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Valuing England's National Parks

Final Report for

National Parks England

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Executive Summary

Introduction

England's ten National Parks[1] are valued national assets. They comprise some of the highest quality landscapes and wildlife habitats in the country and cover more than 9% of the total land area. The National Parks also make important contributions to our economy and society and are also part of our national identity. They are of huge importance to the people who live and work within them, as well as the many millions who visit for recreation and tourism.

The Vision for English National Parks in 2030, produced by the Government and the English National Parks Authorities Association[2], states that National Parks "will be recognised as fundamental to our prosperity and well-being". The National Park Authorities are already responding to the priority for growth and many examples are presented in this report. However, to realise the vision, there is also a need for robust and consistent evidence about the ways in which National Parks can contribute most to the nation's prosperity, and for this evidence to be presented in an accessible format.

This report seeks to present the latest economic and socio-economic data relating to the National Parks, to assess the contribution of National Parks to economic prosperity and well-being, and to identify future opportunities for National Park Authorities to further support sustainable rural economies in partnership with local communities, businesses and local government partners.

The approach taken during the project included: a review of existing literature; the collation of data from public data sources including the Census 2011 and Inter-Departmental Business Register 2012 from the Office for National Statistics; and visits to all National Park Authorities to gather local data, evidence and feedback. A series of case studies were then collated and developed and future opportunities analysed. Methodological issues encountered during the project related to defining the boundaries of the National Park economies, defining the economic impact of National Parks, and variations in data across different National Parks.

National Park economies make a valuable contribution, locally and nationally

England's National Parks cover a total area of more than 1.2 million hectares (9.3% of England's land area) and are relatively sparsely populated with an average population density of 0.3 persons per hectare, although there is considerable variance in both the size and the population density of individual National Parks.

The total population of England's National Parks is 321,000 (0.6% of the England population) and of the working age population 70% is economically active, in line with the national average. The population is older, and population growth over the past ten years has been lower, in the National Parks compared to England, reflecting their rurality. Around half the population of England resides within one hour's travel of a National Park and National Park areas provide benefits to people who live well beyond their boundaries.

The National Parks have a higher proportion of self-employed people than the country as a whole (19% compared to 10%), a similar proportion of part-time workers and a lower proportion of full time workers. Unemployment is 2%, lower than the national average. Of the 157,000 employees in the National Parks, there is a high proportion of senior, professional and skilled occupations in the workforce. Average household income is higher than regional averages for most National Parks and average house prices in National Parks also command a significant premium over regional averages.

[1] National Parks and National Park Authorities are taken to include The Broads which has an equivalent status but its own legislation and additional responsibilities as a harbour authority.

[2] Now known as National Parks England

There are 22,500 businesses located in England's National Parks providing around 141,000 jobs, according to 2012 data; this equates to 1.2% of all businesses and 0.6% of total employment in England. From an analysis of turnover, employment and county-level productivity data, it is estimated that England's National Parks generate £4.1 to 6.3 billion of Gross Value Added (GVA) in 2012 (0.4% to 0.6% of all GVA generated in England). This is comparable to a smaller city such as Plymouth, Coventry, Swindon or Sunderland, or the UK aerospace sector, all of which have a total GVA of between £4 billion and £6 billion.

While the contribution of National Parks to overall employment is in line with their population, the number of businesses per unit of population is twice the national average, a reflection of the number of small businesses in the National Parks. The number and type of businesses and employment varies across individual National Parks.

Key sectors in the National Park economies include the following:

- Farming and forestry. This sector is responsible for managing the vast majority of the National Park area, producing food, timber and other products, and delivering a wide range of public goods and services. Agriculture, forestry and fishing accounts for around 24% of all businesses and nearly 10% of total employment in the National Parks, around 13,500 Full Time Equivalent (FTE) jobs.
- Tourism and recreation. National Parks attract 95 million visitors per annum, with 87 million day trips and 24 million visitor days from staying visitors. Annual visitor expenditure equates to £3.0 billion, which increases to at least £4 billion when the wider "area of influence", which includes neighbouring towns and villages which cater for National Park visitors, is counted. This expenditure is estimated to support some 48,000 FTE jobs, around 34% of total employment in National Parks.
- All other sectors are under-represented compared to the national average but the professional, scientific and technical, construction, wholesale and retail, education and health sectors, in particular, are nevertheless important in terms of business numbers and employment.

National Park Authorities play an important role in supporting National Park economies

National Park Authorities (NPAs) play an important role in the National Park economies in a variety of ways. This role links to their statutory purposes - to conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park; and to promote opportunities for the understanding and enjoyment of the special qualities of the Parks by the public; and, in the case of the Broads Authority, to protect the interests of navigation – as well as their duty to foster the social and economic wellbeing of their local communities.

NPAs work with their partners (communities, businesses and other organisations) to produce Management Plans for the National Parks. These set out the vision, strategic policies and outcomes for the National Parks (including the economy) and the mechanisms, activities and resources used to achieve these.

NPAs also have a direct impact in terms of employment and expenditure on goods and services. In 2011/12, NPA gross expenditure amounted to £74 million, funded through the National Park Grant of £55 million and their own income; this includes revenue income and project grants / other income successfully leveraged in from a variety of external sources. NPA employment was an estimated 1,118 FTE jobs in 2011/12. In total, after taking into account multiplier effects arising from employee and supplier expenditure, it is estimated that the NPAs contributed 1,500 FTE jobs and £50 million GVA to the local economy in 2011/12. With reducing NPA budgets and employment, however, it can be expected that this contribution will be lower in future years.

NPAs, through their influence and different activities, also help to address the specific challenges and opportunities in their local economies, thereby contributing to the vision and objectives of the National Parks. Key initiatives undertaken by NPAs include the following:

- Supporting 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; renewable energy advice and support; woodland advice services; woodland schemes and grants; woodland product initiatives; wood fuel initiatives; branding and marketing initiatives; and training and skills development.
- Promoting sustainable tourism and recreation through: branding, marketing and destination management; sustainable transport initiatives; tourism and recreational infrastructure; initiatives promoting local food and drink to visitors; education and awareness raising activities; and visitor payback/ giving schemes.
- Encouraging diverse and sustainable rural economies through: positive development management advice; employment space provision; economic development activities; environmental economy initiatives; business networking initiatives; initiatives to improve broadband and mobile phone coverage; training and skills development; and renewable energy initiatives.

It is worth noting that a number of studies relating to individual National Parks indicated that over 50% of businesses surveyed felt that their business was directly or indirectly dependent on a high quality landscape and environment, and positively impacted by the National Park designation, with this figure rising for tourism-related businesses. Many businesses in towns and cities located close to, but outside, National Parks stated that they were also dependent on and positively influenced by National Parks. Furthermore, there is no evidence to suggest that businesses in National Parks are suffering from undue planning restrictions compared to elsewhere, with a significant majority of planning applications in National Parks being approved by NPAs (89%, compared to 87% for England as a whole).

By contributing to the conservation and sustainable use of the environment, NPAs also help to enhance the delivery of ecosystem services that are valued by society and contribute to wider well-being. A variety of provisioning, regulating, cultural and supporting services are supported by the high quality ecosystems of National Parks. These services are harder to value but nonetheless provide economic benefits in a number of different ways including: underpinning economic activities such as farming, forestry, extractive industries, tourism and recreation; reducing costs to society by improving our health, sequestering carbon, and purifying our water; enhancing the well-being of people and communities by providing recreational experiences, tranquillity and fine views; and maintaining a liveable environment by regulating climate, air quality, soils and water cycles. NPAs are active in improving water quality, reducing the impacts and costs of floods, and reducing Greenhouse Gas emissions, amongst other initiatives. These help to maintain a healthy environment in which people can live, work and do business.

Finally, 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; providing affordable housing; promoting investment in broadband and mobile communications; and supporting community renewable energy projects. 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. Other NPA activities include investing in community facilities, contributing to awareness and education, promoting healthy outdoor recreation, and enhancing social inclusion. These activities help to strengthen local communities and support local economies, as well as benefiting the wider population and economy.

National Parks and their economies face a range of challenges and opportunities

The National Parks and their economies face a range of current and future challenges, many of which are common to rural or remote rural areas across the country. The main challenges include:

- The general economic downturn with associated loss of businesses and employment; this is affecting the tourism economy amongst other sectors;
- Lack of diversity of businesses and employment, with high reliance on farming, forestry and tourism, and associated seasonality of economic activity;
- Poor profitability of farming systems, particularly upland grazing livestock systems, together with a reliance on public payments and a limited ability for farm businesses to develop and diversify income;
- Lack of access and distance from markets and passing trade in some National Parks;
- Limited stock and quality of employment premises and developable land;
- Limited road and rail infrastructure, and public transport services;
- Poor broadband provision and mobile phone coverage;
- Low affordability of housing and lack of affordable housing;
- Lack of access to reasonably priced and reliable energy supplies;
- An aging workforce and limited opportunities for young people to find full time employment;
- A shortage of modern and traditional skills;
- Low population density threatening the viability of services and businesses;
- Climate change.

There are however also a number of future economic opportunities for National Parks, these include:

- Increasing demand for food and timber;
- Increasing value attached to authentic locally distinct products and services;
- Emerging markets in the form of Payments for Ecosystem Services;
- Potential to grow visitor numbers and visitor expenditure;
- Building on the growing knowledge economy by improving the communications infrastructure across the National Parks;
- Realising the potential of highly valued landscapes and environments in the National Parks;
- Improving recognition of the value of National Parks amongst all types of business and customers;
- Developing appropriate renewable energy generation;
- Working closely with LEPs and government to support business development and entrepreneurship in National Parks, including opportunities for young people.

National Park Authorities are uniquely placed to continue supporting sustainable economic growth in the future

NPAs are uniquely placed to continue supporting sustainable economic growth in National Parks. That is to maintain thriving living landscapes, where natural assets are conserved and enhanced and where people, businesses and communities can prosper, now and in the future.

Working in partnership with a range of other authorities and interest groups, a key part of the role of NPAs is to conserve and enhance the environment of the National Parks in way that also enhance economic development and help sustain local communities, securing mutual benefits for the environment, people and the economy.

NPAs have a good track record of working with businesses, helping them to add value and grow, supporting skills development, investing in infrastructure, and attracting visitors whilst at the same time maintaining a high quality landscape and environment on which many of the businesses depend.

With sufficient core funding and with the support of its partners, the NPAs will be able to continue to do this important work and more, thereby helping to grow the National Park economies in a sustainable way.

The following key opportunities have been identified for NPAs and partners to address the challenges and realise the economic opportunities facing National Parks:

1. Developing and applying the brand;
2. Supporting stronger and more sustainable farming and forestry;
3. Promoting sustainable tourism;
4. Working more closely with businesses;
5. Further developing positive development management and community led planning approaches;
6. Progressing economic development by closer working with Local Enterprise Partnerships and Local Authorities;
7. Developing appropriate infrastructure to support economic growth;
8. Creating pathways to employment;
9. Promoting a low carbon approach and developing renewable energy;
10. Delivering and rewarding the providers of ecosystem services;
11. Further partnership working to deliver National Park purposes;
12. Leveraging further funding and exploring other income-generating opportunities;
13. Delivering European and national environment, heritage and regeneration programmes at local level;
14. Raising the profile of National Parks as contributors to economic growth;
15. Developing the evidence base relating to the economy and economic growth.

The ability of NPAs to undertake these activities with their partners, and thereby contribute to further growth in the National Park economies will continue to depend on the level of core funding made available through the National Park Grant. It will not be possible to deliver on these opportunities if funding reduces to a point where NPAs are restricted to the delivery of essential statutory duties and have no capacity to develop partnerships and projects. Stability is also important to provide NPAs with the certainty and confidence from which to innovate.

Acknowledgements

We would like to thank a number of individuals and organisations for their input in helping us to assess the contribution of England's National Parks to economic prosperity and well-being, and identify future opportunities for National Park Authorities and their partners to further support sustainable rural economies

We would like to thank those staff at the Office for National Statistics, including Emma White and Steve Hibbs, who helped with the provision of Census and Inter-Departmental Business Register data. This data was critical in enabling us to produce an up-to-date analysis of the National Park economies. Thank you also to Sarah Andrews and Stephen Hall, Defra and Liz Bingham, Natural England for highlighting available rural area and agri-environment scheme data.

We would very much like to thank those staff from the nine National Park Authorities and the Broads Authority who gave their time and expertise during the interviews and at other times during the course of the project. The data, information and feedback provided was invaluable, particularly in helping us to appreciate the range of different circumstances across individual Parks, highlighting potential case studies and flagging up key opportunities for the future.

Finally, thank you to the members of the Steering Group including Paul Hamblin and Amanda Brace of National Parks England and Dr Nigel Stone of Exmoor National Park Authority. They have been a huge help in guiding the project and ensuring its objectives were met.

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1 Introduction

1.1 Background

England's ten National Parks[3] cover 9.3% of our land area, form part of the UK family of National Parks (see Figure 1-1) and are internationally recognised[4].They protect vital landscapes and wildlife habitats, are important places where people live and work, and provide a focus for recreation and tourism for millions of visitors each year.

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Figure 1-1: England's National Parks

Importantly, England's National Parks are vital economic assets that make a significant contribution to our nation's prosperity and well-being. They sustain jobs in the management of the natural environment; support businesses involved in farming, food, forestry, tourism, and the production and marketing of locally distinctive and nature based products and services; and provide attractive locations for people and businesses. They deliver essential environmental services on which our wider economy and society depends, such as providing clean water, influencing water supply and flood risk,

[3] National Parks and National Park Authorities are taken to include The Broads which has an equivalent status but its own legislation and additional responsibilities as a harbour authority.
[4] The UK's National Parks are recognised by the International Union for Conservation of Nature (IUCN) which represents protected areas around the world.

regulating climate and air quality, and providing attractive semi-natural landscapes in which people can relax and exercise, helping to improve our health and well-being. They also play an important social and cultural role, supporting education, contributing to our sense of place, and providing a focus for community engagement and volunteering.

The Government and the English National Parks Authorities Association[5] stress the important economic, social and environmental roles of National Parks in their shared Vision for English National Parks in 2030, see Figure 1-2.

Vision for English National Parks in 2030

By 2030 English National Parks and the Broads will be places where:

• There are thriving, living, working landscapes notable for their natural beauty and cultural heritage. They inspire visitors and local communities to live within environmental limits and to tackle climate change. The wide-range of services they provide (from clean water to sustainable food) are in good condition and valued by society.

• Sustainable development can be seen in action. The communities of the Parks take an active part in decisions about their future. They are known for having been pivotal in the transformation to a low carbon society and sustainable living. Renewable energy, sustainable agriculture, low carbon transport and travel and healthy, prosperous communities have long been the norm.

• Wildlife flourishes and habitats are maintained, restored and expanded and linked effectively to other ecological networks. Woodland cover has increased and all woodlands are sustainably managed, with the right trees in the right places. Landscapes and habitats are managed to create resilience and enable adaptation.

• Everyone can discover the rich variety of England's natural and historic environment, and have the chance to value them as places for escape, adventure, enjoyment, inspiration and reflection, and a source of national pride and identity. They will be recognised as fundamental to our prosperity and well-being.

Source: https://www.gov.uk/government/publications/english-national-parks-and-the-broads-uk-government-vision-and-circular-2010

Figure 1-2: Vision for English National Parks by 2030

The Vision states that by 2030 National Parks "*will be recognised as fundamental to our prosperity and well-being"*. NPAs are already responding to the priority for growth, for example by working closely with Local Enterprise Partnerships, and supporting the roll-out of superfast broadband and other investments. However, to realise the vision, National Parks England (NPE)[6] and its member authorities have identified the need for robust and consistent evidence to be gathered about the ways in which National Parks contribute to our prosperity, and for this evidence to be presented in an accessible format.

1.2 Aim

This report seeks to present the latest economic and socio-economic data relating to the National Parks, assess the contribution of National Parks to economic prosperity and well-being, and identify future opportunities for National Park Authorities to further support sustainable rural economies in line with the Government's Vision for the English National Parks and The Broads and Circular 2010.

[5] Now known as National Parks England
[6] Formerly known as the English National Parks Authorities Association

1.3 Approach

The approach taken during the course of the project included: a review of existing literature; the collation of data from public data sources including the Office for National Statistics (ONS); and visits to all National Park Authorities (NPAs) to gather local data, evidence and feedback. A series of case studies were then collated and developed and future opportunities analysed.

1.4 Methodological Issues

A number of methodological issues were encountered in assessing the contribution of National Parks to economic prosperity:

- **Defining the boundaries of National Park economies**. The borders of National Parks often overlap administrative and statistical boundaries such as districts, wards and super output areas. This presents challenges when collating statistics relating to National Park economies and communities. For example, the availability of ONS business and economic data for National Parks in 'best fit' form as opposed to 'exact fit' form. The business and economic data on the local economies of the National Parks is therefore approximate rather than precise. Furthermore, the economic influence of National Parks often extends beyond their borders, particularly into neighbouring towns and villages. For this reason, several of the NPAs have collated statistics that go beyond their boundaries and include a wider economic "influence area". These issues can present challenges when examining and comparing National Park economies. In this report we attempt to define as clearly as possible the geographic scope of the data presented and to highlight any differences between datasets and between National Parks.

- **Defining the economic impact of National Parks.** A key issue in assessing the economic contribution of the National Parks is in distinguishing between the overall level of economic activity in the National Park, the impact of the National Park designation and the impact of the NPA activities on the local economy. There is also a challenge in accurately differentiating these impacts from the influence of other external factors. These difficulties have been experienced and highlighted in previous studies[7]. In this report, we present evidence of the characteristics and performance of the National Park economies and the overall levels of activity within them, as well as considering how the National Park designation and the activities of the NPAs contribute to their economies. No attempt is made to quantify or value the net effect of the designation itself, given the difficulties mentioned above, although evidence relating to individual National Parks is provided where available.

- **Variations in Data.** Different NPAs have collected different types of economic data, in different ways at different times, in different formats and employing different definitions; this is a reflection of varying local circumstances and requirements. These variations present challenges in compiling data in a consistent format across the National Parks. This report aims to compile the available data and to present it as consistently as possible. This has included compiling new data from ONS in a harmonised format. Some variations in datasets still remain, and these are highlighted in the text. The report highlights developing the evidence base in respect of economic growth as an opportunity for future action (see Section 9).

[7] For example, Defra (2011) National Park Authorities – Assessment of Benefits, Working Paper.

2 Overview of the local economies of England’s National Parks

This section presents a summary analysis of the local economies of England’s National Parks. A more detailed analysis of each individual National Park is included in Appendix 1.

2.1 National Parks cover more than 9% of England’s land area and are home to 0.6% of the population

There are ten National Parks in England and they jointly cover an area of more than 1.2 million hectares, as shown in Table 2-1. These areas account for more than 9% of the total land area of England of 13 million hectares. There is considerable variance in both the size and the population density of individual National Parks. The smallest is The Broads, which covers an area of approximately 30,000 hectares, while the Lake District is almost eight times larger and covers an area of almost 230,000 hectares. The average population density across the ten National Parks is 0.3 persons per hectare, although the densities of individual National Parks range from 0.02 persons per hectare in the Northumberland National Park, to 0.69 persons per hectare in the South Downs. However, all ten National Parks are very sparsely populated compared to the national average of 4.1 persons per hectare.

National Park	Hectares	% of English National Parks	Population	% of English National Parks	Population Density
Broads	30,500	2.5%	6,271	2.0%	0.21
Dartmoor	95,300	7.9%	33,596	10.5%	0.35
Exmoor	69,400	5.7%	10,273	3.2%	0.15
Lake District	229,200	18.4%	40,770	12.7%	0.18
New Forest	57,000	4.6%	34,922	10.9%	0.61
North York Moors	143,400	11.9%	23,380	7.3%	0.16
Northumberland	104,800	8.7%	1,993	0.6%	0.02
Peak District	143.700	11.9%	37,905	11.8%	0.26
South Downs	162,400	13.7%	112,343	35.0%	0.69
Yorkshire Dales	176,900	14.7%	19,761	6.2%	0.11
All English National Parks	**1,212,600**	**100.0%**	**321,214**	**100.0%**	**0.3**
England National Total	***13,027,800***		***53,012,456***		***4.1***

Source: ENPAA, ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Table 2-1: Area, Population and Population Density of English National Parks, 2011

More than 321,000 people reside in the ten English National Parks (0.6% of the total population of England). Again, there is considerable variance between individual parks, with populations ranging from less than 2,000 in the sparsely populated Northumberland National Park to more than 112,000 in the relatively densely populated South Downs. It is worth noting that around half the population of England resides within one hour’s travel of a National Park; however the numbers vary significantly from 300,000 people within one hour’s travel from the Broads to 16 million people living within one hour’s travel from the Peak District[8].

[8] ENPAA 2013

2.2 National Parks have a relatively old population

A common trend across all ten National Parks is the ageing structure of the local population, as shown in Table 2-2 below. In total, one in three residents of the English National Parks (33%) is aged 60 and above, compared to fewer than one in four (23%) across the national population as a whole. The proportion of people aged 60 and above is lowest in the Northumberland National Park (29%) and highest in the Broads Authority area (40%). Similarly the number of people aged younger than 45 is relatively low in the English National Parks (44%) compared to the national average (59%).

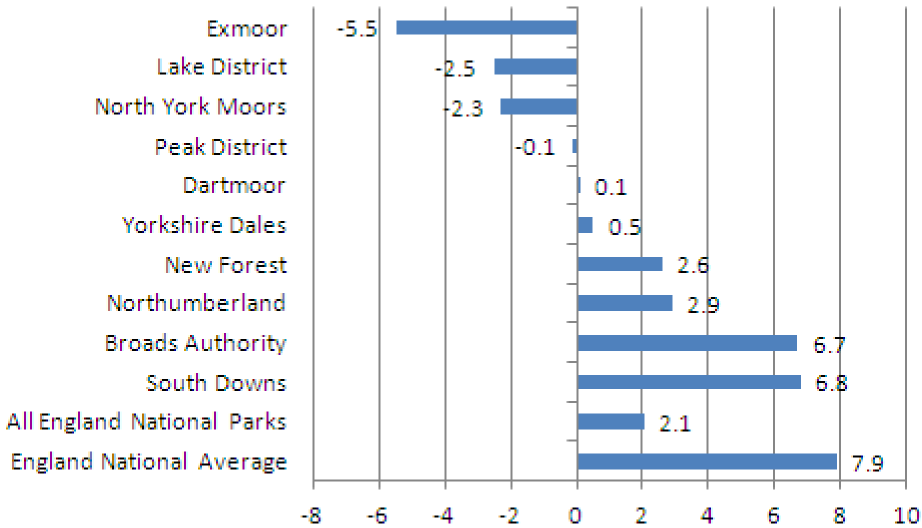
There is also a significant difference in average ages between the National Parks (46 years) and England as a whole (39 years). Average ages in individual National Parks range from 44 years in the South Downs to 49 years in the Broads and Exmoor.

	English National Parks		England National Average
Age 0 to 14	47,437	15%	19%
Age 15 to 29	42,028	13%	19%
Age 30 to 44	51,014	16%	21%
Age 45 to 59	74,994	23%	19%
Age 60 to 74	69,507	22%	15%
Age 75+	36,234	11%	8%
Total	**321,214**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Table 2-2: Population of English National Parks by Age Group, 2011

Population growth in the English National Park areas has typically been significantly lower than the national average for England as a whole. Figure 2-1 shows that the population of the English National Parks increased by 2.1% between 2001 and 2011, according to the latest Census data, compared to an equivalent rate for England as a whole of 7.9%. Population growth in the individual National Park areas has also been lower than the national rate but has been highly varied, with population declines in the North York Moors, Lake District and Exmoor, and strong population growth of approximately 7% in the Broads and the South Downs.

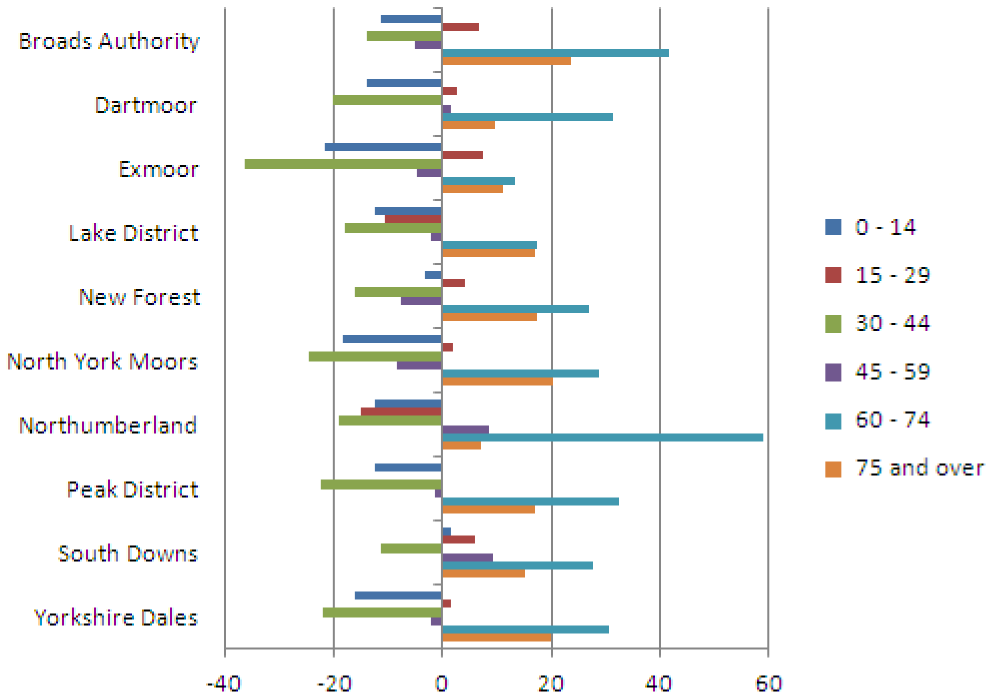


Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Figure 2-1: Population Change in English National Parks, 2001 to 2011

Data from Defra's Statistical Digest of Rural England[9] provides population growth for different types of rural area including 'sparse' or remotely populated areas. It suggests that between 2001 and 2010, the population of sparse rural town and fringe areas increased by 5.4% and that of sparse village and dispersed areas increased by 3.2%. Recent population growth in National Parks, while low, is more in line with the average for remotely populated areas than the country as a whole.

Figure 2-2 shows the rates of population change of the different age groups across the individual National Parks. It shows a similar trend across all areas, of consistent decrease in the proportion aged younger than 45 and consistent and significant increase in the proportion aged 60 and over.



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Figure 2-2: Population Change by Age Group in English National Parks, 2001 to 2011

2.3 While economic activity rates are close to the national average, National Parks have relatively large numbers of self-employed and retired people

Economic activity rates in the National Parks are similar to those at the national level, although there are some significant differences in the types of economic activity and inactivity. The Census 2011 data, presented in Table 2-3, show that the National Parks' working age population (aged between 16 and 74) is approximately 233,650. This represents almost 73% of the total population of the National Parks, which is only slightly lower than the national average.

The data also suggest that 70% of the working age population is economically active in both the National Parks and across England as a whole. This is slightly lower than sparse

[9] Defra (February 2013) Statistical Digest of Rural England 2013

rural areas, which has an economic activity rate of 72% according to the Statistical Digest of Rural England[10].

However, while the proportion of part time employees is similar between the working age populations of the National Parks and the national average, the National Parks have a much lower proportion of full time employees (32%) and much higher levels of self-employment (19%), compared to the national averages of 39% and 10% respectively. Self-employment is particularly high in Northumberland and Exmoor National Parks that are furthest from large urban economic areas, while full time employment is highest in the South Downs. Levels of unemployment and numbers of full-time students are also relatively low in National Parks compared to the national averages.

	English National Parks		**England National Average**
Working Age Population (aged 16-74)	**233,653**	**100%**	**100%**
Economically Active	**162,591**	**70%**	**70%**
Part-time employees	33,220	14%	14%
Full-time employees	74,308	32%	39%
Self-employed	44,788	19%	10%
Unemployed	5,244	2%	4%
Full-time student	5,031	2%	3%
Economically Inactive	**71,062**	**30%**	**30%**
Retired	44,913	19%	14%
Student	8,363	4%	6%
Looking after home or family	8,472	4%	4%
Long-term sick or disabled	5,432	2%	4%
Other	3,882	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data
Note: Some percentage totals may not tally due to rounding.

Table 2-3: Economic Activity in English National Parks, 2011

Economic inactivity is estimated to be 30% of the working age populations of the National Parks and of England as a whole. The proportion of retired people is considerably higher in the National Parks (19%) than at the national level (14%), and is particularly high in the Broads (24%). The proportion of economically inactive people looking after the home or family is in line with the national average, although numbers of students, long-term sick or disabled and other economically inactive are relatively low in the National Parks.

2.4 A relatively large proportion of the National Park population is employed in managerial, professional and skilled occupations

The latest Census data also provide details of the occupations of the 157,000 employees residing in England's National Parks. The data in Table 2-4 suggest that one in five employees residing in National Parks is employed in professional occupations, which is slightly higher than the national average of 17%. The number of managers, directors and senior officials and people working in skilled trades occupations is also relatively high in the National Parks compared to the national average. The number of people employed in all other occupations is relatively low in the National Parks, compared to the national average, particularly in terms of the number of people employed in sales and customer service occupations and process, plant and machinery operatives.

This is likely to reflect the types of jobs that are available within commuting distance of the National Parks, as well as the type of jobs that are likely to be undertaken by individuals who are able to, and want to, live in National Parks. Senior, professional and skilled occupations also tend to command higher wages, making housing affordability within the National Parks less of a barrier to these individuals.

[10] Defra (February 2013) Statistical Digest of Rural England 2013

The number of managers, directors and senior officials is particularly high in the Broads, where they account for 18% of all occupations. It is also interesting to note that the proportion of professional occupations is highest in the South Downs (22% of all occupations), where full time employment is also highest, while the proportion of skilled trades occupations is highest in the Northumberland National Park (26%) and Exmoor (23%) where self-employment is relatively high and commuting distance from large urban economic areas is greatest.

	English National Parks		**England National Average**
Employed residents (aged 16-74)	**156,698**	**100%**	**100%**
Managers, directors & senior officials	25,118	16%	11%
Professional occupations	30,605	20%	17%
Associate professional & technical occupations	18,012	11%	13%
Administrative & secretarial occupations	13,960	9%	11%
Skilled trades occupations	25,550	16%	11%
Caring, leisure & other service occupations	12,735	8%	9%
Sales & customer service occupations	8,168	5%	8%
Process, plant and machine operatives	7,120	5%	7%
Elementary occupations	15,430	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Table 2-4: Occupations of residents of English National Parks, 2011

2.5 Household incomes are higher than the regional average in most National Parks but lower in some

Research undertaken by the Defra Rural Statistics Unit in 2010 provided useful data relating to mean household incomes in the National Parks. The Defra Rural Statistics Unit produced economic profiles for each National Park and the relevant data are summarised below in Table 2-5. These data are mid-year estimates for 2009/10, based on CACI Paycheck data. They suggest that there was considerable variance in the mean gross incomes earned by households in the different National Parks, ranging from £28,700 in Exmoor to almost £42,000 in the New Forest.

For most National Parks, the data suggest that the local mean household incomes were higher than the regional averages, by as much as 7.5% in the Northumberland National Park and more than 11% in the Peak District. Mean household incomes were lower than the regional average in three National Parks (Dartmoor, Exmoor and The Broads). These examples might reflect the large variances in incomes in these regions, where mean incomes in Devon, Somerset, Norfolk and Suffolk are typically lower than the South West and East of England averages (which can be inflated by relatively high incomes in Bristol and Wiltshire, and Cambridgeshire, Essex and Hertfordshire respectively).

National Park	**Average (mean) gross household income**	**Difference from the respective regional average**
New Forest	£41,940	+4.2%
South Downs	£40,248	+0.0%
Peak District	£37,692	+11.3%
The Broads	£35,341	-6.1%
Lake District	£33,935	+2.0%
Dartmoor	£33,039	-1.8%
Yorkshire Dales	£33,021	+1.9%
North York Moors	£32,974	+1.8%
Northumberland	£32,827	+7.5%
Exmoor	£28,668	-14.8%

Source: Defra Rural Statistics Unit (2010) National Parks: economic comparison

Table 2-5: Household income by National Park

2.6 Average house prices in National Parks are significantly higher than regional averages

The Defra economic profiles also provided data on house prices in the National Park areas. Data were provided for all National Park areas except for Northumberland, which could not be disclosed because of the low number of observations. Data for the other nine National Parks are presented in Table 2-6 and show that average house prices in 2009 ranged from less than £245,000 in the Yorkshire Dales to £442,000 in the New Forest.

Comparisons with regional averages showed that average (mean) house prices in all National Parks commanded a significant premium compared with the average house price in their respective regions of between 27% and 90%. The minimum premium of 27% was observed for properties on Dartmoor, compared to average house prices across the South West, while the largest price premium of 90% related to house prices in the Lake District, compared to the North West regional average.

National Park	Average (mean) house price (incl. detached, semi-detached and terraced)	Difference from the respective regional average
New Forest	£442,000	+74%
South Downs	£361,300	+43%
Exmoor	£293,100	+39%
Lake District	£292,100	+90%
Peak District	£290,600	+85%
The Broads	£284,900	+32%
Dartmoor	£267,000	+27%
North York Moors	£250,000	+63%
Yorkshire Dales	£244,600	+60%
Northumberland	-	-

Source: Defra Rural Statistics Unit (2010) National Parks: economic comparison

Table 2-6: House prices by National Park

2.7 National Parks have relatively large numbers of businesses, but these tend to be small in size

The Inter-Departmental Business Register (IDBR) provides the best available data relating to businesses, employment and business turnover in the ten National Parks, based on data collected by HM Revenue and Customs and Companies House. The IDBR provides coverage of 2.1 million businesses and approximately 99% of all economic activity in the UK. However, it is still likely to provide a slight under-estimate of economic activity in the National Parks because it does not cover all small businesses, such as the self-employed and businesses without employees or with a low turnover, that are likely to be particularly prevalent in the National Parks. Furthermore, it is important to note that IDBR data provided for the National Parks are 'best fit' as opposed to 'exact fit' due to the mismatch between National Park boundaries and Output Area boundaries for which data are available[11]. The business and economic data on the local economies of the National Parks are therefore approximate rather than precise. The latest data for 2012 have been analysed to provide additional information relating to the structure of each local economy.

Table 2-7 presents data relating to the number of businesses (i.e. different enterprises) and the number of establishments (i.e. local units) in each of the National Parks. It shows that there were almost 22,500 businesses and 24,750 establishments operating in the English National Parks in 2012, according to the IDBR estimates. The English National Parks are therefore home to 1.2% of all businesses and 1.1% of all establishments in England. The IDBR data suggests that the number of businesses and establishments

[11] IDBR data is provided for those Census Output Areas (COAs) where more than 50% of the population lies within the National Park. Conversely, COAs where less than 50% of the population lies outside the National Park are excluded from the dataset. This 'best fit' approach – while not perfect - provides a consistent basis for collating and analysing data across the ten English National Parks, and follows the method already used by ONS to extract business and economic data for the three Welsh National Parks.

operating in the English National Parks has fallen by 1.8% and 1.9% respectively between 2009 and 2012. Business numbers have fallen across all National Parks although the extent of the decrease ranged from just 0.3% in the Yorkshire Dales to almost 10% in Northumberland. The number of businesses fell most sharply in 2010, however most National Parks have experienced a slight recovery in the number of local businesses in 2012. The South Downs have the largest numbers of businesses, followed by the Lake District and Peak District (Table 2-7).

National Park	Businesses	Establishments
The Broads	170	185
Dartmoor	2,065	2,225
Exmoor	830	915
Lake District	3,375	3,855
New Forest	2,330	2,545
North York Moors	1,825	1,955
Northumberland	140	155
Peak District	2,915	3,235
South Downs	7,025	7,745
Yorkshire Dales	1,770	1,930
All English National Parks	**22,445**	**24,745**
England National Total	***1,842,680***	***2,218,215***

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Table 2-7: Businesses[12] and Establishments[13] located in English National Parks, 2012

Businesses in the National Parks are relatively small, employing fewer than half the number of employees of the average business in England. The IDBR data suggest that the average business located in the English National Parks had 6.3 employees in 2012, compared to the national average of 14.5 employees across England as a whole. There was also variation between individual National Parks, with the average number of employees ranging from three in Northumberland to 11.5 in The Broads.

The data in Table 2-8 also show that the business stock in the National Parks has a relatively high concentration of small and micro businesses. 91% of local businesses in the National Parks employed fewer than ten people in 2012 compared to 89% at the national level. Only The Broads and the Lake District had a smaller proportion of businesses with fewer than ten employees than the national average, while these smallest businesses account for 97% of the total in Northumberland. The IDBR data could only identify 30 businesses with more than 250 employees across all ten National Parks and these were concentrated in the South Downs, New Forest, Peak District and Dartmoor.

	English National Parks		**England National Average**
0-9 employees	20,520	91%	89%
10-49 employees	1,700	8%	9%
50-249 employees	195	1%	2%
250+ employees	30	0%	0%
Total	**22,445**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Table 2-8: Number of businesses in English National Parks by Size, 2012

Unsurprisingly, businesses in the English National Parks are also relatively concentrated in ‘accommodation and food services’ and particularly in ‘agriculture, forestry and fishing’ sectors. Almost one in four (24%) of businesses in the English National Parks are

[12] VAT and/or PAYE based enterprises
[13] VAT and/or PAYE based local units

involved in agriculture, forestry or fishing, compared to just 5% at the national level. There is also significant variation between the National Parks as agriculture, forestry and fishing account for more than two-thirds (68%) of all businesses in Northumberland but only 9% and 10% of businesses in the New Forest and South Downs respectively.

As a result of this concentration in agriculture and tourism sectors, the National Park economies are relatively under-represented in most other sectors. Most notably, the National Parks have a relatively small number of businesses operating in the 'information and communication' and 'professional, scientific and technical' sectors compared to the national average, although again this is not true of the New Forest and South Downs where the local business stock is more similar to the national average rather than the other National Parks.

	English National Parks		**England National Average**
Agriculture, forestry & fishing	5,330	24%	5%
Production	1,075	5%	6%
Construction	2,230	10%	12%
Motor trades	500	2%	3%
Wholesale	685	3%	5%
Retail	1,575	7%	9%
Transport & Storage (inc. postal)	445	2%	3%
Accommodation & food services	1,915	9%	6%
Information & communication	1,065	5%	8%
Finance & insurance	245	1%	2%
Property	720	3%	4%
Professional, scientific & technical	2,910	13%	17%
Business administration & support services	1,330	6%	7%
Public administration & defence	90	0%	0%
Education	350	2%	2%
Health	610	3%	4%
Arts, entertainment, recreation & other services	1,370	6%	7%
Total	**22,445**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Table 2-9: Number of Businesses in English National Parks by Sector, 2012

2.8 Almost 141,000 people are employed in England's National Parks, more than in 2009

The IDBR also provides data relating to employment. The data in Table 2-10 show that there are almost 141,000 jobs in the local economies of the ten National Parks. This suggests that the National Parks support 0.6% of all employment in England[14] or 0.5% of all employment in the UK.

