion of permanent pasture and semi-natural habitat and a relatively small area of land which is cropped. Sheep and beef systems predominate
- There are over 500 commercial farm holdings on Exmoor
- Around 1200 people work in agriculture
- Exmoor's landscape character derives from this long history of livestock farming which has produced a patchwork of fields enclosed by traditional field boundaries (hedgerows and high Devon hedge banks) surrounding the higher moor land which is distinguished by larger enclosures and some common rough grazing

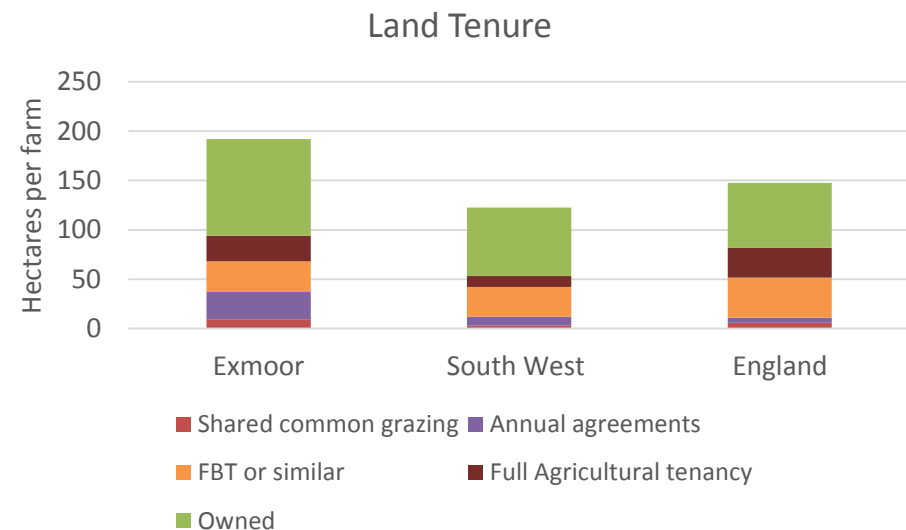
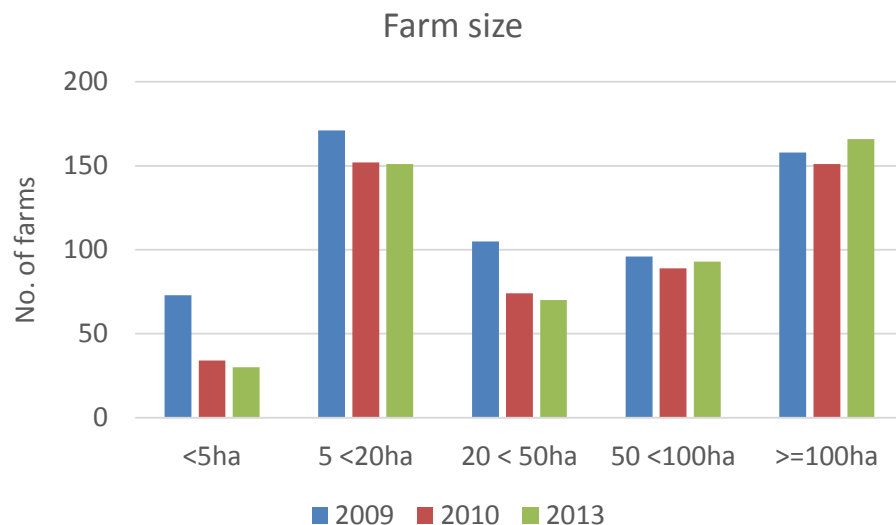
Farming on Exmoor

Extensive livestock grazing is the primary farm type on Exmoor with cattle and sheep as the main livestock kept



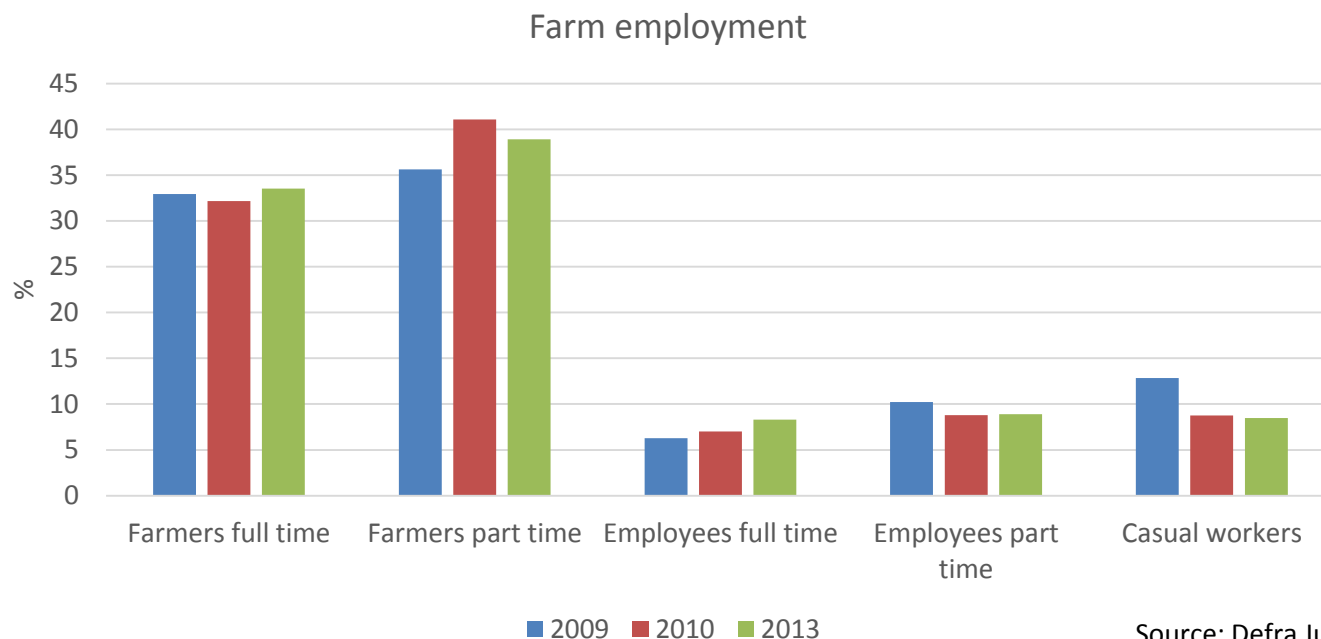
Farm size and tenure

There is a mix of farm sizes. Around a third of commercial farms (32%) are over 100 ha, with a third (30%) between 5-20 ha. Since 2010 there has been a trend towards larger commercial holding with 10% growth in farms over 100 ha. There are slightly higher levels of owned land and shared common grazing

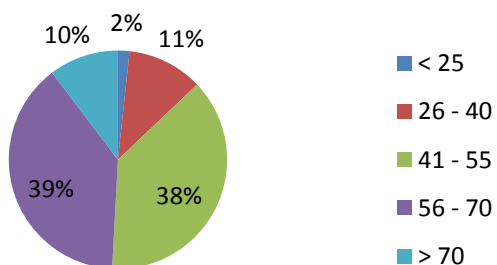


Farm employment

The number of farmers on Exmoor has remained relatively static. There has been a fall in full-time farmers, matched by an increase in part-time labour and management. A more worrying trend is the fall in numbers of casual workers. The age structure among farmers appears healthy and there is a cohort of younger farmers with larger holdings and an innovative and market-focused outlook



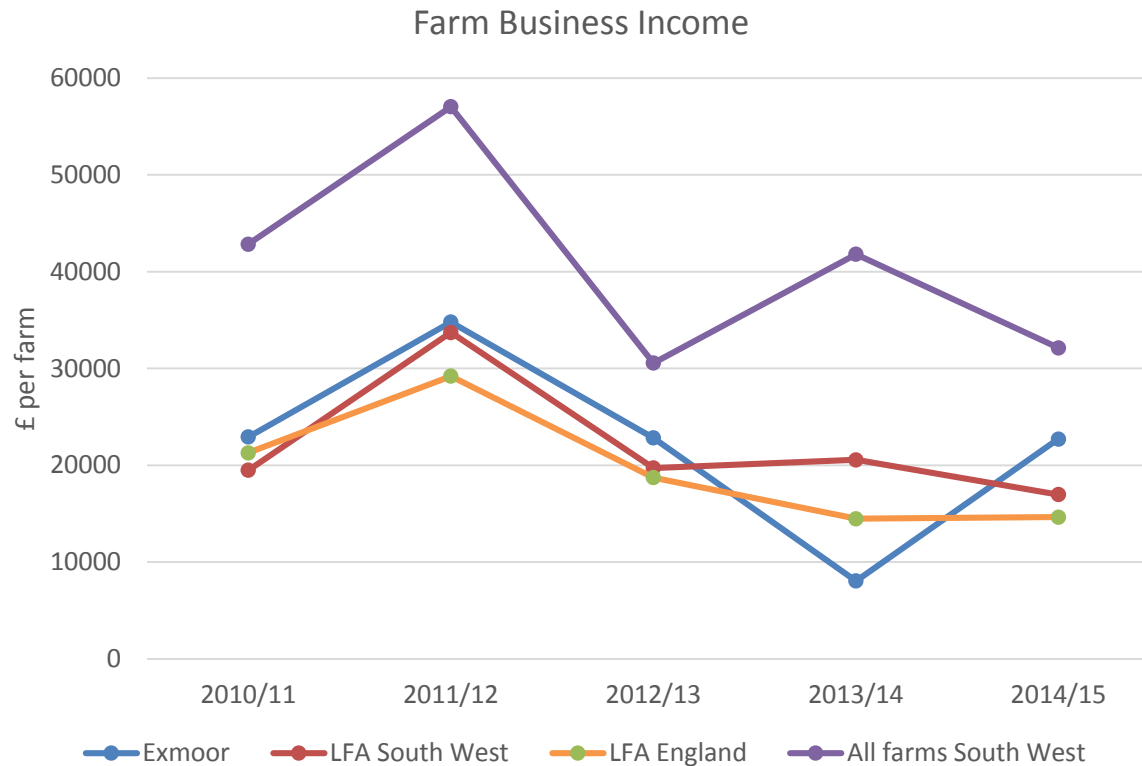
Age of farmers



Source: State of Farming on Exmoor 2015

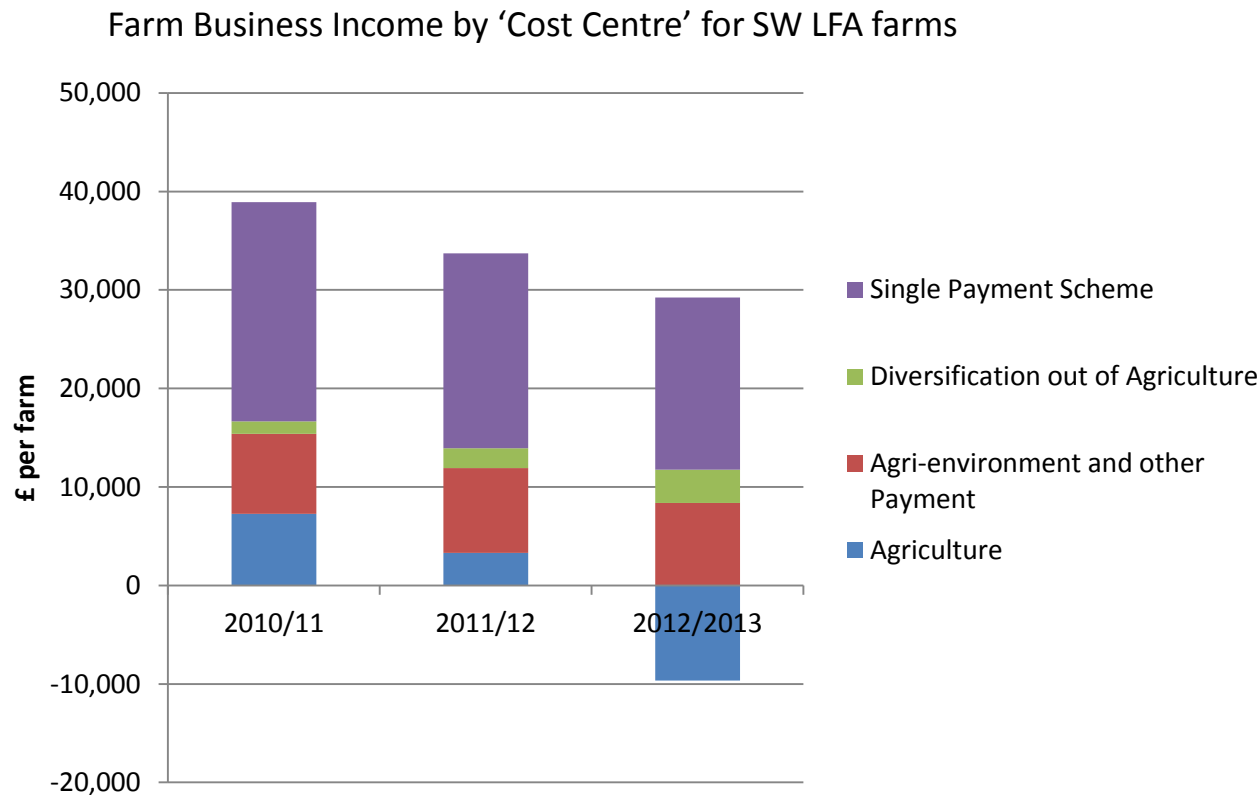
Farm incomes

Upland Farm incomes in Exmoor are significantly lower than average for all farms in England although they are similar to other less favoured areas.