Despite the fall in the local business stock of the National Parks between 2009 and 2012, the level of employment increased by 2.8% over the same period. Across all English National Parks, overall employment increased by 0.6% in 2010, but then fell by 0.4% in 2011 before recovering strongly in 2012 and growing by 2.7%. There were some considerable variations across the individual National Parks, with Northumberland experiencing significant employment decline of more than 14% between 2009 and 2012, while the New Forest experienced significant employment growth of more than 14%, see Table 2-10.

[14] Based on Business Register of Employment Survey (BRES) data for 2011

National Park	Employment	% change from 2009
The Broads	2,000	11.0%
Dartmoor	9,700	8.5%
Exmoor	2,900	-0.1%
Lake District	20,500	5.6%
New Forest	20,300	14.3%
North York Moors	6,900	3.0%
Northumberland	400	-14.1%
Peak District	13,300	0.2%
South Downs	58,100	-1.4%
Yorkshire Dales	6,900	-0.8%
All English National Parks	**140,900**	2.8%
UK Total	***26,766,700***	

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Table 2-10: Employment in English National Parks, 2012

Employees in the English National Parks are relatively likely to be employed within small businesses. The data in Table 2-11 suggest that more than one in three employees (35%) are employed in small and micro businesses employing fewer than ten people compared to just 14% of employment across the whole of the UK. The National Parks also have a relatively high proportion of employees working for businesses with between 10 and 49 employees, and a relatively low number of employees working for businesses with more than 50 employees (and particularly those with more than 250 employees).

It should be noted that the National Park percentages do not sum to 100% because they exclude some of the data for individual National Parks, which has been suppressed to avoid revealing the identity of any individual or business. The figures in Table 2-11 should therefore be treated as being indicative. Where data was not suppressed the proportion of employees working for businesses with fewer than ten employees varied from 25% in the New Forest to 66% in Exmoor.

	English National Parks		UK
0-9 employees	49,400	35.1%	14.1%
10-49 employees	26,900	19.1%	13.9%
50-249 employees	7,500	5.3%	12.9%
250+ employees	24,800	17.6%	59.0%
Total	**140,900**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): Some of the data for individual National Parks has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the overall England National Park figures do not sum to the totals.

Table 2-11: Employment in the English National Parks by Size of Business, 2012

Employment in the National Parks is relatively concentrated in the ‘agriculture, forestry and fishing’ and ‘accommodation and food services’ sectors. The data in Table 2-12 also suggest that employment in ‘education’, ‘property’, ‘construction’ and ‘arts, entertainment, recreation and other services’ sectors is relatively high in the English National Parks compared to the UK average. However, employment in the education sector is inflated by particularly high employment in the South Downs.

Employment in the other sectors is relatively low compared to the national average and is particularly low in ‘production’, ‘wholesale and retail’, ‘transport and storage’, ‘information and communication’, ‘finance and insurance’, ‘business administration and support services’ and ‘public administration and defence’ sectors. These sectors are still important however in terms of the jobs provided in National Parks. Significant variation was identified between the different National Parks with the New Forest and South Downs having the most diverse patterns of employment, which are more similar to the national average than the other National Parks, while employment in the lesser-populated and/or more remote National Parks is more concentrated in the agriculture and tourism sectors.

	English National Parks		UK
Agriculture, forestry & fishing	13,500	9.6%	0.9%
Production	8,300	5.9%	10.2%
Construction	6,900	4.9%	4.5%
Wholesale & retail (inc. motor trades)	16,500	11.7%	16.5%
Transport & Storage (inc. postal)	2,200	1.6%	4.2%
Accommodation & food services	20,800	14.7%	6.4%
Information & communication	2,800	2.0%	3.9%
Finance & insurance	150	0.1%	3.9%
Property	3,300	2.3%	1.6%
Professional, scientific & technical	7,100	5.0%	6.3%
Business administration & support services	5,500	3.9%	8.1%
Public administration & defence	60	0.0%	4.0%
Education	21,900	15.6%	12.9%
Health	15,400	10.9%	12.5%
Arts, entertainment, recreation & other services	7,300	5.2%	4.1%
Total	**140,900**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): Some of the data for individual National Parks has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the overall England National Park figures do not sum to the totals.

Table 2-12: Employment in English National Parks by Sector, 2012

2.9 National Parks generated business turnover of more than £10 billion in 2012

IDBR data has also been provided relating to the turnover of businesses located in each National Park. The data in Table 2-13 show that businesses located in English National Parks generated more than £10.4 billion of turnover in 2012. This suggests that the English National Parks generated approximately 0.23% of all business turnover in the UK in 2012. The largest individual turnover figures were £3.6 billion in the South Downs and £2.7 billion in the New Forest.

National Park	**Turnover (£m)**
The Broads	114
Dartmoor	605
Exmoor	165
Lake District	1,245
New Forest	2,701
North York Moors	428
Northumberland	27
Peak District	1,102
South Downs	3,594
Yorkshire Dales	422
All English National Parks	**10,404**
UK Total	**4,480,574**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Table 2-13: Turnover (£m) in English National Parks, 2012

A relatively large proportion of turnover in the English National Parks is generated by small businesses with fewer than 50 employees, and a relatively small amount of turnover is generated by businesses with more than 50 employees. It should be noted again that the National Park percentages in Table 2-14 do not sum to 100% because of the need to suppress some of the data for individual National Parks and are only indicative. Where data was not suppressed, Exmoor had the highest proportion of turnover generated by small businesses with fewer than ten employees (75%), while the South Downs had the highest proportion of turnover generated by businesses with more than 50 employees (28%).

	English National Parks		UK
0-9 employees	3,947	37.9%	12.6%
10-49 employees	3,346	32.2%	11.6%
50-249 employees	531	5.1%	13.6%
250+ employees	476	4.6%	62.2%
Total	**10,404**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): Some of the data for individual National Parks has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the overall England National Park figures do not sum to the totals.

Table 2-14: Turnover (£m) in English National Parks by Size of Business, 2012

Table 2-15 gives business turnover by sector. The largest turnover in the National Parks is generated by the 'wholesale and retail' sector, although this is relatively low compared to the national average. The IDBR data suggest that National Parks are relatively likely to generate turnover from 'agriculture, forestry and fishing', 'accommodation and food services', 'construction', 'property', 'professional, scientific and technical' 'education' and 'health' sectors. However, the education and health sectors are inflated by the South Downs and the New Forest respectively, where they are significant employers.

The National Parks also generate a much lower proportion of turnover from finance and insurance activities. The 'finance and insurance' sector accounts for just 1% of all turnover in the National Parks compared to 27% of all turnover in the UK, as these activities are more concentrated in large urban centres. Other sectors where turnover in the National Parks is relatively low include 'production' and 'transport and storage', as these activities tend to locate in areas with strong transport connections and supply chains. As above, the South Downs and New Forest, and to a lesser extent the Peak District and Dartmoor, were found to be more closely matched to the national averages, while most other National Parks were more strongly concentrated on agriculture and tourism activities.

	English National Parks		UK
Agriculture, forestry & fishing	811	7.8%	0.8%
Production	1,002	9.6%	15.9%
Construction	734	7.1%	4.4%
Wholesale & retail (inc. motor trades)	1,793	17.2%	24.6%
Transport & Storage (inc. postal)	179	1.7%	3.3%
Accommodation & food services	961	9.2%	1.7%
Information & communication	249	2.4%	4.1%
Finance & insurance	109	1.0%	27.3%
Property	194	1.9%	1.1%
Professional, scientific & technical	544	5.2%	4.7%
Business administration & support services	420	4.0%	3.6%
Public administration & defence	20	0.2%	0.6%
Education	416	4.0%	1.7%
Health	766	7.4%	3.6%
Arts, entertainment, recreation & other services	314	3.0%	2.7%
Total	**10,404**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): Some of the data for individual National Parks has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the overall England National Park figures do not sum to the totals.

Table 2-15: Turnover (£m) in English National Parks by Sector, 2012

2.10 Gross Value Added for the National Parks is estimated to be in the region of £4.1 to 6.3 billion

The economic contribution of different sectors and economies is best measured in terms of gross value added (GVA). GVA represents the total value generated by all producer units in a particular sector, local area, region or country. Unfortunately, GVA data is not available for local areas, which means that there are no GVA estimates for the National Parks. However, GVA can be estimated using different assumptions about GVA per business, per worker or per £1 of output, based on relevant data at the national and county level.

The first approach is to use data from the UK National Accounts to estimate the GVA generated per £1 of output across different sectors and apply this to the estimated turnover for those sectors in the National Parks. The results are presented in Table 2-16 and suggest that the England National Parks support GVA of more than £4.1 billion per annum. The 'wholesale and retail' sector supports the most GVA, accounting for 22% of the total, followed by the 'accommodation and food service' sector (12%) and the health sector (10%). 'Agriculture, forestry and fishing' activities are estimated to support 8% of all GVA supported in the national parks.

However, it is important to note that this approach is likely to under-estimate the true level of GVA because some of the turnover in the National Parks has been suppressed and is therefore excluded from these estimates.

	Local Turnover (£m)	UK GVA per £1 of Output (£)	Local GVA (£m)	% of total GVA
Agriculture, forestry & fishing	811	0.38	311	8%
Production	1,002	0.35	353	9%
Construction	734	0.40	294	7%
Wholesale & retail (inc. motor trades)	1,793	0.51	909	22%
Transport & Storage (inc. postal)	179	0.51	91	2%
Accommodation & food services	961	0.51	487	12%
Information & communication	249	0.52	131	3%
Finance & insurance	109	0.57	62	1%
Property	194	0.63	122	3%
Professional, scientific & technical	544	0.54	291	7%
Business administration & support services	420	0.54	225	5%
Public administration & defence	20	0.56	11	0%
Education	416	0.56	234	6%
Health	766	0.56	431	10%
Arts, entertainment, recreation & other services	314	0.55	174	4%
Total	**10,404**		**4,125**	**100%**

Source: UK National Accounts 2012 and additional analysis of IDBR data

Note(s): Some of the turnover data for individual National Parks has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the overall England National Park figures will provide an underestimate of turnover and GVA.

Table 2-16: Turnover-based GVA Estimates in English National Parks by Sector, 2012

The second approach is to use data from the UK National Accounts to estimate productivity (in terms of GVA per worker) across different sectors and apply this to the estimated employment in those sectors in the National Parks. The results in Table 2-17 suggest that the England National Parks support GVA of more than £4.5 billion per annum. As with the turnover-based approach, the 'wholesale and retail' sector is estimated to support the largest GVA, accounting for 19% of the total. This is followed by the 'education' sector (15%), the 'production' sector (13%) and the health sector (10%). 'Agriculture, forestry and fishing' activities are estimated to support 6% of all GVA supported in the National Parks, using the employment-based approach. However, as above, it is important to note that this approach is likely to under-estimate the true level of

GVA because some of the employment data in the National Parks has been excluded from these estimates.

	Local Employ-ment	UK GVA per Worker (£)	Local GVA (£m)	% of total GVA
Agriculture, forestry & fishing	13,500	£19,531	264	6%
Production	8,300	£71,470	593	13%
Construction	6,900	£39,357	273	6%
Wholesale & retail (inc. motor trades)	16,500	£51,997	856	19%
Transport & Storage (inc. postal)	2,200	£16,417	36	1%
Accommodation & food services	20,800	£16,417	341	8%
Information & communication	2,800	£16,417	46	1%
Finance & insurance	150	£109,061	16	0%
Property	3,300	£49,529	164	4%
Professional, scientific & technical	7,100	£49,529	352	8%
Business administration & support services	5,500	£49,529	273	6%
Public administration & defence	60	£30,483	2	0%
Education	21,900	£30,483	668	15%
Health	15,400	£30,483	468	10%
Arts, entertainment, recreation & other services	7,300	£25,877	188	4%
Total	**140,900**		**4,540**	**100%**

Source: UK National Accounts 2012 and additional analysis of IDBR data
Note(s): Some of the employment data for individual National Parks has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the overall England National Park figures will provide an underestimate of employment and GVA.

Table 2-17: Employment-based GVA Estimates in English National Parks by Sector, 2012

The final approach is to calculate estimates of productivity (i.e. GVA per employee) for the relevant county or counties covered by each National Park and apply these to the total employment estimates for each National Park. GVA data is available at the county level and these data are presented in Table 2-18 and show the relevant counties that are covered by each of the National Parks, and the corresponding GVA, employment and productivity ratios.

National Park	County coverage	Total GVA in relevant counties (£m)	Total employ-ment in relevant counties	GVA per employee in relevant counties (£)
The Broads	Norfolk & Suffolk	27,464	645,998	42,514
Dartmoor National Park	Devon	13,186	318,351	41,420
Exmoor National Park	Devon & Somerset	22,278	540,049	41,252
Lake District National Park	Cumbria	8,950	222,863	40,159
New Forest National Park	Hampshire	28,756	580,711	49,519
North York Moors National Park	North Yorkshire	14,456	361,000	40,044
Northumberland National Park	Northumberland	4,031	100,816	39,984
Peak District National Park	Derbyshire, Cheshire, Greater Manchester, Staffordshire & South & West Yorkshire	160,508	3,766,906	42,610
South Downs National Park	Hampshire, East Sussex & West Sussex	52,780	1,112,812	47,429
Yorkshire Dales National Park	North Yorkshire & Cumbria	64,721	1,569,616	41,234

Source: ONS (2012) Regional GVA - Nuts 3, 2011 and Annual Business Inquiry, 2011 data (accessed April 2013)

Table 2-18: GVA in Relevant Counties, 2011

The relevant county-level productivity ratios have been multiplied by the local level of employment in each National Park to provide an estimate of local GVA and these data are presented below in Table 2-19. These estimates suggest that the English National Park economies generated £6.3 billion of GVA in 2012. This represents approximately 0.6% of all GVA generated in England in 2012 and was concentrated in the South Downs (43.5%), the New Forest (16%) and the Lake District (13%), which jointly account for approximately 72% of all GVA generated within the English national parks. However, it is important to note that this approach is likely to provide an over-estimate of local GVA in the National Parks, where there is a focus on relatively low value economic activities such as agriculture and tourism.

	GVA per employee in relevant counties (£)	**Local employment**	**Estimated Local GVA**
The Broads	42,514	1,960	83
Dartmoor National Park	41,420	9,656	400
Exmoor National Park	41,252	2,864	118
Lake District National Park	40,159	20,482	823
New Forest National Park	49,519	20,277	1,004
North York Moors National Park	40,044	6,899	276
Northumberland National Park	39,984	420	17
Peak District National Park	42,610	13,328	568
South Downs National Park	47,429	58,075	2,754
Yorkshire Dales National Park	41,234	6,908	285
All England National Parks	**44,923**	**140,869**	**6,328**
England	***42,025***	***26,766,676***	***1,124,881***

Source: ONS (2013) UK Business: Activity, Size and Location, 2012; and additional analysis of IDBR data

Table 2-19: GVA Estimates based on County-Level Productivity in English National Parks, 2012

The different GVA estimates are presented for each National Park in Table 2-20. As above, it is important to note that some of the turnover and employment-based GVA estimates will be under-estimates of the true level of GVA because of the suppressed data that has been excluded. This is particularly true of the three national parks with the lowest levels of economic activity: the Broads, Exmoor and Northumberland National Parks. In contrast, the county-based productivity estimates are likely to provide an over-estimate, particularly for those National Parks with a high concentration of low value economic activities.

It is therefore most appropriate to consider the GVA estimates as a range. The data in Table 2-20 suggest that GVA in the English National Parks is likely to fall between £4.1 billion and £6.3 billion per annum. This suggests that the English National Park economies represent between 0.4% and 0.6% of all GVA generated in England in 2012.

These GVA estimates are comparable to those of a smaller city such as Plymouth, Coventry, Swindon or Sunderland, or the UK aerospace sector, all of which have a total GVA of between £4 billion and £6 billion according to latest ONS estimates.

	Turnover-based GVA Estimates (£m)	**Employment-based GVA Estimates (£m)**	**County Productivity-based GVA Estimates (£m)**
The Broads	11	16	83
Dartmoor National Park	292	339	400
Exmoor National Park	59	46	118
Lake District National Park	614	663	823
New Forest National Park	619	700	1,004
North York Moors National Park	174	213	276
Northumberland National Park	5	5	17
Peak District National Park	406	482	568
South Downs National Park	1,748	1,848	2,754
Yorkshire Dales National Park	196	228	285
All England National Parks	**4,125**	**4,540**	**6,328**
% of England GVA	***0.4%***	***0.4%***	***0.6%***

Table 2-20: Range of GVA Estimates in English National Parks, 2012

3 Overview of the influence of National Parks and National Park Authorities on Local Economies

3.1 National Parks

The National Park was introduced as a legal entity in the National Parks and Access to the Countryside Act 1949 and nine National Parks in England have been designated over the period 1951 to 2010[15].

The National Parks were defined in the 1949 Act as extensive tracts of country in England which by reason of (a) their natural beauty and (b) the opportunities they afford for open-air recreation, having regard both to their character and to their position in relation to centres of population, it is especially desirable that the necessary measures be taken for the purposes of:

a) conserving and enhancing the natural beauty, wildlife and cultural heritage of the areas; and
b) promoting opportunities for the understanding and enjoyment of the special qualities of those areas by the public.

The Broads does not have a National Park designation, however since 1989 it has been given equivalent status with an Authority set up to manage the area. The Broads Authority must adhere to the purpose/obligations set out for all National Park authorities, and must additionally protect the interests of navigation.

As indicated in Section 2, England's National Parks (including The Broads) now cover 9.3% of England by area and 0.6% of the total population.

3.2 National Park Authorities

England's National Park Authorities were introduced in the Environment Act 1995 as special status authorities in their own right with development management functions and other executive powers in relation to the Parks. Their role is to help deliver the National Park purposes; they also have a duty to foster the social and economic wellbeing of their local communities.

The NPAs work with their partners (communities, businesses and other organisations) to produce Management Plans for the National Parks. These set out the vision, strategic policies and outcomes for the National Parks and the mechanisms, activities and resources used to achieve these. Partnership working is critical to successful planning and delivery of the National Park purposes and duty. Critically, the National Park Management Plans are for the National Parks themselves, rather than just the NPAs, and typically most actions will be undertaken by others working together with the NPAs.

3.3 National Park Authority Income, Expenditure and Employment

National Park Authorities are funded primarily through the National Park Grant provided by Defra.

[15] The Lake District, Peak District and Dartmoor National Parks were designated in 1951. The South Downs National Park was designated in 2010.

Income and expenditure

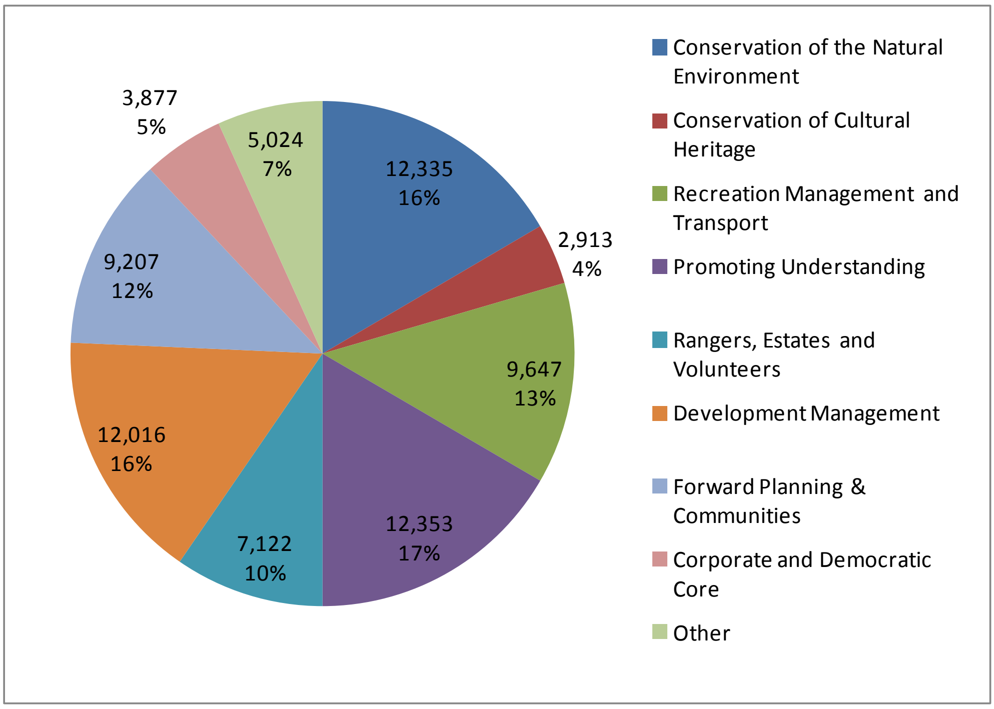
In 2011/12, NPAs received the National Park Grant amounting to £55 million and a further £24 million of income generated from other sources. NPA gross expenditure totalled £74 million. See Table 3-1

National Park	National Park Grant £k	Income from other sources £k	Gross Expenditure £k
The Broads	4,002	3,840	7,269
Dartmoor	4,484	1,318	5,348
Exmoor	3,765	1,011	4,786
Lake District	6,591	4,898	10,818
New Forest	3,812	1,369	5,143
Northumberland	3,136	664	3,070
North York Moors	4,936	2,244	6,947
Peak District	7,664	6,110	13,474
South Downs	11,373	1,130	11,263
Yorkshire Dales	5,108	1,385	6,025
Total	**54,871**	**23,969**	**74,143**

Source: NPAs' 2011/12 accounts - Comprehensive Income and Expenditure Statement
Note: Income from other sources excludes investment income

Table 3-1: NPA Income and Expenditure, 2011/12

Total gross expenditure can be broken down by key activity area for all NPAs as follows: conservation of the natural environment and cultural heritage (20%); recreation management and transport, promoting understanding, and rangers, estates and volunteers (40%); development management, and forward planning and communities (28%); and corporate and democratic core and other (12%). See Figure 3-1.



Source: NPAs' 2011/12 accounts - Comprehensive Income and Expenditure Statement

Figure 3-1: NPA Gross Expenditure (£k) – Breakdown by Key Activity Area, 2011/12

Other income (excluding the National Park Grant) comes from a variety of sources including: project grants from European, national and local sources (37%); recurring revenue income from car parking, visitor centre income, planning fees, navigation tolls (in the case of the Broads), rents, cycle and boat hire, outdoor education centres, advertising etc. (59%); and one-off income, including the Defra Modernisation Fund (3%)[16].

The breakdown and balance of income and expenditure varies from one NPA to another depending on local circumstances.

The National Park Grant for 2011/12 of £55 million is equivalent to around £1 per annum per person in England. The National Park Grant equates to 74% of total expenditure on average across all National Parks. However, when account is taken of projects and programmes led or stimulated by NPAs, the gearing ratio increases by two to three times the grant received by the NPAs[16].

The National Park Grant is reducing over the five years from 2010/11 to 2014/15, as part of the Government's comprehensive spending review. Excluding the newly designated South Downs (which experienced an increase in its budget in the first two years associated with its start-up phase) the National Park Grant is decreasing by £12.5 million from £48.9 million in 2010/11 to £36.4 million in 2014/15. This equates to a reduction of 26% in cash terms, or 36% in real terms once the effect of inflation is taken into account[17]. The impact of this cut will be exacerbated further by reductions in the budgets of partner organisations (which contribute to joint programmes).

By 2014/15, the total National Park Grant for all ten National Parks (including the South Downs) is projected to be £46.6 million, equivalent to 88p per person in England[18].

A further reduction in the National Park Grant for 2014/15 or beyond will reduce the ability of the NPAs to deliver their core functions and services and also reduce the capacity of NPAs to attract in matched or levered in funding for projects. All NPAs have been through a significant prioritisation process and have dropped areas of work to manage the reduced income. NPAs are, wherever possible, looking at ways of developing recurring revenue income streams. Project grants vary considerably in amount between years and do not generally contribute to the delivery of core functions and services.

Employment

In 2011/12, NPAs employed a total of 1,342 staff equivalent to 1,118 Full Time Equivalent (FTE) jobs, of which 83% were Defra funded and 17% were funded from other sources. Employee expenses, spread across the key activity areas referred to previously, accounted for around £36 million (48% of gross expenditure).

Total employment by NPAs is projected to decrease by 13% in terms of FTE jobs over the six years from 2009/10 to 2014/15, or 20% if the South Downs is excluded. Six NPAs are experiencing reductions in the number of FTE jobs of over 20%, with one of these experiencing a reduction of over 40%.

Impacts

The NPA staffing costs of £36 million represent a direct contribution to the GVA of the local economies in which the National Parks are located; this is worth considerably more as expenditure circulates within the local economies.

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[16] ENPAA – Sources of Income, November 2012

[17] ENPAA, April 2013

[18] Equivalent figures for Scotland and Wales are: £2.43 per person (2013/14) and £5.03 per person (2012/13). No figures are available for Wales for 2013/14.

The remaining NPA expenditure of £38 million each year[19] also has a positive impact on local economies by supporting the turnover of businesses that supply goods and services to the NPAs and to those who benefit from NPA grants. The impact of this expenditure is difficult to assess without better data about how this money is spent and the extent of local sourcing. However, the potential impact can be illustrated by assuming (conservatively) that 25% of this expenditure involves purchases of goods and services from local suppliers, supporting business turnover of £9.6 million annually. On the assumption that each £1m of business turnover directly supports GVA of £0.50 million and 10 direct FTE jobs[20], this has the effect of supporting GVA of £4.8 million annually and 96 FTE jobs among supplier businesses.

NPA expenditure on wages and purchases will have additional impacts as a result of multiplier effects, as employee and supplier expenditures stimulate further local economic activity. On the assumption that each unit of direct impact is associated with a further 0.25 units of activity through indirect and induced effects, these multiplier effects can be estimated to support a further 300 FTE jobs and £10 million of GVA locally. Overall, it is estimated that NPA expenditures support more than 1,500 FTE jobs and GVA of £50 million in their respective local economies. See Table 3-2.

	Expenditure (£m)	Employment (FTE)	GVA (£m)
Direct staffing	35.6	1118.5	35.6
Other purchases	38.5	96.3	4.8
Indirect and induced effects		303.7	10.1
Total impact of NPA expenditures		**1518.4**	**50.5**

Table 3-2: Estimated Economic Impact of NPA Expenditures

In considering impacts, it is worth highlighting the wider importance of National Parks to the population. A recent public opinion survey, commissioned by the UK Association of National Park Authorities (UK ANPA)[21], showed that:

- 93% of those surveyed agreed that the UK's National Parks are areas of national importance. Most people see the National Park family as a vital part of what Britain is today and what it will be in the future - highlighting the significance of preserving and safeguarding the Nationals Parks' special qualities for future generations;
- 86% of those surveyed saw National Parks as important to conserving national heritage;
- 89% of those surveyed (and 90% of those in England) said that National Parks are important to them and 96% felt that every child should experience a National Park firsthand;
- When asked about expenditure - £1 per person per year – 48% thought this was about right and 49% thought that more money should be spent on National Parks.

[19] This is derived from total gross expenditure by NPAs in 2011/12 of £74.1 million less total employee expenses of £35.6m.
[20] These are typical national average ratios derived from ONS (2012) UK National Accounts: The Blue Book 2012
[21] http://www.nationalparks.gov.uk/press/pressreleases/pr-uk-national-parks-areas-of-national-importance.htm

3.4 Influences on the local economy, people and environment

The National Parks and NPAs interact with the local economy in a range of different ways. These include:

- Direct employment and expenditure in the management of National Parks. This includes permanent, temporary and casual staff, and the purchases of goods, materials, and services often from local businesses;
- Conserving the environment of the National Park. In addition to involving contractors and others, this directly underpins sectors such as tourism and recreation and more generally maintains an attractive living and working environment, from which people and a wide range of businesses benefit;
- Supporting land-based industries such as farming and forestry through land management schemes and advice;
- Supporting outdoor recreation and tourism by promoting the National Park and providing infrastructure and visitor services;
- Supporting the wider economy through business support schemes and facilitating the development of employment premises and provision of infrastructure such as broadband;
- Leveraging funding to the National Park from other sources; and
- Local National Park branding initiatives such as Dartmoor Meat, New Forest Marque and Environmental Quality Mark in the Peak District which support local producers and retailers.

Planning policy is a further key way in which National Parks and NPAs influence local businesses. The importance of National Park landscapes is reflected in the new National Planning Policy Framework[22] and individual NPA Core Strategies and Development Policies. This policy framework helps to ensure that conservation of the landscape and scenic beauty of the Parks for the benefit of businesses and people is given a high priority which is crucial to the economic prosperity of National Park areas where the tourism economy is a strong traditional component. Examples of planning policies supportive of business include the development rural growth hubs and the provision of affordable housing.

National Park activities also give rise to a range of social benefits by engaging with local communities, encouraging volunteering, investing in community facilities, contributing to awareness and education, promoting healthy outdoor recreation, and enhancing social inclusion. These activities help to strengthen local communities as well as benefiting the wider population.

By contributing to the conservation and sustainable use of the environment, the activities of the National Parks also help to enhance the delivery of ecosystem services that are valued by society and contribute to wider well-being.

Sections 4 to 8 provide more detail in terms of the key sectors or areas of influence. Future opportunities are considered in Section 9.

[22] DCLG (2012) National Planning Policy Framework. Sections 115 and 116.

4 Farming, forestry and land management

4.1 Farming and forestry are responsible for managing most of the area of England's National Parks and fundamental to their economy

England's National Parks are managed landscapes, the product of thousands of years of occupation by man, predominantly through the extensive grazing of cattle and sheep, but also through activities such as cutting, burning, and forestry and woodland management.

Today, farming and forestry remain key sectors in the management of land in England's National Parks, being responsible for managing the vast majority of the total National Park land area.

Agriculture, forestry and fishing account for 13,950 jobs or 10% of total employment in National Parks, according to IDBR data; this varies from 6% in the New Forest and South Downs up to 50% in Northumberland. However these total figures are underestimates, as significant numbers of farming and forestry businesses are not registered for VAT and/or PAYE[23]; more accurate totals for farming businesses are available via Defra statistics which are set out below.

Farming

There are approximately 7,150 commercial farm holdings[24] in England's National Parks comprising 6.7% of the England total. These holdings cover 760,188 ha (7,602 sq km), 63% of the total area of the National Parks and 8.5% of the farmed area in England. The farmed area ranges from 27% in the New Forest to 82% in the Peak District. Around 55% of the farmed area is owner occupied and 45% rented, although again this varies between National Parks (from 18% rented in The Broads to 75% in Northumberland National Park).

Key farm types in the National Parks include Less Favoured Area (LFA) grazing livestock farms (54% by number), lowland grazing livestock farms (16%), general cropping farms (10%), dairy farms (6%) and mixed farms (5%). 33% of farms are under 20ha in size, 39% are 20-100ha, and 28% are over 100ha. See Table 4-1.

The main land uses are permanent grassland (54% of the farmed area), rough grazing (27%) and crops and fallow (11%). Grazing livestock enterprises predominate, with the National Parks supporting: 428,000 cattle (7.7% of the England total), including 61,000 dairy cows and 99,000 beef cows; and significantly 2.69 million sheep (18.9% of the England total) including 1.26 million breeding ewes.

[23] IDBR data from ONS is based on VAT trader and PAYE employer information.

[24] Commercial holdings are defined as those with significant levels of farming activity, i.e. holdings with more than five hectares of agricultural land... or more than 10 cows, 50 pigs, 20 sheep, 20 goats or 1,000 poultry.

National Park	LFA grazing livestock	Lowland grazing livestock	General cropping	Dairy	Mixed	Cereals	Other	Total
The Broads	0	52	68	9	19	17	25	190
Dartmoor	522	74	89	10	32	#	40	767
Exmoor	340	59	45	5	17	11	23	500
Lake District	741	92	69	76	31	#	51	1060
New Forest	0	274	45	7	7	4	28	365
North York Moors	441	154	101	71	105	70	37	979
Northumberland	160	#	#	0	#	#	11	171
Peak District	968	0	135	176	37	#	47	1363
South Downs	0	390	149	39	87	185	78	928
Yorkshire Dales	680	11	53	55	15	0	13	827
Total	**3852**	**1106**	**754**	**448**	**350**	**287**	**353**	**7150**
	53.9%	**15.5%**	**10.5%**	**6.3%**	**4.9%**	**4.0%**	**4.9%**	**100.0%**

Source: Defra June Survey 2010 – National Parks data.
Note: # indicates suppressed to prevent disclosure of information about individual holdings.

Table 4-1: Number of commercial holdings by farm type

The 7,150 commercial farm holdings in England's National Parks employ 17,300 people (5.9% of the total farm labour in England) including: 11,905 farmers, partners, directors and spouses; 419 managers; 3,372 farm workers; and 1,597 casual workers. This is estimated to equate to over 12,000 FTE jobs, see Table 4-2.

National Park	Total	FTE estimate[25]
The Broads	545	350
Dartmoor	1547	1090
Exmoor	1121	764
Lake District	2387	1746
New Forest	1153	650
North York Moors	2220	1625
Northumberland	431	321
Peak District	3012	2179
South Downs	2920	2061
Yorkshire Dales	1964	1450
Total	**17300**	**12235**

Source: Defra June Survey 2010 – National Parks data

Table 4-2: Employment on commercial farm holdings

Farm Business Income data for the key farm types represented in England's National Parks can be derived from the Farm Business Survey (FBS) for England. This indicates that a significant proportion of Farm Business Income is dependent on public payments. Single Payment Scheme and agri-environment scheme payments equate to 95% of Farm Business Income for LFA grazing livestock farms on average and 70% for lowland grazing livestock farms on average, see Table 4-3.

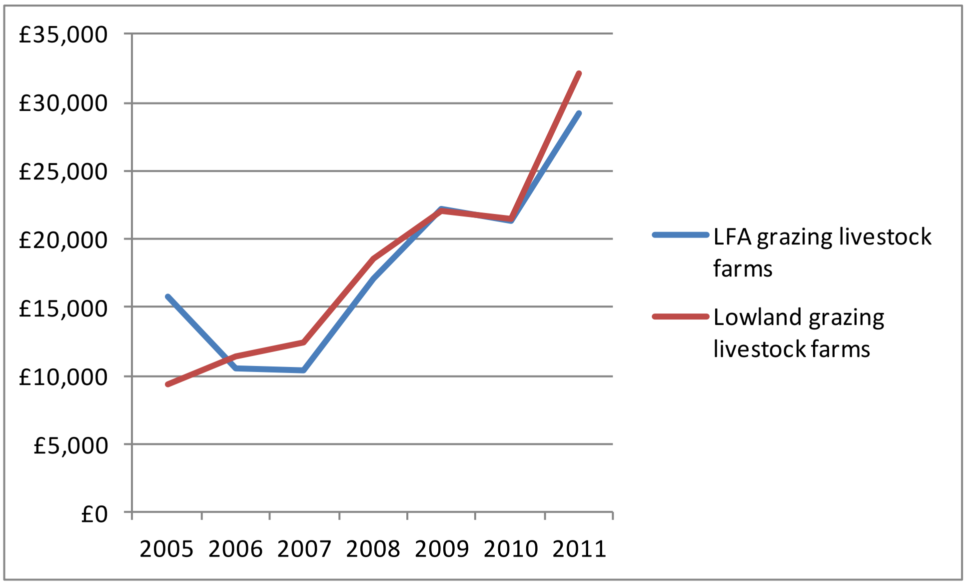
[25] Estimate based on Full time = 1 FTE; Part time = 0.5 FTE; and Casual = 0.25 FTE

Farm type	Agriculture	%	Single Payment Scheme	%	Agri-environment and other payments	%	Diversification out of agriculture	%	Farm Business Income	%
LFA grazing livestock	£583	2%	£19,457	67%	£8,066	28%	£1,106	4%	£29,213	100%
Lowland grazing livestock	£5,316	17%	£18,290	57%	£4,208	13%	£4,353	14%	£32,167	100%

Source: Farm Business Survey 2011/12 data

Table 4-3: Farm Business Income – England - 2011/12 Breakdown

Farm Business Income for the key farm types has improved in recent years, see Figure 4-1, although it is still relatively low in absolute terms amounting to around £30,000 per annum.



Source: Farm Business Survey 2011/12 data

Figure 4-1: Farm Business Income – England – 2005-2011 Trends

801,612ha[26] of farmland in England's National Parks is entered into agri-environment schemes, equivalent to 66% of the total National Park area and 81% of the Utilisable Agricultural Area (UAA). This compares to 70% of UAA for England as a whole[27]. This coverage varies by National Park, with total agri-environment scheme coverage reaching over 90% in some Parks. The Environmental Stewardship Scheme is the predominant scheme, accounting for 67% of UAA, with the classic schemes, Environmentally Sensitive Areas and Countryside Stewardship, accounting for 14% of UAA. The total annual value of agri-environment scheme expenditure in the National Parks is £57m[26]. Agri-environment schemes, particularly the Environmental Stewardship Higher Level Stewardship (HLS) scheme, make a significant contribution to the conservation of National Parks and provide a valuable income stream for farmers and land managers, as well as their contractors and suppliers. Case Study 1 provides an example of landscape scale conservation supported by HLS and other funding. Another example is the New Forest HLS, Europe's largest agri-environment scheme agreement bringing £16 million of external funding to the National Park.

[26] Natural England data dated 2 April 2013
[27] Natural England Land Management Update May 2013.

Northumberland - Linhope Estate - Landscape Scale Conservation

The Linhope Estate is a 5,673 hectare upland estate in the Cheviot Hills in North Northumberland encompassing 6 farm holdings. The Northumberland NPA is working in partnership with Natural England, English Heritage, the Forestry Commission, and the Estate using Higher Level Stewardship (HLS) and Woodland Grants to restore and recreate Biodiversity Action Plan (BAP) habitats and conserve the historic environment on a landscape scale.

The NPA:

- Made the case to Natural England to bring all of the farms on the Estate into HLS in the same time period;
- Undertook the required Farm Environmental Plans, drew up the applications and negotiated the agreement prescriptions for the HLS agreements;
- Ensured that individual but linked HLS agreements were set-up for each tenanted farm as well as the land managed in-hand;
- Commissioned an in-depth survey of the condition of the bog and heath habitats;
- Drew up an estate wide heath restoration and recreation plan and obtained funding through HLS for the work;
- Drew up shepherding plans for some of the holdings
- Drew up an estate wide bracken control program to protect historic features and assist the heath restoration program.
- Identified areas suitable for new native woodland and encouraged the Estate to apply for England Woodland Grant Scheme (EWGS) funding to create the woodland. The NPA subsequently consulted local communities about the proposals.
- Worked with English Heritage to develop a 'super monument' national pilot with English Heritage using a new Section 17 Heritage Management Agreement to cover a whole farm.

The total value of the HLS agreements set up to date is over £3 million (over the lifetime of the agreements) with an estimated 25% due to the additional prescriptions and value added by the NPA. The HLS agreements will restore 1,300 ha of blanket bog and 900 ha of upland heath, both BAP priority habitats. Over 200 ha of upland heath (that otherwise would not have been included) is being recreated due to NPA involvement. Over 100ha ha of new native woodland will be planted over the next 3 years funded by EWGS due to NPA input. The agreements provide protection for 60 scheduled monuments of which approximately 15 were added due to the NPA's input.

NNPA

The benefits include: restoration of SSSI and BAP habitats, including blanket bog which is important for carbon sequestration; re-creation of upland heath; enhanced habitat for upland waders; protection of Scheduled Monuments; increased native woodland cover, and; maintaining the viability of upland farms with hefted sheep as well as providing wider employment on the Estate.

Case Study 1: Northumberland – Linhope Estate – Landscape Scale Conservation

The beef, lamb, milk, crops and other agricultural output from farms in National Parks provide the basis for the production of food and drink both locally and more widely. Some of these enterprises are located on-farm, while others are larger concerns.

Farms in National Parks also support a range of other diversified business enterprises, including those relating to tourism and recreation (bed and breakfast, campsites, equestrian, farm attractions etc.), renewable energy production (solar photovoltaic, biomass, hydro), and rural premises for businesses in other sectors. These diversified businesses provide valuable additional income to farms, supplementing agricultural income.

It is not possible to estimate the total output from farming in National Parks, or farming's contribution to other sectors (such as food and drink production, and tourism and recreation), with any degree of accuracy from existing regional or national datasets. This is due to variations in farm type, farm performance and output within National Parks and across the country. One study[28] in the North York Moors however estimated that the agricultural output from the National Park amounted to £56million; and similar studies could be conducted for other Parks. In addition to this output, farming and land management are crucial to protecting and enhancing National Park landscapes and habitats.

Forestry

Forestry and woodland accounts for 177,465ha (1,775 sq km) or 14.6% of the total area of England's National Parks[29] and an estimated 13.7% of the England total[30]. The area of forest and woodland ranges from 3.4% in the Yorkshire Dales through to 39.5% in the New Forest. Around 48% of the forest and woodland is owned by the Forestry Commission, with the majority of the balance in private ownership. One third of the Public Forest Estate (PFE) in England is located in the National Parks.

Productive forests and woodlands play an important role in the economy of many National Parks. They produce timber and lower value woodland products such as woodchip for chipboard and wood-fuel. These outputs support saw mills and other wood processing facilities, as well as the production of renewable energy.

There are no National Park statistics for forestry output and employment in England's National Parks however approximate estimates can be derived from national figures[30] and the percentage of the country's forest and woodlands located in the National Parks. These suggest that an estimated woodland production of 600,000 green tonnes, forestry employment of around 800 jobs and GVA of around £19 million. If one includes primary wood processing, total employment and GVA dependent on the National Parks' forests and woodland increases significantly however much of this is likely to be located outside the National Parks themselves.

Forests and woodland provide extensive opportunities for both public and private recreation, contribute to the landscapes and biodiversity of National Parks, and play an important role in climate change mitigation and adaptation. Public access to woodlands and forests, particularly the PFE, is extremely important in enabling NPAs to deliver their second purpose and also economically. It is estimated that recreation on the PFE in England's National Parks has an economic valuation in the order of £50million[31].

An example of the contribution of one National Park's forests and woodland to the regional economy is provided in Figure 4-2.

[28] Askham Bryan College (2011) Agricultural Output in the (North York Moors) National Park

[29] NPE (2012) Submission to the Independent Panel on Forestry

[30] FC (2012) Forestry Facts and Figures 2012

[31] Based on EFTEC (2010) The Economic Contribution of the Public Forest Estate in England. This estimates that recreation on the total Public Forest Estate in England has an economic valuation of £160 million.

Forestry in Northumberland National Park and the North East[32]

Northumberland National Park has 22,873ha of woodland, amounting to 22% of the National Park area and 22% of the 103,000ha of woodland (>1ha) in the North East Region. The region is the second most wooded region in England in percentage terms, and has the largest and most important softwood resource in England, much of it used for primary processing (this includes, for example, Egger at Hexham, a major sub-regional employer with 450 employees). Kielder is the largest man made forest in Northern Europe and lies just on the edge of the National Park.

The forestry sector in the North East is an integral and crucial source of employment and income in rural and urban areas where few other opportunities are available. The 22% of the forest resource in the National Park make a valuable contribution to this. The region's forestry and primary processing sector directly accounts for 1,075 FTE jobs, a turnover of £201m and approximately £40 million GVA. An additional 431 FTEs and £15m GVA is supported in the supply chain and through household spending.

The North East's forests, including those in the Northumberland National Park, provide a setting for an extensive and rapidly developing tourism industry. They attract 11.3 million visits per year with forest based tourism resulting in direct, indirect and induced expenditure totalling £150m per annum. 3,520 FTE jobs are dependent on forest based tourism and its wider impacts in the region and GVA is assessed to be £71m per annum

Figure 4-2: Forestry in Northumberland National Park and the North East

Farming, forestry and other land management underpin a range of countryside sports, including shooting and fishing. In economic terms, these enterprises can be more important than agriculture. While no figures are available for the total value of these sporting activities for all ten National Parks, there is some data relating to the contribution of shooting to the local economy of individual Parks, see Figure 4-3.

Grouse shooting on the North York Moors[33]

The majority of the 50,000ha of moorland in North York Moors National Park are managed for grouse. This largely depends on investment by private owners and shooting tenants and is an important factor in the maintenance of the landscape, archaeological remains and a range of moorland bird species. Moorland management also brings significant economic benefit to rural communities, employing 45 full time keepers and over 560 days work for local contractors. The 130 shoot days each year bring an additional 3,000 days work for local people. Shooting also provides benefits in terms of expenditure on accommodation, eating and drinking in local establishments.

Pheasant and partridge shooting on Exmoor[34]

Game shooting on Exmoor supports a total of 680 FTE paid jobs in the UK, including 320 FTE jobs on Exmoor, 160 elsewhere in the South West region and 200 elsewhere in the UK. Of these, 35% are supported directly and the remainder are supported indirectly, through purchases from suppliers and expenditure of profits and wages. The total GVA resulting from game shooting is £18 million, of which £4 million remains in the local economy. Game shooting participants spent a total of £22 million on game shooting goods and services, of which £9.6million was spent on game shooting sites. This provides a valuable additional economic return to upland farms and estates and is a significant part of overall tourism spend in the area.

Figure 4-3: Shooting in England's National Parks

[32] Northwoods and Rural Development Initiatives Ltd (2011) Economic Impact of the Forest Industry to the North East of England
[33] North York Moors National Park (2012) Management Plan .A Wider View
[34] PACEC (2012) The Role of Game Shooting on Exmoor

4.2 Farming and forestry face a range of challenges including poor profitability and, in the case of livestock farming, a dependency on public payments

Farming and forestry challenges include the following:

Farming

- In most National Parks, significant constraints to farm productivity due to climate, topography and soil composition, and limited agricultural opportunities other than livestock farming.
- Low profitability, with relatively limited income from agricultural enterprises themselves and high dependency on public payments through schemes (c.f. FBS data). This in turn influences wage rates.
- Reliance on commodity prices, which are volatile, being subject to the influence of global economy and markets.
- Limited ability to take advantage of the growing demand for local produce due to distance from main markets; this limits the potential for direct selling and adding value to produce.
- Common Agricultural Policy (CAP) reform with a likely reduction in the overall level of support and changes to single payment, agri-environment schemes and LFA support.
- Achieving profitable farm production while also delivering other ecosystem service benefits many of which do not currently achieve a direct financial return to the farmer.
- Integrating agri-environment scheme requirements into viable livestock farming systems.
- Increased need for collaboration especially on commons.
- Limited opportunities for diversification of farm businesses, due mainly to distance from markets.

Forestry

- Increasing demand for timber and woodland products such as wood fuel, driven by fossil fuel prices and renewable energy/heat incentives.
- Potential for timber and wood fuel production from undermanaged woodlands.
- Increased pressure for woodland creation for policy and commercial reasons.
- Market conditions and co-ordination of supply and demand which are currently insufficient to drive improved management and creation.
- Uncertainty over the future of grant schemes (the Rural Development Programme for England (RDPE) and the England Woodland Grant Scheme (EWGS) element of this).

Both farming and forestry

- Land use decisions – farming and forestry often set against each other as competing land use options.
- Aging workforce and lack of opportunities for young people to enter the farming and forestry sectors.
- Poor broadband provision which affects business efficiency, productivity and access to new opportunities.
- Balancing good farming and forestry management with recreational pressures and delivery of other ecosystem services.
- Climate change in the form of increased temperatures, changing rainfall patterns, and more extreme weather events, all of which impact on livestock, crops and growing season.

Yorkshire Dales - Farm advice and support

Farming in the uplands is challenging, both physically and economically. The management of the Yorkshire Dales National Park by farmers and landowners is intrinsically important, not only for the conservation of the landscape but also to help conserve and protect some of Britain's rarest habitats and species. Farms are important rural businesses and employers and are a vital component of rural society.

Yorkshire Dales NPA works with farmers and landowners by providing advice, securing access to funding, and supporting initiatives to improve returns from farming.

- The **Farm and Countryside Service** guides farmers and landowners on good conservation management. It also signposts them to, and helps them access, the wide range of grants and schemes available in the National Park, including Environmental Stewardship, Catchment Sensitive Farming, and the Farming Forestry Improvement Scheme. Hundreds of farmers have benefited from free Farm Environment Plans enabling entry into Higher Level Stewardship; over 80% of the National Park is in some form of agri-environment scheme. Advice on renewable energy production on-farm is also provided.

- The **Limestone Country Project** ran from 2002 to 2008 with the objective to improve limestone grassland habitats by encouraging a return to mixed farming using hardy upland cattle breeds. The project provided a successful model for the promotion of conservation grazing, establishing 18 new cattle herds (12 different native breeds) across 1,800ha. The project also supported investment in infrastructure, such as livestock housing and handling facilities, and support for marketing traditional breed beef. All the farmers who signed up to the project have maintained or developed their herds further and are now using Environmental Stewardship (HLS) to help refine their grazing and management practices. Limestone Country Beef Ltd, which evolved from the project with the support of the NPA, is owned and run by the farmers and is selling beef through the local butchers and box schemes. This route to market helps support premium prices which are essential for the profitability of the cattle enterprises.

Limestone Country Project


Limestone Country Project

Case Study 2: Yorkshire Dales - Farm advice and support

4.3 National Park Authorities are working with partners to secure a long term, sustainable future for farming and forestry in the National Parks

NPAs have a longstanding and close working relationship with farmers and foresters in the National Parks, both as authorities and landowners (in some areas). NPA influences and activities include the following:

Farming

- 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 (see Case Study 1).
- 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 (see Case Study 2).
- 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 (see Case Study 2).
- Renewable energy advice and support, designed to encourage the uptake of suitable renewable energy technology on-farm, to reduce energy costs, generate additional income and cut carbon emissions.
- Planning policies that support farm diversification and ‘home on the farm’ opportunities for extended family accommodation.

Forestry

- Woodland advice service, designed to promote best practice including the management of under-managed woodlands.
- Woodland schemes and grants, designed to encourage woodland creation, active management and the restoration of ancient woodland. This includes securing locally targeted, nationally funded schemes and providing NPA grants.
- Woodland product initiatives, designed to support the production, processing and marketing of high quality timber, coppice and other woodland products. This includes supply chain and quality assurance/certification activities.
- Wood fuel initiatives, designed to support the development of the wood fuel sector in National Parks. This includes business and marketing support, technical advice, and grants for equipment and boilers (see Case Study 3).
- Habitat network and opportunity mapping to identify potential sites for woodland creation.

Farming and forestry

- Branding and marketing initiatives, designed to raise awareness of and grow the market for high quality local produce from farming and forestry in the National Parks.
- Training and skills development, designed to promote both traditional and modern skills in farming and forestry. This includes short courses, training programmes and apprenticeships. This also provides young people with the opportunity to enter the sector.

Farming and forestry businesses produce valuable food and timber and deliver the vast majority of the land management in National Parks, with the support of NPAs and their partners. This land-based activity underpins a significant tourism and recreation economy, provides primary resources for use by other businesses, and supports a wide range of ecosystem services. These areas are explored in the following sections.

Supporting the wood fuel sector in England's National Parks

NPAs are encouraging the development of small scale wood fuel sector for both environmental and economic benefits. Publicly and privately managed woodlands offer huge potential for the production of wood fuel for heat generation. The industry generates additional income, creates and sustains jobs, brings unmanaged and under managed woodlands and plantations into more efficient use, and significantly reduces carbon emissions from heating (compared to fossil fuel systems). Examples of two initiatives are outlined below:

Northumberland - NU Logs

As the lead partner in Northumberland Uplands LEADER, Northumberland NPA has played an active role in developing the NULogs project in association with Northwoods. This ran as a pilot project from 2008-2012. NULogs aimed to unlock the economic potential of un-managed woodland and support small operators in the wood fuel sector in the area.

It supported existing and new wood fuel suppliers through: business support and advice; technical assistance on harvesting, storing, processing and delivery; training in production and marketing, including a subsidised study tour to Sweden; networking and marketing opportunities; brand development; an online map of suppliers of firewood and heating equipment; and education for public and woodland owners. A Northumberland Firewood Fair was also held to promote the sector.

An evaluation of NULogs shows that 24 local businesses were supported, including three start-ups. These include several which received support to access the Bio-energy Capital Grants Scheme, creating 5.5 jobs and safeguarding a further 3 jobs. In addition, a total of 44 training days were delivered.

www.northwood.co.uk

Exmoor WoodCert and Exmoor Woodheat Project

Exmoor NPA and its partners have been helping to develop the wood fuel sector through a number of initiatives including:

- Exmoor Woodcert. This is a local woodland and timber Group Certification scheme, for local woodland owners and buyers and users of local certified timber. Its aim is to promote the sustainability and quality of local wood and products and help to secure markets. The scheme was set up by and is now managed by the NPA. The NPA is also a member of Woodcert and all its woodlands, over 500ha, are certified.
- Exmoor Woodheat. The NPA and Exmoor Trust, in association with other partners, launched this scheme following a successful bid to the Department of Energy and Climate Change for £189,000 funding through its Renewable Heat Premium Payment Communities Scheme. Grants of up to £3,000 are available for farmers and homeowners with no access to the natural gas 'network' in the Exmoor area, to enable them to install log, pellet or wood chip heating systems.

Other related NPA activities include: free wood fuel potential audits; wood fuel extraction, processing, handling and storage events; and free moisture meters for Exmoor Woodheat customers.

Case Study 3: Supporting the wood fuel sector

5 Tourism and recreation

5.1 England's National Parks are centres for tourism and recreation activity

Alongside conservation and enhancement, one of the two main aims of National Park designation is to promote opportunities for the understanding and enjoyment of their special qualities by the public. National Parks therefore form important centres for tourism and recreation, and education. This is reflected in the large numbers of visitors that National Parks receive and the prominence of tourism and recreation in their local economies.

Section 2 demonstrates that tourism related sectors such as accommodation and catering are important in the local economies of all of England's National Parks. However, the overall economic significance of tourism and recreation is greater than this, as money spent by visitors also supports retailing and other activities, as well as services that support the tourism sector. Tourism also helps to support important community services such as post offices, village shops, pubs, public transport and recreational facilities such as swimming pools.

England's NPAs have commissioned studies which have used the Scarborough Tourism Economic Activity Monitor (STEAM) to estimate the volume, value and impact of tourism activity. The latest available estimates indicate that England's ten National Parks:

- Receive a total of 95 million visitors each year;
- Attract more than 87 million day trips each year;
- Receive more than 24 million visitor days from staying visitors; and
- Attract annual visitor expenditure of £3.0 billion.

The number of visitors each year ranges from 1.3 million in Exmoor and Northumberland to more than 46 million in the South Downs. The figures also show that the profile of visitors varies significantly, with Dartmoor, Exmoor, the Lake District and the North York Moors attracting a relatively high proportion of staying visitors, compared to the South Downs where day trips predominate. These variations reflect the accessibility of National Parks from centres of population. While the South Downs is accessible to large numbers of day visitors from South East England, other National Parks such as the Lake District and Exmoor are relatively less accessible from centres of population so that staying visitors are relatively more important for their tourism economies. See Table 5-1.

National Park	Year of Estimate	Day trips	Staying visits	Total visits	Total visitor days from staying visitors
The Broads	2011	6,308,000	602,800	6,910,800	2,911,200
Dartmoor	2011	2,042,000	234,000	2,276,000	906,000
Exmoor	2011	1,060,700	266,500	1,327,200	957,700
Lake District	2010	12,960,630	2,263,200	15,223,830	8,994,520
New Forest	2009	3,161,000	360,000	3,521,000	1,543,000
North York Moors	2011	5,099,650	477,920	5,577,570	1,914,820
Northumberland	2011	1,290,200	84,490	1,374,690	333,560
Peak District	2011	7,954,000	733,000	8,687,000	3,084,000
South Downs	2011/12	44,316,000	1,992,000	46,308,000	1,992,000
Yorkshire Dales	2011	3,117,000	410,000	3,527,000	1,490,000
Total		**87,309,180**	**7,423,910**	**94,733,090**	**24,126,800**

Note: Figures in the table are for day trippers and staying visitors within the National Park boundaries. Most National Parks also produce estimates for a wider "area of influence". These are the latest available estimates.

Table 5-1: Estimated tourism visits to England's National Parks

Estimates – largely using the STEAM model – put the value of annual tourism expenditure at between £66 million in Northumberland and £935 million in the Lake District (Table 5-2). These figures emphasise the importance of overnight tourism for the economies of the National Parks. For example, even though the Lake District receives only one third as many visits each years as the South Downs, the estimated size of its tourism economy is more than twice as large, because it receives many more staying visitors.

National Park	Year of Estimate	Annual tourism expenditure (£m) – National Park	Annual tourism expenditure (£m) – National Park + Area of Influence
The Broads	2011	345	469
Dartmoor	2011	119	157
Exmoor	2010	93	226
Lake District	2010	935	935*
New Forest	2009	176	176*
North York Moors	2011	264	434
Northumberland	2011	66	152
Peak District	2011	426	516
South Downs	2011/12	464	464*
Yorkshire Dales	2011	199	528
Total		**3,087**	**4,057***

**Figures for Lake District, New Forest and South Downs are for expenditure within NP boundary only – no estimate is available for a wider "area of influence"*

Table 5-2: Estimated tourism expenditure attracted by England's National Parks

Table 5-2 also gives estimates – where available – for the size of tourism expenditure within a wider "area of influence" which includes neighbouring towns and villages which cater for National Park visitors. Annual visitor expenditures within these wider areas of influence total at least £4.0 billion per year. The economic impact of tourism in Exmoor, Northumberland and the Yorkshire Dales is much greater in this wider area of influence than within the National Park boundary itself.

The studies have also 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[35] in the wider area of influence, making a total of 68,000 FTE jobs within the National Parks and their wider areas of influence (Table 5-3). These estimates of expenditure and employment suggest that National Parks support between 15% and 20% of all rural tourism activity in England[36].

The impact on employment within the National Parks is estimated to range from just over 1,000 FTE jobs in Northumberland to almost 15,000 FTE jobs in the Lake District.

		Employment (FTE) supported by tourism:	
National Park	**Year**	**Within National Park**	**Within National Park + Area of Influence**
The Broads	2011	4,420	6,367
Dartmoor	2011	2,172	3,014
Exmoor	2010	2,105	4,301
Lake District	2010	14,865	14,865*
New Forest	2009	2,829	2,829*
Northumberland	2011	1,120	3,182
North York Moors	2011	4,495	7,857
Peak District	2011	7,570	9,477
South Downs	2011/12	4,883	6,976
Yorkshire Dales	2012	3,790	9,354
Total		**48,249**	**68,222***

**No separate estimates are available for the wider area of influence of the Lake District and New Forest National Parks, so the figures given are those for employment within the NP boundary*

Table 5-3: Estimated employment supported by visitor expenditures

Detailed breakdowns of the employment supported by particular types of expenditure are available for some National Parks. It is estimated that 28% of this employment involves the provision of accommodation and a further 22% the supply of food and drink (Table 5-4).

[35] This figure is based on 8 National Parks only.

[36] Latest estimates by Natural England from the Monitor of Engagement with the Natural Environment put expenditure supported by countryside visits at £20 billion per year. Natural England (2012) Monitor of Engagement with the Natural Environment: The national survey on people and the natural environment. Annual Report from the 2011-12 survey. Available from: http://www.naturalengland.org.uk/ourwork/research/mene.aspx

	The Broads, 2011	Lake District, 2010	New Forest, 2009	Northumb -erland, 2011	North York Moors, 2011	Yorkshire Dales, 2011
Accommodation	917	4,821	580	250	1,233	1,556
Food & Drink	1,407	3,729	566	402	834	569
Recreation	630	1,196	291	129	405	270
Shopping	1,607	1,212	670	75	1,006	645
Transport	320	914	147	54	204	137
Total Direct Employment	4,881	11,891	2,253	910	3,682	3,178
Indirect Employment	1,486	2,974	576	209	813	612
TOTAL	**6,367**	**14,865**	**2,829**	**1,120**	**4,495**	**3,790**

Table 5-4: Total employment supported by tourism spending in selected National Parks (FTE)

For some National Parks, the impacts on employment are estimated to be much greater in the wider “area of influence”. 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.

Dartmoor - The Dartmoor Partnership

The Dartmoor Partnership was formed in April 2008, when Dartmoor Tourist Association joined forces with West Devon Borough Council, Dartmoor National Park Authority, the Duchy of Cornwall and Dartmoor Farmers Association. The Partnership is now established as the official tourism and trade organization for Dartmoor, a representative for local people, local business and a champion of Dartmoor as a tourist destination.

The work of the Partnership includes:

- Branding – creation of a unified brand for Dartmoor – selling the link between the landscape, food and farming.
- Communications – promoting Dartmoor in the press and media, issuing newsletters to businesses and consumers, maintaining the Dartmoor.co.uk website and Facebook presence. The Dartmoor.co.uk website received 136,000 visits in 2011;
- Marketing materials – including visitors guide, attractions and activities map, badges, plaques, competitions, leaflets and the Dartmoor marque;
- Market intelligence – the Partnership has commissioned regular monitoring reports on the local tourism economy, which employ the STEAM model to assess the volume, value and impact of visitor spending.
- Training and technology support for members, through seminars, targeted training events and online booking through the website Dartmoor.co.uk;
- Active Dartmoor project – promoting the National Park for cycling, climbing, kayaking and other sports, with funding of £130,000 over three years;
- Events – including local food events and Dartmoor Showcase days to promote local produce and attractions. Dartmoor Partnership events have included Dartmoor on Your Doorstep, Photography Days, Showcase Day, Local food festival, Familiarisation Visits, Business Workshops and Network Events.
- Working with Dartmoor Farmers Association to support and promote local produce.
- Dartmoor First - a local award for Sustainability – has now been awarded to nearly 80 businesses.

After initial grant funding from the Greater Dartmoor LEAF and Dartmoor NPA, the Partnership is now required to be self-supporting, receiving income from its members, advertising, commercial sponsorship and project funding.

The link with the farming industry was crucial in establishing the Partnership and securing the funding to employ a professional manager. The Dartmoor Partnership is raising the profile of Dartmoor as a quality destination and as a quality provider of local produce. A joint branding exercise with the Dartmoor Farmers Association is ensuring maximum exposure and a successful partnership between tourism and farming, which will benefit both tourism and farming communities as well as the special qualities of the National Park.

The Dartmoor Partnership has more than 450 members and tourism on Dartmoor is estimated to be worth £119m a year to the local economy, supporting 2,172 full-time equivalent jobs (STEAM 2011). The Dartmoor brand is now used by Dartmoor Partnership members and on a variety of publications and publicity materials.

dartmoor

www.dartmoor.co.uk

DNPA

Case Study 4: Dartmoor – The Dartmoor Partnership

5.2 Sustainable tourism and recreation in National Parks – providing opportunities for enjoyment and caring for the environment

The NPAs are charged with two main responsibilities:

- To conserve and enhance the natural beauty, wildlife and cultural heritage; and
- To promote opportunities for the understanding and enjoyment of the special qualities of National Parks by the public.

In addressing these aims the NPAs recognise that people are attracted to the National Parks by the quality of their landscapes, historic environment and wildlife, and by their tranquil and unspoilt nature.

One of the most important responsibilities of the NPAs is therefore to promote sustainable tourism and recreation – encouraging tourism and recreational activities that respect the quality of the environment and help to maintain that quality for future visitors and future generations.

NPAs have supported a wide range of different initiatives designed to promote sustainable tourism and recreational activities, including:

- Branding, marketing and destination management, designed to promote the sustainable growth of tourism activity. Much of this activity focuses on the quality of the environment of the National Parks and aims to strengthen linkages with land management and local produce (Case Study 4);
- Visitor payback or giving schemes, designed to increase the benefits that tourism brings to the environment and heritage on which it depends, by encouraging visitors to donate to environmental, heritage and community projects within the National Parks (Case Study 5);
- Sustainable transport initiatives, designed to reduce the pressure of transport on the environment of the National Parks, by promoting alternatives to car use such as public transport, cycling and walking (Case Study 6);
- Tourism and recreational infrastructure, designed to encourage access to the countryside, to promote appreciation of the environment and heritage, and to manage the impact of visitors. This includes provision of access and rights of way, visitor centres, signage and interpretation;
- Initiatives to promote food and local produce to visitors, thus enhancing the benefits that tourism brings to local economies and the land management sector, and strengthening local economic multipliers;
- Education and awareness raising activities, designed to promote understanding and awareness of the wildlife, landscape and heritage of the National Parks and to encourage appreciation of conservation issues among visitors and the public; and
- Supporting and contributing to international initiatives, such as the European Charter for Sustainable Tourism in Protected Areas and International Dark Sky Reserves.

Lake District - Visitor Giving via Nurture Lakeland

Tourism in Cumbria brings an estimated £2 billion into the economy annually and supports 1 in 5 jobs. Nurture Lakeland has established Visitor Giving as a simple way of inviting voluntary donations from visitors who feel inspired to put something back into looking after the places they visit, helping to ensure that tourism contributes to the maintenance of the environment on which it depends. Tourism businesses are invited to collect the contributions from their customers. The money raised then goes to support a variety of projects across Cumbria, delivered by many committed organisations who are working hard to protect the landscape and heritage and to support local communities.

www.nuturelakeland.org

Businesses act as the conduit between customer and conservation, which can help to build stronger links between businesses, the community, visitors and the environment, helping to make tourism more sustainable in the longer term. Visitor Giving can help to raise awareness among visitors and to strengthen businesses' environmental credentials, providing opportunities for positive publicity and marketing.

Businesses can choose which projects they support, with recent examples including:

- Fix the Fells – A project to repair and maintain upland paths, currently trodden by over 10 million people each year, in order to keep them fit for the future. Visitor Giving has inspired visitors with a love of fell-walking to contribute around £500,000 to this vital work.
- Red Squirrels Conservation - Visitor Giving contributes more than £10,000 annually to help to protect these iconic, much-loved but endangered creatures in Cumbria and to raise awareness and monitoring of red squirrel populations.
- Nurture Small Grants Fund - Fundraising by businesses in Cumbria means that each year, the Small Grants Fund is able to offer grants of up to £1,000 to help make a difference in local communities who would otherwise struggle for financial support, such as the Orton Community Woodland.

Visitor Giving offers a variety of options. The most successful and popular method involves accommodation guests adding a small voluntary contribution (perhaps 50p, £1 or £2) to their bill. Visitor attractions and event organisers often use a ticket or entry fee 'levy', which may add 10p or 50p to the price of each entry or trip. Other businesses may ask for a donation added to the sale of a particular product (10p per cup of tea/ coffee or pint of beer, £1 per outdoor jacket or pair of socks etc). Businesses are asked to pass on the money raised twice per year.

Examples of businesses participating in the scheme:

- Sarah Nelson's Grasmere Gingerbread is donating £1 to Nurture Lakeland from every bag of gingerbread crumbs it sells. They expect to sell over a thousand bags of gingerbread crumbs every year and are aiming to raise over £1,000.
- Heart of the Lakes wanted to offer guests the opportunity to contribute to a local conservation project. When guests book a cottage, a small donation of £2 per week is added to the bill; so far the company has raised over £190,000 through Visitor Giving.
- South Lakeland Parks invite guests to make a small donation through their bookings, and have raised £55,564 to date for a variety of projects.

Case Study 5: The Lake District – Visitor Giving

New Forest – New Forest Tour

Local businesses, visitors and the environment have all benefited from the growing success of the award-winning New Forest Tour. During the summer four open-top buses run a hop-on hop-off service on two scenic routes around the heart of the National Park. Customer numbers have more than tripled from 9,000 in 2007 to nearly 34,000 in 2011. By reducing the number of cars on the roads, the Tour reduces the impact of traffic on the National Park and helps cut carbon emissions. In 2011 the tour saved more than 147,000 private car miles. In 2012 the Tour beat global competition to win a 'Highly Commended' award in the Best Responsible Transport category at the Virgin Holiday Responsible Tourism Awards.

NFNPA/NFT

The New Forest Tour plays an important economic role. It links customers with local businesses such as visitor attractions, leisure providers, shops, pubs, restaurants and accommodation. Increased customer numbers have supported existing businesses and jobs and helped rural village shops and pubs at the heart of local communities. The Tour has also increased its advertising revenues and sponsorship. Its links with towns beyond the Park's boundary also allow more spending customers to visit the Park in a sustainable way. In 2011 it is estimated that the Tour contributed about £480,000 to the local economy, and this is expected to grow in the future.

The Tour has proved to be such a success that the National Park Authority has added a new route for 2013, which means the entire National Park area will now be covered. It is hoped that the prospect of more customers will attract new business opportunities and investment.
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NFNPA/NFT

Case Study 6: New Forest – New Forest Tour

The activities and initiatives undertaken by the NPAs and their partners are important in sustaining the visitor economies of England's National Parks, and encouraging the development of patterns of tourism that benefit their economies while respecting and appreciating their natural and heritage assets.

The tourism sector is closely linked to the wider business economy of National Parks, and much of the work of the NPAs supports businesses in both in tourism and the wider economy. The following section examines other sectors of the National Park economies and how they are influenced by the activities of the NPAs.

6 Supporting business and enabling economic activity

6.1 England's National Parks support a wide range of businesses and economic activity

Just over two thirds (68%)[37] of all businesses in National Parks are in sectors other than agriculture, forestry and fisheries and accommodation and food services, i.e. those most directly associated with farming, forestry and land management and tourism and recreation. The proportion of businesses in these other sectors varies from 29% in Northumberland National Park through to 85% in both the New Forest and South Downs National Parks. The average for England as a whole is 89%. These businesses operate in a range of sectors, with those in the professional, scientific and technical sector most numerous, followed by construction and retail.

Over three quarters (76%)[37] of total employment in National Parks is linked to these other sectors. This proportion varies across National Parks, with other sectors accounting for as much as 89% of total employment in the South Downs. Key sectors by employment include education, wholesale and retail, and health.

Many businesses in these other sectors are small family businesses or, increasingly, small office - home office businesses, as indicated in Section 3. These include start-up businesses established by residents or incomers attracted by the prospect of living and working in the high quality of environment which the National Parks offer. However there are some larger employers in these other sectors in National Parks. Examples include Boulby Potash mine and RAF Fylingdales in the North York Moors which between them employ around 1,226 people and account for 17% of total employment in the National Park, although these are the exception.

Businesses in other sectors are located in shops, offices and workshops in market towns, on the high street and in small scale industrial estates, as well as dispersed across the villages and countryside of the National Parks.

Many of these businesses have a direct or, more often, indirect link to the National Park. They include: businesses which service visitors attracted in to the National Park as well as local people (for example, shops, pubs, restaurants, and cafes); businesses which service the land-based sector which manages the majority of the land in the Parks (for example agricultural suppliers, contractors and professional advisers); and those which sell and market local produce derived from the area.

A number of economic studies[38] [39] [40] have explored the linkage between businesses and the National Parks through business surveys, see Table 6-1. These showed that:

- 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.

[37] IDBR 2012 data indicates these 'other' sectors account for 15,200 businesses and 106.600 jobs in England's National Parks

[38] SQW (2004) The economic value of protected areas in the North East. Report to ONE North East

[39] SQW (2006). Prosperity and Protection – The economic impact of National Parks in the Yorkshire and Humber regions. Report for the Council for National Parks

[40] SQW Consulting (2008) Contribution of the Peak District to the economy of the East Midlands. Report for East Midlands Development Agency

These percentages appear to be relatively consistent across the five National Parks studied. Unsurprisingly, the positive relationship with National Parks was especially important for tourism businesses and retail businesses which benefit from tourism spend. 89% of hotels and 69% of retail businesses surveyed in the Peak District, for example, indicated a positive impact, compared to 56% for all businesses.

Percentage of businesses in the National Park agreeing that	**Northumberland 2004**[38]	**North York Moors, Yorkshire Dales & Peak District 2006**[39]	**Peak District 2008**[40]
The quality of the landscape and environment positively impacts on business performance	60%	69%	56%
The business is directly or indirectly dependent on the landscape and environment	-	65%	64%
The effect of a deterioration of the landscape and environment would have a serious or some impact on the business	65%	58%	60%
The National Park designation has a positive impact on the business	53%	51%	-

Table 6-1: Views of businesses surveyed in selected National Parks

In many National Parks, there is a strong local economy, with trade between local suppliers and customers being important. To some extent this is a reflection of location and remoteness, but it is also relates to the size and sector of businesses which predominate in National Parks.

There is also inter-dependence between businesses located within National Parks and towns and cities located close to the Park boundaries, with many NPAs citing the importance of 'gateway towns' to the National Park economies and vice versa i.e. National Parks being an important influence on towns outside the park boundary. The 2006 study[39] that focused on the three National Parks in Yorkshire and Humberside found that 26% of businesses in gateway towns felt that National Park status was important in attracting business to the towns and that it was a pull factor for several businesses re-locating to the towns.

The 2008 Peak District study[40] went further, in terms of assessing the contribution of the National Park to the regional economy. It found that 40% of all businesses surveyed would be seriously affected by a deterioration of the landscape, and that these businesses account for £314 m of turnover and £119m of GVA. When a multiplier of 1.3 was applied[41], this equated to a contribution of £408m to regional turnover and £155m to regional GVA, and supported 7,000 jobs in the region. This highlights the economic importance of the NPA's role in maintaining a high quality environment.

[41] Regional multipliers typically range from 1.3 to 1.7, based on the English Partnerships (2004) Additionality Guide: Method Statement. The lower figure was used in the study given the Park's proximity to major sources of supply outside the region.

Peak District – Business Support and Facilitation

The Peak District NPA has for many years taken a pro-active business facilitation role, and has developed and operated a number of initiatives working with businesses for the benefit of the National Park and its economy. Some of the key ones are outlined below:

The **New Environmental Economy Programme** (2002-2008) used a package of linked projects and schemes to encourage and support businesses in the Peak District, and increase their profitability on the basis of their links to the environmental and cultural character of the Peak District. A total of £3.75 million of public and private money was invested through the programme, with funding drawn from a variety of regional, national and European Union sources and match funding from businesses themselves. The programme supported over 625 businesses. The grant scheme alone created 132 jobs and contributed to the maintenance or enhancement of a further 1,543 jobs. It also supported the creation of more than 2,880 m^2 of new workspace, helped to launch 193 new products or services, and 70 new or improved facilities or attractions.

The **Live and Work Rural Programme** (2009-2012) provided advice, training and seed-corn funding to help local businesses develop and thrive. Overall £1.25 million of public and private money was invested in the area through the programme. It created a total of 21 net additional businesses and safeguarded a further 8 firms; created a total of 28 net additional jobs and safeguarded a further 13 existing jobs; and generated/safeguarded a net additional £613,200 worth of annual GVA. It is estimated that the total GVA created or safeguarded in the National Park will amount to up to £4.8 million over ten years (or £5.56 of additional GVA per £1 of expenditure). Going forward, a rural business advisor employed by the NPA will continue to help small businesses grow, protecting and creating jobs.

The Peak District **Environmental Quality Mark** has been a further lasting output from both of the above programmes. This innovative scheme accredits environmentally friendly businesses with a passion for Peak District and helps them use that accreditation to market themselves to residents and visitors. Business benefits include official recognition of green achievements, demonstrating a commitment to sustainability, reduced running costs, networking with like-minded businesses and greater customer focus, all leading to improved business profitability. The scheme has 65 business members. It is now self-funded and run by a Community Interest Company on behalf of the NPA.

PDNPA/EQM

PDNPA

Case Study 7: Peak District – Business Support and Facilitation

6.2 Businesses face a number of issues and challenges, many generic to rural areas and a few specific to National Parks

National Parks are prosperous places and good places to do business, as evidenced by the data above and in Sections 2 and 3. However businesses in National Parks face a number of challenges.

These challenges partly relate to the general economic climate, which is affecting businesses and employment in National Parks as part of the wider economy. There is evidence however that at least some National Park economies have been relatively resilient in the recent downturn (for example in terms of business numbers and employment over the period 2009-2012, see Section 2).

There are also challenges which relate to National Parks being rural or remote rural areas, irrespective of their designation as protected landscapes. These challenges[42] include:

- Lack of diversity of businesses and employment in some National Park economies, with high reliance on farming, forestry and tourism;
- Seasonality of economic activity;
- Lack of access to markets and passing trade in some National Parks;
- Limited stock and quality of employment premises and land available to be developed for employment;
- Limited road and rail infrastructure, and public transport services;
- Significant levels of commuting in and out of some National Parks;
- Low broadband speeds and/or lack of broadband altogether, and poor mobile phone reception;
- A shortage of modern and traditional skills;
- A limited number of young people available to join new or growing businesses;
- Low affordability of housing; and
- Lack of access to reasonably priced and reliable energy supplies in some National Parks.

A further challenge relates to growing businesses sustainably within the environmental limits of National Parks. This particularly applies to extractive industries (e.g. quarrying and mining) and defence, for example, but it is also relevant to other sectors.

In this context, it is recognised that planning requirements are sometimes perceived to be a barrier to economic activity or growth in National Parks. It is important to note however that the evidence does not support this perception. A significant majority of planning applications in National Parks are approved by NPAs and there is a higher overall approval rate in National Parks than for England as a whole, see Figure 6-1. It is only in a minority of cases that limitations will be imposed through the planning system on the expansion or relocation of certain types of business or activity in National Parks; this is generally where there is large scale or inappropriate development proposed.

These recent statistics appear to bear out one of the findings in the conclusions of the 2006 study[39] focused on the three National Parks in Yorkshire and Humberside.

"*There is no evidence that businesses as a whole within the Parks are suffering from undue restrictions compared to those elsewhere. There is every reason to suppose that all existing English National Parks produce similar effects, as would any National Parks designated in future*."

[42] Many of these challenges are recognised by 'Rural areas as engines of economic growth' (RELU, 2013)

- The nine NPAs received 5,000 planning applications in 2011/12
- NPAs granted approval for 89% of planning applications compared to the English average of 87%.
- NPAs approved 89% of major and minor applications (excluding 'other' applications), against an English average of 84%.
- NPAs approved 91% (48) of major development applications.
- NPAs compare well against other LPAs in terms of speed of approval:
  - 60% of major developments were approved by NPAs within 13 weeks, compared to the English average of 57%.
  - 69% of minor applications were approved within 8 weeks compared to the English average of 70%.

Source: DCLG (2012) Planning Statistics for year ending June 2012 for 9 NPAs, excluding the South Downs

Figure 6-1: NPA Planning Statistics

6.3 National Park Authorities are helping to develop diverse and sustainable rural economies in England's National Parks

NPAs, in pursuing their core purposes, have a duty to foster the social and economic wellbeing of local communities in National Parks.