Farm incomes

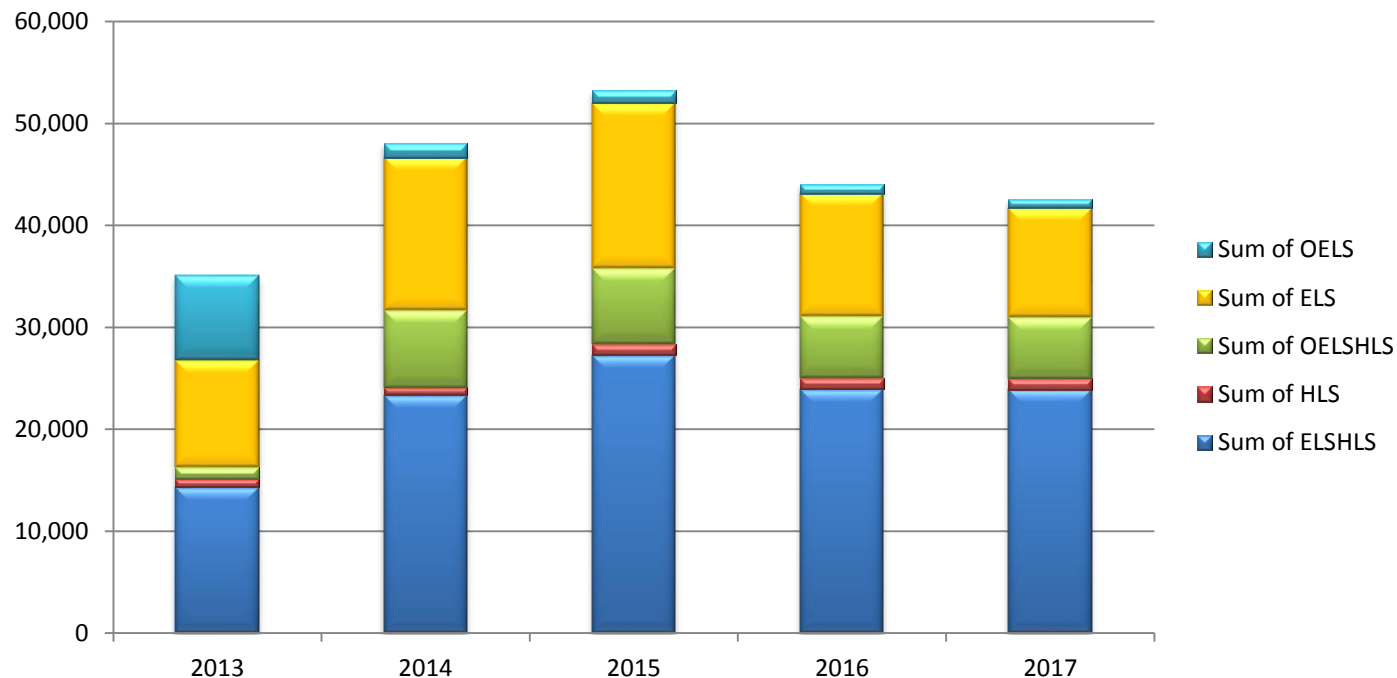
Around 60% of farm income is from the basic payment scheme, 30% from agri-environment schemes and 12% from diversification. Net income from agric production is negligible or negative, which mirrors the national picture.



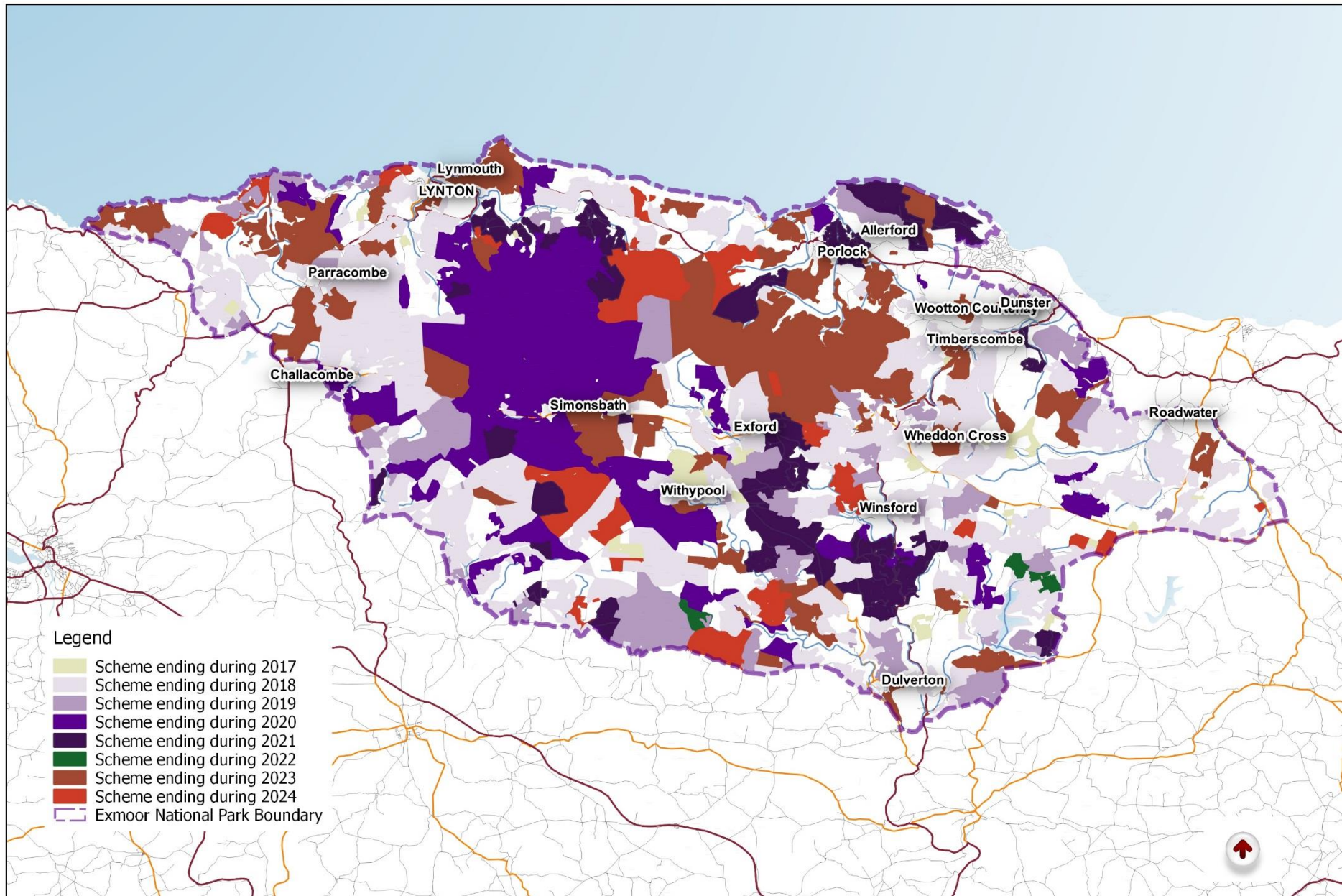
Agri-environment funding

- Around 73% of farmland and moorland on Exmoor (the Utilisable Agricultural Area) is covered by agri-environment agreements (AES). This includes 52% which is in Higher Level Stewardship schemes. Coverage is falling as old schemes end, although in 2016/17 there were 16 new Countryside Stewardship schemes, covering 291 hectares
- Over £20 million has been paid through agri-environment agreements on Exmoor over the last 5 years

Agri-Environment schemes on Exmoor (ha)



Coverage of Agri-environment schemes on Exmoor (excluding new Countryside Stewardship schemes)



Distinctive local breeds

- The sight of distinctive local breeds on Exmoor such as Exmoor horn and Devon Closewool sheep, Devon Red Ruby cattle and herds of free-roaming Exmoor ponies is an iconic part of the Exmoor experience. These hardy breeds are able to withstand the harsh conditions on the moors, and are also important for conservation grazing
- Numbers of Devon Red Ruby cattle remain static, which is positive in light of significant factors such as bovine TB
- Exmoor horn sheep numbers are also stable
- Exmoor pony numbers have increased from historic low post war. Between 2000-2015 a total of 1367 foals were born on the moor and registered into Section 1 of the Exmoor Pony Society studbook. Since then numbers have fallen but there is more focus now amongst some breeders on breeding specific bloodlines
- A recent study concluded that the ponies on the moors are in good health, a distinctive local breed and a valuable asset to the heritage and amenity of the National Park. A project is underway to characterise the full genome of the Exmoor pony to preserve genetic diversity and inform long term management of the ponies

Special Quality: An exceptional rights of way network, with paths that are often rugged and narrow in character, along with extensive areas of open country and permitted access, providing superb opportunities for walking, riding and cycling