NPAs seek to do this by encouraging diverse and sustainable rural economies, and supporting businesses which recognise, maintain and enhance the National Park. Relevant NPA activities and initiatives include the following:

- Positive development management advice, designed to guide business owners and developers through the planning process from an early stage and ensure that suitable planning applications are submitted (Case Study 8).
- Promoting and providing employment space, designed to enable business growth and attract new businesses. This includes employment land allocations, developable sites, incubator units and rural growth hubs to attract clusters of businesses.
- Economic development activities, designed to progress priority infrastructure, attract inward investment, and support balanced, economic growth. This includes working with Local Enterprise Partnerships (LEPs) and local authority economic development officers.
- Environmental economy initiatives, designed to support the development of sustainable businesses which benefit the National Park. This includes grants for suitable enterprises, and the development of green business schemes and environmental quality marks.
- Business networking initiatives, designed to increase local trade between businesses and encourage local procurement. These also help improve beneficial working between local businesses and the National Park (Case Study 7).
- Initiatives to improve broadband and mobile phone coverage, thereby enabling businesses to benefit from better communication and access new markets.
- Training and skills development programmes, designed to address shortages in traditional and modern skills. This includes apprenticeships, short courses, and live-work programmes.

- Renewable energy initiatives, designed to reduce energy costs, promote low carbon business, generate additional income and utilise available natural resources. These include through adopting a positive planning policy, promoting projects, awarding grants and providing advice (Case Study 9).

Exmoor – Cutcombe Livestock Market

The Cutcombe Livestock Market provides a good example of a positive and flexible approach to planning which has helped retain and rejuvenate a vital facility benefiting farming and food businesses in Exmoor and supporting grazing management of the valued moorland landscape.

A livestock market has operated from the central moorland village of Cutcombe for over 60 years. The business was bought by 194 local farmers in 1997. The market had a very good reputation because of the high quality of stock that Exmoor produces however, over past decades the market infrastructure had gradually deteriorated. £1m was needed to redevelop the site and provide a modern market.

Cutcombe Livestock Market is exceptionally important to Exmoor. Without a modern and conveniently located livestock market there would be increased costs to farmers to take their stock to market and less incentive to continue farming at levels needed to control scrub encroachment.


www.exmoorfarmers.co.uk


www.exmoorfarmers.co.uk

The Exmoor NPA worked with the Cattle Market, Somerset County Council and a local developer to help facilitate the replacement market. Regional and European grant opportunities were fully investigated but not available, so to help pay for the market the NPA agreed to 13 open market houses as an exception to its planning policies, which normally allow only affordable homes for local people. The NPA also gave a Sustainable Development Fund grant for the sustainable and renewable energy elements of the design of the new market building.

The approved scheme incorporates a new cattle market, business development, and 25 homes, 12 of which will be affordable for local people. The Livestock Market building was finished and operational in 2010. It has brought significant improvements in terms of the handling and operation of the market, and generated increased numbers of stock and throughput. It draws in customers from across the country to buy Exmoor stock. The market will bring social, economic and landscape benefits in the National Park for years to come.

Case Study 8: Exmoor – Cutcombe Livestock Market

Yorkshire Dales – Hydro-power

The Yorkshire Dales NPA has taken a highly proactive approach to encouraging the installation of hydro-power schemes within the National Park. In the last 2 years, this has resulted in 3 significant – and very different - hydro-power schemes coming 'on-stream'.

The Halton Gill Micro Hydro Scheme is a 40kW high head micro-scale hydro scheme with a projected energy generation equivalent to the consumption of 20-25 households. The project is a farm diversification project entirely independent of agriculture, and providing an upland farm with an alternative source of income that is extremely long-lasting with low maintenance and running costs.

River Bain Hydro Ltd is the first community owned small-scale hydro project in the Yorkshire Dales National Park. The 45kW hydro power plant was completed in 2011, generating approximately 185,000kWh per year, enough to power 40 houses. Surplus monies from the sale of hydro electricity to the National Grid are funding local environmental projects.

Linton Falls hydro was built in 1909. The site (now a scheduled monument) was abandoned in 1948 and was restored by its owners, JN Bentley Ltd, to produce 500,000 kWh of electricity a year (see below). The electricity generated by Linton Falls, equivalent to the average energy use per year of 90 family homes, is being supplied to the National Grid.

YDNPA

Amongst other things, the NPA has:

- Funded a Park-wide feasibility study;
- Grant-aided 14 specific feasibility schemes (including for all 3 of these sites);
- Grant aided the installation of the Halton Gill and Bainbridge schemes;
- Given planning permission for all 3 schemes;
- Facilitated the securing of other necessary consents, notably from the Environment Agency and Natural England.

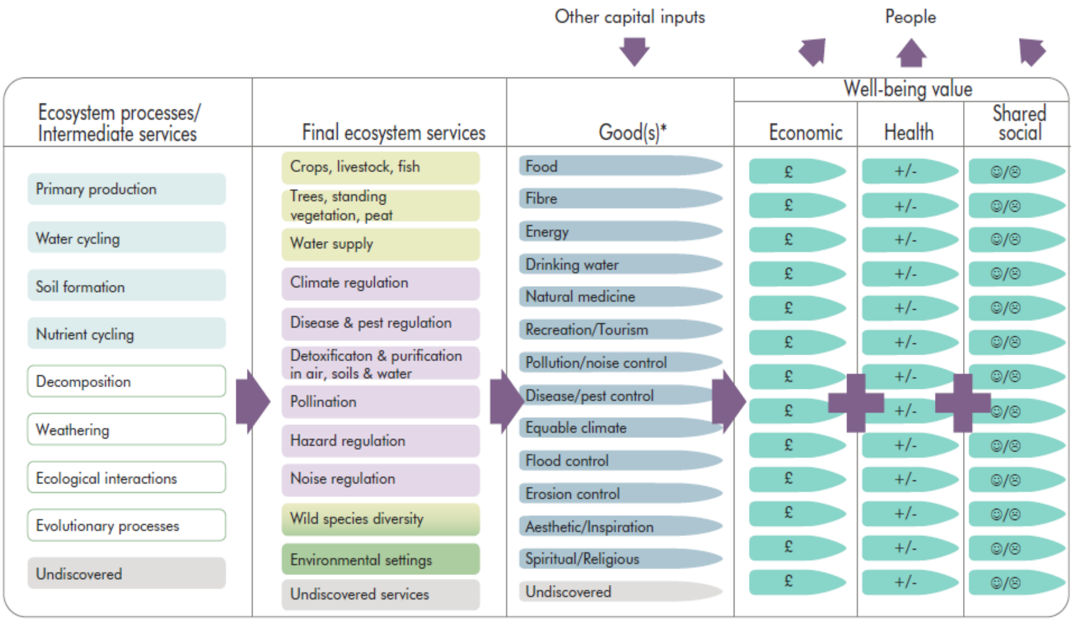
Case Study 9: Yorkshire Dales – Hydro-power

There is a wide range of economic activity which makes an important contribution to the economies of National Parks. NPA activities and initiatives, undertaken in partnership with businesses and other organisations, help to develop diverse and sustainable rural economies. They include encouraging businesses to benefit from and contribute to the high quality landscapes and environments of National Parks. The following section explores the variety of ecosystem services delivered by the Parks themselves.

7 Ecosystem services

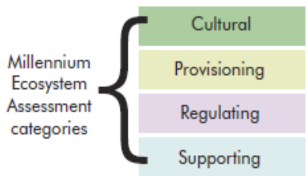
7.1 The ecosystem services of England's National Parks make vital contributions to our prosperity and well-being

The distinctive and high quality ecosystems of National Parks support a variety of provisioning, regulating, cultural and supporting services which make vital contributions to our prosperity and well-being. These different services are illustrated in Figure 7-1, together with the goods and values delivered.



Source: UK National Ecosystem Assessment 2011

Figure 7-1: Ecosystem processes, services, goods and values



Ecosystem services provide economic benefits in different ways, by:

Underpinning economic activities in a variety of different sectors including land-based industries, such as farming and forestry, and industries which extract aggregates, minerals, water and energy; these activities are directly dependent on the natural resource 'provisioning services' of National Parks. 'Cultural services' such as tourism and recreation also depend directly on the high quality environment, and support the accommodation and food services industry in the National Parks.

Reducing costs to society. National Parks help to improve our health, sequester carbon and purify our water, thus helping to reduce the costs of health services, climate change and water treatment. For example, the provision of clean drinking water to the UK population is vital to its health and prosperity. 70% of the UK's drinking water comes from the Uplands and 62% of the English Uplands are designated as National Parks, Areas of Outstanding Natural Beauty or Sites of Special Scientific Interest[43]. By way of example: the Peak District provides drinking water to the Midlands and South Yorkshire; much of

[43] http://www.defra.gov.uk/food-farm/land-manage/uplands/

North-West England gets its drinking water from within the Lake District National Park; Exmoor National Park is the source of drinking water to more than 0.5 million people; and the chalk aquifers underneath the South Downs National Park are the source of drinking water to 1.2 million people.

Enhancing the well-being of people and communities. People derive wider benefits from National Parks, through recreational experiences (England's National Parks receive 91 million visitors per year), enjoyment of landscape and wildlife, or simply through the knowledge that landscape and wildlife are protected. Surveys have estimated these "non-market" benefits by eliciting the willingness to pay of visitors and wider society. For example, a study with the North York Moors National Park showed that heather moorland and semi-natural broadleaved woodland were highly valued by visitors to the Park, moorland primarily for recreation and woodland primarily for nature conservation.[44]

Maintaining a liveable environment. By regulating climate, air quality, soils and water cycles, National Parks help to maintain a healthy environment in which we can live, work and do business. For example, peatlands, fens, moors and woodland habitats store large volumes of carbon and it is vital that these are safeguarded. 119 Mt of carbon is held in the 449,000 ha of peat soils in National Parks alone – this is equivalent to England's entire carbon dioxide emissions for one year. The 143,300 ha of woodland in National Parks store a further 7 Mt of carbon.[45]

Quantifying exactly 'how much' health and well-being is produced by our surrounding environments is a challenge that we are just beginning to address, and converting this value into financial value is no simple task.[46] This means that it is impossible to quantify the health benefits of the National Parks without undertaking substantive research. There are several studies describing the role that the natural environment plays in the delivery of key societal goals such as health and education[47], and UK research has indicated that populations in areas with more green space tend to be healthier, and also tend to experience a lower degree of health inequalities.[48]

The 2011 Census data gathered information about people's health in National Parks, by asking respondents to rate their general health as 'Good', 'Fairly Good' or 'Poor'. While this health measure is self-reported, it has been shown to be a robust and reliable indicator of people's objective health status. Below is an extract from the ONS reporting on the health of the population in the National Parks in England and Wales:

"The majority of National Park residents, 82 per cent (331,300), described themselves as being in good, or very good health. This percentage is slightly higher than for England and Wales overall. Given that the National Parks have an older age structure than nationally, and that generally, health deteriorates with age, this is an indication that people residing in National Parks tend to have better health than those living in the rest of the country. Within the individual National Parks, the South Downs had the highest percentage of residents describing their health as 'very good'; 51 per cent (57,200). The Broads had the lowest figure at 40 per cent (2,500)."

There are likely to be numerous interconnected factors determining the health status of the local population, particularly socio-economic status, employment and access to health services. The available data would not allow us to directly infer the health and well-being benefits of the National Parks. However, it is possible – or even probable – that the high

[44] P.C.L. White, J.C. Lovett, Public preferences and willingness-to-pay for nature conservation in the North York Moors National Park, UK, Journal of Environmental Management, Volume 55, Issue 1, January 1999, Pages 1–13

[45] Climate Change Mitigation and Adaptation, ENPAA, 2009

[46] Wheeler, B., ' Environment, Human Health & Wellbeing on the Lizard Peninsula, European Centre for Environment and Human Health in Cornwall, 2011

[47] Natural solutions - Nature's role in delivering well-being and key policy goals – opportunities for the third sector, New Economics Foundation, 2012

[48] Mitchell R, Popham F. Effect of exposure to natural environment on health inequalities: an observational population study. Lancet 2008;372(9650):1655-60

quality natural environments of the National Parks confer health and well-being benefits to both local populations and visitors.

Ecosystem services are valuable but difficult to quantify, as many of the benefits are not measured through 'the market'. A Scottish valuation study found that The Loch Lomond and the Trossachs National Park "generates an estimated value of £866m per year, of which only about half goes through the market. In other words the National Park generates as much value that is not recorded in conventional systems as that which is. The extra is made up of public enjoyment of the natural assets and resources, of values in excess of what consumers actually pay, and of ecosystem services rendered to the world at large."[49] It is reasonable to assume that English National Parks also generate significant non-market value of this type.

7.2 The challenge for National Parks is to maintain and enhance the value of their natural assets and safeguard benefits for future generations

A significant challenge for National Parks and NPAs is to continue to be thriving living landscapes, where the natural assets are maintained and enhanced, while people, businesses and communities prosper, now and in the future. There are many pressures on the landscape, for example:

- **Visitor pressures**; large numbers of visitors could threaten the special qualities of the National Parks by causing congestion, noise, pollution, litter, erosion, etc.;
- **Farming pressures**; farm enterprises in the National Park operate in a world of global food prices which influences the way farmers manage the land. UK and EU funding regimes also have an impact on land use and land management in the Parks which can have an effect on water quality, flood risk and biodiversity, etc.;
- **Housing and development pressures**; in most National Parks the topography is a strong constraint on developable land, over-development could have an impact on the landscape values of National Parks;
- **Overexploitation of resources**; due to strong demand for resources such as food, timber, water, energy and minerals. These resources could be over-exploited, reducing the value of the natural assets of National Parks.

The 'stocks' of natural assets of the National Parks are difficult to measure, and so are the benefits of the ecosystem services that are provided by the National Parks' natural capital. Although some ecosystem services such as agricultural production and timber production could be measured relatively easily using market prices, other benefits of many services are more difficult to measure, such as people's enjoyment of the National Parks, for which no market prices exist. There is also potential for benefits of ecosystem services to overlap with each other. For example, if people visit a National Park to go walking, they may use it for physical exercise, to enjoy a beautiful view, and to observe bird life. Valuing these three different benefits separately, and then aggregating, could risk 'double-counting' which needs to be avoided; that said it is also possible that the total benefit could be greater than the sum of its parts.

There is currently a gap of knowledge in the assessment of the benefits of ecosystem services and in its use in decision making processes, as well as gaps in our understanding of the natural processes that deliver ecosystem services:

- There is still much uncertainty about the role of biodiversity in supporting ecosystem services, and how a loss of biodiversity affects the value of 'Supporting', 'Regulating', and 'Cultural' services[50];
- Despite much research, there is still uncertainty over how management (e.g. of the uplands) affects certain ecosystem service benefits (e.g. carbon sequestration)[51];

[49] Loch Lomond and the Trossachs National Park – Valuing the Park, 2011, Report by Cogent SI, Moffat Centre (Glasgow Caledonian University) and Grid Economics.
[50] Watson, R., Albon, S., 'UK National Ecosystem Assessment Draft synthesis of current status and recent trends', 2010
[51] 'Economic valuation of uplands ecosystem services', EFTEC (Economics for the Environment Consultancy), 2009

- There is still uncertainty about ‘thresholds’, i.e. the point at which the exploitation of resources becomes ‘unsustainable’[52].

If benefits cannot be measured or valued, it is difficult to take them into account in decision making. Often the value of an ecosystem only becomes apparent, once an ecosystem has been degraded or destroyed (e.g. soil erosion and water pollution leading to greater costs in drinking water treatment).

Finally, even if the value of the benefits of individual ecosystem services in National Parks could be measured through the use of proxies or ‘benefit transfers’, this does not necessarily mean that there would be money (real cash) available to protect and/or enhance them. As long as market mechanisms are functioning inadequately to protect and enhance the National Parks' natural assets, public funding will be needed to make up for this.

7.3 National Park Authorities consider protecting and enhancing natural capital as their ‘core business’

The conservation and enhancement of natural capital and ecosystem services lies at the heart of the responsibilities of the NPAs, through the two statutory purposes of National Parks:

1. to conserve and enhance the natural beauty, wildlife, and cultural heritage of the area, and
2. to promote opportunities for the understanding and enjoyment of the Park's special qualities by the public

Below are some examples of ‘provisioning services’, such as the provision of clean drinking water, and ‘regulating services’, in the form of flood mitigation and carbon sequestration, which are important ecosystem services provided by England’s National Parks. These include specific case studies that illustrate how the National Park Authorities are taking an ecosystem approach to maximise the overall benefits to society.

Improving water quality

Many National Parks are an important source of drinking water, and NPAs are working with partners to promote land use and land management practices that enhance water quality. Water treatment works ensure that drinking water meets legal standards, but are increasingly costly to operate. The focus on improving water quality has therefore shifted to managing water at source and higher up in their catchments. Case Study 10 provides one example in relation to the South Downs.

[52] Valuing Nature Network Conference, 19 March, 2013

South Downs – Improving water quality

The groundwater chalk aquifers under the South Downs National Park deliver drink water to 1.2 million people.[53] There are two key issues:

- **Pollution**; nitrate pollution from farming is a major issue, and pollution levels are rising. 75% of aquifers are failing to comply with environmental standards; the other 25% are predicted to fail in the future. The need to improve this situation is driven by two factors: the need to comply with the EU Water Framework Directive (WFD) and the added cost for water companies to treat the water. The quality of the river water is also important, as too many nitrates can cause algal bloom.
- **Abstractions**; the results of the local Catchment Abstraction Management Strategies show that abstraction can have a significant adverse impact on groundwater. This impacts freshwater contributions to the river systems of the South Downs National Park and the protected harbours of the South coast (e.g. Chichester & Langstone Harbours).

The South Downs NPA is leading the new Nature Improvement Area (NIA) scheme to protect habitats and the environmental, economic and social benefits they bring. In February 2012 the South Downs National Park was awarded £608,000, by the Secretary of State for the Environment, towards a £3 million plan to safeguard endangered chalk downland in the National Park.[54]

The quality of groundwater is directly affected by land management, and the NPA is working together with a range of partners, such as the river trusts, the three local water companies, the Environment Agency, and the Downs & Harbours Clean Water Partnership to produce compelling evidence to inform/drive catchment management schemes to deliver improvements under the WFD. Now that the South Downs is a National Park, NPA staff feel that it is much easier to get the partners around the table. The NPA provides a convening power to draw together the diversity of partners and develop associated synergies. The role of the NPA is also one of **knowledge exchange:**

- The NPA is working with farmers to raise awareness, including setting up a land management group to address land management issues.
- The NPA has agreed a modelling methodology and data collection process to address the pollution issues and assess impacts on treatment costs. This evidence will be used to inform a cost-benefit analysis of catchment management measures and the next water company planning round (the 2019 Periodic Review). It will also provide a basis for developing any future PES (Payment for Ecosystem Services) schemes.
- The NPA is also carrying out 'spatial targeting' to enhance other ecosystem services, such as: improving landscape ecology and landscape connectivity (as recommended in the Lawton Review[55]) to enhance biodiversity, and improving public access to green space where the need of the local population is greatest.

Anne Bone

Case Study 10: South Downs – Improving water quality

[53] http://www.southdowns.gov.uk/about-us/news/special-qualities-of-south-downs-national-park-key-to-future-economy-says-new-report
[54] http://www.southdowns.gov.uk/looking-after/biodiversity/south-downs-way-ahead-nature-improvement-area
[55] Making Space for Nature: A review of England's Wildlife Sites and Ecological Network, Chaired by Professor Sir John Lawton CBE FRS, 2010

Other examples of NPA involvement in improving water quality include:

- In the Peak District, United Utilities has been running the Sustainable Catchment Management Programme (SCaMP). In partnership with local landowners and farmers, they have restored blanket bog and upland heathland habitats around their reservoirs, and are creating new habitats such as upland oakwoods, which help to protect water quality and quantity now and into the future. Peat erosion is halted, so that the water runs clearer, meaning improved water quality and lower treatment cost.
- In Dartmoor and Exmoor, South West Water's 'Upstream Thinking' initiative aims to improve land management so that water quality and quantity is improved at source, long before it reaches the water treatment works. Working together with a range of organisations including the West Country Rivers Trust, Dartmoor and Exmoor NPAs, Devon and Cornwall Wildlife Trusts, the Environment Agency and Natural England, Upstream Thinking has helped restore thousands of acres of wetlands which supply the majority of the region's water supply. Another key part of the project is working with farmers to help them protect water sources. This benefits farmers, through the restoration of vegetation and reduction of erosion for example, and helps control future water treatment costs.
- In the Yorkshire Dales, the Yorkshire Dales Rivers Trust is working in partnership with land owners and managers to carry out river restoration work, and promote Catchment Sensitive Farming practices, while the Yorkshire Peat Partnership aims to restore moorland peat, reduce erosion and discoloration, and therefore improve river quality.

Reducing the cost of floods

NPAs can play a role in reducing the cost of floods, through planning control and influencing land management within the river catchment areas in National Parks. "Flooding has a major impact on people and communities. Apart from physical health risks, damage to property and disruption during the recovery process, the psychological effect can be profound and long lasting"[56]. According to the Environment Agency, the average cost incurred as a result of flooding is between £23,000 and £30,000 per flooded home (with 25% of homeowners not fully covered by insurance and 30% forced to relocate to temporary accommodation) and between £75,000 and £112,000 per flooded business. In addition, floods cause damage to infrastructure, utilities supplies, agricultural land, and incur major clean up and repair costs for emergency services and local government.

Climate change is expected to bring wetter winters and more intense weather events[57], which could increase the frequency and severity of flooding of low lying areas. Flooding is not just a result of severe weather conditions, but can be aggravated by inappropriate development, land use, and land management decisions.

NPAs can have a direct impact on flood risk, partly through planning decisions and development management conditions, but more significantly by working with farmers and land managers and other partners such as the Environment Agency and Natural England, to influence land use and land management. This is in line with Government policy set out in "Making Space for Water" and the Pitt Review following the Summer 2007 floods, which highlighted the need to work more with natural processes. Changing the land use upstream in the catchment can mitigate flooding downstream however it can also have economic implications for those who own the land of the catchment.

Several NPAs are working with partner organisations to seek to reduce flood risk through natural processes, such as the 'Making Space for Water' Project in the Peak District, see Case Study 11, and the 'Slowing the Flow' Project in the North York Moors.

[56] The Economic and Social Research Council (ESRC) UK, 2007
[57] http://www.defra.gov.uk/environment/climate/adapting/

Peak District – Making Space for Water

The Making Space for Water Project is investigating a new approach to flood management. The Moors for the Future partnership, including the Peak District NPA and the Environment Agency, aims to demonstrate how our natural resources can help to protect against flooding.[58]

The Upper Derwent catchment, located within the Peak District National Park, is a major source of water for regular flood events affecting the entire length of the River Derwent including the Lower Derwent and City of Derby downstream into the Trent towards Nottingham and beyond. The upland catchment for these regions in the Peak District is predominantly moorland, giving way to extensive areas of farmland.

The Making Space for Water in the Upper Derwent Valley Project aims to demonstrate how practical restoration of degraded moorland can add benefit to reducing flood risk at the same time as delivering other benefits. Practical work conducted could reduce the impact of flooding downstream by holding water back and increasing the time it takes for rainwater to reach the river during a storm.

Phase 1 of the Making Space for Water project (2009-2011) was mainly concerned with restoring presently heavily eroded moorland by blocking erosion gullies and re-establishing vegetation on bare soils. Eroded peat soils received stabilisation treatments involving spreading heather brash and re-vegetation. Gullies were blocked by putting in stone and timber dams. Sites that have been restored and covered with vegetation, "showed an attenuation effect on storm-flow runoff"[59], as planned.

Phase 2 of the Making Space for Water project (2012-2015) is mainly concerned with the delivery of hydrological monitoring and evaluation, including a modelling exercise to show the likely effects of the restoration on downstream flood risk, along with an assessment of the ecosystem service benefits associated with the works.

www.moorsforthefuture.org.uk

Alongside, a pilot project has been set up in the National Park to support landowners and managers to create clough woodlands (areas of steep-sided woodland on the edge of open moorland), using funding from the Forestry Commission and Natural England. There will be close working with landowners and managers to raise awareness of the benefits of clough woodland in mitigating flood risk, improving water quality and biodiversity. The project aims to demonstrate new ways of working and how land-use change at catchment scale can be delivered using a partnership approach.

Case Study 11: Peak District – Making Space for Water

[58] http://www.moorsforthefuture.org.uk/making-space-water
[59] Preliminary results, The Making Space for Water project, 2013

In the North York Moors, the 'Slowing the Flow' project aims to alleviate flood risk in Pickering and Sinnington. Pickering has been flooded four times in the last ten years; with the last flood in 2007 the most serious to date, causing damage to homes and businesses valued at approximately £7m. The work is taking place on the Public Forest Estate, with the Forestry Commission and the NPA working together to construct large woody debris dams within the upper parts of streams. These leaky dams are designed to allow normal rates of flow to pass unrestricted yet slow potential flood waters during periods of heavy rainfall. The initial target is to construct 100 such dams in the Pickering Beck catchment and 50 in the River Seven catchment, thereby reducing flood risk and potential future losses.

Reducing greenhouse gas emissions

A study on Greenhouse Gas (GHG) emissions in England's National Parks showed that the National Parks are net-emitters of GHG emissions.[60] Table 7-1 shows the tCO2e (tonne CO2 equivalents) emissions across industry sector, with industry, land use and transport the main sources of emissions.

National Park	Industry	Domestic	Transport	Waste	Land Use (net)	Total
The Broads	215	68	73	39	52	447
Dartmoor	84	103	167	29	184	566
Exmoor	44	43	63	11	138	299
Lake District	209	147	295	32	355	1039
New Forest	134	164	250	90	27	666
North York Moors	142	84	168	46	271	711
Northumberland	15	12	26	30	65	149
Peak District	1269	149	273	89	327	2107
South Downs	12	3	13	235	255	519
Yorkshire Dales	67	67	130	25	257	546
Total	**2192**	**839**	**1459**	**627**	**1932**	**7048**
	31%	12%	21%	9%	27%	100%

Note: GHG emissions are based on 2006 data for CO2 and 2008 data for nitrous oxide and methane

Table 7-1: GHG emissions across industry sector in England's National Parks (in kT CO2e)[61]

The net land-use emissions account for 27% of total emissions, and are mainly due to agriculture, which accounts for 60% of Methane and 90% of Nitrous Oxide emissions; these are respectively 21 times as powerful and 310 times as powerful as CO2. The remaining methane emissions come mainly from waste. The emissions from nature in terms of methane and nitrous oxide were negligible, while carbon emissions from land use (LULUCF[62]) were nearly balanced out by carbon removals.

[60] Greenhouse Gas Emissions Estimates for England's National Parks English National Park Authorities Association November 2010
[61] No CO2 emissions were available for South Downs National Park. High industrial emissions in the Peak District skew the sectoral distribution of GHG emissions.
[62] Land Use, Land-Use Change and Forestry, as defined by United Nations

Many NPAs are undertaking initiatives to reduce greenhouse gas emissions, for example by:

- **Reducing emissions from peatland**, by restoring them to prevent their erosion and the resulting emissions of carbon into the atmosphere. At present it is estimated that over 50% of deep peat soil habitats are out of condition and require restoration work. Examples of peat restoration projects are the MIRE Project led by South West Water on Exmoor, the Yorkshire Dales Peat Partnership, and Moors for the Future in the Peak District.
- **Planting woodlands.** Woodlands also have an important role in carbon absorption. Currently 285 ha of woodland are planted in National Parks each year. If this continues, 125 kt of carbon will have been absorbed by 2020 through new woodland planting[60].
- **Reducing emissions from agriculture**, by protecting the stored carbon in peat moorland and permanent grassland and reducing emissions from fuel use and inputs such as fertilisers. Farming is one of the most important activities within National Parks however, farming and land use also gives rise to significant GHG emissions. NPAs, alongside partners such as Natural England and the Environment Agency, work with farmers to help them adapt their farming methods to reduce emissions (e.g. the Peak District's Farm Carbon Footprint and Water Audit Pilot Project).
- **Reducing emissions from transport**, by promoting public transport to reduce car journeys (e.g. GoLakes, New Forest Tour)
- **Reducing emissions from fossil fuels** for community and domestic use, by promoting renewables (e.g. grant schemes for wood fuel, hydro-electric vehicles)

An illustration of a peatland restoration project in the Peak District National Park is provided in Case Study 12. 'Low Carbon Lake District', which aims to reduce emissions on a number of fronts, is illustrated in Case Study 13.

Peak District – Peatland restoration

Since 2002 the Moors for the Future Partnership, hosted by the Peak District NPA, has undertaken an ambitious programme of conservation, education and research projects to stabilise and restore the carbon rich Peak District moorlands - key to water and carbon storage.

The worst eroded areas are losing 200 to 300 tonnes of carbon rich peat per year. 70%-80% of this loss is prevented within 18 months of initial restoration works. The techniques Moors for the Future have used have proven highly effective, with almost 550 ha of bare peat now covered with vegetation. Planned research, studying the effects of water storage and flow from the upper catchments to the lower catchments, will help Moors for the Future better understand the role that moorlands play in terms of their contribution to flood risk management in the lower catchments, typically urban areas surrounding the National Park.

www.moorsforthefuture.org.uk

Case Study 12: Peak District – Peatland restoration

Lake District – Low-carbon Lake District

The Lake District National Park Partnership - a grouping of 24 organisations from the public, private and voluntary sectors - established climate change as a key strategic priority, and committed to establishing a local carbon budget, a comprehensive action plan and a suite of collaborative projects, including:

- The GoLakes Travel programme, which won £5 million from the Department for Transport to establish a sustainable transport 'beacon area' in the central Lake District.
- The Cumbria Warm Homes Programme, which in conjunction with energy company EOn brings energy efficiency advice and subsidised offers to local residents.
- Promoting local food and drink, through the Taste Cumbria initiative.
- In partnership with the University of Cumbria, developing a toolkit for land managers and farmers, which helps them maximise carbon storage in the landscape and reduce emissions, by protecting peat stores and managing woodlands, for example.

Progress towards their 'carbon budget' is assessed each year by partner organisations and an independent assessor, including a quantitative assessment of tonnes of carbon saved.

LDNPA

www.golakes.co.uk

The Low-carbon Lake District Initiative has resulted in an estimated 14,000 tonnes of carbon reduction per year and is aiming for reductions of 23,000 tonnes per year in future. Particular successes include:

- The Taste Cumbria initiative, promoting local food and drink, has resulted in over 900 tonnes of carbon savings, together with economic benefits to local producers.
- The GoLakes Travel Programme has introduced one of the country's first Electric Bike Hire networks, providing an alternative to the car in the central Lake District. Local businesses can participate in the scheme by offering bikes for hire, or charge points, so there are financial gains too.
- The Lake District NPA has reduced carbon emissions from its own estate and operations by 25% over four years, through efficiency savings and changes in staff behaviour. This won awards from the Carbon Trust and the Energy Saving Trust.
- Considerable interest from other areas, with West Sussex and Greater Manchester adopting similar approaches.

Case Study 13: Lake District – Low-carbon Lake District

Although a recently published report commissioned by Defra and NERC[63] ranked the opportunity for developing a 'peatland carbon code' as top of the list of potential business opportunities arising from valuing and/or protecting nature's services, there are currently no carbon reduction projects in England's National Parks that are earning carbon credits. The development of a 'Peatland Carbon Code' is still in progress, and any carbon credits would need to be verified by an accredited organisation. A long term monitoring programme of CO_2, CH_4 (methane) and N_2O (nitrous oxide) emissions would be required to verify the estimates for carbon sequestration and greenhouse gas emissions. The complexities of accreditation combined with current low market prices for carbon credits, can provide an explanation of why no carbon credit projects have been developed in England's National Parks to date.

The National Parks provide valuable ecosystem services that are vital to the nation's prosperity and well-being. It is beyond the scope of this report to put a value on the natural capital of the Parks, nor to estimate the total value of the benefits of the ecosystem services provided. Instead, the above case studies illustrate some of the benefits that the National Parks are providing, and show how the NPAs work closely with partners (including farmers and land managers) to protect, restore and enhance the natural assets of the Parks in order to safeguard its benefits for the long term prosperity and well-being of the nation.

[63] G Duke, Principal Investigator, I Dickie, T Juniper, K ten Kate, M Pieterse, M Rafiq, M Rayment, S Smith, N Voulvoulis. Opportunities for UK Business that value and/or protect nature's services, 14 June 2012

8 People and communities

8.1 The communities living in National Parks face a number of demographic, economic and infrastructure challenges

Demographic challenges

Low population density has an impact on the viability of services and businesses, such as local schools, shops, post offices, pubs, etc. Population growth in the English National Park areas has typically been significantly lower than the national average for England as a whole, with some National Parks showing a decline in population (e.g. Exmoor, Lake District and North York Moors). The rates of population change of the different age groups across the individual National Parks show a consistent reduction in the proportion aged younger than 45 and consistent and significant increase in those aged 60 and over. This suggests that the already ageing populations of the National Park areas are becoming older over time, which will bring its own challenges, for example in the provision of services for the elderly.

Economic challenges

It is a challenge to retain young people living in the National Parks, as many find it difficult to find full-time employment within the Park, particularly in well-paid careers, and house prices are significantly higher than outside the Park for comparable dwellings. The National Parks have a much lower proportion of full time employees (32% compared to 39% nationally), many of whom commute out of the Park to earn a living. On the positive side, however, there are higher levels of self-employment (19%, compared to 10% nationally) and the overall unemployment rate is half the national rate (2% compared to 4% nationally).

Infrastructure challenges

A good infrastructure (particularly transport and communications) is essential for a thriving economy. Broadband and mobile phone reception are often of variable quality or non-existent in remote rural areas. In a survey carried out amongst businesses in three National Parks (the Yorkshire Dales, North York Moors and part of the Peak District), 22% of businesses in the Parks complained about ‘poor infrastructure’ (roads, facilities, services) which had a negative effect on their business. Altogether 57% of businesses attributed no negative effects to Park designation, and only 21% were concerned about planning and development restrictions.[64]

8.2 National Park Authorities lead and support a range of initiatives and projects to address these challenges

Supporting pathways to employment through volunteering and apprenticeships

Every NPA has a volunteering programme. The majority of the work consists of outdoor practical conservation work, but volunteers can also provide general support and advice for visitors to the National Park, and participate in educational and promotional activities to increase awareness and understanding of the Park (e.g. welcoming visitors, leading walks and talks). Depending on the individual interest and experience of volunteers, they can also get involved in other activities, such as biological surveying, research or administrative work.

The total number of volunteer days with the NPAs is estimated to be 43,353 (see Table 8-1), which would be equivalent to around 200 FTEs. The annual value of this input, based on the number of hours worked, is estimated at over £3.2 million. This calculation is

[64] SQW (2006). Prosperity and Protection – The economic impact of National Parks in the Yorkshire and Humber regions. Report for the Council for National Parks .

based on a 50/50 split of unskilled and semi-skilled work, and a rate for unskilled volunteering of £50 per day, and a rate for semi-skilled volunteering of £100 per day[65]. The total value of volunteering in the National Parks overall will be much higher, because many more people volunteer for partner organisations in the Parks, such as the Forestry Commission and the National Trust. In addition, the value of the work volunteers do should be included alongside the value of their time.

National Park	No. of volunteer days organised or supported by the NPA	No. of those days attended by 'under represented' groups
The Broads	2,637	95
Dartmoor	1,870	392
Exmoor	2,029	489
Lake District	4,402	86
New Forest	685	2
North York Moors	10,455	2,153
Northumberland	1,480	158
Peak District	8,780	1,969
South Downs	5,300	Not available
Yorkshire Dales	5,715	739
Total	**43,353**	**6,083**

Source: NPE, 2013. NPA 2011-12 Performance Indicators

Table 8-1: Total number of volunteer days, including those attended by 'under represented' groups

There are many reasons why people volunteer, whether they enjoy the physical work in the outdoors, want to gain new skills to support their pursuit of a paid job, meet new people, and/or 'give something back' to society. The numbers of volunteer days give an indication of the support that National Parks receive from their communities.

Volunteering is one way of giving people an opportunity to develop their skills and gain experience, which could help them on their way to secure a paid job. Some National Parks have also developed training and apprenticeship schemes for traditional skills such as farming, dry stone walling, fencing, hedging and path maintenance. Examples of apprenticeship schemes from the North York Moors and Northumberland NPAs are set out in Case Study 14.

A different approach – this time working with young offenders to help them to improve their job prospects and reduce re-offending - has been taken in the Broads, see Case Study 15.

[65] http://www.naturalengland.org.uk/Images/VIVA-report_tcm6-32598.pdf

Supporting pathways to employment in England's National Parks

North York Moors

The North York Moors NPA recognises the importance of providing opportunities for young people to gain skills which will enable them to find jobs locally.

- The NPA has trained over 50 **Apprentices** in environmental conservation, accounting and business administration. At present, the NPA employs 16 apprentices - 14% of the NPA's workforce - and supports a further 8 apprentices working on hill farms and in traditional building crafts. All are given a broad based practical training together with a level 2/3 qualification and other relevant work based certificates (e.g. chainsaw, pesticides use etc). Over the nine years they have had a 100% success rate in qualifications and a 95% success rate in apprentices going straight into employment or further qualifications. The NPA won the 2012 award for the best medium sized employer of apprentices in the Yorkshire and Humber region and was listed in the top 100 apprenticeship employers in the UK in 2011 and 2012.

- One specific project, set up by the NPA with the University of York's Centre for Conservation Studies, is the **Traditional Building Skills Apprenticeship Scheme** aimed at offering hands-on experience in a range of building maintenance and conservation skills. The scheme was created in order to try and address the decline of historic building repair skills on traditional estates, to enhance the employability of young people by offering training and qualification in an area of demonstrable skills shortage, and to increase the capacity of Estates and the rural community to conserve the vernacular built heritage.


www.gazettelive.co.uk


NNPA

Northumberland

The Northumberland NPA has a major focus on training and providing career pathways:

- The NPA delivered a five year **Traditional Boundaries Traditional Skills Project** providing training on boundary and access skills (drystone walling, hedge laying, fencing, path construction). 50 trainees benefited from the scheme, of which 47 gained a Lantra/Dry Stone Walling Association qualification and 43 went into employment or education after the training (including 26 who set up their own contracting business). The NPA also piloted a one year **Upland Farming Traineeship** project, providing upland farming skills to young people wanting to pursue a career in upland farming. 8 people undertook the training of which 7 gained NVQ diplomas and are now employed in upland farming roles.

- **Future priorities** for the NPA in this area are: to develop a career pathways framework to identify opportunities for training, volunteering, and work experience across the National Park over the next 3 years; and to host and deliver a LEADER youth project to develop the work skills and experience of young people in the Northumberland uplands.

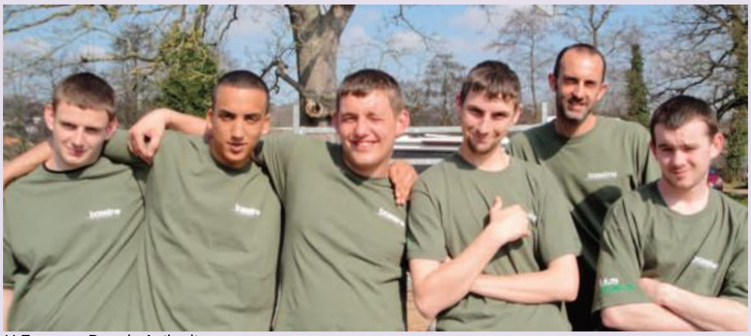
Case Study 14: Supporting pathways to employment

The Broads – Baseline on The Broads – working with young offenders

The Baseline on The Broads (BoB) project was created in conjunction with Future Projects, the Broads Authority, Norfolk County Council and Norfolk 180 Offender Management and was partly funded by the Broads Authority's Sustainable Development Fund.

The project provided ex-offenders, ranging in age from 18 to 37, with a disciplined five day week undertaking paid conservation work such as building steps, repairing fences, coppicing and scrub management, combined with education and training at Easton College.

BoB helped participants to develop new skills and motivation, experience new challenges and improve confidence, thus enhancing future job prospects and reducing the rate of reoffending. The positive effect on mental and physical health, and the local environment, was also noted. BoB won national acclaim and attracted the interest of Government.



H Franzen, Broads Authority

Case Study 15: The Broads – Baseline on The Broads

Providing affordable housing

Relatively high house prices in National Parks compared to average local incomes mean that some people have difficulty finding suitable accommodation to continue living 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, the 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. NPAs have policies that prioritise affordable homes and work closely with local parish councils, housing authorities and housing associations to identify sites for affordable housing development. NPAs also permit private sector housing with local occupancy conditions in order to increase the stock of housing available to local people. See Case Study 16.

North York Moors – Affordable housing

The North York Moors is one of the most expensive parts of Yorkshire to live, with average house prices now over £250,000. The North York Moors NPA takes the issue seriously and has devoted considerable resources to working with local communities to find sites where it can give planning permission for rural affordable housing.

The 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. Since 2006, a total of 109 new homes have been given planning permission in the National Park, of which 89 have been completed and are already occupied by local people (include the Lythe, see picture below) and 20 are under construction. All the units are tied through legal agreements to ensure that they remain affordable to local people in perpetuity.

NYMNPA

Case Study 16: North York Moors - Affordable housing

Promoting investment in broadband and mobile communications

In many remote rural areas there is currently limited or no broadband connectivity and low broadband speeds (under 2Mbps megabits per second). This is an issue for home workers, rural businesses, and local residents, as well as for visitors accessing tourism information. For example, resident and visitor surveys in Northumberland National Park showed that the current broadband provision is unsatisfactory. Availability of high broadband speeds is essential for businesses (including the self-employed) which are dependent on remote working.

Remote areas with low population densities are less attractive for private companies to invest in communication infrastructure as such areas are not profitable. The Rural Community Broadband Fund (RCBF) is a £20m Fund (jointly funded by Defra and Broadband Delivery UK (BDUK)), which is delivered as part of the Rural Development Programme for England to provide grants to communities to establish superfast broadband in hard-to-reach areas. The RCBF requires evidence that the current situation is causing problems, and enough people have to show an interest to justify the funding. In National Parks, however, broadband is essential for the visitor economy in addition to residents.

NPAs are keen for their communities to have access to high quality communications infrastructure. NPAs have adopted positive policies in National Park Management Plans and Planning Documents for broadband and mobile roll-out on the basis that this contributes towards the socio-economic well being of their communities. NPAs are working with local authorities and local business networks (e.g. LEPs) to galvanise sufficient interest from local residents and businesses to access funding from BDUK, LEADER or other funding mechanisms, to improve broadband and mobile communications infrastructure in their area. As planning authorities, NPAs have been working with providers to encourage well designed proposals. See Case Study 17.

Promoting broadband and mobile communications in England's National Parks

Examples of NPA involvement in rolling out broadband and mobile communications include:

- Northumberland NPA led on a regional pilot to test satellite broadband in the Hadrian's Wall area between 2002 and 2006.
- Northumberland and Exmoor NPAs have worked with their respective LEPs to gain support from Defra for Rural Growth Hubs in the National Parks that will include live-work units and high speed broadband to three large estates and local communities.
- Exmoor NPA has piloted satellite technologies and the development of wireless broadband to farms and businesses. They also petitioned successfully for an additional Orange mast to serve the National Park settlement of Lynton.
- Lake District NPA sits on a Cumbria-wide steering group aiming to get superfast broadband coverage to 95% of the county (including the National Park).
- North York Moors NPA is involved at the very initial stages of the national Mobile Phone Improvement project, by providing planning advice to Government officials preparing the project.
- New Forest NPA is supporting parish councils in joint bids to Defra's Rural Communities Broadband Fund.
- Peak District NPA has (in partnership with local authorities and private businesses through Business Peak District) submitted a successful bid for LEADER funding to hold a series of community broadband workshops that will provide advice and guidance to rural communities on what broadband has to offer and to help them develop and deliver local solutions for superfast broadband.


PDNPA


PDNPA

Case Study 17: Promoting broadband and mobile communications

Supporting community renewable energy projects

The NPAs are supporting a variety of renewable energy projects for the benefit of local communities through the Sustainable Development Fund (SDF). The SDF is a grant scheme that supports new ways of living and working within National Parks in a sustainable manner. The funding is provided by Defra and managed by the NPAs. Extracts from a report by Land Use Consultants, who evaluated the SDF in English National Parks[66], are set out below

- There is an increased focus on renewable energy (from 5% of SDF projects in 2003/04 to 20% in 2008/09)

[66] Evaluation of the Sustainable Development Fund in English National Parks, 2002-2009, Land Use Consultants Report, March 2010

- The introduction of other initiatives such as the Low Carbon Community Challenge in Exmoor, Northumberland and Lake District National Parks, has raised the interest in renewable energy projects.
- Renewable energy projects tend to be polarised between smaller feasibility studies (22% costing less than £5,000) and large capital investment projects (27% costing more than £50,000). Examples of the smaller projects include eco-surveys of village halls to identify opportunities for energy conservation in the North York Moors, and hydro-electric feasibility studies in the Lake District, North York Moors and Dartmoor. Examples of the larger projects include the Flegg Biomass Project in The Broads and the Gayle Mill Trust biomass and hydro-electric project in the Yorkshire Dales.
- Such has been the interest in renewable energy projects in recent years that many NPAs are now requiring that renewable energy projects demonstrate additional (for instance social or educational) benefits and/or innovative in terms of technological development or similar.

In order to address the demographic, economic and infrastructure challenges, NPAs lead and support a wide range of initiatives, and have been successful in leveraging funding for a range of social and community projects. The above case studies illustrate some of the work the NPAs undertake to improve local skills, to address the need for affordable housing, to promote investment in communications infrastructure, and to support investment in renewable energy. However, there are many more examples where NPAs are investing in their communities, for example, in education, engagement, waste management, health and well-being, and in enhancing the natural and cultural heritage of National Parks.

Extracts from 'The Sustainable Development Fund in England's National Parks (Update 2012)' are set out in Figure 8-1 by way of illustration.

The Sustainable Development Fund in England's National Parks

Between 2002 and 2011, each NPA in England was allocated a ring-fenced sum of £200,000 per annum by Defra to offer Sustainable Development Fund grants to promote sustainable ways of living. During the nine years of the programme to March 2011, 1,669 projects were funded with 484 jobs created at approximately £8,000 per job (compared to £19,000 per full-time equivalent job for the Rural Enterprise Scheme during 2000- 2006). [67]

Sustainable Development Funds also helped lever in external funds to rural communities and businesses at an average ratio of 1:4.5 bringing in £61.3million of match funding in nine years.

Significant benefits were delivered for communities, the environment and the economy including: renewable energy installations; community building refurbishments; business start-ups; rural diversification; training and apprenticeships; education projects; sustainable transport; and habitat restoration.

Figure 8-1: Sustainable Development Fund in England's National Parks

[67] The Sustainable Development Fund in England's National Parks, Update 2012, ENPAA, 2012

9 Future opportunities

The NPAs' core purposes – conserving and enhancing the natural beauty, wildlife, and cultural heritage of the National Parks, promoting opportunities for the understanding and enjoyment of the Parks' special qualities by the public and, through them, fostering the social and economic wellbeing of their local communities – enable NPAs to contribute to economic prosperity and well being in a unique, focused and integrated way at both a local and national level. In fulfilling their responsibilities / core purposes, NPAs are well placed to promote the positive linkages between the high quality environment of National Parks and a vibrant economy, to balance different and sometimes competing interests, and to facilitate approaches which are beneficial for the Parks themselves and all those who live, work and visit them.

This section considers the key opportunities for action that can contribute to the economic prosperity and well being of National Park communities in the future, and thereby benefit the country as a whole. They include examples of good practice which can be expanded or replicated more widely, ways in which barriers to growth can be overcome, and emerging trends that provide new market opportunities. The opportunities are by necessity 'high level' and the specifics will vary from one National Park to another.

1. Developing and applying the brand

England's National Parks have a great opportunity to develop their brand, individually and collaboratively, and apply it to support economic growth, thereby harnessing the tremendous goodwill and affection which the public has for its National Parks. This brand is already very strong in some locations and draws in a considerable number of visitors and tourism-related business as a result. Elsewhere, the brand is less clear or less well recognised or developed. The brand can be used to raise the profile of the National Parks and support the wide range of land-based, tourism and other types of businesses which contribute to their economies, especially those focused on high quality and adding value. One example of this approach is the recently completed partnership agreement with VisitEngland to promote England's National Parks more effectively and boost rural tourism.

2. Supporting stronger and more sustainable farming and forestry

Farming and forestry are fundamental to the positive management of England's National Parks and make a significant contribution to their local economies, both directly and indirectly. However most farming, particularly in the disadvantaged areas of the uplands is not profitable without public funding support and farmers and land managers need to be better rewarded for the goods and services they provide, including ecosystem services. NPAs and NPE have a role to work with others including Defra, Natural England, Forestry Commission and farming and forestry organisations to get the best possible support for farmers and foresters which arise from the reform of the CAP, including the new RDPE, in order to underpin the delivery of public benefits. Business and technical support, skills development and investment will also enable more farming and forestry businesses to add value to their products, develop new markets which build on local strengths and the National Park brand, and capitalise on growing demand for food and timber more generally. This will improve incomes, reduce dependency on public support, and secure their long term viability. It will also enhance their contribution to the environment, economy and culture of the National Parks.

3. Promoting sustainable tourism

The tourism and recreation sector is another key part of the National Park economies. There is potential to grow visitor numbers and visitor expenditure, by raising awareness, improving marketing at home and abroad, encouraging more staying and out of season visitors, capitalising on growth areas such as outdoor pursuits and adventure activities (for example, Adventure Capital in the Lake District) and local food and drink (for example, the Our Land initiative in the New Forest and South Downs), improving quality and value added, and investing in tourism infrastructure (for example, sustainable transport infrastructure and visitor centres such as The Sill in Northumberland). Many of these opportunities involve further strengthening of the relationship between tourism, land management, local produce and the built environment, and the role of NPAs is often to work at the interface of these different interests. In particular, NPAs often play a key role in developing and supporting tourism partnerships - and building partnerships between tourism and other sectors such as the food and drink and land based sectors - to deliver these objectives in a strategic and cost effective way.

4. Working more closely with businesses

There are businesses in all sectors located in England's National Parks and a number of NPAs have been actively engaging and supporting businesses in the broader economy for many years. There is a potential to roll out this approach more widely through existing mechanisms such as business forums, business networks, green business and environmental accreditation schemes, and business clusters[68]. The NPAs have the opportunity to fulfil a specific role focusing on the business/environment/land management interface. This includes boosting the green economy through land management, produce and sustainable tourism, whilst also seeking opportunities for environmental benefits.

5. Further developing positive development management and community led planning approaches

NPAs have an important role in promoting sustainable development that respects and conserves the quality of the natural and built environment. There is an opportunity to roll out good practice in the form of a positive development management service, including the provision of pre-application advice at no charge in order to facilitate good schemes and keep business costs down. This is already bearing fruit in National Parks in terms of a more strategic approach for bringing forward appropriate development, high planning application approval rates and a better understanding of priorities and processes. A community led planning approach is also beneficial in helping to improve public ownership and understanding. A well managed, streamlined system will benefit businesses seeking to grow and/or invest in National Parks.

6. Progressing economic development through closer working with LEPs and Local Authorities

There is a real opportunity for Local Economic Partnerships to see National Parks as key areas to demonstrate the potential for rural economic growth, working closely with NPAs. LEPs are still quite new and most do not currently appear to have a strong, rural focus or a good appreciation of National Parks as economic assets. Joint schemes in National Parks can help to highlight the importance of the environment as an economic driver, and to identify priorities for investment that maximise the opportunities for sustainable business growth that benefits from and respects the unique character and environment of the National Parks. This applies to both National Parks themselves and areas on the periphery. At the same time, there would be value in working more closely with Local Authority economic development officers to progress priority sites and infrastructure improvements. This links into the positive planning approach outlined above.

[68] These opportunities and mechanisms are recognised and identified by 'Rural areas as engines of economic growth' (RELU, 2013)

7. Developing appropriate infrastructure to support economic growth

NPAs are already involved in promoting investment in employment sites, affordable housing, broadband and public transport[68]. This includes direct investment in appropriate infrastructure (for example, via strategic use of SDF funds) and leading or being actively engaged in partnerships to bring about such investment. Targeting of support through national infrastructure programmes such as Broadband Delivery UK and Defra's Rural Community Broadband Fund will be crucial for economic development in National Parks and to avoid these already remote areas from being 'left behind' in the use of new technologies and being able to access growing markets.

8. Creating pathways to employment

NPAs have been successful in developing opportunities for young people and others in National Parks to gain the skills, experience and qualifications to enable them to obtain employment and at the same time contribute to the upkeep and management of National Parks. In the current economic climate, this is particularly important and support is needed to encourage businesses and other organisations to follow suit, providing a wider range of volunteering, training and apprenticeship opportunities to contribute to the growth of the local economy and employment.

9. Promoting a low carbon approach and developing renewable energy

Promoting low carbon living and business and supporting the development of appropriate renewable energy is enabling NPAs and their partners to make a contribution to mitigating climate change and developing a more sustainable and resilient economy and society in National Parks.

10. Delivering and rewarding the providers of ecosystem services

National Parks deliver a range of valuable ecosystem services, some of which are undervalued or unvalued in the market place, for example the provision of clean drinking water, flood mitigation and carbon sequestration. NPAs currently play a role in identifying, targeting and enhancing these services working with a range of partners. In the future, National Park economies could benefit substantially from the development of Payment for Ecosystem Services schemes to reward farmers and landowners for beneficial land use and management. There are significant challenges which need to be overcome (for example in measuring and valuing ecosystem services) and government has an essential role in developing and supporting effective PES mechanisms. NPAs can assist by gathering local evidence and facilitating the development of partnerships and pilot projects to ensure that local economies benefit from PES programmes. Over time this could generate new revenues for land managers and improve the management of the ecosystems of National Parks.

11. Further partnership working to deliver National Park purposes

Partnership working is embedded into the work of all NPAs. Partnership working enables strategic and organisational objectives to be aligned, improves relations between different groups and public perception, saves valuable resources, and contributes to more effective working. While much is already being done, there is potential to undertake further partnership working to deliver National Park purposes and contribute to economic growth and well-being. This includes improving existing partnerships, developing new partnerships with organisations in different sectors (for example health) and trialling new approaches (for example joint investments). With sufficient resources, NPAs can continue to play an important role in facilitating partnership approaches, linking environmental, social and economic interests and helping to develop and implement interventions that deliver benefits for all.

12. Leveraging further funding and exploring other income-generating opportunities

NPAs have a proven track record in leveraging external funding to complement the National Park Grant and other existing income. To date, this has included European, national and local funding predominantly from the public sector and lottery funded programmes. Again, if sufficiently resourced, NPAs have the potential to continue to do this, especially in the context of increasing partnership working, and expand the approach to including private and voluntary sector funding. This would tie in with closer working with business and developing corporate support. Again, by working at the interface between the environment, economy and local communities, NPAs are well placed to identify the multiple benefits that projects can deliver and to lever funding from different sources to achieve this.

13. Delivering European and national environment, heritage and regeneration programmes at local level

Operating in a defined geographic area and across sectors, NPAs have the strategic positioning and expertise to act as delivery agents for European and national programmes. This has occurred to date in some areas, for example in the facilitation of agri-environment schemes or managing LEADER schemes, however there is potential for the delegation of greater responsibility and expanding the type of programmes delivered (for example through the new RDPE 2014-2020). NPAs are well placed to deliver programmes cost effectively and in a more integrated way. This closely links to partnership working and leveraging further funding.

14. Raising the profile of National Parks as contributors to economic growth

The rationale for this report, as identified in the Vision for National Parks, is the need and opportunity to raise the profile of England's National Parks as contributors to economic growth and well-being. This report helps to do this, but more work remains to raise awareness amongst businesses, communities and other organisations of the economic asset that is the National Parks and how this can be nurtured and grown for the benefit of all and the Parks' themselves.

15. Developing the evidence base

Linked to raising the profile of National Parks as contributors to economic growth, is the need to develop the evidence base. This includes identifying and monitoring key economic indicators (building on the national datasets available through the IDBR, for example), and systematically evaluating the economic outputs and outcomes arising from NPA activities, interventions and projects. This will maximise learning within and amongst NPAs and partners and enable budgets to be prioritised, so that NPAs can make the biggest difference and add the most value.

In summary, there will continue to be a range of important challenges which need to be addressed if the National Parks are to continue to contribute to economic prosperity and well being, at local and national level. NPAs are well placed to design and deliver practical and sustainable solutions, working in partnership with others. They will be able to lever in additional resources to support this work, however the range of activities and their effectiveness depends crucially on core support in the form of the National Park Grant. Little of the above will be possible if this funding reduces to a point where the NPAs are restricted to the delivery of essential statutory duties and have no capacity to develop partnerships and projects. Stability of funding is also required to provide NPAs with a degree of certainty and confidence from which to innovate and take risks.

10 Conclusions

England's National Parks are valued national assets. They comprise some of the highest quality landscapes and wildlife habitats in the country and make important contributions to our economy and society and are also part of our national identity. They are of huge importance to the people who live and work within them, as well as the many millions who visit for recreation and tourism.

10.1 National Park economies make a valuable contribution, locally and nationally

England's National Parks cover a total area of more than 1.2 million hectares (9.3% of England's land area) and are relatively sparsely populated with an average population density of 0.3 persons per hectare, although there is considerable variance in both the size and the population density of individual National Parks.

The total population of England's National Parks is 321,000 (0.6% of the England population) and of the working age population 70% is economically active, in line with the national average. The population is older, and population growth over the past ten years has been lower, in the National Parks compared to England, reflecting their rurality. Around half the population of England resides within one hour's travel of a National Park and National Park areas provide benefits to people who live well beyond their boundaries.

The National Parks have a higher proportion of self-employed people than the country as a whole (19% compared to 10%), a similar proportion of part-time workers and a lower proportion of full time workers. Unemployment is 2%, lower than the national average. Of the 157,000 employees in the National Parks, there is a high proportion of senior, professional and skilled occupations in the workforce. Average household income is higher than regional averages for most National Parks and average house prices in National Parks also command a significant premium over regional averages.

There are 22,500 businesses located in England's National Parks providing around 141,000 jobs, according to 2012 data; this equates to 1.2% of all businesses and 0.6% of total employment in England. From an analysis of turnover, employment and county-level productivity data, it is estimated that England's National Parks generate £4.1 to 6.3 billion of GVA in 2012 (0.4% to 0.6% of all GVA generated in England). This is comparable to a smaller city such as Plymouth, Coventry, Swindon or Sunderland, or the UK aerospace sector, all of which have a total GVA of between £4 billion and £6 billion.

While the contribution of National Parks to overall employment is in line with their population, the number of businesses per unit of population is twice the national average, a reflection of the number of small businesses in the National Parks. The number and type of businesses and employment varies across individual National Parks.

Key sectors in the National Park economies include the following:

- Farming and forestry. This sector is responsible for managing the vast majority of the National Park area, producing food, timber and other products, and delivering a wide range of public goods and services. Agriculture, forestry and fishing accounts for around 24% of all businesses and nearly 10% of total employment in the National Parks, around 13,500 FTE jobs.
- Tourism and recreation. National Parks attract 95 million visitors per annum, with 87 million day trips and 24 million visitor days from staying visitors. Annual visitor expenditure equates to £3.0 billion, which increases to at least £4 billion when the wider "area of influence", which includes neighbouring towns and villages which cater for National Park visitors, is counted. This expenditure is estimated to support some 48,000 FTE jobs, around 34% of total employment in National Parks.

- All other sectors are under-represented compared to the national average but the professional, scientific and technical, construction, wholesale and retail, education and health sectors, in particular, are nevertheless important in terms of business numbers and employment.

10.2 National Park Authorities play an important role in supporting National Park economies

NPAs play an important role in the National Park economies in a variety of ways. This role links to their statutory purposes - to conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park; and to promote opportunities for the understanding and enjoyment of the special qualities of the Parks by the public; and, in the case of the Broads Authority, to protect the interests of navigation – as well as their duty to foster the social and economic wellbeing of their local communities.

NPAs work with their partners (communities, businesses and other organisations) to produce Management Plans for the National Parks. These set out the vision, strategic policies and outcomes for the National Parks (including the economy) and the mechanisms, activities and resources used to achieve these.

NPAs also have a direct impact in terms of employment and expenditure on goods and services. In 2011/12, NPA gross expenditure amounted to £74 million, funded through the National Park Grant of £55 million and their own income; this includes revenue income and project grants / other income successfully leveraged in from a variety of external sources. NPA employment was an estimated 1,118 FTE jobs in 2011/12. In total, after taking into account multiplier effects arising from employee and supplier expenditure, it is estimated that the NPAs contributed 1,500 FTE jobs and £50 million GVA to the local economy in 2011/12. With reducing NPA budgets and employment, however, it can be expected that this contribution will be lower in future years.

NPAs, through their influence and different activities, also help to address the specific challenges and opportunities in their local economies, thereby contributing to the vision and objectives of the National Parks. Key initiatives undertaken by NPAs include the following:

- Supporting 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; renewable energy advice and support; woodland advice services; woodland schemes and grants; woodland product initiatives; wood fuel initiatives; branding and marketing initiatives; and training and skills development.
- Promoting sustainable tourism and recreation through: branding, marketing and destination management; sustainable transport initiatives; tourism and recreational infrastructure; initiatives promoting local food and drink to visitors; education and awareness raising activities; and visitor payback/ giving schemes.
- Encouraging diverse and sustainable rural economies through: positive development management advice; employment space provision; economic development activities; environmental economy initiatives; business networking initiatives; initiatives to improve broadband and mobile phone coverage; training and skills development; and renewable energy initiatives.

It is worth noting that a number of studies relating to individual National Parks indicated that over 50% of businesses surveyed felt that their business was directly or indirectly dependent on a high quality landscape and environment, and positively impacted by the National Park designation, with this figure rising for tourism-related businesses. Many businesses in towns and cities located close to, but outside, National Parks stated that they were also dependent on and positively influenced by National Parks. Furthermore, there is no evidence to suggest that businesses in National Parks are suffering from undue planning restrictions compared to elsewhere, with a significant majority of planning applications in National Parks being approved by NPAs (89%, compared to 87% for England as a whole).

By contributing to the conservation and sustainable use of the environment, NPAs also help to enhance the delivery of ecosystem services that are valued by society and contribute to wider well-being. A variety of provisioning, regulating, cultural and supporting services are supported by the high quality ecosystems of National Parks. These services are harder to value but nonetheless provide economic benefits in a number of different ways including: underpinning economic activities such as farming, forestry, extractive industries, tourism and recreation; reducing costs to society by improving our health, sequestering carbon, and purifying our water; enhancing the well-being of people and communities by providing recreational experiences, tranquillity and fine views; and maintaining a liveable environment by regulating climate, air quality, soils and water cycles. NPAs are active in improving water quality, reducing the impacts and costs of floods, and reducing Greenhouse Gas emissions, amongst other initiatives. These help to maintain a healthy environment in which people can live, work and do business.

Finally, 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; providing affordable housing; promoting investment in broadband and mobile communications; and supporting community renewable energy projects. 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. Other NPA activities include investing in community facilities, contributing to awareness and education, promoting healthy outdoor recreation, and enhancing social inclusion. These activities help to strengthen local communities and support local economies, as well as benefiting the wider population and economy.

10.3 National Parks and their economies face a range of challenges and opportunities

The National Parks and their economies face a range of current and future challenges, many of which are common to rural or remote rural areas across the country. The main challenges include:

- The general economic downturn with associated loss of businesses and employment; this is affecting the tourism economy amongst other sectors;
- Lack of diversity of businesses and employment, with high reliance on farming, forestry and tourism, and associated seasonality of economic activity;
- Poor profitability of farming systems, particularly upland grazing livestock systems, together with a reliance on public payments and a limited ability for farm businesses to develop and diversify income;
- Lack of access and distance from markets and passing trade in some National Parks;
- Limited stock and quality of employment premises and developable land;
- Limited road and rail infrastructure, and public transport services;
- Poor broadband provision and mobile phone coverage;
- Low affordability of housing and lack of affordable housing;
- Lack of access to reasonably priced and reliable energy supplies;
- An aging workforce and limited opportunities for young people to find full time employment;
- A shortage of modern and traditional skills;
- Low population density threatening the viability of services and businesses;
- Climate change.

There are however also a number of future economic opportunities for National Parks, these include:

- Increasing demand for food and timber;
- Increasing value attached to authentic locally distinct products and services;
- Emerging markets in the form of Payments for Ecosystem Services;
- Potential to grow visitor numbers and visitor expenditure;
- Building on the growing knowledge economy by improving the communications infrastructure across the National Parks;
- Realising the potential of highly valued landscapes and environments in the National Parks;
- Improving recognition of the value of National Parks amongst all types of business and customers;
- Developing appropriate renewable energy generation;
- Working closely with LEPs and government to support business development and entrepreneurship in National Parks, including opportunities for young people.

10.4 National Park Authorities are uniquely placed to continue supporting sustainable economic growth

NPAs are uniquely placed to continue supporting sustainable economic growth in National Parks. That is to maintain thriving living landscapes, where natural assets are conserved and enhanced and where people, businesses and communities can prosper, now and in the future.

Working in partnership with a range of other authorities and interest groups, a key part of the role of NPAs is to conserve and enhance the environment of the National Parks in way that also enhance economic development and help sustain local communities, securing mutual benefits for the environment, people and the economy.

NPAs have a good track record of working with businesses, helping them to add value and grow, supporting skills development, investing in infrastructure, and attracting visitors whilst at the same time maintaining a high quality landscape and environment on which many of the businesses depend.

With sufficient core funding and with the support of its partners, the NPAs will be able to continue to do this important work and more, thereby helping to grow the National Park economies in a sustainable way.

The following key opportunities have been identified for NPAs and partners to address the challenges and realise the economic opportunities facing National Parks:

1. Developing and applying the brand;
2. Supporting stronger and more sustainable farming and forestry;
3. Promoting sustainable tourism;
4. Working more closely with businesses;
5. Further developing positive development management and community led planning approaches;
6. Progressing economic development by closer working with Local Enterprise Partnerships and Local Authorities;
7. Developing appropriate infrastructure to support economic growth;
8. Creating pathways to employment;
9. Promoting a low carbon approach and developing renewable energy;
10. Delivering and rewarding the providers of ecosystem services;

11. Further partnership working to deliver National Park purposes;
12. Leveraging further funding and exploring other income-generating opportunities;
13. Delivering European and national environment, heritage and regeneration programmes at local level;
14. Raising the profile of National Parks as contributors to economic growth;
15. Developing the evidence base relating to the economy and economic growth.

The ability of NPAs to undertake these activities with their partners, and thereby contribute to further growth in the National Park economies will continue to depend on the level of core funding made available through the National Park Grant. It will not be possible to deliver on these opportunities if funding reduces to a point where NPAs are restricted to the delivery of essential statutory duties and have no capacity to develop partnerships and projects. Stability is also important to provide NPAs with the certainty and confidence from which to innovate and take risks.

Appendix 1: Individual National Park Economic Profiles

The Broads

The Broads are a wetland, a network of rivers, lakes and fens in Norfolk and Suffolk in the East of England of international significance and a member of the National Park family. The Broads is a small area compared to other English National Parks, covering an area of approximately 30,000 hectares. The local area also has a relatively low population density of 0.21 persons per hectare, which is slightly lower than the average of 0.26 across the English National Parks.

Population and age profile

The Broads has a relatively small population of approximately 6,300, according to the latest Census data. The data in Table A1.1 show that the local population is very much an ageing population, with a larger proportion of people aged 60 and over (40%), compared to those aged younger than 45 (36%). Across the English National Parks as a whole there are more people aged under 45 (44%) than aged 60 and over (33%), while the national average has 59% aged under 45 and just 23% aged 60 and over.

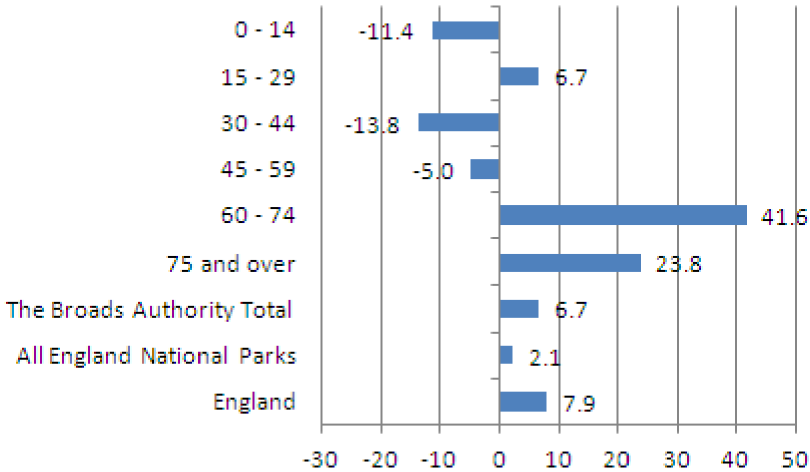
Table A1.1 – Population of the Broads by Age Group, 2011

	The Broads		All England National Parks	England
Age 0 to 14	655	10%	16%	19%
Age 15 to 29	778	12%	12%	19%
Age 30 to 44	892	14%	16%	21%
Age 45 to 59	1,451	23%	23%	19%
Age 60 to 74	1,672	27%	22%	15%
Age 75+	823	13%	11%	8%
Total	**6,271**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.1 shows that the Broads population has experienced strong growth of 6.7% between 2001 and 2011, according to Census data. This is the second strongest growth rate of all English National Parks and, although slightly lower than the 7.9% population growth across England as a whole, is significantly higher than the average across all English National Parks (of 2.1%). However, the local population has become more aged over time, with significant declines in the number of people aged younger than 60 and significant growth amongst those aged 60 and over.

Figure A1.1 – Population Change in The Broads, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity

The latest Census data suggest that The Broads has a relatively small 'working age' population of approximately 4,700 people. The data in Table A1.2 also show that the local rate of economic activity (65%) is significantly lower than the National Park and England averages of 70%, due to relatively low rates of part time, full time and self employment. Unemployment is also slightly higher than the wider National Park average, although it remains lower than the national average of 4%. Corresponding rates of economic inactivity are therefore higher than average, due primarily to the large number of retired people.

Table A1.2 – Economic Activity in the Broads, 2011

	The Broads		All England National Parks	England
Working Age Population (aged 16-74)	**4,732**	**100%**	**100%**	**100%**
Economically Active	**3,077**	**65%**	**70%**	**70%**
Part-time employees	618	13%	14%	14%
Full-time employees	1,464	31%	32%	39%
Self-employed	773	16%	19%	10%
Unemployed	141	3%	2%	4%
Full-time student	81	2%	2%	3%
Economically Inactive	**1,655**	**35%**	**30%**	**30%**
Retired	1,143	24%	19%	14%
Student	123	3%	4%	6%
Looking after home or family	149	3%	4%	4%
Long-term sick or disabled	167	4%	2%	4%
Other	73	2%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.3 shows that there are almost 3,000 employed people living in The Broads, including a relatively large number of managers, directors and senior officials. In contrast, there are relatively few people with professional and elementary occupations compared to both the National Park and national averages.

Table A1.3 – Occupations of residents in The Broads, 2011

	The Broads		All England National Parks	England
Employed residents (aged 16-74)	**2,925**	**100%**	**100%**	**100%**
Managers, directors & senior officials	529	18%	16%	11%
Professional occupations	480	16%	20%	17%
Associate professional & technical occupations	322	11%	11%	13%
Administrative & secretarial occupations	299	10%	9%	11%
Skilled trades occupations	421	14%	16%	11%
Caring, leisure & other service occupations	263	9%	8%	9%
Sales & customer service occupations	162	6%	5%	8%
Process, plant and machine operatives	174	6%	5%	7%
Elementary occupations	275	9%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

The 2010 Defra economic profiles suggested that the average gross income of households on The Broads was £35,341 in 2009/10[69]. This was the fourth highest of all English National Parks but was also significantly lower (-6.1%) than the average household income for the East of England region.

House prices

The Defra economic profiles also estimated, based on 2009 Land Registry sales data, that the average house price on The Broads was almost £285,000 (which was fairly average across the English National Parks) but almost a third higher (32%) than the average house price in the East of England at the time.

[69] CACI Paycheck data, mid-year estimates 2009-10

Number of businesses

The latest IDBR data record that there were approximately 170 businesses[70] operating from 185 establishments (local units) in The Broads in 2012. These numbers have remained relatively stable since 2009. The data in Table A1.4 show that the large majority of businesses and establishments in The Broads has fewer than ten employees, which is consistent with the other English National Parks and the national average.

Table A1.4 – Businesses and Establishments in the Broads by Size, 2012

Businesses	**The Broads**		**All England National Parks**	**England**
0-9 employees	150	88%	91%	89%
10-49 employees	15	9%	8%	9%
50-249 employees	5	3%	1%	2%
250+ employees	0	0%	0%	0%
Total	**170**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	160	86%	88%	83%
10-49 employees	20	11%	10%	14%
50-249 employees	5	3%	1%	3%
250+ employees	0	0%	0%	0%
Total	**185**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Table A1.5 shows the distribution of businesses by sector. The numbers are very small for The Broads but show a concentration of businesses in ‘agriculture, forestry and fishing’, ‘retail’ and ‘professional, scientific and technical’ sectors. These sectors account for around 45% of local businesses, which is similar to the other English National Parks but higher than the national average. The data also reveal a relatively large number of businesses in the ‘retail’, ‘transport and storage’, ‘property’, ‘business administration and support services’, and ‘arts, entertainment, recreation and other services’ sectors compared to the other National Parks and the national average. In contrast, the number of local businesses in ‘manufacturing’, ‘motor trades’, ‘information and communication’, ‘finance and insurance’ and ‘education’ sectors is relatively low.

Table A1.5 – Businesses in The Broads by Sector, 2012

Businesses	**The Broads**		**All England National Parks**	**England**
Agriculture, forestry & fishing	35	21%	24%	5%
Production	5	3%	5%	6%
Construction	15	9%	10%	12%
Motor trades	0	0%	2%	3%
Wholesale	5	3%	3%	5%
Retail	20	12%	7%	9%
Transport & Storage (inc. postal)	10	6%	2%	3%
Accommodation & food services	15	9%	9%	6%
Information & communication	0	0%	5%	8%
Finance & insurance	0	0%	1%	2%
Property	10	6%	3%	4%
Professional, scientific & technical	20	12%	13%	17%
Business administration & support services	15	9%	6%	7%
Public administration & defence	0	0%	0%	0%
Education	0	0%	2%	2%
Health	5	3%	3%	4%
Arts, entertainment, recreation & other services	15	9%	6%	7%
Total	**170**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

70 VAT and/or PAYE based enterprises

Employment

Employment in The Broads has grown by almost 11% between 2009 and 2012. The 170 local businesses in The Broads provided employment for approximately 2,000 people in 2012. This suggests that the average business employed 11.5 people in 2012. Much of the local employment data in Table A1.6 has been suppressed due to the small number of local businesses, but it does suggest a relatively high proportion of employees in The Broads work for businesses employing between 10 and 49 people compared to the other National Parks and the national average.

Table A1.6 – Employment in the Broads by Size of Business, 2012

	The Broads		**All England National Parks**	**UK**
0-9 employees	..C	..C	35.1%	14.1%
10-49 employees	399	20.4%	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	..C	..C	17.6%	59.0%
Total	**1,960**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Broads and England National Park figures do not sum to the totals.

Similarly, much of the sectoral employment data has been suppressed in Table A1.7. The disclosed data suggest a particularly high level of local employment in the 'arts, entertainment, recreation and other services' sector, which accounts for 15% of employment in the Broads, compared to 5% across the other National Parks and 4% across the whole of the UK.

Table A1.7 – Employment in the Broads by Sector, 2012

	The Broads		**All England National Parks**	**UK**
Agriculture, forestry & fishing	142	7.2%	9.6%	0.9%
Production	..C	..C	5.9%	10.2%
Construction	..C	..C	4.9%	4.5%
Wholesale & retail (inc. motor trades)	..C	..C	11.7%	16.5%
Transport & Storage (inc. postal)	..C	..C	1.6%	4.2%
Accommodation & food services	..C	..C	14.7%	6.4%
Information & communication	..C	..C	2.0%	3.9%
Finance & insurance	..C	..C	0.1%	3.9%
Property	19	1.0%	2.3%	1.6%
Professional, scientific & technical	..C	..C	5.0%	6.3%
Business administration & support services	94	4.8%	3.9%	8.1%
Public administration & defence	0	0.0%	0.0%	4.0%
Education	..C	..C	15.6%	12.9%
Health	..C	..C	10.9%	12.5%
Arts, entertainment, recreation & other services	288	14.7%	5.2%	4.1%
Total	**1,960**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Broads and England National Park figures do not sum to the totals.

Alternative employment estimates have been produced in Table A1.8 based on 2011 data from the Business Register and Employment Survey (BRES). In this case the 'Broads' area is defined as covering all the lower super output areas (LSOAs) which had some part, however small, in The Broads area, rather than focusing only on the LSOAs where more than half of the population falls in The Broads area. This has a significant impact on the total level of employment associated with The Broads, which increases to more than 140,000 jobs. The proportion of jobs in 'agriculture, forestry and fishing' and 'arts, entertainment, recreation and other services' falls significantly when adopting the larger area, which then becomes more closely matched to the UK average than the other national parks.

Table A1.8 – Employment in the Broads by Sector based on BRES data, 2011

	The Broads	
Agriculture, forestry & fishing	195	0.1%
Production	12,510	8.9%
Construction	6,429	4.6%
Wholesale & retail (inc. motor trades)	27,715	19.8%
Transport & Storage (inc. postal)	4,864	3.5%
Accommodation & food services	10,409	7.4%
Information & communication	3,873	2.8%
Finance & insurance	5,903	4.2%
Property	2,586	1.8%
Professional, scientific & technical	8,516	6.1%
Business administration & support services	14,669	10.5%
Public administration & defence	8,795	6.3%
Education	12,598	9.0%
Health	12,810	9.1%
Arts, entertainment, recreation & other services	8,282	5.9%
Total	**140,154**	**100.0%**

Source: BRES (2011 data), accessed via NOMIS on 17 April 2013

Turnover and GVA

The IDBR data estimate that the 170 local businesses generated a combined annual turnover of approximately £114 million in The Broads in 2012. This equates to an average turnover of £59,500 per employee, which is considerably lower than the English National Park and UK averages of £68,000 and £167,000 per employee respectively. Although much of the data in Table A1.9 is suppressed it again shows a relatively high turnover amongst businesses in The Broads with between 10 and 49 employees compared to the national average.