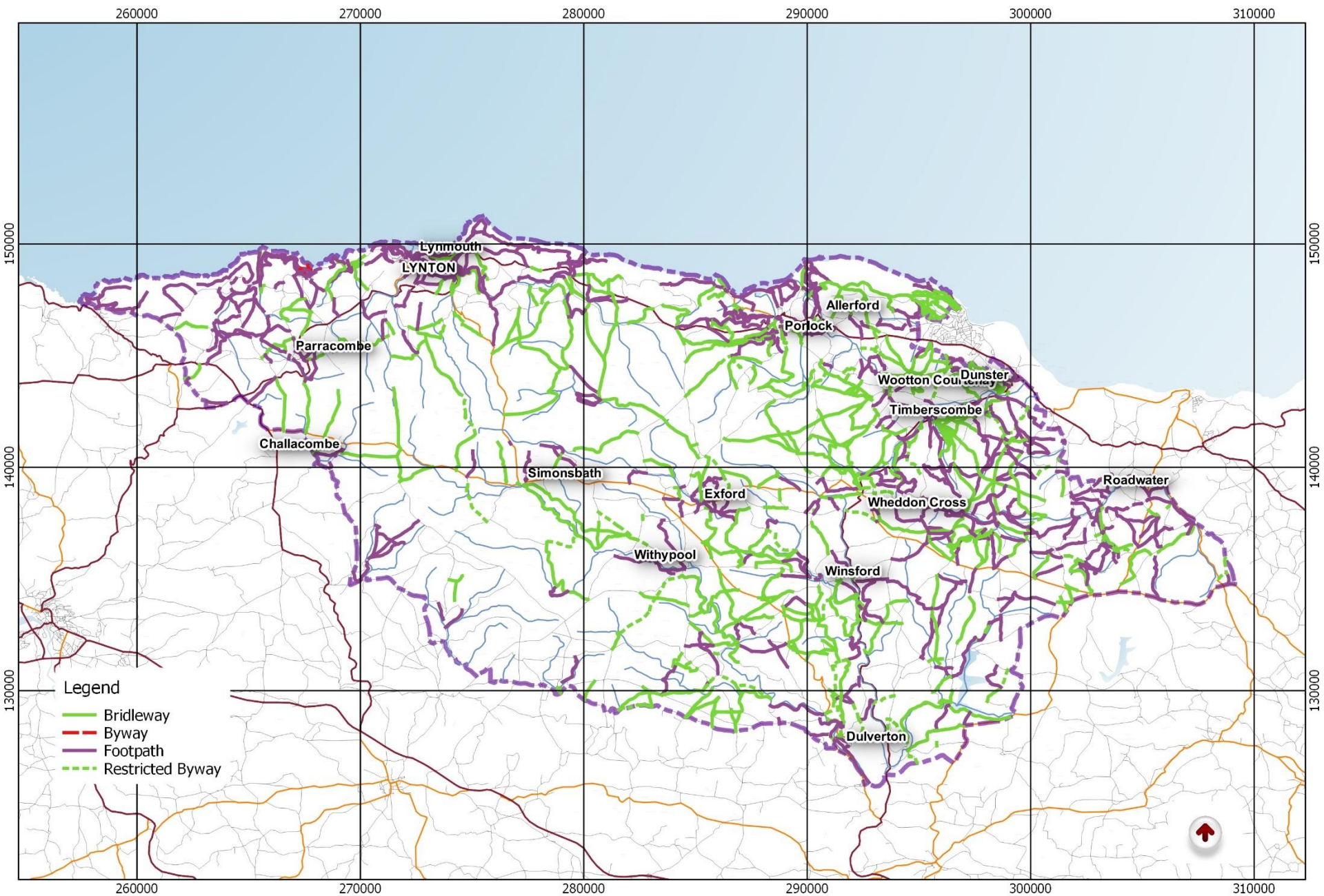
33% of people surveyed thought that this special quality was getting better; 39% said there has been little change in the past 5 years

96% of rights of way are considered to be 'easy to use'

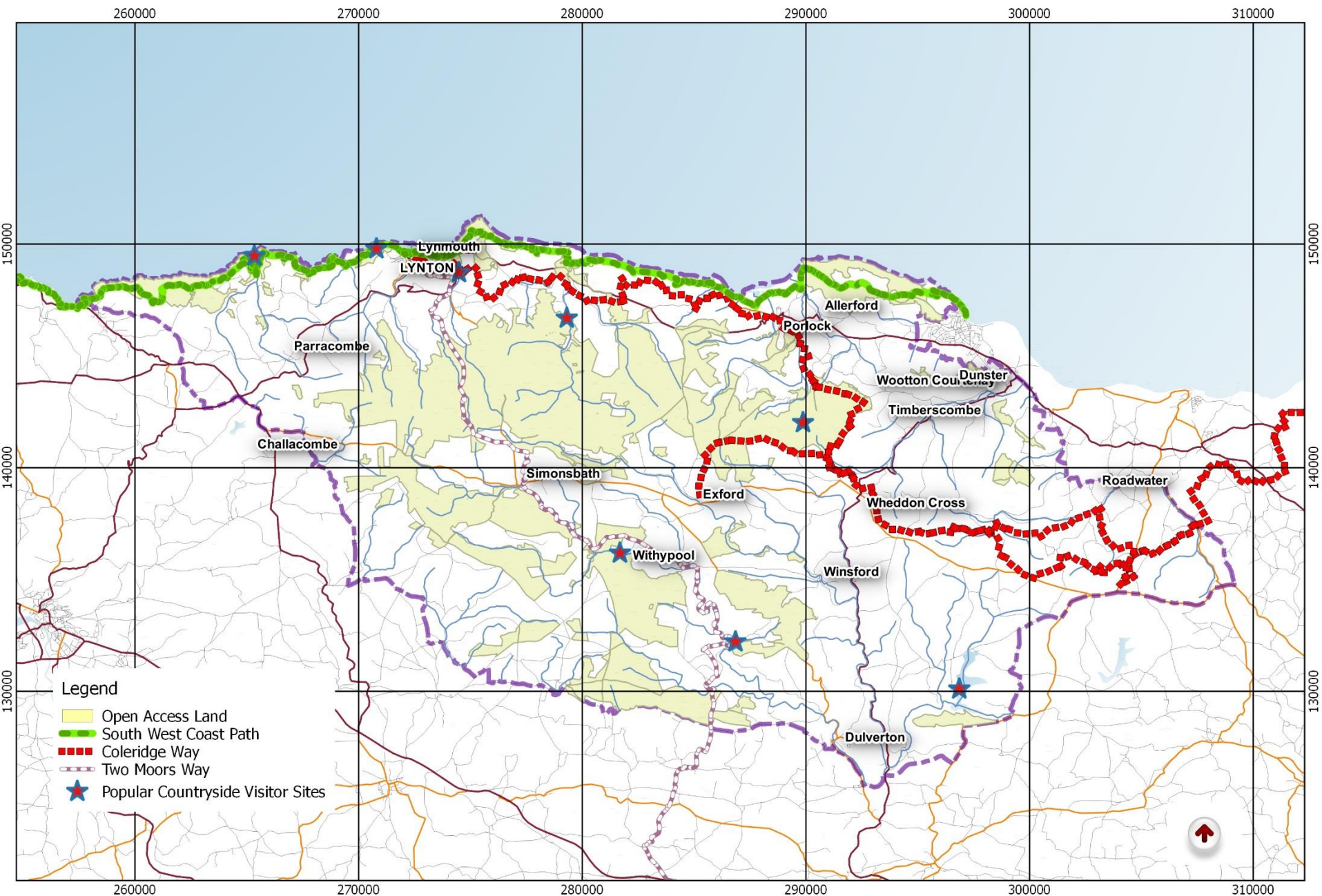
Exmoor's rights of way and access network:

- A total of 1,342 km of public rights of way and permitted paths, many of them wild and rugged, comprising:
 - 438 km footpaths
 - 464 km bridleways
 - 376 km of permitted paths
 - 64 km other rights of way
- 17,595 hectares of open access land

Rights of Way on Exmoor

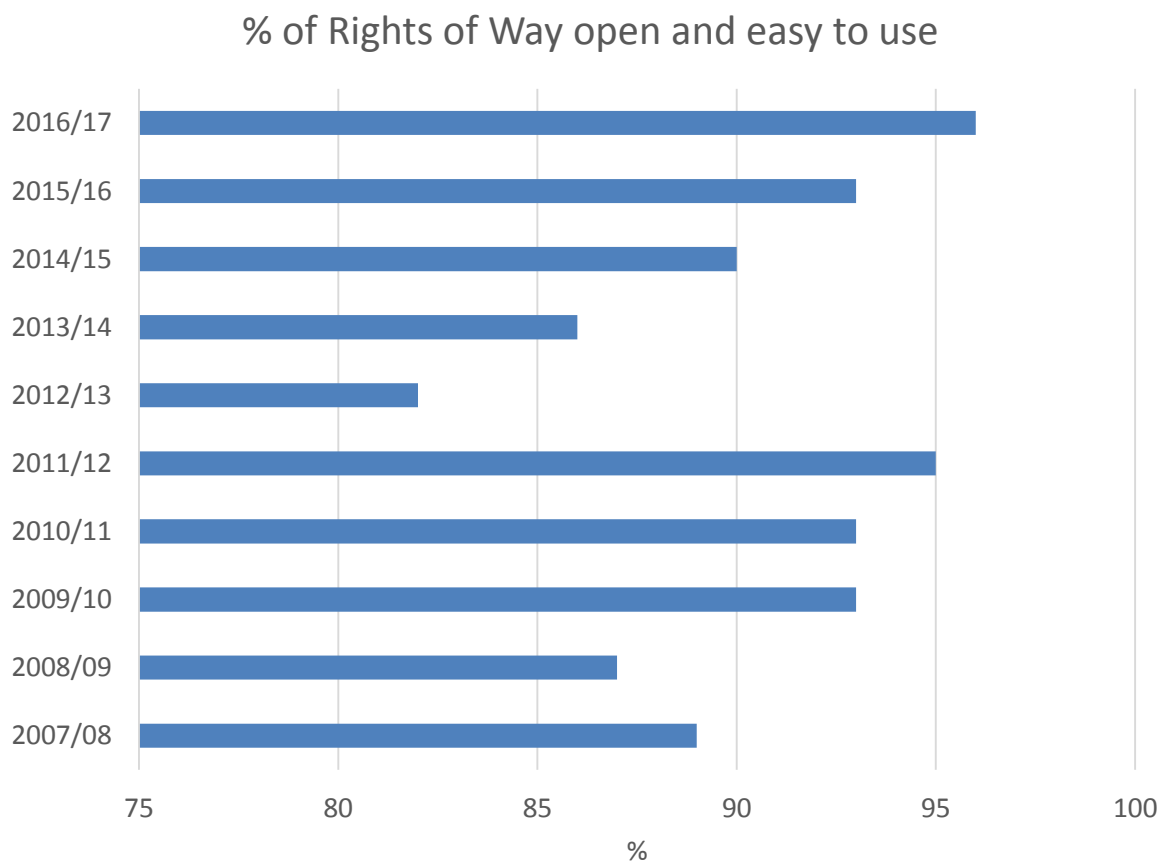


Long Distance Routes, Open Access Land and Popular Countryside Visitor Sites



Rights of Way Condition

96% of Rights of Way are considered open and easy to use, the highest of all National Parks



Source: Exmoor National Park Visitor survey 2016

Visitor Satisfaction with Rights of Way

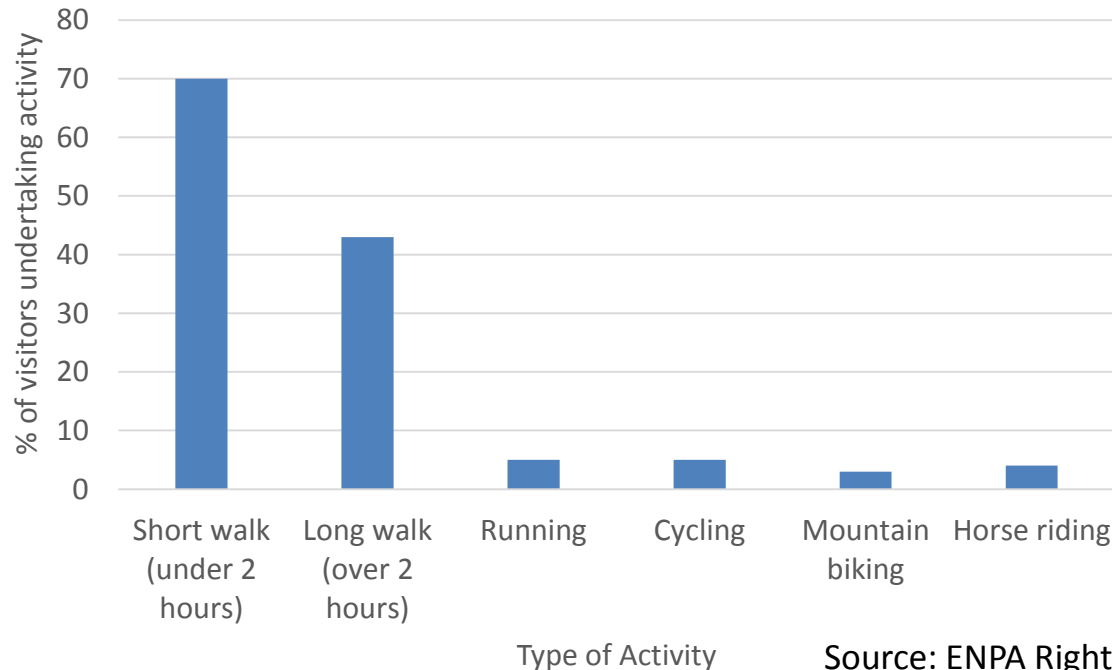
97% of visitors surveyed thought that the Rights of Way were good or very good