Table A1.9 – Turnover (£m) in The Broads by Size of Business, 2012

	The Broads		All England National Parks	UK
0-9 employees	..C	..C	37.9%	12.6%
10-49 employees	21.1	18.5%	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	..C	..C	4.6%	62.2%
Total	**114.3**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Broads and England National Park figures do not sum to the totals.

The unsuppressed data in Table A1.10 shows a relatively high turnover in the primary (agriculture, forestry and fishing) sectors and business administration and support services sector in The Broads, compared to the other English National Parks and the UK average.

Table A1.10 – Turnover (£m) in The Broads by Sector, 2012

	The Broads		All England National Parks	UK
Agriculture, forestry & fishing	19.1	16.8%	7.8%	0.8%
Production	..C	..C	9.6%	15.9%
Construction	..C	..C	7.1%	4.4%
Wholesale & retail (inc. motor trades)	..C	..C	17.2%	24.6%
Transport & Storage (inc. postal)	..C	..C	1.7%	3.3%
Accommodation & food services	..C	..C	9.2%	1.7%
Information & communication	..C	..C	2.4%	4.1%
Finance & insurance	..C	..C	1.0%	27.3%
Property	1.1	1.0%	1.9%	1.1%
Professional, scientific & technical	..C	..C	5.2%	4.7%
Business administration & support services	6.0	5.3%	4.0%	3.6%
Public administration & defence	-	0.0%	0.2%	0.6%
Education	..C	..C	4.0%	1.7%
Health	..C	..C	7.4%	3.6%
Arts, entertainment, recreation & other services	..C	..C	3.0%	2.7%
Total	**114.3**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Broads and England National Park figures do not sum to the totals.

GVA has been estimated for The Broads using the three different approaches described in Section 2. Unfortunately, the relatively high levels of suppressed data in the above turnover and employment data mean that the GVA estimates based on turnover and employment are likely to underestimate the true level of GVA in The Broads, while the GVA estimates based on county level productivity are likely to over-estimate GVA because of the concentration of agricultural activity in the Broads. These estimates suggest that the businesses in The Broads generated GVA of between £11 and £83 million per annum in 2012. However, if the GVA estimates are based on the higher level of employment (associated with all LSOAs which had some part in The Broads area) the estimate of GVA could be as high as £6 billion.

Dartmoor National Park

Dartmoor National Park is located in Devon in South West England and covers an area of more than 95,000 hectares. It is one of the smaller National Parks in England (7th largest of the ten National Parks) and has a relatively high population density of 0.35 persons per hectare (third highest of all English National Parks), although this is still significantly lower than the national average of 4.1 persons per hectare.

Population and age profile

Dartmoor has a total population of 33,600, according to the latest Census data. The data in Table A1.11 show that the age structure of the local population in Dartmoor is fairly typical of the other English National Parks with 44% of the population aged less than 45 and 32% aged 60 and over. However, this is a much older population than the national average, where 59% of the population is aged younger than 45 and 23% is aged 60 and over.

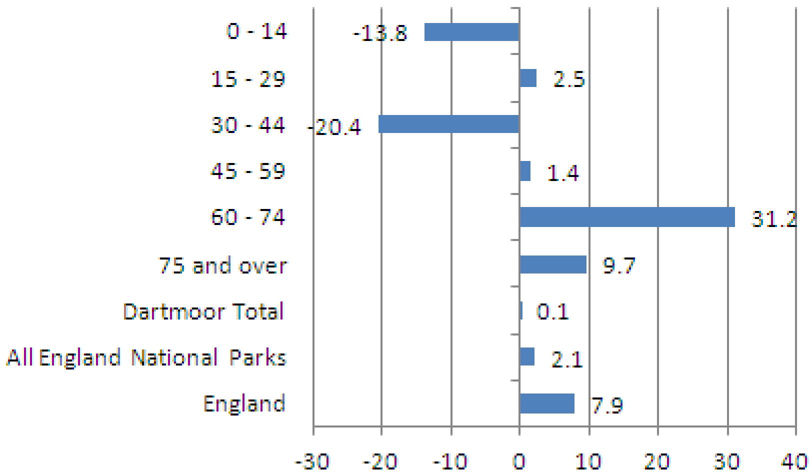
Table A1.11 – Population of the Dartmoor National Park by Age Group, 2011

	Dartmoor National Park		**All England National Parks**	**England**
Age 0 to 14	5,033	15%	15%	18%
Age 15 to 29	4,458	13%	13%	20%
Age 30 to 44	5,402	16%	16%	21%
Age 45 to 59	7,987	24%	23%	19%
Age 60 to 74	7,120	21%	22%	15%
Age 75+	3,596	11%	11%	8%
Total	**33,596**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.2 shows that the Dartmoor population has remained stable between 2001 and 2011, according to Census data, growing at just 0.1%. Over the same period the population across all English National Park areas has increased by 2.1%, while the total population of England has increased by 7.9%. However, Dartmoor has experienced an increasingly ageing population, with particularly strong growth in the number of people aged 60 and over.

Figure A1.2 – Population Change in the Dartmoor National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity

The latest Census data suggest that there are approximately 25,000 people of 'working age' (aged between 16 and 74) living in the Dartmoor National Park. The data in Table A1.12 show that the local rate of economic activity is slightly lower than average at 68%, compared to the National Park and England averages of 70%. The proportion of full time employees is relatively low, while self-employment and unemployment are in line with the National Park average, such that self-employment is significantly higher than the national average and unemployment is relatively low. The rates of economically inactivity are also similar to the National Park average with relatively high numbers of retired people.

Table A1.12 – Economic Activity in the Dartmoor National Park, 2011

	Dartmoor National Park		All England National Parks	England
Working Age Population (aged 16-74)	**24,572**	**100%**	**100%**	**100%**
Economically Active	**16,716**	**68%**	**70%**	**70%**
Part-time employees	3,685	15%	14%	14%
Full-time employees	7,244	29%	32%	39%
Self-employed	4,674	19%	19%	10%
Unemployed	573	2%	2%	4%
Full-time student	540	2%	2%	3%
Economically Inactive	**7,856**	**32%**	**30%**	**30%**
Retired	4,697	19%	19%	14%
Student	866	4%	4%	6%
Looking after home or family	855	3%	4%	4%
Long-term sick or disabled	772	3%	2%	4%
Other	666	3%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.13 shows that the 16,000 employed people living on Dartmoor comprise a relatively large number of people with professional and skilled trade occupations compared to the National Park and England averages. Most of the other occupations are in line with the National Park average, with relatively few people in administrative, sales and customer service occupations and plant and machine operatives. The number of directors, managers and senior officials is relatively low compared to the other National Parks but remains higher than the national average.

Table A1.13 – Occupations of residents in the Dartmoor National Park, 2011

	Dartmoor National Park		All England National Parks	England
Employed residents (aged 16-74)	**16,052**	**100%**	**100%**	**100%**
Managers, directors & senior officials	2,116	13%	16%	11%
Professional occupations	3,323	21%	20%	17%
Associate professional & technical occupations	1,824	11%	11%	13%
Administrative & secretarial occupations	1,342	8%	9%	11%
Skilled trades occupations	2,658	17%	16%	11%
Caring, leisure & other service occupations	1,487	9%	8%	9%
Sales & customer service occupations	861	5%	5%	8%
Process, plant and machine operatives	863	5%	5%	7%
Elementary occupations	1,578	10%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

An economic profile of Dartmoor National Park was published by the Defra Rural Statistics Unit in 2010, which provided data on household incomes. The data suggest that the average gross income of households on Dartmoor was £33,039 in 2009/10[71]. This was a fairly typical level of household income across the ten National Park areas but was one of only three National Parks where the average household income for the National Park was lower (-1.8%) than the regional average (although this is likely to be due to the large difference in sub-regional incomes in the South West region).

[71] CACI Paycheck data, mid-year estimates 2009-10

House prices

The Defra economic profiles also provided data on house prices on Dartmoor, compared to the regional average at the time. The data, based on 2009 Land Registry sales data, suggest that the average house price on Dartmoor was £267,000, which was amongst the lowest of the ten English National Parks. House prices on Dartmoor were also found to have the smallest premium (27%) over the average regional house price at the time.

Number of businesses

There were approximately 2,065 businesses[72] operating from 2,230 establishments on Dartmoor in 2012 according to the latest IDBR data. These numbers have fallen slightly since 2009, by around 40 businesses and 65 establishments. The data in Table A1.14 show that more than 90% of the businesses and establishments on Dartmoor have fewer than ten employees, which is higher than the National Park and national averages.

Table A1.14 – Businesses and Establishments in Dartmoor National Park by Size, 2012

Businesses	**Dartmoor National Park**		**All England National Parks**	**England**
0-9 employees	1,900	92%	91%	89%
10-49 employees	145	7%	8%	9%
50-249 employees	15	1%	1%	2%
250+ employees	5	0%	0%	0%
Total	**2,065**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	2,000	90%	88%	83%
10-49 employees	205	9%	10%	14%
50-249 employees	20	1%	1%	3%
250+ employees	5	0%	0%	0%
Total	**2,230**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

The data in Table A1.15 show that more than half of the businesses on Dartmoor are in 'agriculture, forestry and fishing', 'construction' and 'professional, scientific and technical' sectors. This is higher than the other English National Parks and national averages, primarily because of particularly high number of agriculture, forestry and fishing businesses. In contrast, Dartmoor has a relatively low number of local businesses in 'wholesale', 'retail', 'information and communication' and 'education' sectors.

Table A1.15 – Businesses in the Dartmoor National Park by Sector, 2012

Businesses	**Dartmoor National Park**		**All England National Parks**	**England**
Agriculture, forestry & fishing	610	30%	24%	5%
Production	100	5%	5%	6%
Construction	210	10%	10%	12%
Motor trades	55	3%	2%	3%
Wholesale	45	2%	3%	5%
Retail	125	6%	7%	9%
Transport & Storage (inc. postal)	35	2%	2%	3%
Accommodation & food services	140	7%	9%	6%
Information & communication	80	4%	5%	8%
Finance & insurance	20	1%	1%	2%
Property	65	3%	3%	4%
Professional, scientific & technical	235	11%	13%	17%
Business administration & support services	135	7%	6%	7%
Public administration & defence	15	1%	0%	0%
Education	20	1%	2%	2%
Health	60	3%	3%	4%
Arts, entertainment, recreation & other services	115	6%	6%	7%
Total	**2,065**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and analysis of IDBR data

72 VAT and/or PAYE based enterprises

Employment

The 2,065 local businesses located on Dartmoor provided employment for almost 10,000 people in 2012. Employment on Dartmoor has therefore increased by around 8.5% between 2009 and 2012, despite the slight decrease in the number of local businesses. This suggests that the average business size has increased over this time but still remains lower than five employees. The data in Table A1.16 suggest that a relatively large proportion of local employment is within businesses with fewer than 50 employees, compared to the other National Parks and national average.

Table A1.16 – Employment in the Dartmoor National Park by Size of Business, 2012

	Dartmoor National Park		**All England National Parks**	**UK**
0-9 employees	4,505	46.7%	35.1%	14.1%
10-49 employees	2,460	25.5%	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	..C	..C	17.6%	59.0%
Total	**9,656**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Dartmoor and England National Park figures do not sum to the totals.

The data in Table A1.17 show relatively high levels of employment in 'agriculture, forestry and fishing', 'construction', 'accommodation and food services' and 'business administration and support services' sectors and relatively low employment in 'education' and 'health' sectors on Dartmoor, in comparison with the other National Parks and the rest of the UK.

Table A1.17 – Employment in the Dartmoor National Park by Sector, 2012

	Dartmoor National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	1,375	14.2%	9.6%	0.9%
Production	729	7.5%	5.9%	10.2%
Construction	802	8.3%	4.9%	4.5%
Wholesale & retail (inc. motor trades)	1,022	10.6%	11.7%	16.5%
Transport & Storage (inc. postal)	220	2.3%	1.6%	4.2%
Accommodation & food services	1,648	17.1%	14.7%	6.4%
Information & communication	248	2.6%	2.0%	3.9%
Finance & insurance	23	0.2%	0.1%	3.9%
Property	225	2.3%	2.3%	1.6%
Professional, scientific & technical	519	5.4%	5.0%	6.3%
Business administration & support services	870	9.0%	3.9%	8.1%
Public administration & defence	19	0.2%	0.0%	4.0%
Education	505	5.2%	15.6%	12.9%
Health	937	9.7%	10.9%	12.5%
Arts, entertainment, recreation & other services	514	5.3%	5.2%	4.1%
Total	**9,656**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Dartmoor and England National Park figures do not sum to the totals.

Turnover and GVA

The 2,065 local businesses are estimated to have generated a combined annual turnover of more than £600 million in 2012. This equates to an average turnover of approximately £76,000 per employee, which is the third highest of the English National Parks and higher than the National Park average of £68,000. The data in Table A1.18 show that turnover of businesses on Dartmoor is also concentrated amongst smaller businesses with fewer than 50 employees.

Table A1.18 – Turnover (£m) in the Dartmoor National Park by Size of Business, 2012

	Dartmoor National Park		**All England National Parks**	**UK**
0-9 employees	283.0	46.7%	37.9%	12.6%
10-49 employees	159.9	26.4%	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	..C	..C	4.6%	62.2%
Total	**605.5**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Dartmoor and England National Park figures do not sum to the totals.

The data in Table A1.19 also show a relatively high turnover in the 'agriculture, forestry and fishing', 'construction', 'accommodation and food services', 'information and communication', 'business administration and support services' and 'arts, entertainment, recreation and other services' sectors on Dartmoor, compared to the other English National Parks and the UK average.

Table A1.19 – Turnover (£m) in the Dartmoor National Park by Sector, 2012

	Dartmoor National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	56.0	9.2%	7.8%	0.8%
Production	47.7	7.9%	9.6%	15.9%
Construction	92.0	15.2%	7.1%	4.4%
Wholesale & retail (inc. motor trades)	111.5	18.4%	17.2%	24.6%
Transport & Storage (inc. postal)	11.7	1.9%	1.7%	3.3%
Accommodation & food services	66.4	11.0%	9.2%	1.7%
Information & communication	30.8	5.1%	2.4%	4.1%
Finance & insurance	1.7	0.3%	1.0%	27.3%
Property	13.1	2.2%	1.9%	1.1%
Professional, scientific & technical	34.3	5.7%	5.2%	4.7%
Business administration & support services	42.8	7.1%	4.0%	3.6%
Public administration & defence	0.4	0.1%	0.2%	0.6%
Education	25.1	4.1%	4.0%	1.7%
Health	42.1	7.0%	7.4%	3.6%
Arts, entertainment, recreation & other services	29.7	4.9%	3.0%	2.7%
Total	**605.5**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Dartmoor and England National Park figures do not sum to the totals.

GVA has been estimated for Dartmoor National Park using the three different approaches described in Chapter 2. Fortunately, the above turnover and employment data has not been suppressed for Dartmoor, so the GVA estimates based on turnover and employment are likely to provide a more accurate estimate of the true local level of GVA. However, the GVA estimates based on county level productivity are likely to over-estimate local GVA because of the concentration of agricultural and tourism activity on Dartmoor.

The respective GVA estimates are presented in Table A1.20 below and suggest that businesses on Dartmoor generated GVA of between £292 and £400 million per annum in 2012. Businesses in the 'wholesale and retail' sector are estimated to generate the most GVA of all sectors.

Table A1.20 – GVA Estimates (£m) for the Dartmoor National Park, 2012

	Turnover-based GVA Estimates (£m)	**Employment-based GVA Estimates (£m)**	**County Productivity-based GVA Estimates (£m)**
Agriculture, forestry & fishing	21	27	
Production	17	52	
Construction	37	32	
Wholesale & retail (inc. motor trades)	57	53	
Transport & Storage (inc. postal)	6	4	
Accommodation & food services	34	27	
Information & communication	16	4	
Finance & insurance	1	3	
Property	8	11	
Professional, scientific & technical	18	26	
Business administration & support services	23	43	
Public administration & defence	0	1	
Education	14	15	
Health	24	29	
Arts, entertainment, recreation & other services	16	13	
Total	**292**	**339**	**400**

Exmoor National Park

Exmoor National Park is located in Devon and Somerset in South West England. It is the third smallest National Park in England covering an area of approximately 69,000 hectares. It has a relatively low population resulting in a population density of just 0.15 persons per hectare (the third lowest of all National Parks in England).

Population and age profile
Exmoor has a relatively small population of just over 10,000, according to the latest Census data. The data in Table A1.21 show that it also has a particularly ageing population, as a larger proportion of the population is aged 60 and over (39%) compared to those aged younger than 45 (36%). This is a more ageing population than the average across the English National Parks and the national average where 33% and 23% are aged 60 and over, and 44% and 59% are aged younger than 45, respectively.

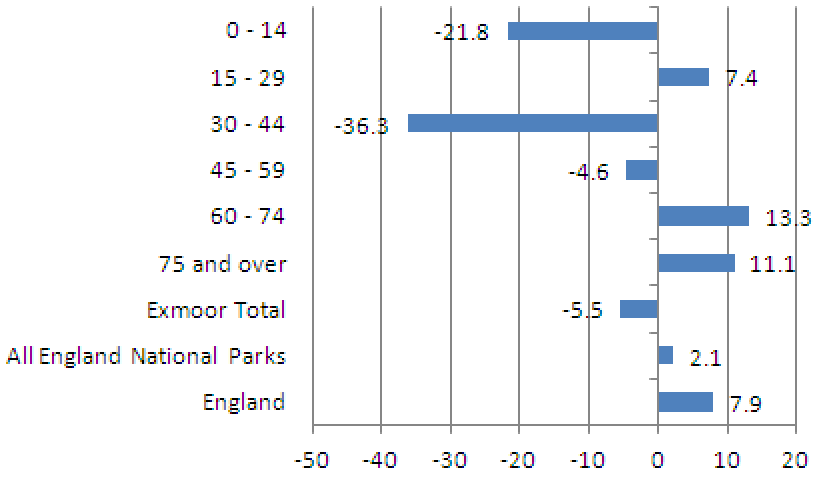
Table A1.21 – Population of the Exmoor National Park by Age Group, 2011

	Exmoor National Park		**All England National Parks**	**England**
Age 0 to 14	1,176	11%	16%	19%
Age 15 to 29	1,313	13%	12%	19%
Age 30 to 44	1,215	12%	16%	21%
Age 45 to 59	2,521	25%	23%	19%
Age 60 to 74	2,672	26%	22%	15%
Age 75+	1,376	13%	11%	8%
Total	**10,273**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.3 shows that the Exmoor population has declined by -5.5% between 2001 and 2011, according to Census data. Over the same period the population across all English National Park areas has increased by 2.1%, while the total population of England has increased by 7.9%. Exmoor also shares the trend of the other National Parks of an increasingly ageing population over time and has experienced a particularly large decrease in the number of people aged between 30 and 44 years.

Figure A1.3 – Population Change in the Exmoor National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity
The latest Census data suggest that Exmoor has a 'working age' population of approximately 7,600 people. The data in Table A1.22 show that the local rate of economic activity (67%) is slightly lower than the National Park and England averages of 70%. The proportion of full time employees is particularly low in the Exmoor National Park, while self-employment is particularly high, compared to both National Park and England averages. The rates of economically inactivity are also slightly higher than average as a result of particularly high numbers of retired people.

Table A1.22 – Economic Activity in the Exmoor National Park, 2011

	Exmoor National Park		**All England National Parks**	**England**
Working Age Population (aged 16-74)	**7,626**	**100%**	**100%**	**100%**
Economically Active	**5,081**	**67%**	**70%**	**70%**
Part-time employees	994	13%	14%	14%
Full-time employees	1,796	24%	32%	39%
Self-employed	1,998	26%	19%	10%
Unemployed	171	2%	2%	4%
Full-time student	122	2%	2%	3%
Economically Inactive	**2,545**	**33%**	**30%**	**30%**
Retired	1,735	23%	19%	14%
Student	204	3%	4%	6%
Looking after home or family	245	3%	4%	4%
Long-term sick or disabled	216	3%	2%	4%
Other	145	2%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.23 shows that there are almost 5,000 employed people living on Exmoor. This total includes a relatively large number of managers, directors and senior officials and people with skilled trade occupations, accounting for 40% of all occupations, compared to the National Park and England averages of 32% and 22% respectively. In contrast, there are relatively few associate professional, technical and administrative occupations and plant and machine operatives compared to both the National Park and national averages.

Table A1.23 – Occupations of residents in the Exmoor National Park, 2011

	Exmoor National Park		**All England National Parks**	**England**
Employed residents (aged 16-74)	**4,889**	**100%**	**100%**	**100%**
Managers, directors & senior officials	851	17%	16%	11%
Professional occupations	592	12%	20%	17%
Associate professional & technical occupations	418	9%	11%	13%
Administrative & secretarial occupations	360	7%	9%	11%
Skilled trades occupations	1,123	23%	16%	11%
Caring, leisure & other service occupations	468	10%	8%	9%
Sales & customer service occupations	287	6%	5%	8%
Process, plant and machine operatives	217	4%	5%	7%
Elementary occupations	573	12%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

The 2010 Defra economic profile for Exmoor National Park suggested that the average gross income of households on Exmoor was £28,668 in 2009/10[73]. This was the lowest of all English National Parks and was also significantly lower (-15%) than the average household income for the South West region. This is likely to be due to the relatively long distances from Exmoor to large urban areas, resulting in lower levels of commuting from Exmoor compared to the other National Parks, as well as large sub-regional differences in incomes in the South West region).

House prices

The Defra economic profiles also suggested, based on 2009 Land Registry sales data, that the average house price on Exmoor was more than £293,000 (the third highest of all English National Parks) and some 39% higher than average house price in the South West at the time.

[73] CACI Paycheck data, mid-year estimates 2009-10

Number of businesses

The latest IDBR data suggest that there were 830 businesses[74] operating from 915 establishments on Exmoor in 2012. The number of businesses has fallen over the last few years, having decreased by around 6% since 2009. The data in Table A1.24 show that between 90% and 95% of businesses and establishments on Exmoor have fewer than ten employees, which is higher than the other English National Parks and the national average.

Table A1.24 – Businesses and Establishments in the Exmoor National Park by Size, 2012

Businesses	**Exmoor National Park**		**All England National Parks**	**England**
0-9 employees	780	94%	91%	89%
10-49 employees	45	5%	8%	9%
50-249 employees	5	1%	1%	2%
250+ employees	0	0%	0%	0%
Total	**830**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	845	92%	88%	83%
10-49 employees	65	7%	10%	14%
50-249 employees	5	1%	1%	3%
250+ employees	0	0%	0%	0%
Total	**915**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

There is a particularly strong focus on agriculture and tourism on Exmoor and the data in Table A1.25 show that more than half (53%) of the businesses on Exmoor are in the 'agriculture, forestry and fishing' and 'accommodation and food services' sectors. This is significantly higher than the averages across the other English National Parks and across England as a whole. In contrast, Exmoor has a relatively low number of local businesses in 'manufacturing' and many of the other service sectors.

Table A1.25 – Businesses in the Exmoor National Park by Sector, 2012

Businesses	**Exmoor National Park**		**All England National Parks**	**England**
Agriculture, forestry & fishing	320	39%	24%	5%
Production	25	3%	5%	6%
Construction	55	7%	10%	12%
Motor trades	10	1%	2%	3%
Wholesale	25	3%	3%	5%
Retail	65	8%	7%	9%
Transport & Storage (inc. postal)	10	1%	2%	3%
Accommodation & food services	115	14%	9%	6%
Information & communication	20	2%	5%	8%
Finance & insurance	5	1%	1%	2%
Property	15	2%	3%	4%
Professional, scientific & technical	55	7%	13%	17%
Business administration & support services	45	5%	6%	7%
Public administration & defence	5	1%	0%	0%
Education	5	1%	2%	2%
Health	20	2%	3%	4%
Arts, entertainment, recreation & other services	35	4%	6%	7%
Total	**830**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

[74] VAT and/or PAYE based enterprises

Employment

The latest IDBR data also suggest that 2,864 people were employed in the 830 local businesses in Exmoor in 2012. Employment in Exmoor has remained relatively stable between 2009 and 2012. The average business is relatively small and employed fewer than 3.5 people in 2012. The local concentration of micro and small businesses is also evident in Table A1.26, which shows that two-thirds (66%) of local employees work in businesses with fewer than ten employees, compared to 35% across all English National Parks and just 14% across the whole of the UK.

Table A1.26 – Employment in the Exmoor National Park by Size of Business, 2012

	Exmoor National Park		**All England National Parks**	**UK**
0-9 employees	1,889	66.0%	35.1%	14.1%
10-49 employees	..C	..C	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	0	0.0%	17.6%	59.0%
Total	**2,864**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Exmoor and England National Park figures do not sum to the totals.

Much of the sectoral employment data has been suppressed in Table A1.27. However, the unsuppressed data provide further evidence of the local concentration of activity in 'agriculture, forestry and fishing' and 'accommodation and food services' sectors, which also account for more than half (57%) of all employment on Exmoor. In contrast, employment in 'professional, scientific & technical' and 'health' sectors is relatively low compared to the other National Parks and the rest of the UK.

Table A1.27 – Employment in the Exmoor National Park by Sector, 2012

	Exmoor National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	734	25.6%	9.6%	0.9%
Production	..C	..C	5.9%	10.2%
Construction	152	5.3%	4.9%	4.5%
Wholesale & retail (inc. motor trades)	..C	..C	11.7%	16.5%
Transport & Storage (inc. postal)	59	2.1%	1.6%	4.2%
Accommodation & food services	864	30.2%	14.7%	6.4%
Information & communication	..C	..C	2.0%	3.9%
Finance & insurance	..C	..C	0.1%	3.9%
Property	30	1.0%	2.3%	1.6%
Professional, scientific & technical	100	3.5%	5.0%	6.3%
Business administration & support services	..C	..C	3.9%	8.1%
Public administration & defence	..C	..C	0.0%	4.0%
Education	..C	..C	15.6%	12.9%
Health	140	4.9%	10.9%	12.5%
Arts, entertainment, recreation & other services	..C	..C	5.2%	4.1%
Total	**2,864**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Exmoor and England National Park figures do not sum to the totals.

Turnover and GVA

The 830 businesses on Exmoor are estimated to have generated a combined annual turnover of almost £165 million in 2012. This equates to an average turnover of approximately £56,000 per employee, which is considerably lower than the English National Park and UK averages of £68,000 and £167,000 per employee respectively. The data in Table A1.28 show that smaller businesses with fewer than 10 employees account for 75% of this turnover.

Table A1.28 – Turnover (£m) in the Exmoor National Park by Size of Business, 2012

	Exmoor National Park		All England National Parks	UK
0-9 employees	123.8	75.1%	37.9%	12.6%
10-49 employees	..C	..C	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	0	0.0%	4.6%	62.2%
Total	**164.9**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Exmoor and England National Park figures do not sum to the totals.

Similarly, the data in Table A1.29 also show a relatively high turnover in the 'agriculture, forestry and fishing' and 'accommodation and food services', which account for approximately 40% of turnover on Exmoor. The construction sector also generates a relatively large proportion of turnover (11%) on Exmoor, compared to the National Park and UK averages of 7.1% and 4.4% respectively.

Table A1.29 – Turnover (£m) in the Exmoor National Park by Sector, 2012

	Exmoor National Park		All England National Parks	UK
Agriculture, forestry & fishing	34.8	21.1%	7.8%	0.8%
Production	..C	..C	9.6%	15.9%
Construction	18.1	11.0%	7.1%	4.4%
Wholesale & retail (inc. motor trades)	24.7	15.0%	17.2%	24.6%
Transport & Storage (inc. postal)	..C	..C	1.7%	3.3%
Accommodation & food services	30.9	18.8%	9.2%	1.7%
Information & communication	..C	..C	2.4%	4.1%
Finance & insurance	..C	..C	1.0%	27.3%
Property	0.5	0.3%	1.9%	1.1%
Professional, scientific & technical	5.9	3.6%	5.2%	4.7%
Business administration & support services	..C	..C	4.0%	3.6%
Public administration & defence	..C	..C	0.2%	0.6%
Education	..C	..C	4.0%	1.7%
Health	8.3	5.0%	7.4%	3.6%
Arts, entertainment, recreation & other services	4.1	2.5%	3.0%	2.7%
Total	**164.9**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Exmoor and England National Park figures do not sum to the totals.

GVA has been estimated for Exmoor National Park using the three different approaches described in Section 2. Unfortunately, the relatively high levels of suppressed data in the above turnover and employment data mean that the GVA estimates based on turnover and employment are likely to underestimate the true level of GVA on Exmoor, while the GVA estimates based on county level productivity are likely to over-estimate GVA because of the concentration of agricultural and tourism activities on Exmoor. These estimates suggest that the businesses in the Exmoor National Park generated GVA of between £46 and £118 million per annum in 2012.

Lake District National Park

The Lake District National Park is located in Cumbria in North West England. It is the largest of the ten National Parks in England and covers an area of almost 230,000 hectares. It also has a relatively low population density of 0.18 persons per hectare, which is lower than the English National Park average of 0.26 and significantly lower than the national average of 4.1 persons per hectare.

Population and age profile

The Lake District has the second largest population of all English National Parks of almost 41,000, according to the latest Census data. The data in Table A1.30 show that it is somewhat typical of the other English National Parks in terms of its age profile, with 44% of the population aged less than 45 and 34% aged 60 and over. However, this is a much older population than the national average, where 59% are aged younger than 45 and 23% are aged 60 and over.

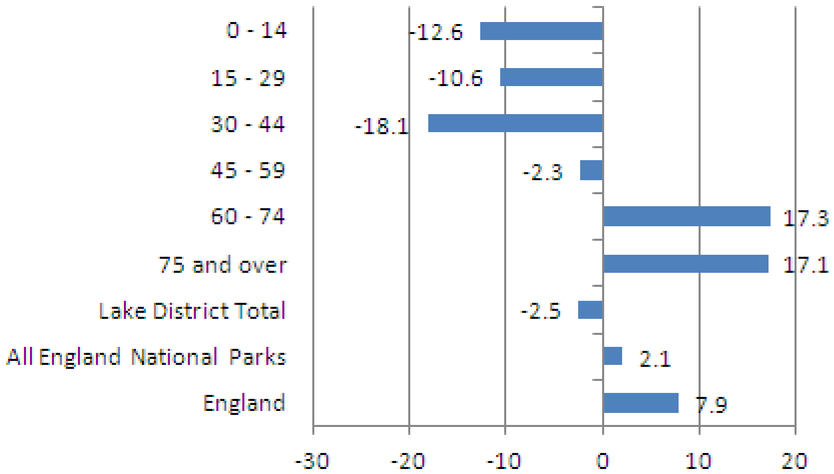
Table A1.30 – Population of the Lake District National Park by Age Group, 2011

	Lake District National Park		**All England National Parks**	**England**
Age 0 to 14	5,126	13%	16%	19%
Age 15 to 29	5,554	14%	12%	19%
Age 30 to 44	6,812	17%	16%	21%
Age 45 to 59	9,276	23%	23%	19%
Age 60 to 74	9,164	22%	22%	15%
Age 75+	4,838	12%	11%	8%
Total	**40,770**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.4 shows that the local population in the Lake District has declined by 2.5% between 2001 and 2011, according to Census data, compared to growth of 2.1% across all English National Parks and 7.9% for England as a whole. The local population has also become more aged over time, with significant declines across those aged younger than 45 and significant growth for those aged 60 and over.

Figure A1.4 – Population Change in the Lake District National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity

The latest Census data suggest that the Lake District has a 'working age' population of more than 30,000 people. The data in Table A1.31 show that the local rate of economic activity (72%) is higher than both the National Park and England averages of 70%, as rates of full-time and self-employment are relatively high. The corresponding rates of economically inactivity are therefore relatively low, despite a higher than average number of retired people.

Table A1.31 – Economic Activity in the Lake District National Park, 2011

	Lake District National Park		All England National Parks	England
Working Age Population (aged 16-74)	**30,384**	**100%**	**100%**	**100%**
Economically Active	**21,766**	**72%**	**70%**	**70%**
Part-time employees	4,158	14%	14%	14%
Full-time employees	10,058	33%	32%	39%
Self-employed	6,272	21%	19%	10%
Unemployed	606	2%	2%	4%
Full-time student	672	2%	2%	3%
Economically Inactive	**8,618**	**28%**	**30%**	**30%**
Retired	6,126	20%	19%	14%
Student	802	3%	4%	6%
Looking after home or family	692	2%	4%	4%
Long-term sick or disabled	613	2%	2%	4%
Other	385	1%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.32 shows that there are more than 21,000 employed people living in the Lake District, with a relatively large number of managers, directors and senior officials, people with skilled trade occupations and people with elementary occupations. In contrast, there are relatively few people with professional occupations, associate professional, technical and administrative occupations and plant and machine operatives compared to both the National Park and national averages.

Table A1.32 – Occupations of residents in the Lake District National Park, 2011

	Lake District National Park		All England National Parks	England
Employed residents (aged 16-74)	**21,098**	**100%**	**100%**	**100%**
Managers, directors & senior officials	3,914	19%	16%	11%
Professional occupations	2,885	14%	20%	17%
Associate professional & technical occupations	1,889	9%	11%	13%
Administrative & secretarial occupations	1,585	8%	9%	11%
Skilled trades occupations	4,097	19%	16%	11%
Caring, leisure & other service occupations	1,643	8%	8%	9%
Sales & customer service occupations	1,431	7%	5%	8%
Process, plant and machine operatives	874	4%	5%	7%
Elementary occupations	2,780	13%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

The 2010 Defra economic profile for the Lake District National Park suggested that the average gross income of households in the Lake District was £33,935 in 2009/10[75]. This was a fairly average level of household income across the ten National Park areas and was slightly higher (2%) than the North West regional average household income.

House prices

The Defra economic profiles also suggested, based on 2009 Land Registry sales data, that the average house price in the Lake District was more than £292,000 (the fourth highest of all English National Parks). The data suggested that house prices in the Lake District were 90% higher than the average price of houses in the North West region at the time.

Number of businesses

The Lake District is home to around 3,375 businesses[76] and 3,855 establishments according to the latest IDBR data. The Lake District therefore has the second largest

[75] CACI Paycheck data, mid-year estimates 2009-10

[76] VAT and/or PAYE based enterprises

number of businesses of all English National Parks. The number of businesses and establishments has fallen by 3-4% since 2009. While the large majority of businesses in the Lake District have fewer than ten employees, which is in line with the National Park and national averages, the data in Table A1.33 show that the Lake District also has a relatively large number of businesses with between 10 and 49 employees

Table A1.33 – Businesses and Establishments in the Lake District National Park by Size, 2012

Businesses	**Lake District National Park**		**All England National Parks**	**England**
0-9 employees	2,985	88%	91%	89%
10-49 employees	355	11%	8%	9%
50-249 employees	35	1%	1%	2%
250+ employees	0	0%	0%	0%
Total	**3,375**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	3,310	86%	88%	83%
10-49 employees	495	13%	10%	14%
50-249 employees	45	1%	1%	3%
250+ employees	0	0%	0%	0%
Total	**3,850**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

The data in Table A1.34 show that almost half (45%) of businesses in the Lake District are in 'agriculture, forestry and fishing' and 'accommodation and food services' sectors. All other sectors are under-represented in the Lake District compared to the averages across the other National Parks and across England as a whole.

Table A1.34 – Businesses in the Lake District National Park by Sector, 2012

Businesses	**Lake District National Park**		**All England National Parks**	**England**
Agriculture, forestry & fishing	910	27%	24%	5%
Production	120	4%	5%	6%
Construction	310	9%	10%	12%
Motor trades	50	1%	2%	3%
Wholesale	70	2%	3%	5%
Retail	290	9%	7%	9%
Transport & Storage (inc. postal)	50	1%	2%	3%
Accommodation & food services	600	18%	9%	6%
Information & communication	75	2%	5%	8%
Finance & insurance	20	1%	1%	2%
Property	85	3%	3%	4%
Professional, scientific & technical	285	8%	13%	17%
Business administration & support services	180	5%	6%	7%
Public administration & defence	15	0%	0%	0%
Education	55	2%	2%	2%
Health	75	2%	3%	4%
Arts, entertainment, recreation & other services	185	5%	6%	7%
Total	**3,375**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Employment

The Lake District also has the second highest level of employment of the ten English National Parks and the number of local jobs has increased by approximately 5.6% between 2009 and 2012, which is stronger than the National Park and national averages. The 3,375 local businesses provided employment for more than 20,000 people in 2012, at an average of six employees per business. The data in Table A1.35 also highlight the relatively small size of businesses in the Lake District as the large majority of employees work for businesses with fewer than 50 employees.

Table A1.35 – Employment in the Lake District National Park by Size of Business, 2012

	Lake District National Park		**All England National Parks**	**UK**
0-9 employees	8,023	39.2%	35.1%	14.1%
10-49 employees	6,744	32.9%	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	..C	..C	17.6%	59.0%
Total	**20,482**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Lake District and England National Park figures do not sum to the totals.

The data in Table A1.36 show a particularly high concentration of employment in 'accommodation and food services' (34%) and 'wholesale and retail' (22%) sectors. These two sectors, combined with 'agriculture, forestry and fishing', account for two-thirds (67%) of all employment in the Lake District. This is significantly higher than the National Park average of 36% and the national average of 24%.

Table A1.36 – Employment in the Lake District National Park by Sector, 2012

	Lake District National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	2,049	10.0%	9.6%	0.9%
Production	827	4.0%	5.9%	10.2%
Construction	1,033	5.0%	4.9%	4.5%
Wholesale & retail (inc. motor trades)	4,531	22.1%	11.7%	16.5%
Transport & Storage (inc. postal)	427	2.1%	1.6%	4.2%
Accommodation & food services	7,041	34.4%	14.7%	6.4%
Information & communication	453	2.2%	2.0%	3.9%
Finance & insurance	35	0.2%	0.1%	3.9%
Property	461	2.3%	2.3%	1.6%
Professional, scientific & technical	614	3.0%	5.0%	6.3%
Business administration & support services	673	3.3%	3.9%	8.1%
Public administration & defence	16	0.1%	0.0%	4.0%
Education	716	3.5%	15.6%	12.9%
Health	755	3.7%	10.9%	12.5%
Arts, entertainment, recreation & other services	851	4.2%	5.2%	4.1%
Total	**20,482**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Lake District and England National Park figures do not sum to the totals.

Turnover and GVA

The 3,375 local businesses are therefore estimated to have generated a combined annual turnover of more than £1.2 billion in 2012, see Table A1.37. This is the third highest turnover of the ten English National Parks. However, businesses in the Lake District have a relatively small turnover per employee, as the average turnover per employee is £63,000. This is in contrast to the New Forest, which has a similar level of employment, but a much higher turnover of £2.7 billion.

Table A1.37 – Turnover (£m) in the Lake District National Park by Size of Business, 2012

	Lake District National Park		All England National Parks	UK
0-9 employees	467.7	37.6%	37.9%	12.6%
10-49 employees	371.2	29.8%	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	..C	..C	4.6%	62.2%
Total	**1,244.9**	**100.0%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Lake District and England National Park figures do not sum to the totals.

The relatively low turnover per employee is likely to be due to the concentration of activity in the relatively low value wholesale, retail, accommodation and food service sectors. The data in Table A1.38 show that these sectors account for almost 60% of the turnover of businesses in the Lake District, compared to around 26% of turnover across the other National Parks and across the UK as a whole.