Rights of Way

- A high quality rights of way and access network are important parts of what attracts people to Exmoor
- Walking is one of the main activities undertaken by visitors – 70% of visitors went for a short walk and 43% for a long walk (over 2 hours)
- The number of visitors who state that they come to Exmoor to go cycling or mountain biking is relatively low but this hides the large number of people involved in cycling clubs or large events on Exmoor, and numbers of cyclists are thought to be increasing

Activities utilising Rights of Way
Visitor Survey 2015/16



Source: ENPA Rights of Way and Access Report 2016/17

Accessible Exmoor

- Exmoor has a good network of accessible footpaths including a range of easy access routes. 818km of rights of way routes are free of stiles comprising 83% of the rights of way network
- A number of improvements have been made over the last 5 years and there are now several places on Exmoor where an all-terrain tramper can be used and in some cases hired
- Further information about easily accessible routes has been made available via the 'Accessible Exmoor' webpage and the promotion of easy access trails including those at Heddon Valley, Wimbleball Lake and Dunster Castle
- A number of easy circular routes are now signed at popular locations including Tarr steps, County Gate, Haddon Hill and are promoted on the ENPA website



Rights of Way maintenance

- The rights of way network is managed and maintained by Exmoor National Park Authority through delegated powers from Devon & Somerset County Councils
- ENPA also assists with the maintenance of rights of way furniture, including 284 bridges, 383 stiles, 1,930 field gates, 639 hunting gates, 212 sets of steps and 2,716 signposts
- 78% of faults reported on the rights of way network were resolved by ENPA within 3 months, (an increase on the previous year of 69%) but still just falling short of the 80% target
- ENPA is responsible for managing undergrowth on the RoW network, and ensuring that landowners cut back overhanging vegetation (paring). 184km of routes were pared in 2016/17. Milder weather and a longer growing season has made it harder to keep the access open
- Heavy rainfall and flash flood events are occurring more frequently causing serious erosion issues and footpath and bridleway surfaces are increasingly being gullied and washed out. ENPA has been maintaining and installing drains to remove water from public rights of way and to protect the path surface. For 2016/17 a total of 1,185 drains were restored/maintained. This includes increasing capacity to improve the network's resilience to flooding
- Volunteer Path Parish Liaison Officers and Path Watchers help to ensure Exmoor's paths are well cared for and that any issues are reported and resolved quickly

Rights of Way improvements

- Improvements to the rights of way network are continually being made, including changes to furniture or surfaces, diverting paths onto better routes. In 2016/17 sixteen major works were carried out including surface improvements, new signage and new furniture
- Improvements have also been made to long distance footpaths which are popular with visitors and locals. This includes plans for changes to the South West Coast path as part of its incorporation into the England Coast Path. In 2014, the Coleridge Way was extended to finish in Lynmouth rather than Porlock and in 2016 improvements were made to the Two Moors Moors Way for its 40th anniversary. The promotional materials and business engagement for these routes were also improved



Other recreational activities

Sightseeing is a very popular general recreation activity on Exmoor with half of visitors participating. (Exmoor Visitor Survey, 2016). Taking in the view whilst travelling or at a view point; sitting and enjoying an outdoor picnic with family and friends; visiting historic settlements and features of interest. These activities appear to remain very popular and there is anecdotal evidence of both increased and decreased visitors in some locations. Road sign information, informal and formal parking spots, toilet facilities, refreshments and information provide important support for these activities



Recreational pressures

- The biggest impact on people's enjoyment of access land is the scrubbing up of large areas which make access difficult
- Exmoor remains a popular location for large organised (corporate or charity) recreational events which can cause local disruption while they take place, although they encourage people to visit Exmoor, contribute to the local economy, and their impact is not considered to be significant. The increase in such events is something that requires monitoring
- Illegal use of vehicles and other antisocial activities are contained and not considered to be a major issue. Off-road driving by 4x4 vehicles has required occasional action by landowners and National Park rangers but is not considered to have grown as a problem. Special efforts have been carried out on West Anstey and around Landacre Bridge to help restrict and contain unauthorised vehicular access
- Popular countryside visitor sites such as North Hill, Haddon Hill and Tarr Steps have recreational management issues including litter and dog mess. Recreational Management plans are being developed and implemented to address these issues
- Permitted access arrangements are in place on several rivers to allow canoeing at particular times of the year to reduce user conflicts and avoid impacts on wildlife
- One of the notable changes in the last 5 years has been the increase in infrastructure and land management changes associated with shoots such as large release pens being sited on or close to rights of way

Special Quality: A landscape that provides inspiration and enjoyment to visitors and residents alike

54% of people surveyed thought that there has been little change to this special quality in the past 5 years; 27% thought it was getting better

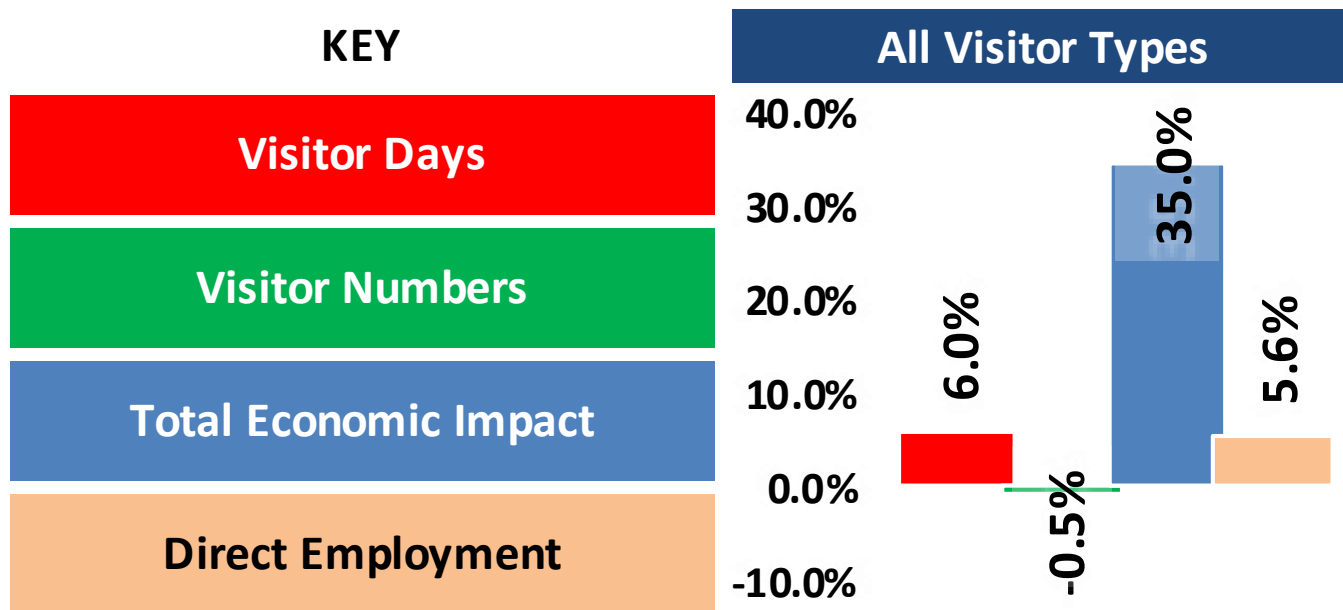
99% of visitors surveyed rate their experience here as “good” or “very good”

Tourism, learning and engagement:

- Exmoor welcomes more than 1.3 million visitors each year, equating to around 2.15 million visitor days
- The value of tourism to the local economy is nearly £115 million
- 79% of visitors surveyed said their understanding of Exmoor’s landscape had increased as a result of their visit
- There were 3,411 volunteer days at an estimated value of £255,825 in 2016/17
- 6181 children were involved in ENPA organised events

Visitor trends 2009-2016

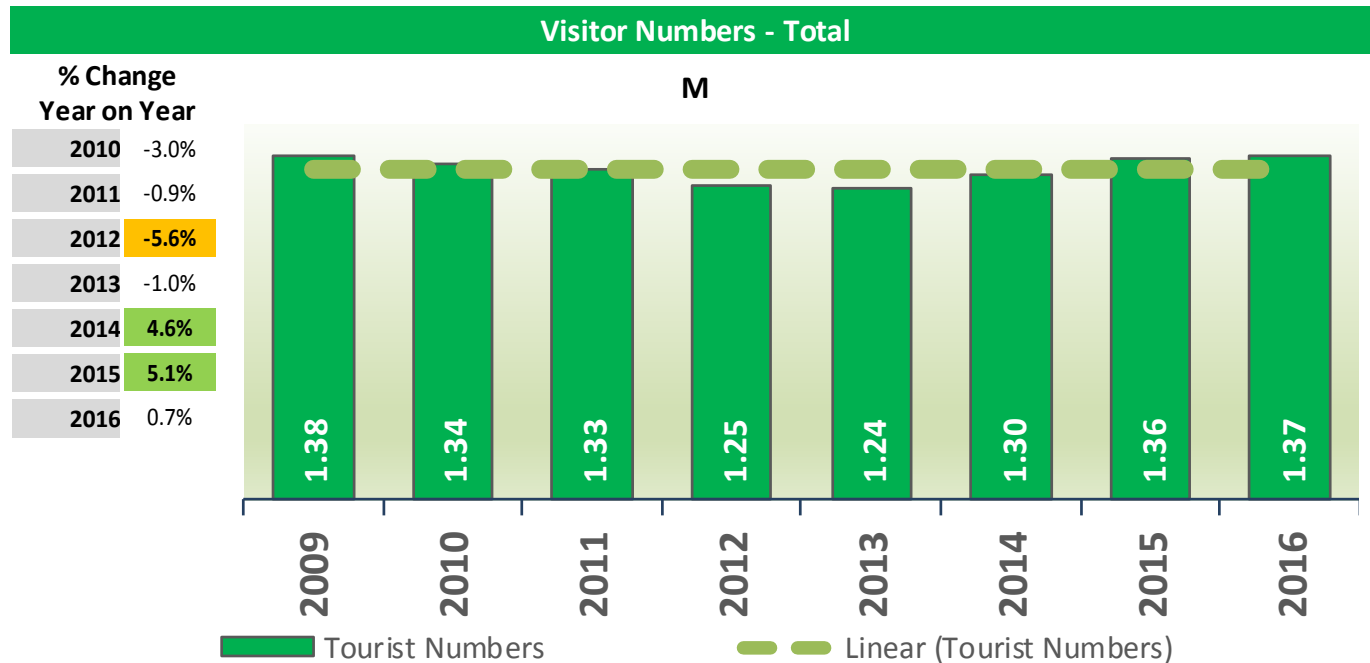
There has been an increase in the number of visitor days and direct employment compared to 2009, but a slight decrease in visitor numbers. Despite this, the total economic impact of tourism has significantly increased, partly due to the increase in staying visitors, who tend to spend more in the local economy