Table A1.38 – Turnover (£m) in the Lake District National Park by Sector, 2012

	Lake District National Park		All England National Parks	UK
Agriculture, forestry & fishing	105.9	8.5%	7.8%	0.8%
Production	60.2	4.8%	9.6%	15.9%
Construction	70.4	5.7%	7.1%	4.4%
Wholesale & retail (inc. motor trades)	456.9	36.7%	17.2%	24.6%
Transport & Storage (inc. postal)	23.2	1.9%	1.7%	3.3%
Accommodation & food services	273.6	22.0%	9.2%	1.7%
Information & communication	24.1	1.9%	2.4%	4.1%
Finance & insurance	2.6	0.2%	1.0%	27.3%
Property	30.5	2.4%	1.9%	1.1%
Professional, scientific & technical	36.8	3.0%	5.2%	4.7%
Business administration & support services	40.9	3.3%	4.0%	3.6%
Public administration & defence	0.4	0.0%	0.2%	0.6%
Education	44.1	3.5%	4.0%	1.7%
Health	38.3	3.1%	7.4%	3.6%
Arts, entertainment, recreation & other services	37.0	3.0%	3.0%	2.7%
Total	**1,244.9**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Lake District and England National Park figures do not sum to the totals.

GVA has been estimated for the Lake District using the three different approaches described in Section 2. Fortunately, the above turnover and employment data has not been suppressed for the Lake District, so the GVA estimates based on turnover and employment are likely to provide a more accurate estimate of the true local level of GVA. However, the GVA estimates based on county level productivity are likely to over-estimate local GVA because of the concentration of agricultural and tourism activity in the Lake District.

The respective GVA estimates are presented in Table A1.39 below and suggest that businesses in the Lake District generated GVA of between £614 and £823 million per annum in 2012. Businesses in the 'wholesale and retail' and 'accommodation and food services' sectors are estimated to generate approximately half of all GVA in the Lake District.

Table A1.39 – GVA Estimates (£m) for the Lake District National Park, 2012

	Turnover-based GVA Estimates (£m)	**Employment-based GVA Estimates (£m)**	**County Productivity-based GVA Estimates (£m)**
Agriculture, forestry & fishing	41	40	
Production	21	59	
Construction	28	41	
Wholesale & retail (inc. motor trades)	232	236	
Transport & Storage (inc. postal)	12	7	
Accommodation & food services	139	116	
Information & communication	13	7	
Finance & insurance	1	4	
Property	19	23	
Professional, scientific & technical	20	30	
Business administration & support services	22	33	
Public administration & defence	0	0	
Education	25	22	
Health	22	23	
Arts, entertainment, recreation & other services	21	22	
Total	**614**	**663**	**823**

New Forest National Park

The New Forest National Park is located in Hampshire in South East England. It is the second smallest National Park, covering an area of 57,000 hectares but it has a relatively dense population of 0.61 persons per hectare (the second highest of the ten National Parks in England), although this is significantly lower than the national average of 4.1 persons per hectare across England as a whole.

Population and age profile

The New Forest has a population of approximately 35,000, according to the latest Census data. The data in Table A1.40 show that it has a particularly ageing population compared to the national average and other English National Park areas. Only 39% of the local population is younger than 45 (compared to the national average of 59% and the English National Park average of 44%), while 38% are aged 60 and over (compared to 33% across all English National Parks and 23% for England as a whole).

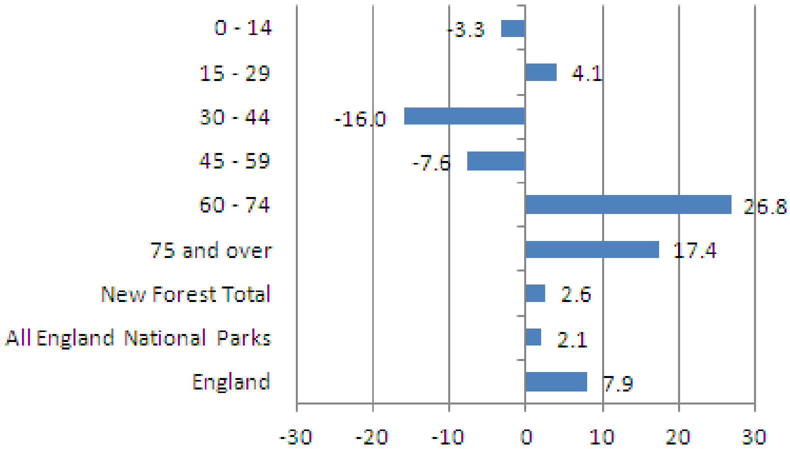
Table A1.40 – Population of the New Forest National Park by Age Group, 2011

	New Forest National Park		**All England National Parks**	**England**
Age 0 to 14	4,846	14%	16%	19%
Age 15 to 29	4,010	11%	12%	19%
Age 30 to 44	4,957	14%	16%	21%
Age 45 to 59	8,129	23%	23%	19%
Age 60 to 74	8,265	24%	22%	15%
Age 75+	4,715	14%	11%	8%
Total	**34,922**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.5 shows that the New Forest population increased by 2.6% between 2001 and 2011, according to Census data. This is stronger growth than the average across all ten National Parks (of 2.1%), but is significantly lower than the 7.9% growth in the national population. The New Forest also shares the trend of the other National Parks of an increasingly ageing population and has experienced particularly strong growth in the number of people aged between 60 and 74 years.

Figure A1.5 – Population Change in the New Forest National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity

The latest Census data indicate that the New Forest has a 'working age' population of almost 25,000 people. The data in Table A1.41 show that the local rate of economic activity (68%) is slightly lower than both the National Park and England averages of 70%, while economic inactivity rates are relatively high, primarily because of a higher than average number of retired people.

Table A1.41 – Economic Activity in the New Forest National Park, 2011

	New Forest National Park		All England National Parks	England
Working Age Population (aged 16-74)	**24,969**	**100%**	**100%**	**100%**
Economically Active	**16,861**	**68%**	**70%**	**70%**
Part-time employees	3,651	15%	14%	14%
Full-time employees	7,891	32%	32%	39%
Self-employed	4,343	17%	19%	10%
Unemployed	440	2%	2%	4%
Full-time student	536	2%	2%	3%
Economically Inactive	**8,108**	**32%**	**30%**	**30%**
Retired	5,450	22%	19%	14%
Student	740	3%	4%	6%
Looking after home or family	1,004	4%	4%	4%
Long-term sick or disabled	514	2%	2%	4%
Other	400	2%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile
Table A1.42 shows that there are more than 16,000 employed people living in the New Forest, comprising a relatively large number of managers, directors and senior officials and people with professional occupations. In contrast, there are relatively few people with elementary occupations and plant and machine operatives compared to both the National Park and national averages.

Table A1.42 – Occupations of residents in the New Forest National Park, 2011

	New Forest National Park		All England National Parks	England
Employed residents (aged 16-74)	**16,357**	**100%**	**100%**	**100%**
Managers, directors & senior officials	2,860	17%	16%	11%
Professional occupations	3,501	21%	20%	17%
Associate professional & technical occupations	2,028	12%	11%	13%
Administrative & secretarial occupations	1,771	11%	9%	11%
Skilled trades occupations	2,131	13%	16%	11%
Caring, leisure & other service occupations	1,274	8%	8%	9%
Sales & customer service occupations	772	5%	5%	8%
Process, plant and machine operatives	651	4%	5%	7%
Elementary occupations	1,369	8%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income
The 2010 Defra economic profile for New Forest National Park estimated that the average gross income of local households was £41,940 in 2009/10[77]. Not only was this the highest household income across the ten National Park areas, it was also reported to be 4.2% higher than the average household income across the South East region.

House prices
The Defra economic profiles also suggested, based on 2009 Land Registry sales data, that the New Forest had the highest average house prices of all the English National Parks. The average house price in the New Forest was estimated to be £442,000. This was more than 20% higher than house prices in the South Downs, the National Park with the second most expensive average house, and was estimated to be almost 75% higher than the average South East house price at the time.

Number of businesses
The latest IDBR data estimate that there were approximately 2,330 businesses[78] operating from 2,230 establishments in the New Forest in 2012. The data in Table A1.43

[77] CACI Paycheck data, mid-year estimates 2009-10
[78] VAT and/or PAYE based enterprises

show that the large majority of local businesses and establishments in the New Forest have fewer than ten employees, which is in line with the other English National Parks and the national average. The number of businesses and establishments has fallen slightly since 2009, by around 1.5-2%.

Table A1.43 – Businesses and Establishments in the New Forest National Park by Size, 2012

Businesses	**New Forest National Park**		**All England National Parks**	**England**
0-9 employees	2,120	91%	91%	89%
10-49 employees	175	8%	8%	9%
50-249 employees	30	1%	1%	2%
250+ employees	5	0%	0%	0%
Total	**2,330**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	2,220	87%	88%	83%
10-49 employees	275	11%	10%	14%
50-249 employees	45	2%	1%	3%
250+ employees	5	0%	0%	0%
Total	**2,545**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

The data in Table A1.44 show a much more diverse range of economic activities in the New Forest compared to most of the other National Parks. The overall distribution of businesses across all sectors is much more closely matched to the national average, than the other National Parks. For example, the largest sectors in the New Forest are 'professional, scientific and technical' and 'construction' sectors, which account for around 30% of all local businesses. These sectors are relatively large in the New Forest compared to the other National Parks but are broadly in line with the wider average across England as a whole.

Table A1.44 – Businesses in the New Forest National Park by Sector, 2012

Businesses	**New Forest National Park**		**All England National Parks**	**England**
Agriculture, forestry & fishing	220	9%	24%	5%
Production	115	5%	5%	6%
Construction	310	13%	10%	12%
Motor trades	80	3%	2%	3%
Wholesale	90	4%	3%	5%
Retail	160	7%	7%	9%
Transport & Storage (inc. postal)	55	2%	2%	3%
Accommodation & food services	130	6%	9%	6%
Information & communication	155	7%	5%	8%
Finance & insurance	40	2%	1%	2%
Property	125	5%	3%	4%
Professional, scientific & technical	405	17%	13%	17%
Business administration & support services	145	6%	6%	7%
Public administration & defence	5	0%	0%	0%
Education	60	3%	2%	2%
Health	65	3%	3%	4%
Arts, entertainment, recreation & other services	170	7%	6%	7%
Total	**2,330**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Employment

Despite the slight decrease in the number of local businesses between 2009 and 2012, the New Forest has experienced strong employment growth over the same period of more than 14%. This is stronger growth than all other National Parks and the national average. The 2,330 local businesses in the New Forest provided employment for more than 20,000 people in 2012. This suggests that the average business employs almost nine people, compared to the National Park average of six employees. The data in Table A1.45 show that a relatively small proportion of people in the New Forest are employed in small businesses with fewer than 50 employees, compared to the other National Parks. It also suggests that most of the employment in the New Forest is accounted for by larger businesses employing in excess of 50 employees.

Table A1.45 – Employment in the New Forest National Park by Size of Business, 2012

	New Forest National Park		All England National Parks	UK
0-9 employees	5,004	24.7%	35.1%	14.1%
10-49 employees	3,451	17.0%	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	..C	..C	17.6%	59.0%
Total	**20,277**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the New Forest and England National Park figures do not sum to the totals.

The data in Table A1.46 show the significance of the 'health' sector to the local New Forest economy. Approximately 42% of employment in the New Forest is concentrated in the 'health' sector, compared to 11% across the ten English National Parks and 12.5% across the whole of the UK. The other 58% of employees in the New Forest work across a broad range of sectors, which suggests a fairly diverse range of other activities in a local economy dominated by the 'health' sector.

Table A1.46 – Employment in the New Forest National Park by Sector, 2012

	New Forest National Park		All England National Parks	UK
Agriculture, forestry & fishing	998	4.9%	9.6%	0.9%
Production	1,238	6.1%	5.9%	10.2%
Construction	890	4.4%	4.9%	4.5%
Wholesale & retail (inc. motor trades)	1,635	8.1%	11.7%	16.5%
Transport & Storage (inc. postal)	233	1.1%	1.6%	4.2%
Accommodation & food services	1,825	9.0%	14.7%	6.4%
Information & communication	361	1.8%	2.0%	3.9%
Finance & insurance	..C	..C	0.1%	3.9%
Property	396	2.0%	2.3%	1.6%
Professional, scientific & technical	1,119	5.5%	5.0%	6.3%
Business administration & support services	592	2.9%	3.9%	8.1%
Public administration & defence	..C	..C	0.0%	4.0%
Education	1,353	6.7%	15.6%	12.9%
Health	8,488	41.9%	10.9%	12.5%
Arts, entertainment, recreation & other services	1,064	5.2%	5.2%	4.1%
Total	**20,277**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the New Forest and England National Park figures do not sum to the totals.

Turnover and GVA

The 2,330 local businesses are estimated to have generated a combined annual turnover of £2.7 billion in 2012. This equates to a relatively high turnover per employee of £79,000, which is significantly higher than the National Park average of £68,000. The data in Table A1.47 also show that most of the turnover of businesses in the New Forest is concentrated amongst businesses with between 10 and 50 employees.

Table A1.47 – Turnover (£m) in the New Forest National Park by Size of Business, 2012

	New Forest National Park		All England National Parks	UK
0-9 employees	434.3	16.1%	37.9%	12.6%
10-49 employees	1,626.1	60.2%	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	..C	..C	4.6%	62.2%
Total	**2,700.6**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the New Forest and England National Park figures do not sum to the totals.

The data in Table A1.48 also highlight the relatively high turnover in the 'health' sectors in the New Forest, although much of the turnover data has been suppressed to protect the identities of local businesses.

Table A1.48 – Turnover (£m) in the New Forest National Park by Sector, 2012

	New Forest National Park		All England National Parks	UK
Agriculture, forestry & fishing	49.2	1.8%	7.8%	0.8%
Production	140.3	5.2%	9.6%	15.9%
Construction	118.0	4.4%	7.1%	4.4%
Wholesale & retail (inc. motor trades)	88.0	3.3%	17.2%	24.6%
Transport & Storage (inc. postal)	25.2	0.9%	1.7%	3.3%
Accommodation & food services	63.1	2.3%	9.2%	1.7%
Information & communication	27.1	1.0%	2.4%	4.1%
Finance & insurance	..C	..C	1.0%	27.3%
Property	44.5	1.6%	1.9%	1.1%
Professional, scientific & technical	92.5	3.4%	5.2%	4.7%
Business administration & support services	56.7	2.1%	4.0%	3.6%
Public administration & defence	..C	..C	0.2%	0.6%
Education	22.4	0.8%	4.0%	1.7%
Health	447.6	16.6%	7.4%	3.6%
Arts, entertainment, recreation & other services	50.0	1.9%	3.0%	2.7%
Total	**2,700.6**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the New Forest and England National Park figures do not sum to the totals.

GVA has been estimated for the New Forest National Park using the three different approaches described in Section 2. The above turnover and employment data has only been suppressed for a couple of sectors in the New Forest, so the GVA estimates based on turnover and employment are likely to provide a slight under-estimate of the true local level of GVA. However, the GVA estimates based on county level productivity are likely to over-estimate local GVA because of the relatively high levels of low value activities in agricultural, tourism and health sectors in the New Forest.

The respective GVA estimates are presented in Table A1.49 below and suggest that businesses in the New Forest generated GVA of between £619 million and £1 billion per annum in 2012. The 'health' sector is estimated to generate by far the most GVA of all sectors.

Table A1.49 – GVA Estimates (£m) for the New Forest National Park, 2012

	Turnover-based GVA Estimates (£m)	**Employment-based GVA Estimates (£m)**	**County Productivity-based GVA Estimates (£m)**
Agriculture, forestry & fishing	19	20	
Production	49	88	
Construction	47	35	
Wholesale & retail (inc. motor trades)	45	85	
Transport & Storage (inc. postal)	13	4	
Accommodation & food services	32	30	
Information & communication	14	6	
Finance & insurance	-	-	
Property	28	20	
Professional, scientific & technical	50	55	
Business administration & support services	30	29	
Public administration & defence	-	-	
Education	13	41	
Health	252	259	
Arts, entertainment, recreation & other services	28	28	
Total	**619**	**700**	**1,004**

North York Moors National Park

The North York Moors National Park is located in North Yorkshire in the Yorkshire and the Humber region. It is one of the largest National Parks in England, covering an area of more than 143,000 hectares, and is almost identical in size to the Peak District National Park. The local population is relatively sparse, averaging just 0.2 persons per hectare and only three English National Parks are more sparsely populated.

Population and age profile

The North York Moors has a population of 23,400, according to the latest Census data. The data in Table A1.50 show that it is a relatively ageing population as only 41% of the local population is younger than 45 (compared to the national average of 59% and the English National Park average of 44%), while 35% are aged 60 and over (compared to 33% across all English National Parks and 23% for England as a whole).

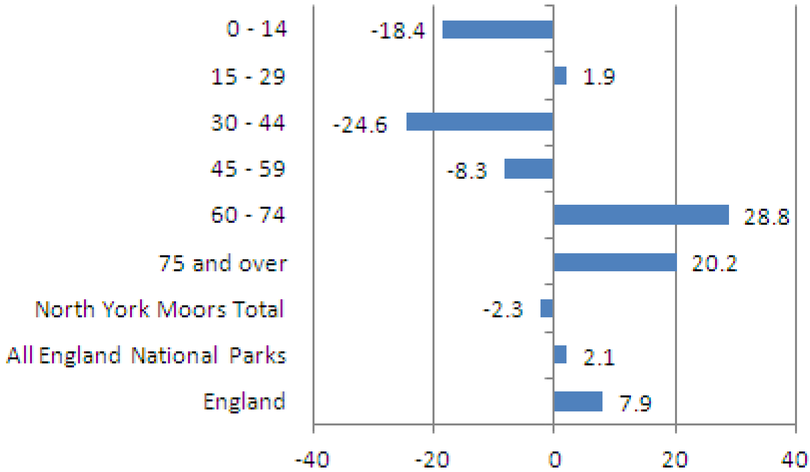
Table A1.50 – Population of the North York Moors National Park by Age Group, 2011

	North York Moors National Park		**All England National Parks**	**England**
Age 0 to 14	3,037	13%	16%	19%
Age 15 to 29	3,068	13%	12%	19%
Age 30 to 44	3,396	15%	16%	21%
Age 45 to 59	5,677	24%	23%	19%
Age 60 to 74	5,656	24%	22%	15%
Age 75+	2,546	11%	11%	8%
Total	**23,380**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.6 shows that the North York Moors population has declined by 2.3% between 2001 and 2011, according to Census data, compared to growth of 2.1% across all English National Parks and 7.9% for England as a whole. The local population has also become more aged over time, with significant growth amongst those aged 60 and over.

Figure A1.6 – Population Change in the North York Moors National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity

The latest Census data estimated that the North York Moors has a 'working age' population of approximately 17,500 people. The data in Table A1.51 show that the local rate of economic activity (68%) is slightly lower than the National Park and England averages of 70%, which is primarily due to a relatively low number of full-time employees. In contrast, self-employment on the North York Moors is relatively high. Rates of economic inactivity are slightly higher than average, due to a relatively large number of retired people.

Table A1.51 – Economic Activity in the North York Moors National Park, 2011

	North York Moors National Park		**All England National Parks**	**England**
Working Age Population (aged 16-74)	**17,521**	**100%**	**100%**	**100%**
Economically Active	**11,900**	**68%**	**70%**	**70%**
Part-time employees	2,451	14%	14%	14%
Full-time employees	5,054	29%	32%	39%
Self-employed	3,647	21%	19%	10%
Unemployed	381	2%	2%	4%
Full-time student	367	2%	2%	3%
Economically Inactive	**5,621**	**32%**	**30%**	**30%**
Retired	3,761	21%	19%	14%
Student	530	3%	4%	6%
Looking after home or family	580	3%	4%	4%
Long-term sick or disabled	501	3%	2%	4%
Other	249	1%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.52 shows that there are approximately 11,500 employed people living on the North York Moors, a particularly high proportion of whom are employed in skilled trade occupations. In contrast, there are relatively few people with associate professional, technical, administrative, sales and customer service occupations compared to both the National Park and national averages.

Table A1.52 – Occupations of residents in the North York Moors National Park, 2011

	North York Moors National Park		**All England National Parks**	**England**
Employed residents (aged 16-74)	**11,478**	**100%**	**100%**	**100%**
Managers, directors & senior officials	1,746	15%	16%	11%
Professional occupations	2,018	18%	20%	17%
Associate professional & technical occupations	1,031	9%	11%	13%
Administrative & secretarial occupations	896	8%	9%	11%
Skilled trades occupations	2,425	21%	16%	11%
Caring, leisure & other service occupations	947	8%	8%	9%
Sales & customer service occupations	515	4%	5%	8%
Process, plant and machine operatives	694	6%	5%	7%
Elementary occupations	1,206	11%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

The 2010 Defra economic profile for North York Moors National Park estimated that the average gross income of households on the North York Moors was £32,974 in 2009/10[79]. This was the third lowest of all English National Parks but was slightly higher (1.8%) than the average income across Yorkshire and the Humber as a whole.

House prices

The Defra economic profiles also suggested, based on 2009 Land Registry sales data, that the average house price on the North York Moors was exactly £250,000. This was amongst the lowest of all English National Park areas but was estimated to be 63% higher than the average house price for the region at the time.

Number of businesses

The latest IDBR data, presented in Table A1.53, estimate that there were approximately 1,825 businesses[80] operating from 1,955 establishments on the North York Moors in 2012. More than 90% of these businesses and establishments have fewer than ten

[79] CACI Paycheck data, mid-year estimates 2009-10

[80] VAT and/or PAYE based enterprises

employees, which is higher than the other English National Parks and the national average.

The size of the local businesses stock has fallen slightly since 2009. The number of local businesses fell by more than 50 (almost 3% of the total) between 2009 and 2010, but has since recovered slightly in 2011 and 2012.

Table A1.53 – Businesses and Establishments in the North York Moors National Park by Size, 2012

Businesses	**North York Moors National Park**		**All England National Parks**	**England**
0-9 employees	1,705	93%	91%	89%
10-49 employees	115	6%	8%	9%
50-249 employees	5	0%	1%	2%
250+ employees	0	0%	0%	0%
Total	**1,825**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	1,785	91%	88%	83%
10-49 employees	160	8%	10%	14%
50-249 employees	10	1%	1%	3%
250+ employees	0	0%	0%	0%
Total	**1,955**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

The North York Moors has a particularly strong concentration of agricultural businesses. The data in Table A1.54 show that 44% of businesses on the North York Moors are in the ‘agriculture, forestry and fishing’ sector. Not only is this much higher than the national average, it is also almost double the proportion of ‘agriculture, forestry and fishing’ businesses located across all English National Parks. The North York Moors are under-represented in all other sectors, compared to the National Park and national averages, except ‘accommodation and food services’, which accounts for 9% of businesses on the North York Moors (the same as across all other English National Parks).

Table A1.54 – Businesses in the North York Moors National Park by Sector, 2012

Businesses	**North York Moors National Park**		**All England National Parks**	**England**
Agriculture, forestry & fishing	810	44%	24%	5%
Production	75	4%	5%	6%
Construction	155	8%	10%	12%
Motor trades	40	2%	2%	3%
Wholesale	40	2%	3%	5%
Retail	85	5%	7%	9%
Transport & Storage (inc. postal)	30	2%	2%	3%
Accommodation & food services	170	9%	9%	6%
Information & communication	25	1%	5%	8%
Finance & insurance	15	1%	1%	2%
Property	40	2%	3%	4%
Professional, scientific & technical	145	8%	13%	17%
Business administration & support services	85	5%	6%	7%
Public administration & defence	5	0%	0%	0%
Education	15	1%	2%	2%
Health	35	2%	3%	4%
Arts, entertainment, recreation & other services	55	3%	6%	7%
Total	**1,825**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Employment

Employment on the North York Moors has increased in recent years and has grown by 3% between 2009 and 2012. The 1,825 businesses on the North York Moors provided employment for 6,900 people in 2012. This suggests that the average business employs fewer than four people and the data in Table A1.55 show that a relatively high proportion of employees on the North York Moors are employed in small businesses with fewer than 10 employees, compared to the other National Parks and national average.

Table A1.55 – Employment in the North York Moors National Park by Size of Business, 2012

	North York Moors National Park		**All England National Parks**	**UK**
0-9 employees	4,093	59.3%	35.1%	14.1%
10-49 employees	..C	..C	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	..C	..C	17.6%	59.0%
Total	**6,899**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the North York Moors and England National Park figures do not sum to the totals.

As expected, given the strong concentration of local agricultural and tourism businesses, almost half of all employment on the North York Moors is in 'agriculture, forestry and fishing' and 'accommodation and food services' sectors. The data in Table A1.56 show that there are also relatively high levels of employment in 'construction', 'property' and 'arts, entertainment, recreation & other services' sectors, in comparison with the other National Parks and the rest of the UK, and relatively low levels of employment in all other sectors.

Table A1.56 – Employment in the North York Moors National Park by Sector, 2012

	North York Moors National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	1,793	26.0%	9.6%	0.9%
Production	439	6.4%	5.9%	10.2%
Construction	514	7.5%	4.9%	4.5%
Wholesale & retail (inc. motor trades)	682	9.9%	11.7%	16.5%
Transport & Storage (inc. postal)	144	2.1%	1.6%	4.2%
Accommodation & food services	1,552	22.5%	14.7%	6.4%
Information & communication	33	0.5%	2.0%	3.9%
Finance & insurance	28	0.4%	0.1%	3.9%
Property	215	3.1%	2.3%	1.6%
Professional, scientific & technical	275	4.0%	5.0%	6.3%
Business administration & support services	200	2.9%	3.9%	8.1%
Public administration & defence	..C	..C	0.0%	4.0%
Education	..C	..C	15.6%	12.9%
Health	521	7.6%	10.9%	12.5%
Arts, entertainment, recreation & other services	376	5.5%	5.2%	4.1%
Total	**6,899**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the North York Moors and England National Park figures do not sum to the totals.

Turnover and GVA

The 1,825 local businesses are estimated to have generated a combined annual turnover of approximately £428 million in 2012. This equates to an average turnover of approximately £63,000 per employee, which is lower than the English National Park and UK averages of £68,000 and £167,000 per employee respectively. The data in Table A1.57 show that almost two-thirds (64%) of all turnover on the North York Moors is generated amongst small businesses with fewer than 10 employees.

Table A1.57 – Turnover (£m) in the North York Moors National Park by Size of Business, 2012

	North York Moors National Park		All England National Parks	UK
0-9 employees	272.9	63.8%	37.9%	12.6%
10-49 employees	..C	..C	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	0	0.0%	4.6%	62.2%
Total	**427.8**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the North York Moors and England National Park figures do not sum to the totals.

The data in Table A1.58 also show a relatively high proportion of turnover in the 'agriculture, forestry and fishing', 'construction' and 'accommodation and food services' sectors on the North York Moors, compared to the other English National Parks and the UK average. Although lower than National Park and national averages, there is also considerable turnover generated in the 'production' and 'wholesale and retail sectors'.

Table A1.58 – Turnover (£m) in the North York Moors National Park by Sector, 2012

	North York Moors National Park		All England National Parks	UK
Agriculture, forestry & fishing	111.4	26.0%	7.8%	0.8%
Production	47.6	11.1%	9.6%	15.9%
Construction	33.8	7.9%	7.1%	4.4%
Wholesale & retail (inc. motor trades)	44.3	10.4%	17.2%	24.6%
Transport & Storage (inc. postal)	11.1	2.6%	1.7%	3.3%
Accommodation & food services	55.0	12.9%	9.2%	1.7%
Information & communication	2.8	0.6%	2.4%	4.1%
Finance & insurance	2.5	0.6%	1.0%	27.3%
Property	9.1	2.1%	1.9%	1.1%
Professional, scientific & technical	20.5	4.8%	5.2%	4.7%
Business administration & support services	12.5	2.9%	4.0%	3.6%
Public administration & defence	..C	..C	0.2%	0.6%
Education	..C	..C	4.0%	1.7%
Health	23.4	5.5%	7.4%	3.6%
Arts, entertainment, recreation & other services	10.8	2.5%	3.0%	2.7%
Total	**427.8**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the North York Moors and England National Park figures do not sum to the totals.

GVA has been estimated for the North York Moors using the three different approaches described in Section 2. The above turnover and employment data has only been suppressed for a couple of sectors on the North York Moors, so the GVA estimates based on turnover and employment are likely to provide only a slight under-estimate of the true local level of GVA. However, the GVA estimates based on county level productivity are likely to over-estimate local GVA because of the concentration of low value agricultural and tourism activities on the North York Moors.

The respective GVA estimates are presented in Table A1.59 below and suggest that businesses on the North York Moors generated GVA of between £174 million and £276 million per annum in 2012. Businesses in the 'agriculture, forestry and fishing', 'wholesale and retail' and 'accommodation and food services' sectors are estimated to generate approximately half of all GVA on the North York Moors.

Table A1.59 – GVA Estimates (£m) for the North York Moors National Park, 2012

	Turnover-based GVA Estimates (£m)	**Employment-based GVA Estimates (£m)**	**County Productivity-based GVA Estimates (£m)**
Agriculture, forestry & fishing	43	35	
Production	17	31	
Construction	14	20	
Wholesale & retail (inc. motor trades)	22	35	
Transport & Storage (inc. postal)	6	2	
Accommodation & food services	28	25	
Information & communication	1	1	
Finance & insurance	1	3	
Property	6	11	
Professional, scientific & technical	11	14	
Business administration & support services	7	10	
Public administration & defence	-	-	
Education	-	-	
Health	13	16	
Arts, entertainment, recreation & other services	6	10	
Total	**174**	**213**	**276**

Northumberland National Park

Northumberland National Park is located in the county of Northumberland in the North East of England and is the Northernmost National Park in England. It is a medium-sized National Park, covering an area of 105,000 hectares, but is the most sparsely populated with a population density of just 0.02 persons per hectare. The next lowest population density is more than five times higher, standing at 0.11 persons per hectare in the Yorkshire Dales National Park.

Population and age profile
The Northumberland National Park has a population of less than 2,000, according to the latest Census data, and is therefore the least populated of all English National Parks. The data in Table A1.55 show that more than half (51%) of the local population is aged between 45 and 74, which is relatively high compared to the English National Park average of 45% and especially compared to the national average of 34%.

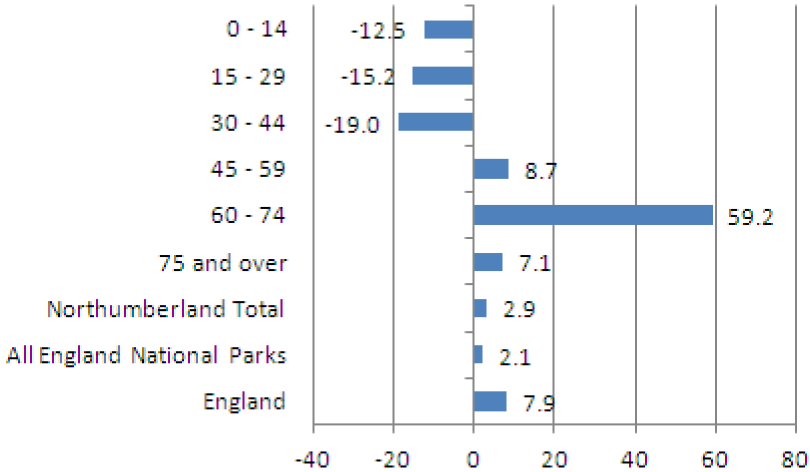
Table A1.60 – Population of the Northumberland National Park by Age Group, 2011

	Northumberland National Park		All England National Parks	England
Age 0 to 14	266	13%	16%	19%
Age 15 to 29	239	12%	12%	19%
Age 30 to 44	353	18%	16%	21%
Age 45 to 59	563	28%	23%	19%
Age 60 to 74	452	23%	22%	15%
Age 75+	120	6%	11%	8%
Total	**1,993**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.7 shows that the population of the Northumberland National Park increased by 2.9% between 2001 and 2011, according to Census data. This is stronger growth than the average across all English National Parks (of 2.1%), but is significantly lower than the 7.9% growth in the national population. The local population is also becoming increasingly aged over time and the number of people aged between 60 and 74 years has increased significantly, by 59% between 2001 and 2011.

Figure A1.7 – Population Change in the Northumberland National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity
The latest Census data suggest that the Northumberland National Park has a very small 'working age' population of less than 1,600 people. However, the data in Table A1.61 show that the local rate of economic activity (76%) is significantly higher than the National Park and England averages of 70%. This is because of a relatively high number of full-time and particularly self-employed workers, while part-time employment is relatively low. Rates of economic inactivity are therefore lower than average. While the number of

retired people is higher than the national average, it is lower than the National Park average.

Table A1.61 – Economic Activity in the Northumberland National Park, 2011

	Northumberland National Park		All England National Parks	England
Working Age Population (aged 16-74)	**1,588**	**100%**	**100%**	**100%**
Economically Active	**1,209**	**76%**	**70%**	**70%**
Part-time employees	198	12%	14%	14%
Full-time employees	519	33%	32%	39%
Self-employed	441	28%	19%	10%
Unemployed	34	2%	2%	4%
Full-time student	17	1%	2%	3%
Economically Inactive	**379**	**24%**	**30%**	**30%**
Retired	264	17%	19%	14%
Student	40	3%	4%	6%
Looking after home or family	38	2%	4%	4%
Long-term sick or disabled	26	2%	2%	4%
Other	11	1%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.62 shows that there are fewer than 1,200 employed people living in the Northumberland National Park, a particularly high proportion of whom are employed in skilled trade occupations (26%). There is also a relatively high proportion of people with elementary occupations. In contrast, there are relatively few people with administrative, sales, customer service, caring leisure and other service occupations compared to both the National Park and national averages.

Table A1.62 – Occupations of residents in the Northumberland National Park, 2011

	Northumberland National Park		All England National Parks	England
Employed residents (aged 16-74)	**1,169**	**100%**	**100%**	**100%**
Managers, directors & senior officials	153	13%	16%	11%
Professional occupations	200	17%	20%	17%
Associate professional & technical occupations	125	11%	11%	13%
Administrative & secretarial occupations	78	7%	9%	11%
Skilled trades occupations	300	26%	16%	11%
Caring, leisure & other service occupations	65	6%	8%	9%
Sales & customer service occupations	51	4%	5%	8%
Process, plant and machine operatives	57	5%	5%	7%
Elementary occupations	140	12%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

The 2010 Defra economic profile for Northumberland National Park suggested that the average gross income of households on Northumberland was £32,827 in 2009/10[81]. This was the second lowest of all English National Parks but was significantly higher (7.5%) than the average household income for the North East region as a whole.

House prices

Unfortunately, due to a low number of observations, it was not possible for the Defra economic profiles to disclose house price information for Northumberland.

Number of businesses

There were approximately 140 businesses[82] operating from 155 establishments in the Northumberland National Park in 2012 according to the latest IDBR data. These

[81] CACI Paycheck data, mid-year estimates 2009-10

[82] VAT and/or PAYE based enterprises

numbers have fallen by around 9% since 2009, although they recovered very slightly in 2012. The data in Table A1.63 show that all local businesses and establishments have fewer than 50 employees and a particularly strong concentration have fewer than ten employees, compared to the National Park and national averages.

Table A1.63 – Businesses and Establishments in the Northumberland National Park by Size, 2012

Businesses	**Northumberland National Park**		**All England National Parks**	**England**
0-9 employees	140	97%	91%	89%
10-49 employees	5	3%	8%	9%
50-249 employees	0	0%	1%	2%
250+ employees	0	0%	0%	0%
Total	**145**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	145	94%	88%	83%
10-49 employees	10	6%	10%	14%
50-249 employees	0	0%	1%	3%
250+ employees	0	0%	0%	0%
Total	**155**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

The Northumberland National Park has the highest concentration of agricultural businesses of all English National Parks. The data in Table A1.64 show that more than two-thirds of local businesses are in the 'agriculture, forestry and fishing' sector, which is considerably higher than the National Park and national averages. There are also a small number of businesses operating in the 'production', 'construction', 'wholesale', 'retail', 'transport and storage', 'accommodation and food service', professional, scientific and technical', 'business administration and support services' and 'health' sectors.

Table A1.64 – Businesses in the Northumberland National Park by Sector, 2012

Businesses	**Northumberland National Park**		**All England National Parks**	**England**
Agriculture, forestry & fishing	95	68%	24%	5%
Production	5	4%	5%	6%
Construction	5	4%	10%	12%
Motor trades	0	0%	2%	3%
Wholesale	5	4%	3%	5%
Retail	5	4%	7%	9%
Transport & Storage (inc. postal)	5	4%	2%	3%
Accommodation & food services	5	4%	9%	6%
Information & communication	0	0%	5%	8%
Finance & insurance	0	0%	1%	2%
Property	0	0%	3%	4%
Professional, scientific & technical	5	4%	13%	17%
Business administration & support services	5	4%	6%	7%
Public administration & defence	0	0%	0%	0%
Education	0	0%	2%	2%
Health	5	4%	3%	4%
Arts, entertainment, recreation & other services	0	0%	6%	7%
Total	**140**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Employment

The 140 local businesses provided employment for 420 people in 2012. Local employment fell by approximately 14% between 2009 and 2012, which has resulted in the average size of local businesses falling to three people in 2012. The data in Table A1.65 has been suppressed due to the small number of local businesses.

Table A1.65 – Employment in the Northumberland National Park by Size of Business, 2012

	Northumberland National Park		All England National Parks	UK
0-9 employees	..C	..C	35.1%	14.1%
10-49 employees	..C	..C	19.1%	13.9%
50-249 employees	0	0.0%	5.3%	12.9%
250+ employees	0	0.0%	17.6%	59.0%
Total	**420**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Northumberland and England National Park figures do not sum to the totals.

Most of the data in Table A1.66 have also been suppressed, although they do show particularly high levels of agricultural employment with the 'agriculture, forestry and fishing', 'construction' sector accounting for 55% of all local jobs. This is higher than all other National Parks in England.

Table A1.66 – Employment in the Northumberland National Park by Sector, 2012

	Northumberland National Park		All England National Parks	UK
Agriculture, forestry & fishing	232	55.2%	9.6%	0.9%
Production	..C	..C	5.9%	10.2%
Construction	..C	..C	4.9%	4.5%
Wholesale & retail (inc. motor trades)	..C	..C	11.7%	16.5%
Transport & Storage (inc. postal)	..C	..C	1.6%	4.2%
Accommodation & food services	..C	..C	14.7%	6.4%
Information & communication	..C	..C	2.0%	3.9%
Finance & insurance	0	0.0%	0.1%	3.9%
Property	0	0.0%	2.3%	1.6%
Professional, scientific & technical	..C	..C	5.0%	6.3%
Business administration & support services	..C	..C	3.9%	8.1%
Public administration & defence	..C	..C	0.0%	4.0%
Education	0	0.0%	15.6%	12.9%
Health	..C	..C	10.9%	12.5%
Arts, entertainment, recreation & other services	..C	..C	5.2%	4.1%
Total	420	100%	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Northumberland and England National Park figures do not sum to the totals.