Visitor numbers

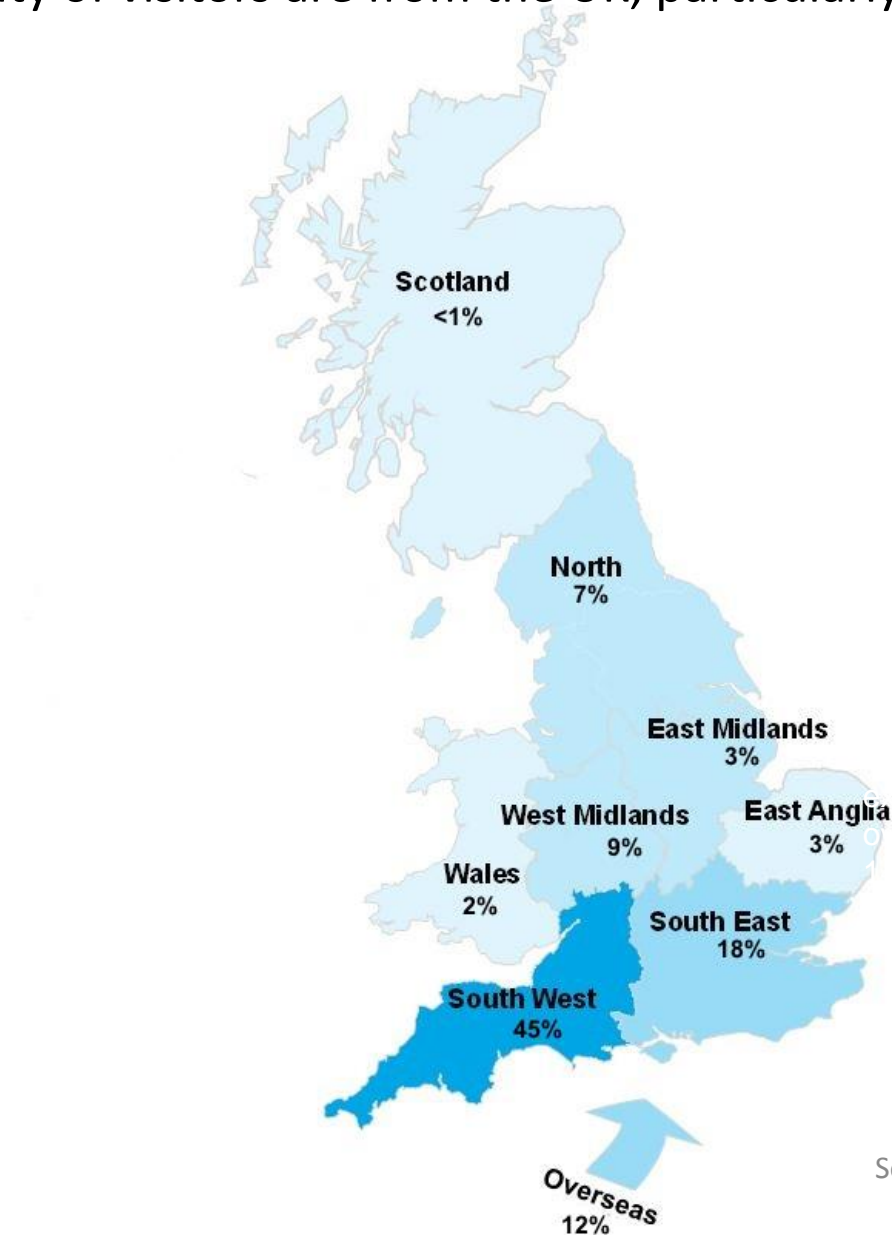
Visitor numbers are relatively stable, with annual fluctuations often due to external factors such as the weather, security fears and the economy.

79% of people surveyed would not object if visitor numbers in Exmoor National Park increased by 10% compared to current levels



Origin of visitors

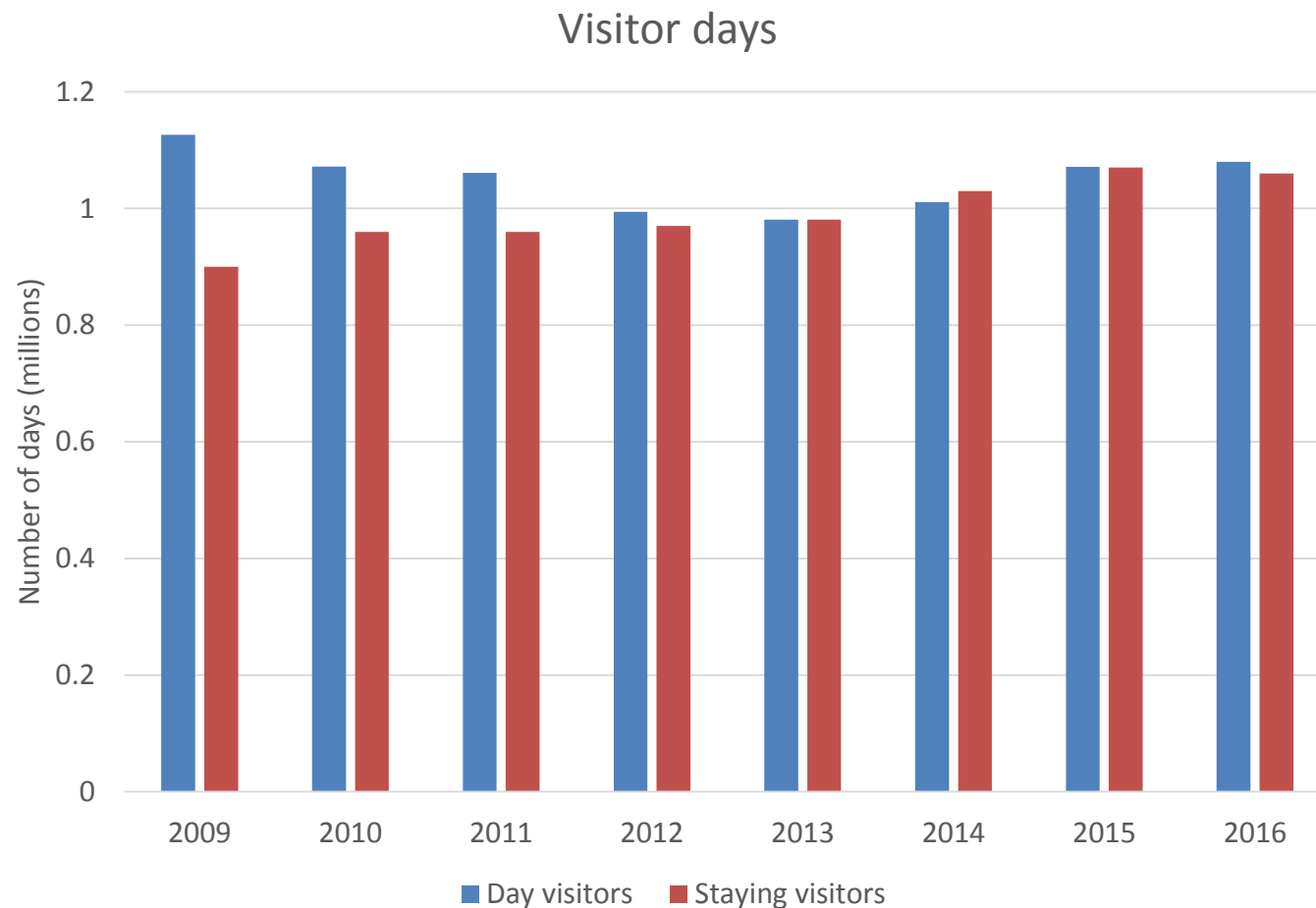
The majority of visitors are from the UK, particularly the South West



Source: Exmoor National Park Visitor survey
2016/57

Visitor days

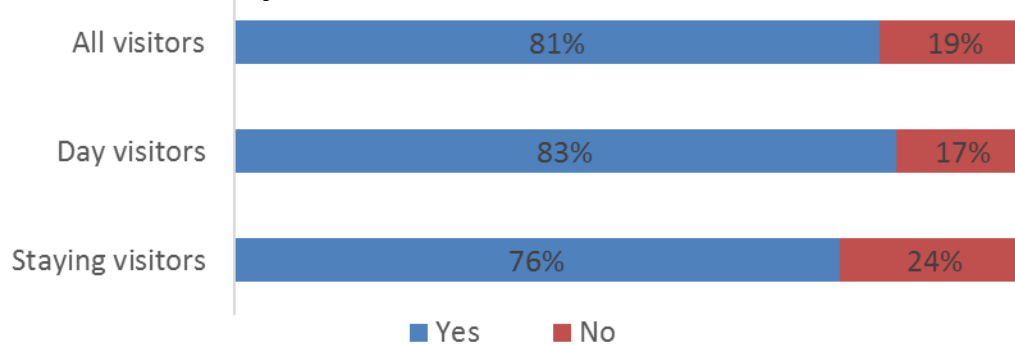
The total number of visitor days is increasing, particularly staying visitors



Repeat Visits

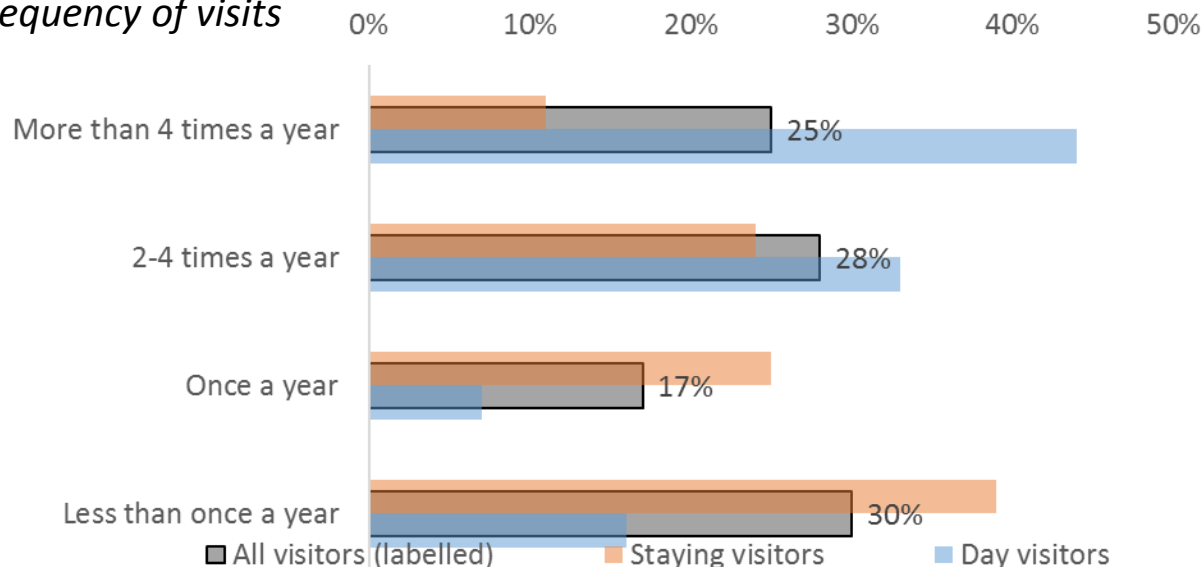
Exmoor attracts a high level of repeat visits. Less than a fifth of visitors were on a first time visit to the area. Of those on a repeat visit 70% come to the area at least once a year with a quarter visiting more than 4 times a year (11% of staying visitors, 44% of day visitors)

Have you been to Exmoor before?



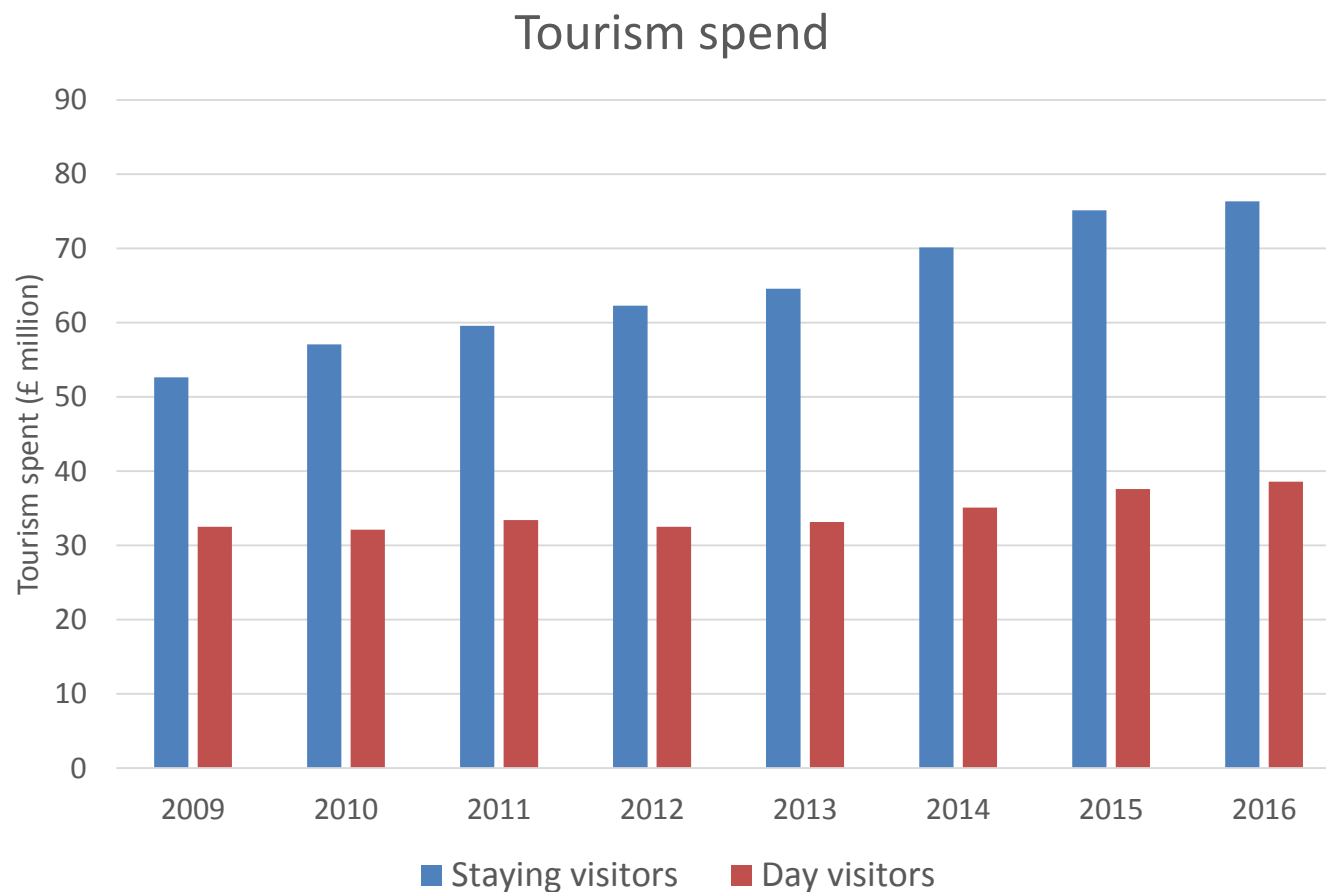
Source: Exmoor National Park Visitor survey 2016

Frequency of visits



Tourism spend

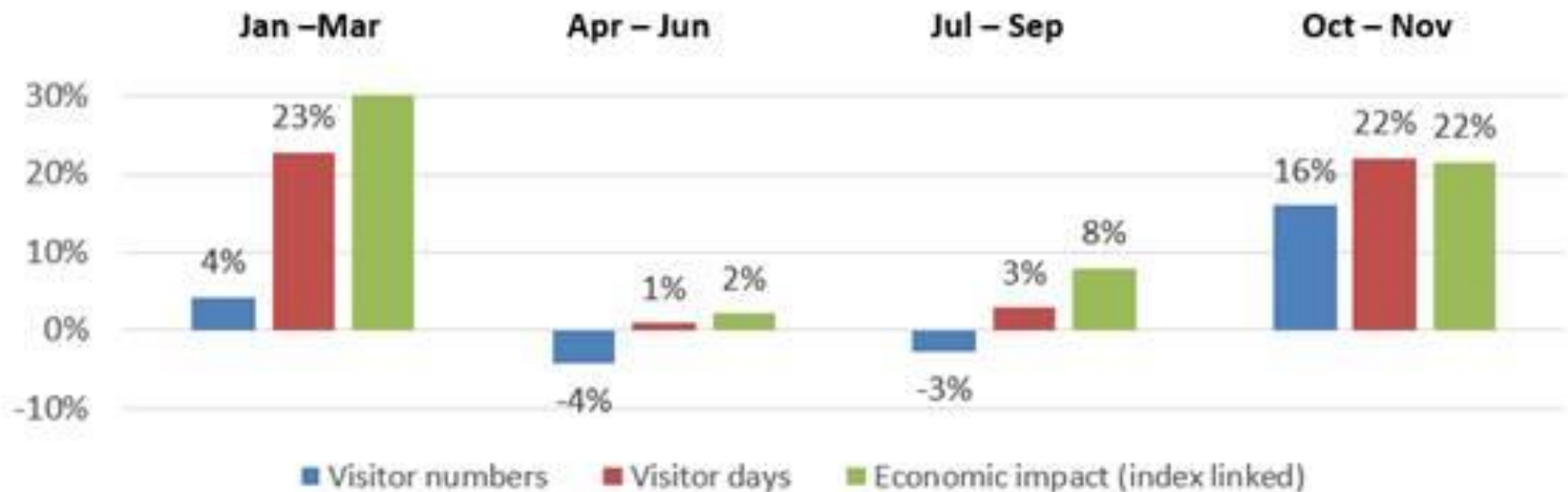
The value of tourism to the local economy has increased, particularly staying visitors



Seasonal changes 2009-2015

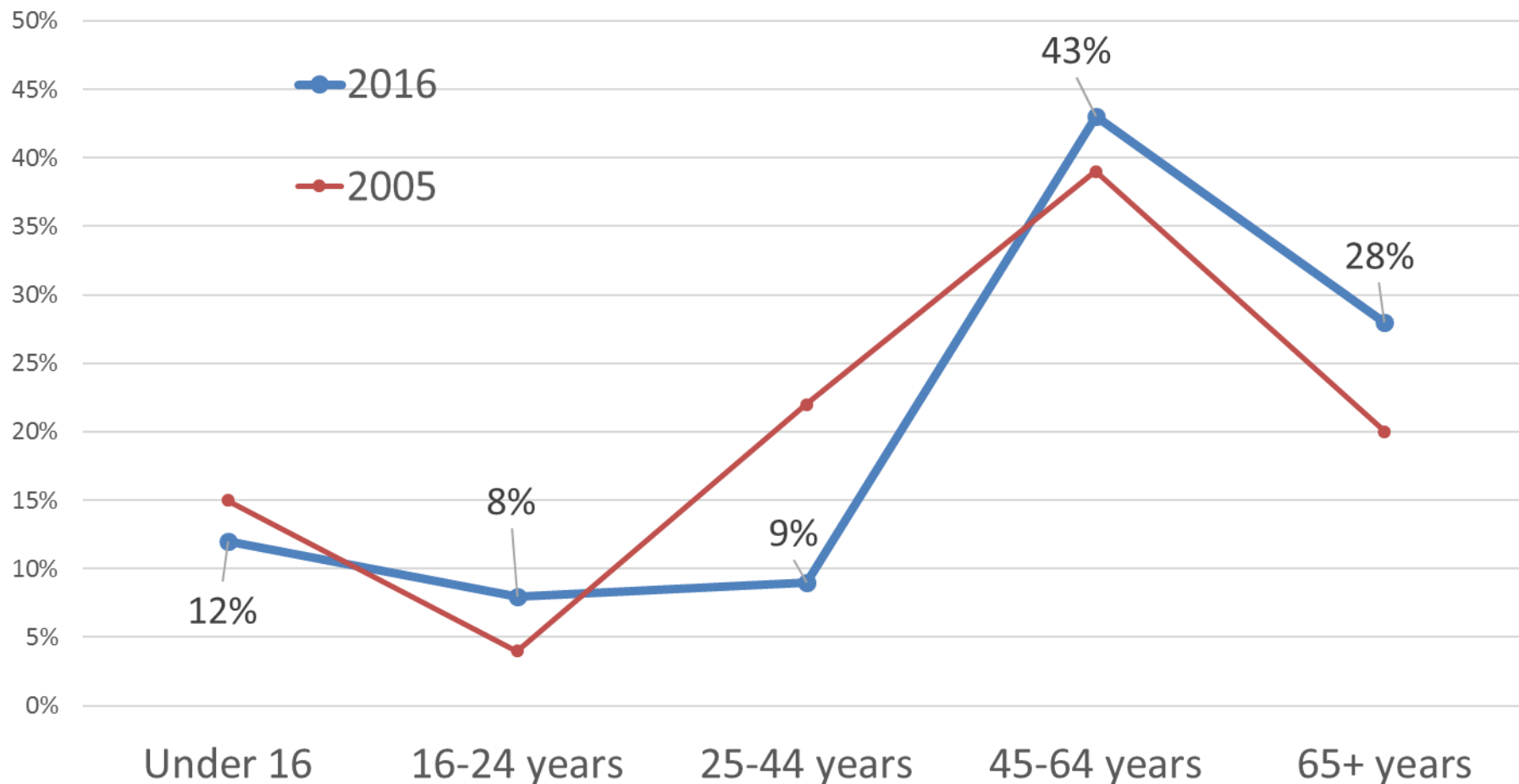
There has been a welcome increase in visitor numbers, days and economic impact during the 'low season'

Seasonal changes 2009-2016



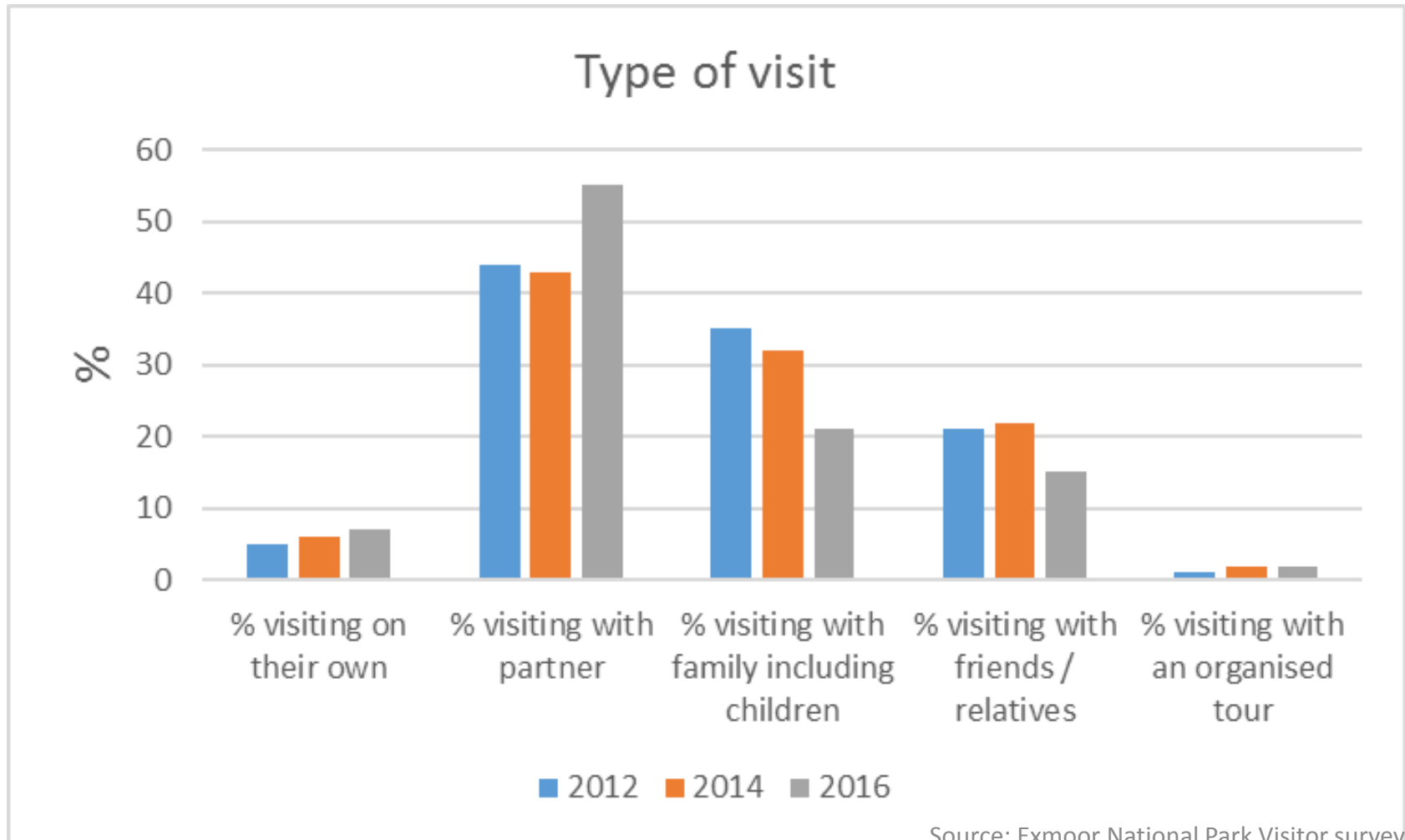
Age profile of visitors

The age profile of visitors continues to be skewed towards older visitors. Those aged over 45 now account for 71% of all visitors (59% in 2005). Younger adults aged between 16 and 44 have dropped as a proportion from 25% in 2005 to 17% in 2016.



Type of visit

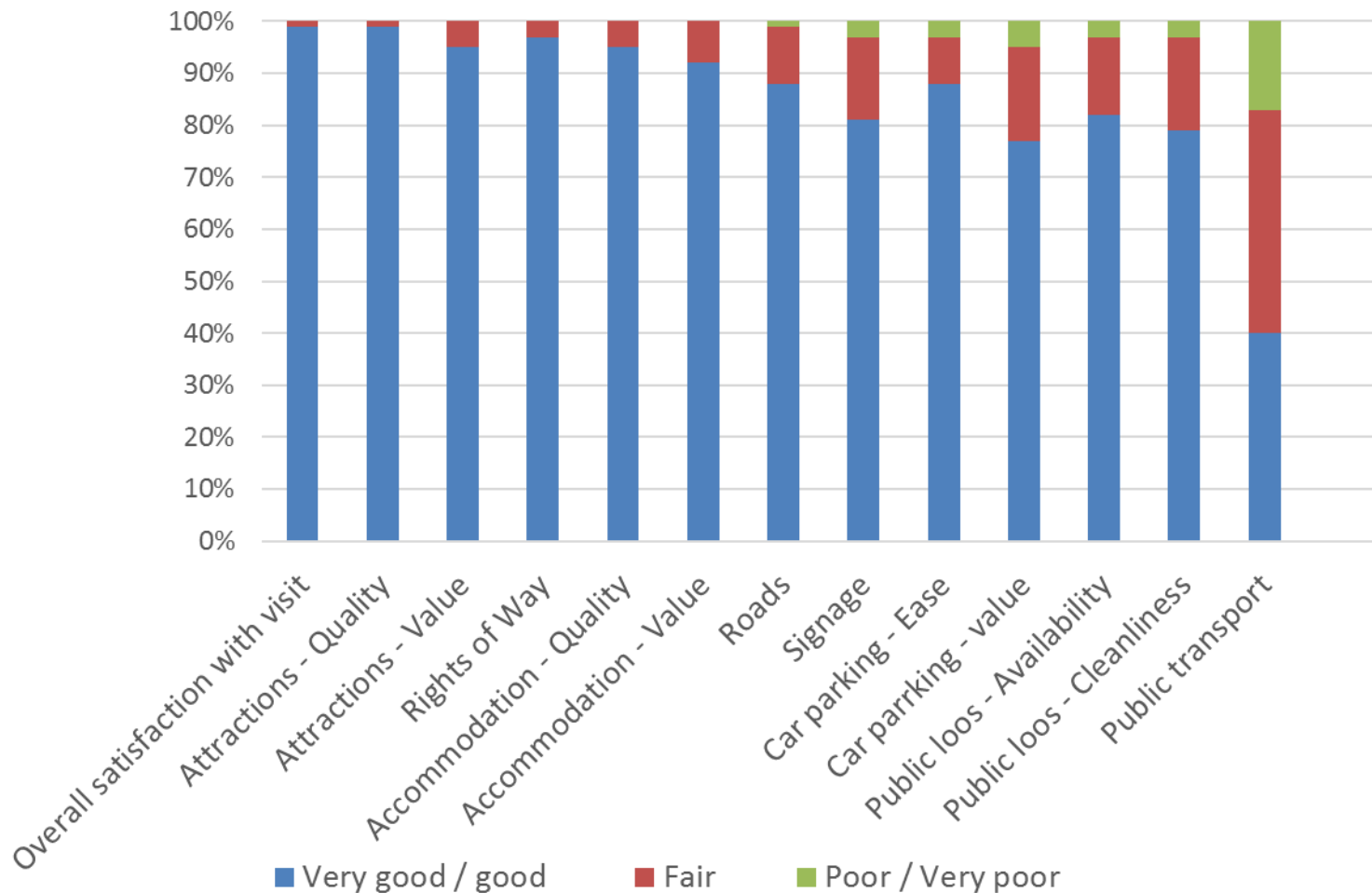
Over half of all visitors to the area come as a couple, just over a fifth as a family group, and 15% with friends. Nationally, 12% of children never visit the countryside (Natural England Monitoring Engagement with the Natural Environment)



Source: Exmoor National Park Visitor survey 2016

Visitor Satisfaction

Overall satisfaction continues to remain high. Those stating their overall experience of holidaying on Exmoor as 'Good' or 'very good' remains at 99%. However the proportion of those stating their experience as 'very good' has risen from 67% in 2014 to 76% in 2016. This increase appears to come primarily from staying visitors



Source: Exmoor National Park Visitor survey 2016

People's motivations to visit Exmoor

The majority of visitors are attracted to the area by the National Park's special qualities, particularly the landscape and tranquillity



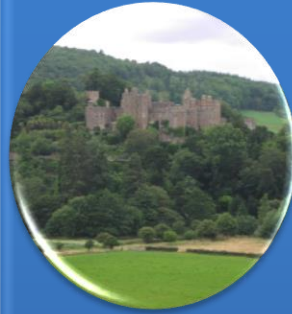
**Scenery /
landscape
(85%)**



**Tranquillity
/ peace
(68%)**



**Coast /
beaches
(51%)**



**History and
heritage
(35%)**



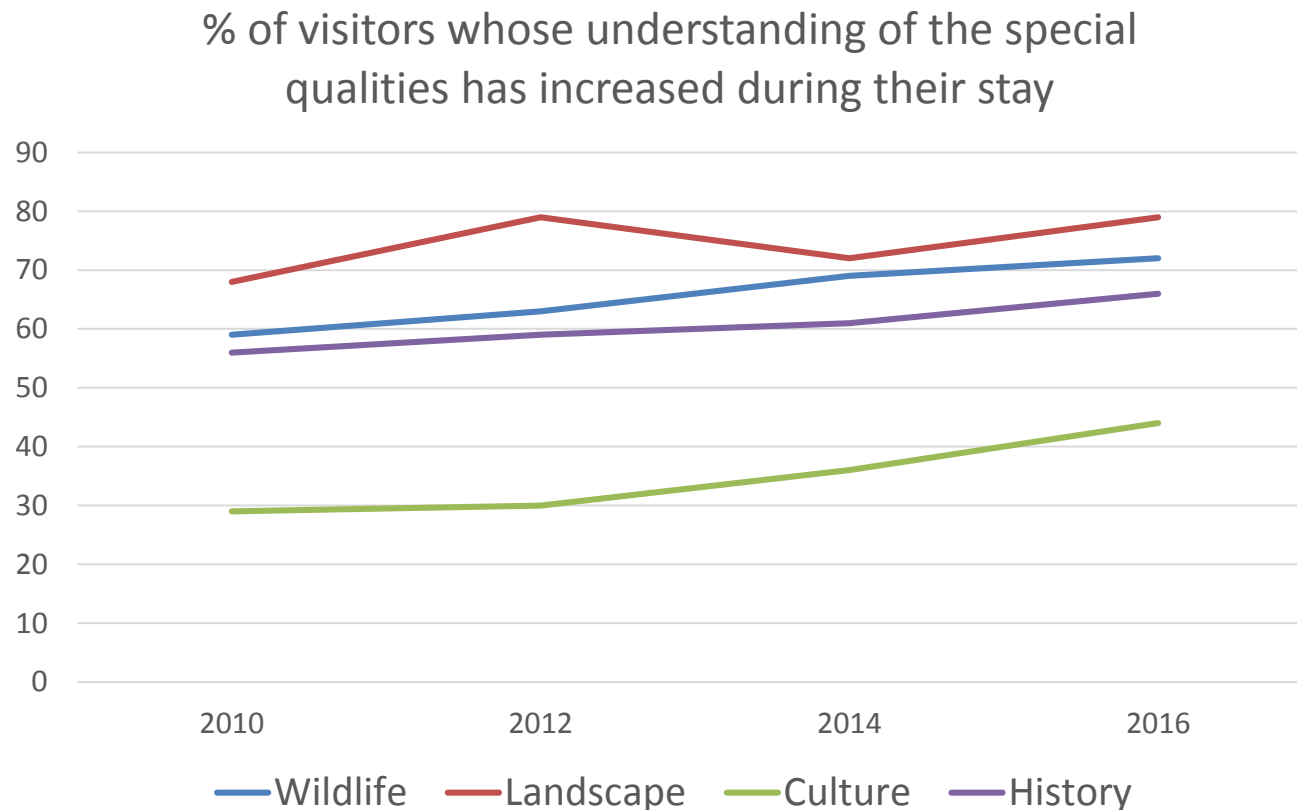
**Outdoor
activities
(33%)**



**Wildlife
(54%)**

Awareness and understanding

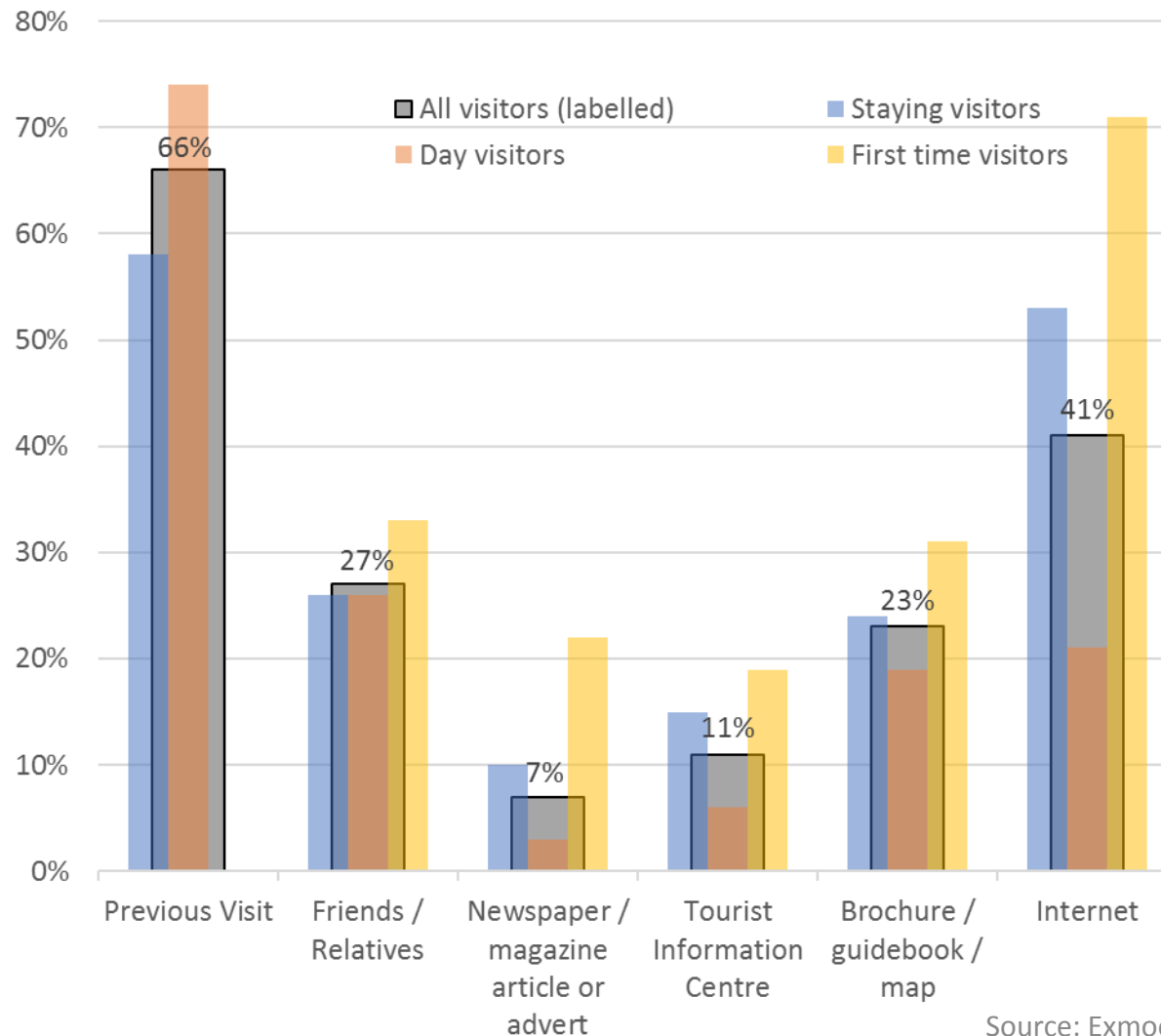
- There is strong recognition of National Parks nationally, 90% of the public say that National Parks are important to them (UK Association of National Park Authorities, 2012)
- 96% of visitors knew that Exmoor was a National Park before visiting
- A survey of non-visitors also found that 81% knew about Exmoor
- People's understanding of Exmoor's special qualities has increased as a result of their stay



Source: Exmoor National Park Visitor survey 2016

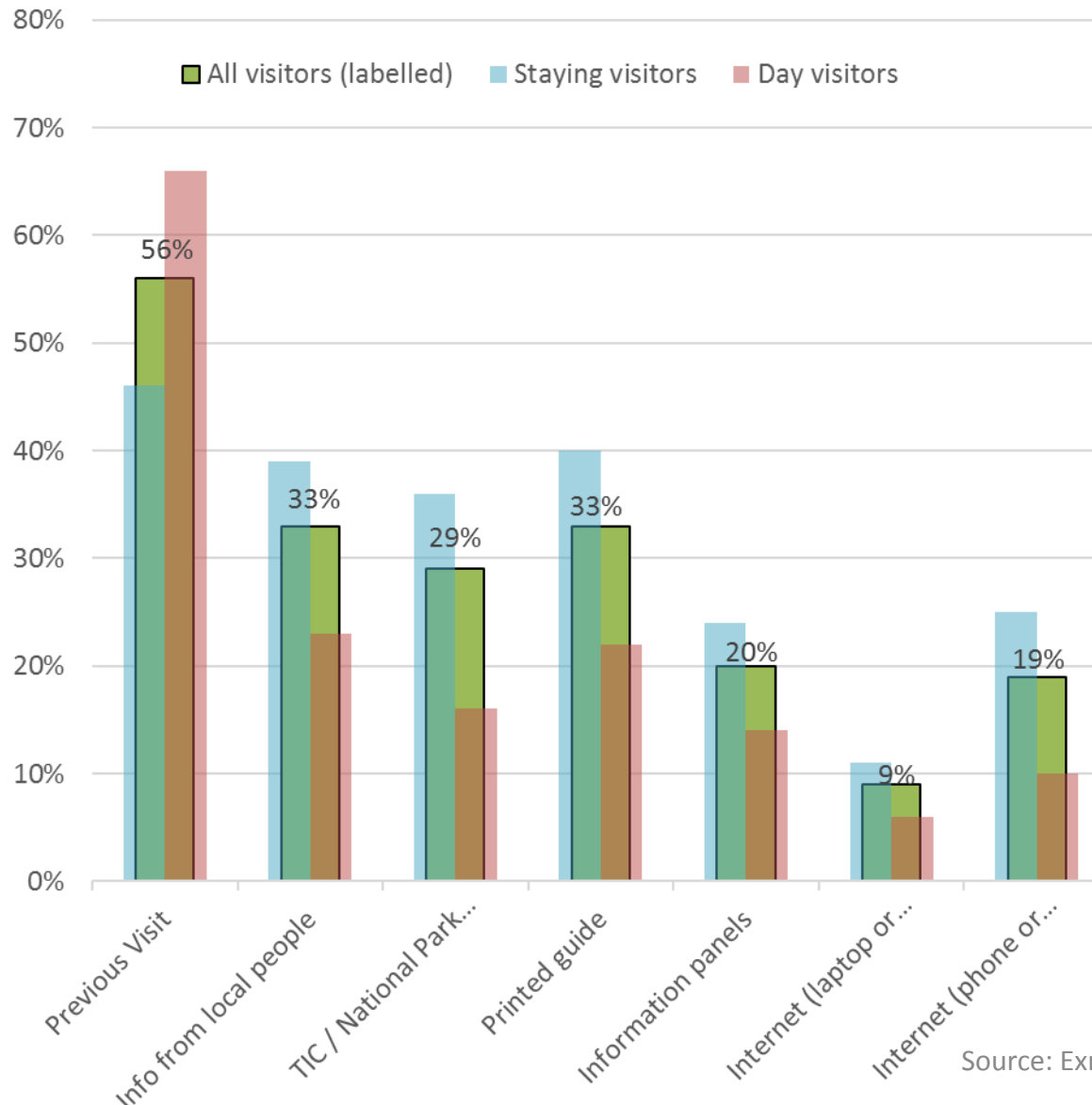
Information prior to a visit

Information obtained prior to a visit is primarily through previous visits or from friends & relatives. For first time visitors its through the internet and friends & relatives



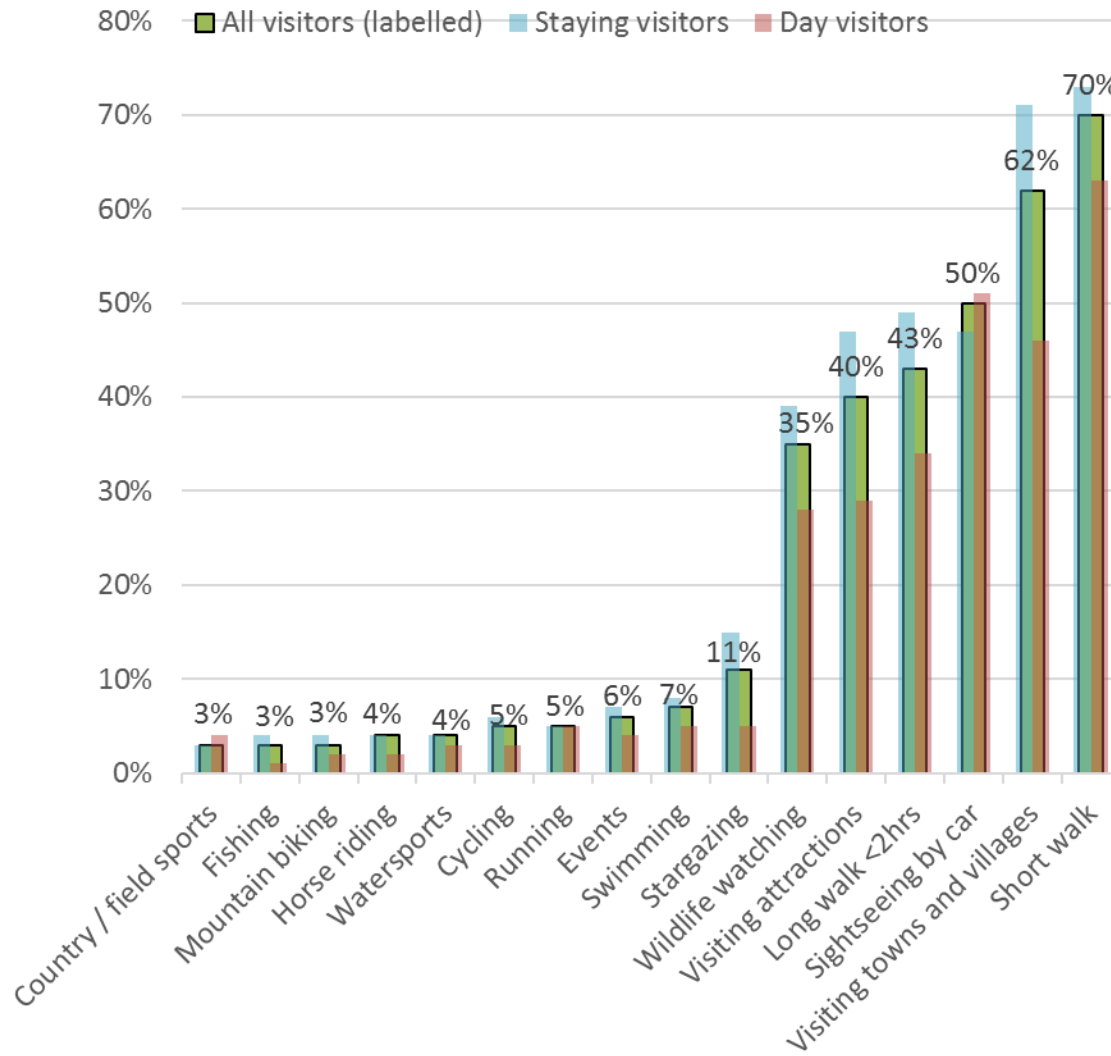
Information during a visit

Once in the National Park, people will primarily use information centres, printed guides and information from local people



Health and well-being

Walking is the most commonly activity undertaken on visits. This corresponds with national surveys which show that health and exercise continued to be one of the most frequently cited motivations for visiting the outdoors (Natural England Monitoring Engagement with the Natural Environment).



80% of people surveyed said that Exmoor is important to their health and sense of well-being

There was support for an increase in activities such as sea kayaking and canoeing (87%) and wildlife watching (84%)

(ENPA Public opinion survey 2017)

Moor to Enjoy

The Exmoor *Moor to Enjoy* project aims to demonstrate the health and wellbeing benefits of visiting Exmoor National Park and experiences in the natural environment through working with health groups and GP practices to encourage visits to the National Park as part of the treatment patients receive. Initial evidence after the first 2 years of the project indicates that on the day of the visit:

- 38% of participants are more physically active than on an average day
- 77% reported having been more sociable than on an average day
- 74% said they were more relaxed after visiting Exmoor National Park, and
- 87% said visiting Exmoor National Park had lifted their spirits

Volunteering on Exmoor

There are a large number of people who volunteer to help look after Exmoor, and help people enjoy and understand it. This ranges from practical conservation, research, leading guided walks and undertaking wildlife surveys. In return, volunteers have access to support and training, and the chance to develop skills.

- In 2016/17 there were 3,411 volunteer days organised by ENPA, but there are many more voluntary activities for which data is not currently available.
- Around 11% of these volunteer days involved attendance by 'under-represented' groups.
- 77% of people surveyed support initiatives to get more people involved in volunteering on Exmoor (ENPA Public Opinion survey 2017)

Engaging with schools and new audiences

In 2016/17:

- Over 200 activities were organised by ENPA with schools located both within the National Park, and outside it
- A total of 6181 children were involved
- 76% of people surveyed support initiatives to help more young people visit and enjoy Exmoor
- 22 new audiences were engaged, with a total of 612 people
- A total of 7460 people attended public events