Alternative employment estimates have been produced in Table A1.67 based on 2011 data from the BRES. In this case the 'Northumberland National Park' area is defined as covering all LSOAs which had some part, however small, in the National Park, rather than focusing only on the LSOAs where more than half of the population falls in the National Park. This has a significant impact on the total level of employment in the Northumberland National Park, which increases from 420 jobs to more than 6,100 jobs. The proportion of jobs in 'agriculture, forestry and fishing' falls significantly in this larger area and the employment profile becomes more closely matched to the UK average. However, employment remains relatively high in 'construction', 'transport and storage', 'accommodation and food services', 'property', 'professional, scientific and technical', and 'arts, entertainment, recreation and other services' sectors compared to the national park and UK averages.

Table A1.67 – Employment in the Northumberland National Park based on BRES data, 2011

	Northumberland National Park	
Agriculture, forestry & fishing	185	3.0%
Production	597	9.7%
Construction	428	6.9%
Wholesale & retail (inc. motor trades)	798	13.0%
Transport & Storage (inc. postal)	461	7.5%
Accommodation & food services	1,002	16.3%
Information & communication	60	1.0%
Finance & insurance	62	1.0%
Property	186	3.0%
Professional, scientific & technical	472	7.7%
Business administration & support services	226	3.7%
Public administration & defence	141	2.3%
Education	681	11.1%
Health	431	7.0%
Arts, entertainment, recreation & other services	430	7.0%
Total	**6,160**	**100.0%**

Source: BRES (2011 data), accessed via NOMIS on 17 April 2013

Turnover and GVA

The 140 local businesses are estimated to have generated a combined annual turnover of more than £27 million in 2012, at an average turnover of just over £54,000 per employee, compared to the English National Park and UK averages of £68,000 and £167,000 per employee respectively. The data in Table A1.68 has also been suppressed due to the small number of local businesses.

Table A1.68 – Turnover (£m) in the Northumberland National Park by Size of Business, 2012

	Northumberland National Park		**All England National Parks**	**UK**
0-9 employees	..C	..C	37.9%	12.6%
10-49 employees	..C	..C	32.2%	11.6%
50-249 employees	0	0.0%	5.1%	13.6%
250+ employees	0	0.0%	4.6%	62.2%
Total	**27.1**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Northumberland and England National Park figures do not sum to the totals.

Most of the data in Table A1.69 have also been suppressed, but those provided show particularly high turnover in the 'agriculture, forestry and fishing', 'construction' sector. Almost half of all turnover in the Northumberland National Park (46%) is generated by this sector, which is the highest of all English National Parks and is significantly higher than the National Park and national averages.

Table A1.69 – Turnover (£m) in the Northumberland National Park by Sector, 2012

	Northumberland National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	12.5	46.2%	7.8%	0.8%
Production	..C	..C	9.6%	15.9%
Construction	..C	..C	7.1%	4.4%
Wholesale & retail (inc. motor trades)	..C	..C	17.2%	24.6%
Transport & Storage (inc. postal)	..C	..C	1.7%	3.3%
Accommodation & food services	..C	..C	9.2%	1.7%
Information & communication	..C	..C	2.4%	4.1%
Finance & insurance	0	0.0%	1.0%	27.3%
Property	0	0.0%	1.9%	1.1%
Professional, scientific & technical	..C	..C	5.2%	4.7%
Business administration & support services	..C	..C	4.0%	3.6%
Public administration & defence	..C	..C	0.2%	0.6%
Education	0	0.0%	4.0%	1.7%
Health	..C	..C	7.4%	3.6%
Arts, entertainment, recreation & other services	..C	..C	3.0%	2.7%
Total	**27.1**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Northumberland and England National Park figures do not sum to the totals.

GVA has been estimated for the Northumberland National Park using the three different approaches described in Section 2. Unfortunately, the relatively high levels of suppressed data in the above turnover and employment data mean that the GVA estimates based on turnover and employment are likely to underestimate the true local level of GVA, while the GVA estimates based on county level productivity are likely to over-estimate GVA because of the significant concentration of local agricultural activity. These estimates suggest that the businesses in the Northumberland National Park generated GVA of between £5 and £17 million per annum in 2012.

However, if the GVA estimates are based on the higher level of employment (associated with all LSOAs which had some part in the Northumberland National Park) the estimate of GVA could be as high as £246 million.

Peak District National Park

The Peak District National Park covers an area of almost 144,000 hectares in Central and Northern England. It crosses a number of administrative boundaries including Derbyshire, Cheshire, Greater Manchester, Staffordshire and South and West Yorkshire. It has a fairly typical population density of 0.26 persons per hectare, which is the same as the average across all English National Parks.

Population and age profile
The Peak District has a population of almost 38,000, according to the latest Census data. The data in Table A1.70 shows that it is somewhat typical of the other English National Parks in terms of its age profile, with 43% of the population aged less than 45 and 33% aged 60 and over. This is still a much more ageing population than the national average of 59% aged younger than 45 and 23% aged 60 and over.

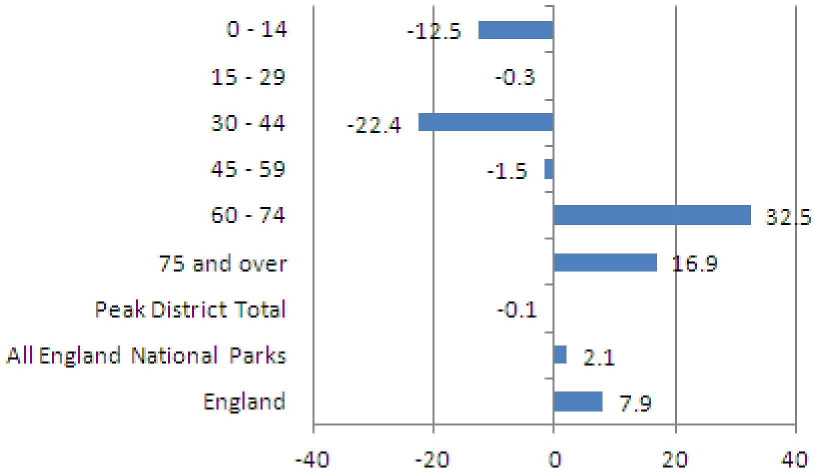
Table A1.70 – Population of the Peak District National Park by Age Group, 2011

	Peak District National Park		All England National Parks	England
Age 0 to 14	5,534	15%	16%	19%
Age 15 to 29	4,699	12%	12%	19%
Age 30 to 44	5,980	16%	16%	21%
Age 45 to 59	9,264	24%	23%	19%
Age 60 to 74	8,359	22%	22%	15%
Age 75+	4,069	11%	11%	8%
Total	**37,905**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.8 shows that the Peak District population remained stable between 2001 and 2011, according to Census data, compared to growth of 2.1% across all English National Parks and 7.9% for England as a whole. The local population has also become more aged over time, with significant growth amongst those aged 60 and over.

Figure A1.8 – Population Change in the Peak District National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity
The latest Census data suggest that the Peak District National Park has a 'working age' population of almost 28,000 people. The data in Table A1.71 show that the local rate of economic activity (71%) is very slightly higher than the National Park and England averages of 70%, due to a relatively high number of part-time employees. Rates of economic inactivity are slightly lower than average, despite a relatively large number of retired people.

Table A1.71 – Economic Activity in the Peak District National Park, 2011

	Peak District National Park		All England National Parks	England
Working Age Population (aged 16-74)	**27,876**	**100%**	**100%**	**100%**
Economically Active	**19,805**	**71%**	**70%**	**70%**
Part-time employees	4,215	15%	14%	14%
Full-time employees	9,059	32%	32%	39%
Self-employed	5,321	19%	19%	10%
Unemployed	594	2%	2%	4%
Full-time student	616	2%	2%	3%
Economically Inactive	**8,071**	**29%**	**30%**	**30%**
Retired	5,479	20%	19%	14%
Student	866	3%	4%	6%
Looking after home or family	791	3%	4%	4%
Long-term sick or disabled	603	2%	2%	4%
Other	332	1%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.72 shows that there are more than 19,000 employed people living in the Peak District, with a relatively large number of people with professional and skilled trade occupations. In contrast, there are relatively few people with associate professional, technical, caring, leisure and other service occupations compared to both the National Park and national averages.

Table A1.72 – Occupations of residents in the Peak District National Park, 2011

	Peak District National Park		All England National Parks	England
Employed residents (aged 16-74)	**19,150**	**100%**	**100%**	**100%**
Managers, directors & senior officials	2,953	15%	16%	11%
Professional occupations	4,055	21%	20%	17%
Associate professional & technical occupations	1,889	10%	11%	13%
Administrative & secretarial occupations	1,651	9%	9%	11%
Skilled trades occupations	3,348	17%	16%	11%
Caring, leisure & other service occupations	1,380	7%	8%	9%
Sales & customer service occupations	893	5%	5%	8%
Process, plant and machine operatives	1,096	6%	5%	7%
Elementary occupations	1,885	10%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

The 2010 Defra economic profile for the Peak District National Park suggested that the average gross income of households in the Peak District was £37,692 in 2009/10[83]. This was the third highest of all English National Parks and was also the National Park with the highest income premium over and above its respective regional average. Household incomes in the Peak District were estimated to be 11.3% higher than the East Midlands regional average.

House prices

The Defra economic profiles also suggested, based on 2009 Land Registry sales data, that the average house price in the Peak District was more than £290,000 (which was fairly average across the English National Parks) but was some 85% higher than the average house price in the East Midlands at the time.

Number of businesses

The Peak District is the third largest National Park in England in terms of the size of the local business stock. There were approximately 2,915 businesses[84] operating from 3,235

[83] CACI Paycheck data, mid-year estimates 2009-10

[84] VAT and/or PAYE based enterprises

establishments in the Peak District in 2012, according to the latest IDBR data, suggesting that the size of the business stock has fallen by 1.2% since 2009. The data in Table A1.73 show that more than 90% of the businesses and establishments in the Peak District have fewer than ten employees, which is higher than the other English National Parks and the national average.

Table A1.73 – Businesses and Establishments in the Peak District National Park by Size, 2012

Businesses	**Peak District National Park**		**All England National Parks**	**England**
0-9 employees	2,700	93%	91%	89%
10-49 employees	195	7%	8%	9%
50-249 employees	15	1%	1%	2%
250+ employees	5	0%	0%	0%
Total	**2,915**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	2,905	90%	88%	83%
10-49 employees	300	9%	10%	14%
50-249 employees	30	1%	1%	3%
250+ employees	0	0%	0%	0%
Total	**3,235**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

The data in Table A1.74 show that businesses in the Peak District cover a diverse range of sectors. The relative size of each sector is broadly in line with the average across all English National Parks, except the Peak District has a relatively large number of agricultural businesses. The 'agriculture, forestry and fishing' sector accounts for approximately one in three businesses (31%) in the Peak District.

Table A1.74 – Businesses in the Peak District National Park by Sector, 2012

Businesses	**Peak District National Park**		**All England National Parks**	**England**
Agriculture, forestry & fishing	910	31%	24%	5%
Production	160	5%	5%	6%
Construction	255	9%	10%	12%
Motor trades	55	2%	2%	3%
Wholesale	90	3%	3%	5%
Retail	195	7%	7%	9%
Transport & Storage (inc. postal)	100	3%	2%	3%
Accommodation & food services	245	8%	9%	6%
Information & communication	110	4%	5%	8%
Finance & insurance	25	1%	1%	2%
Property	85	3%	3%	4%
Professional, scientific & technical	295	10%	13%	17%
Business administration & support services	140	5%	6%	7%
Public administration & defence	10	0%	0%	0%
Education	45	2%	2%	2%
Health	85	3%	3%	4%
Arts, entertainment, recreation & other services	110	4%	6%	7%
Total	**2,915**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Employment

The 2,915 businesses located on Peak District provided employment for more than 13,300 people in 2012 and local levels of employment have remained relatively stable since 2009. The average business in the Peak District employs fewer than five people and Table A1.75 shows that a relatively large proportion of local employment is within businesses with fewer than 50 employees, compared to the other National Parks and national average.

Table A1.75 – Employment in the Peak District National Park by Size of Business, 2012

	Peak District National Park		**All England National Parks**	**UK**
0-9 employees	6,525	49.0%	35.1%	14.1%
10-49 employees	3,523	26.4%	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	..C	..C	17.6%	59.0%
Total	**13,328**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Peak District and England National Park figures do not sum to the totals.

The data in Table A1.76 show relatively high levels of employment in 'agriculture, forestry and fishing', 'production', 'construction', 'wholesale and retail', and particularly 'accommodation and food services' sectors compared to the other National Parks and the rest of the UK. These five sectors account for 72% of all employment in the Peak District, compared to 47% across all English National Parks and 39% across the UK as a whole. Employment in 'education' and 'health' sectors in the Peak District is particularly low compared to the National Park and national averages.

Table A1.76 – Employment in the Peak District National Park by Sector, 2012

	Peak District National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	1,927	14.5%	9.6%	0.9%
Production	1,492	11.2%	5.9%	10.2%
Construction	663	5.0%	4.9%	4.5%
Wholesale & retail (inc. motor trades)	2,479	18.6%	11.7%	16.5%
Transport & Storage (inc. postal)	484	3.6%	1.6%	4.2%
Accommodation & food services	2,971	22.3%	14.7%	6.4%
Information & communication	244	1.8%	2.0%	3.9%
Finance & insurance	61	0.5%	0.1%	3.9%
Property	214	1.6%	2.3%	1.6%
Professional, scientific & technical	676	5.1%	5.0%	6.3%
Business administration & support services	459	3.4%	3.9%	8.1%
Public administration & defence	24	0.2%	0.0%	4.0%
Education	552	4.1%	15.6%	12.9%
Health	646	4.8%	10.9%	12.5%
Arts, entertainment, recreation & other services	436	3.3%	5.2%	4.1%
Total	**13,328**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Peak District and England National Park figures do not sum to the totals.

Alternative employment estimates have been produced in Table A1.77 based on 2011 data from the BRES. In this case the 'Peak District National Park' area is defined as only covering the LSOAs which had more than 90% of their population in the National Park, rather than focusing on all LSOAs where more than half of their population falls in the National Park. This smaller area had a slightly lower level of employment in 2011 of 12,100 jobs. Somewhat strangely, the number of jobs in 'production', 'education', 'health' and 'arts, entertainment, recreation and other services' increases in this smaller area, while the number of jobs in the 'agriculture, forestry and fishing' and 'accommodation and food services' sectors falls significantly. This is considered less likely to be due to the small change in area and is more likely to be due to differences in the samples of the BRES and IDBR datasets.

Table A1.77 – Employment in the Peak District National Park based on BRES data, 2011

	Peak District National Park	
Agriculture, forestry & fishing	23	0.2%
Production	1,935	16.0%
Construction	526	4.3%
Wholesale & retail (inc. motor trades)	2,124	17.6%
Transport & Storage (inc. postal)	530	4.4%
Accommodation & food services	1,880	15.5%
Information & communication	219	1.8%
Finance & insurance	67	0.6%
Property	196	1.6%
Professional, scientific & technical	592	4.9%
Business administration & support services	393	3.2%
Public administration & defence	68	0.6%
Education	1,523	12.6%
Health	1,225	10.1%
Arts, entertainment, recreation & other services	800	6.6%
Total	**12,101**	**100%**

Source: BRES (2011 data), accessed via NOMIS on 17 April 2013

Turnover and GVA

The 2,915 local businesses are estimated to have generated a combined annual turnover of more than £1.1 billion in 2012. This equates to an average turnover of more than £87,000 per employee, which is the highest of all English National Parks and significantly higher than the English National Park average of £68,000. The data in Table A1.78 show that the turnover of businesses in the Peak District is relatively concentrated amongst small businesses with fewer than 10 employees.

Table A1.78 – Turnover (£m) in the Peak District National Park by Size of Business, 2012

	Peak District National Park		All England National Parks	UK
0-9 employees	468.0	42.4%	37.9%	12.6%
10-49 employees	232.7	21.1%	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	..C	..C	4.6%	62.2%
Total	**1,102.5**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Peak District and England National Park figures do not sum to the totals.

The data in Table A1.79 show that the 'production' and 'wholesale and retail' sectors generate the largest turnover in the Peak District. These sectors generate more than 37% of all turnover in the Peak District, which is much higher than the National Park average of 27% and is more similar to the UK average of 40%. The Peak District also generates a relatively high turnover in the 'agriculture, forestry and fishing' and 'transport and storage' sectors, and a relatively low turnover in the 'information and communication', 'finance and insurance', 'professional, scientific and technical' and 'health' sectors, compared to the other English National Parks and the UK average.

Table A1.79 – Turnover (£m) in the Peak District National Park by Sector, 2012

	Peak District National Park		All England National Parks	UK
Agriculture, forestry & fishing	109.4	9.9%	7.8%	0.8%
Production	147.4	13.4%	9.6%	15.9%
Construction	62.6	5.7%	7.1%	4.4%
Wholesale & retail (inc. motor trades)	261.4	23.7%	17.2%	24.6%
Transport & Storage (inc. postal)	41.9	3.8%	1.7%	3.3%
Accommodation & food services	87.2	7.9%	9.2%	1.7%
Information & communication	15.1	1.4%	2.4%	4.1%
Finance & insurance	4.7	0.4%	1.0%	27.3%
Property	13.0	1.2%	1.9%	1.1%
Professional, scientific & technical	37.4	3.4%	5.2%	4.7%
Business administration & support services	37.6	3.4%	4.0%	3.6%
Public administration & defence	..C	..C	0.2%	0.6%
Education	21.0	1.9%	4.0%	1.7%
Health	33.3	3.0%	7.4%	3.6%
Arts, entertainment, recreation & other services	..C	..C	3.0%	2.7%
Total	**1,102.5**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data. Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Peak District and England National Park figures do not sum to the totals.

GVA has been estimated for the Peak District using the three different approaches described in Section 2. The above turnover and employment data has only been suppressed for a couple of sectors in the Peak District, so the GVA estimates based on turnover and employment are likely to provide only a slight under-estimate of the true level of local GVA. However, the GVA estimates based on county level productivity are likely to over-estimate local GVA because of the concentration of low value agricultural and tourism activities in the Peak District.

The respective GVA estimates are presented in Table A1.80 below and suggest that businesses in the Peak District generated GVA of between £406 million and £568 million per annum in 2012. Businesses in the 'wholesale and retail' sector are estimated to generate the largest GVA of all sectors.

Table A1.80 – GVA Estimates (£m) for the Peak District National Park, 2012

	Turnover-based GVA Estimates (£m)	Employment-based GVA Estimates (£m)	County Productivity-based GVA Estimates (£m)
Agriculture, forestry & fishing	42	38	
Production	52	107	
Construction	25	26	
Wholesale & retail (inc. motor trades)	133	129	
Transport & Storage (inc. postal)	21	8	
Accommodation & food services	44	49	
Information & communication	8	4	
Finance & insurance	3	7	
Property	8	11	
Professional, scientific & technical	20	33	
Business administration & support services	20	23	
Public administration & defence	-	1	
Education	12	17	
Health	19	20	
Arts, entertainment, recreation & other services	-	11	
Total	**406**	**482**	**568**

However, if the GVA estimates are based on the lower level of employment (associated with all LSOAs with 90% of their population in the Peak District National Park) the estimate of GVA, based on productivity at the county level, would fall to £516 million.

South Downs National Park

The South Downs National Park is located in Hampshire and Sussex in the South East of England and is the third largest National Park in England, covering an area of more than 162,000 hectares. It is also the most densely populated of the ten English National Parks with a population density of 0.69 persons per hectare, although this is still significantly lower than the national average of 4.1 persons per hectare.

Population and age profile

The South Downs has by far the largest population of all English National Parks of more than 112,000, according to the latest Census data. The local age profile shares the same ageing structure of all other English National Parks, although it is slightly closer to the national average. For example, the data in Table A1.81 show that 30% of the South Downs population is aged 60 and over, which is between the national average of 23% and the English National Park average of 33%. Furthermore, almost half (48%) of the local population is younger than 45, compared to an average of 44% across the ten English National Parks and 59% across England as a whole.

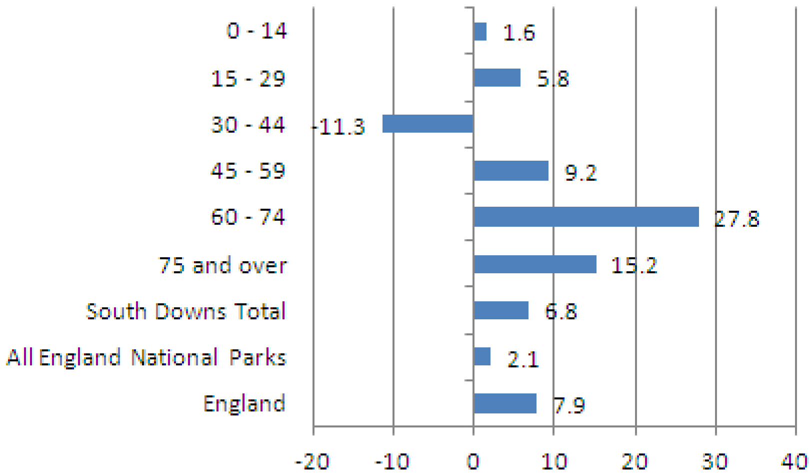
Table A1.81 – Population of the South Downs National Park by Age Group, 2011

	South Downs National Park		All England National Parks	England
Age 0 to 14	19,100	17%	16%	19%
Age 15 to 29	15,334	14%	12%	19%
Age 30 to 44	19,112	17%	16%	21%
Age 45 to 59	25,513	23%	23%	19%
Age 60 to 74	21,373	19%	22%	15%
Age 75+	11,911	11%	11%	8%
Total	**112,343**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.9 shows that the South Downs population increased by 6.8% between 2001 and 2011, according to Census data. This is the strongest growth of all English National Parks and, although slightly lower than the 7.9% population growth across England as a whole, is significantly higher than the average across all English National Parks (of 2.1%). The population growth was experienced across most age groups, and strongest amongst those aged 60 to 74, although the number of people aged between 30 and 44 declined by 11%.

Figure A1.9 – Population Change in the South Downs National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity

The latest Census data suggest that the South Downs has a 'working age' population of almost 80,000 people. The data in Table A1.82 show that the local rate of economic activity is the same as the National Park and England averages of 70%. However, there are also some key differences in the types of economic activity, as the proportion of full time employees in the South Downs is slightly higher than the National Park average but lower than the overall England average, while self-employment is relatively low compared to the other National Parks but is higher than the national average. The South Downs also has a relatively low number of retired people, compared to the other National Parks, and a larger number of students and people looking after the family and home.

Table A1.82 – Economic Activity in the South Downs National Park, 2011

	South Downs National Park		**All England National Parks**	**England**
Working Age Population (aged 16-74)	**79,824**	**100%**	**100%**	**100%**
Economically Active	**56,005**	**70%**	**70%**	**70%**
Part-time employees	11,158	14%	14%	14%
Full-time employees	26,977	34%	32%	39%
Self-employed	14,010	18%	19%	10%
Unemployed	2,055	3%	2%	4%
Full-time student	1,805	2%	2%	3%
Economically Inactive	**23,819**	**30%**	**30%**	**30%**
Retired	13,203	17%	19%	14%
Student	3,636	5%	4%	6%
Looking after home or family	3,784	5%	4%	4%
Long-term sick or disabled	1,776	2%	2%	4%
Other	1,420	2%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.83 shows that there are almost 54,000 employed people living in the South Downs, including a relatively large number of people with professional, associate professional and technical occupations. In contrast, there are relatively few plant and machine operatives compared to both the National Park and national averages.

Table A1.83 – Occupations of residents in the South Downs National Park, 2011

	South Downs National Park		**All England National Parks**	**England**
Employed residents (aged 16-74)	**53,681**	**100%**	**100%**	**100%**
Managers, directors & senior officials	8,487	16%	16%	11%
Professional occupations	11,872	22%	20%	17%
Associate professional & technical occupations	7,500	14%	11%	13%
Administrative & secretarial occupations	5,111	10%	9%	11%
Skilled trades occupations	6,813	13%	16%	11%
Caring, leisure & other service occupations	4,490	8%	8%	9%
Sales & customer service occupations	2,804	5%	5%	8%
Process, plant and machine operatives	2,029	4%	5%	7%
Elementary occupations	4,575	9%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

The 2010 Defra economic profile for the South Downs National Park estimated that the average gross income of households on the South Downs was £40,248 in 2009/10[85]. This was the second highest of all English National Parks and was on a par with the average household income for the South East region at the time.

[85] CACI Paycheck data, mid-year estimates 2009-10

House prices
The Defra economic profiles estimated, based on 2009 Land Registry sales data, that the average house price on the South Downs was the second highest of all English National Parks at more than £361,000. This was estimated to be 43% higher than average house price in the South East at the time.

Number of businesses
The South Downs is by far the largest of the English National Parks in terms of the number of local businesses. The latest IDBR data suggest that there were around 7,025 businesses[86] operating from 7,745 establishments in the South Downs in 2012. However, while the local business stock in the South Downs increased in 2011 and 2012, it remains approximately 1% lower than the 2009 figure due to a large decrease in 2010. The data in Table A1.84 show that the South Downs are broadly representative of the English National Parks in terms of the size of local businesses, around 90% of which employ fewer than ten employees.

Table A1.84 – Businesses and Establishments in the South Downs National Park by Size, 2012

Businesses	**South Downs National Park**		**All England National Parks**	**England**
0-9 employees	6,380	91%	91%	89%
10-49 employees	555	8%	8%	9%
50-249 employees	75	1%	1%	2%
250+ employees	15	0%	0%	0%
Total	**7,025**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	6,750	87%	88%	83%
10-49 employees	875	11%	10%	14%
50-249 employees	105	1%	1%	3%
250+ employees	15	0%	0%	0%
Total	**7,745**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

The data in Table A1.85 show that the structure of the local economy in the South Downs is more closely matched to the national average than the other National Parks. The two largest sectors in terms of the number of local businesses in the South Downs are the ‘professional, scientific and technical’ and ‘construction’ sectors, which account for almost 30% of local businesses. This proportion is similar to the national average and much higher than the other English National Parks. Even the proportion of agricultural employment is more closely matched to the national average than the National Park average and is considerably lower than most other National Parks.

86 VAT and/or PAYE based enterprises

Table A1.85 – Businesses in the South Downs National Park by Sector, 2012

Businesses	South Downs National Park		All England National Parks	England
Agriculture, forestry & fishing	715	10%	24%	5%
Production	405	6%	5%	6%
Construction	740	11%	10%	12%
Motor trades	190	3%	2%	3%
Wholesale	270	4%	3%	5%
Retail	510	7%	7%	9%
Transport & Storage (inc. postal)	105	1%	2%	3%
Accommodation & food services	355	5%	9%	6%
Information & communication	550	8%	5%	8%
Finance & insurance	115	2%	1%	2%
Property	250	4%	3%	4%
Professional, scientific & technical	1,345	19%	13%	17%
Business administration & support services	500	7%	6%	7%
Public administration & defence	25	0%	0%	0%
Education	130	2%	2%	2%
Health	225	3%	3%	4%
Arts, entertainment, recreation & other services	595	8%	6%	7%
Total	**7,025**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Employment

The 7,025 businesses located in the South Downs provide employment for more than 58,000 people. This suggests that the average business in the South Downs employs more than eight people, which is more than the National Park average of 6.3 but considerably lower than the national average of 14.5. The data in Table A1.86 show that large businesses account for a much larger proportion of employment in the South Downs than the other National Parks. More generally, the overall distribution of employment by size of business is somewhere between the National Park and UK averages.

Table A1.86 – Employment in the South Downs National Park by Size of Business, 2012

	South Downs National Park		All England National Parks	UK
0-9 employees	15,356	26.4%	35.1%	14.1%
10-49 employees	10,362	17.8%	19.1%	13.9%
50-249 employees	7,511	12.9%	5.3%	12.9%
250+ employees	24,846	42.8%	17.6%	59.0%
Total	**58,075**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the South Downs and England National Park figures do not sum to the totals.

The data in Table A1.87 show a concentration of employment in the 'education' sector, which accounts for almost one in three jobs (32%) in the South Downs and is more than double the National Park and national averages. There are also a relatively large number of jobs in the 'property' and 'arts, entertainment, recreation and other services' sectors compared to the National Park and national averages, and a relatively low number of jobs in 'production', 'construction', 'wholesale and retail', 'transport and storage' and 'health' sectors.

Table A1.87 – Employment in the South Downs National Park by Sector, 2012

	South Downs National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	2,656	4.6%	9.6%	0.9%
Production	3,048	5.2%	5.9%	10.2%
Construction	2,419	4.2%	4.9%	4.5%
Wholesale & retail (inc. motor trades)	5,176	8.9%	11.7%	16.5%
Transport & Storage (inc. postal)	409	0.7%	1.6%	4.2%
Accommodation & food services	3,791	6.5%	14.7%	6.4%
Information & communication	1,335	2.3%	2.0%	3.9%
Finance & insurance	..C	..C	0.1%	3.9%
Property	1,625	2.8%	2.3%	1.6%
Professional, scientific & technical	3,510	6.0%	5.0%	6.3%
Business administration & support services	2,376	4.1%	3.9%	8.1%
Public administration & defence	..C	..C	0.0%	4.0%
Education	18,341	31.6%	15.6%	12.9%
Health	3,463	6.0%	10.9%	12.5%
Arts, entertainment, recreation & other services	3,324	5.7%	5.2%	4.1%
Total	**58,075**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the South Downs and England National Park figures do not sum to the totals.

Turnover and GVA
The 7,025 businesses in the South Downs generated an estimated turnover of £3.6 billion in 2012. This equates to an average turnover of approximately £62,500 per employee, which is lower than the English National Park and UK averages of £68,000 and £167,000 per employee respectively. The data in Table A1.88 show that small businesses with fewer than 10 employees generate almost half of all turnover in the South Downs.

Table A1.88 – Turnover (£m) in the South Downs National Park by Size of Business, 2012

	South Downs National Park		**All England National Parks[87]**	**UK**
0-9 employees	1,652.4	46.0%	37.9%	12.6%
10-49 employees	934.6	26.0%	32.2%	11.6%
50-249 employees	530.8	14.8%	5.1%	13.6%
250+ employees	476.4	13.3%	4.6%	62.2%
Total	**3,594.1**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the South Downs and England National Park figures do not sum to the totals.

The data in Table A1.89 also suggest that more than a third (34%) of all turnover in the South Downs is generated by businesses operating in the 'production' and 'wholesale and retail' sectors. This is slightly lower than the UK average but higher than the National Park average. Businesses in the South Downs also generate a relatively high turnover in the 'education', 'construction', 'accommodation and food services', 'property', 'professional, scientific and technical', 'business administration and support services' and 'arts, entertainment, recreation and other services' sectors, compared to the other English National Parks and the UK average.

Table A1.89 – Turnover (£m) in the South Downs National Park by Sector, 2012

	South Downs National Park		All England National Parks	UK
Agriculture, forestry & fishing	217.6	6.1%	7.8%	0.8%
Production	514.2	14.3%	9.6%	15.9%
Construction	310.2	8.6%	7.1%	4.4%
Wholesale & retail (inc. motor trades)	708.0	19.7%	17.2%	24.6%
Transport & Storage (inc. postal)	47.2	1.3%	1.7%	3.3%
Accommodation & food services	346.0	9.6%	9.2%	1.7%
Information & communication	140.8	3.9%	2.4%	4.1%
Finance & insurance	97.4	2.7%	1.0%	27.3%
Property	76.7	2.1%	1.9%	1.1%
Professional, scientific & technical	300.8	8.4%	5.2%	4.7%
Business administration & support services	208.6	5.8%	4.0%	3.6%
Public administration & defence	18.7	0.5%	0.2%	0.6%
Education	286.5	8.0%	4.0%	1.7%
Health	151.6	4.2%	7.4%	3.6%
Arts, entertainment, recreation & other services	169.7	4.7%	3.0%	2.7%
Total	**3,594.1**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the South Downs and England National Park figures do not sum to the totals.

GVA has been estimated for the South Downs National Park using the three different approaches described in Section 2. The above turnover and employment data has only been suppressed for a couple of sectors in the South Downs, so the GVA estimates based on turnover and employment are likely to provide a slight under-estimate of the true level of local GVA. However, the GVA estimates based on county level productivity are likely to over-estimate local GVA because of the concentration of low value agricultural and tourism activities in the South Downs.

The respective GVA estimates are presented in Table A1.90 below and suggest that businesses in the South Downs generated GVA of between £1.7 and £2.8 billion per annum in 2012. Businesses in the 'education' and 'wholesale and retail' sectors are estimated to generate the largest GVA of all sectors.

Table A1.90 – GVA Estimates (£m) for the South Downs National Park, 2012

	Turnover-based GVA Estimates (£m)	Employment-based GVA Estimates (£m)	County Productivity-based GVA Estimates (£m)
Agriculture, forestry & fishing	83	52	
Production	181	218	
Construction	124	95	
Wholesale & retail (inc. motor trades)	359	269	
Transport & Storage (inc. postal)	24	7	
Accommodation & food services	175	62	
Information & communication	74	22	
Finance & insurance	55	-	
Property	48	80	
Professional, scientific & technical	161	174	
Business administration & support services	112	118	
Public administration & defence	11	-	
Education	161	559	
Health	85	106	
Arts, entertainment, recreation & other services	94	86	
Total	**1,748**	**1,848**	**2,754**

Yorkshire Dales National Park

The Yorkshire Dales National Park is the second largest National Park in England comprising an area of almost 177,000 hectares and covering parts of North Yorkshire in Yorkshire and the Humber, and Cumbria in North West England. It is also the second most sparsely populated with a population density of just 0.11 persons per hectare.

Population and age profile

The Yorkshire Dales has a population of almost 20,000, according to the latest Census data. The data in Table A1.91 show that it is a relatively ageing population, not only compared to the national average, but also the other English National Park areas. Only 41% of the local population is younger than 45 (compared to the national average of 59% and the English National Park average of 44%), while 35% are aged 60 and over (compared to 33% across all English National Parks and 23% for England as a whole).

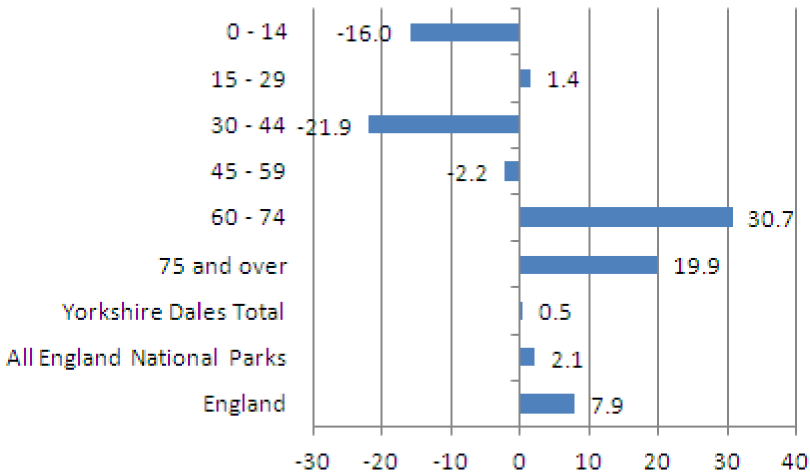
Table A1.91 – Population of the Yorkshire Dales National Park by Age Group, 2011

	Yorkshire Dales National Park		All England National Parks	England
Age 0 to 14	2,664	13%	16%	19%
Age 15 to 29	2,575	13%	12%	19%
Age 30 to 44	2,895	15%	16%	21%
Age 45 to 59	4,613	23%	23%	19%
Age 60 to 74	4,774	24%	22%	15%
Age 75+	2,240	11%	11%	8%
Total	**19,761**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Figure A1.10 shows that the Yorkshire Dales population has remained relatively stable (increased by 0.5%) between 2001 and 2011, according to Census data, compared to growth of 2.1% across all English National Parks and 7.9% for England as a whole. The local population has also become more aged over time, with significant growth amongst those aged 60 and over.

Figure A1.10 – Population Change in the Yorkshire Dales National Park, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity

The latest Census data suggest that the Yorkshire Dales has a 'working age' population of more than 14,500 people. The data in Table A1.92 show that the local rate of economic activity is the same as the National Park and England averages of 70%, although rates of self-employment are relatively high and rates of full time employment are relatively low compared to the National Park and England averages. The Yorkshire Dales also have a relatively large number of retired people and a relatively low number of people looking after the family and/or home, and sick and disabled people.

Table A1.92 – Economic Activity in the Yorkshire Dales National Park, 2011

	Yorkshire Dales National Park		All England National Parks	England
Working Age Population (aged 16-74)	**14,561**	**100%**	**100%**	**100%**
Economically Active	**10,171**	**70%**	**70%**	**70%**
Part-time employees	2,092	14%	14%	14%
Full-time employees	4,246	29%	32%	39%
Self-employed	3,309	23%	19%	10%
Unemployed	249	2%	2%	4%
Full-time student	275	2%	2%	3%
Economically Inactive	**4,390**	**30%**	**30%**	**30%**
Retired	3,055	21%	19%	14%
Student	556	4%	4%	6%
Looking after home or family	334	2%	4%	4%
Long-term sick or disabled	244	2%	2%	4%
Other	201	1%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile

Table A1.93 shows that there are almost 10,000 employed people living in the Yorkshire Dales, including a particularly large proportion of people with skilled trade occupations. In contrast, there are relatively few people with associate professional, technical, caring, leisure and other service occupations compared to both the National Park and national averages.

Table A1.93 – Occupations of residents in the Yorkshire Dales National Park, 2011

	Yorkshire Dales National Park		All England National Parks	England
Employed residents (aged 16-74)	**9,899**	**100%**	**100%**	**100%**
Managers, directors & senior officials	1,509	15%	16%	11%
Professional occupations	1,679	17%	20%	17%
Associate professional & technical occupations	986	10%	11%	13%
Administrative & secretarial occupations	867	9%	9%	11%
Skilled trades occupations	2,234	23%	16%	11%
Caring, leisure & other service occupations	718	7%	8%	9%
Sales & customer service occupations	392	4%	5%	8%
Process, plant and machine operatives	465	5%	5%	7%
Elementary occupations	1,049	11%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income

The 2010 Defra economic profile for the Yorkshire Dales National Park estimated that the average gross income of households on the Yorkshire Dales was £33,021 in 2009/10[88]. This was amongst the lowest of all English National Parks but was 1.9% higher than the average household income for the Yorkshire and the Humber region.

House prices

The Defra economic profiles also estimated, based on 2009 Land Registry sales data, that the average house price on the Yorkshire Dales was almost £245,000. This was the lowest of the English National Park areas (excluding Northumberland) but was estimated to be 60% higher than average house price in Yorkshire and the Humber at the time.

Number of businesses

There were approximately 1,765 businesses[89] operating from 1,930 establishments on Yorkshire Dales in 2012 according to the latest IDBR data. These numbers are similar to those in 2009, having fallen in 2010 before recovering in 2011 and 2012. The data in Table A1.94 show that there is a relatively high incidence of small businesses in the

[88] CACI Paycheck data, mid-year estimates 2009-10
[89] VAT and/or PAYE based enterprises

Yorkshire Dales as a particularly high proportion of local businesses and establishments have fewer than ten employees, compared to the other English National Parks and the national average.

Table A1.94 – Businesses and Establishments in the Yorkshire Dales National Park by Size, 2012

Businesses	**Yorkshire Dales National Park**		**All England National Parks**	**England**
0-9 employees	1,660	94%	91%	89%
10-49 employees	95	5%	8%	9%
50-249 employees	10	1%	1%	2%
250+ employees	0	0%	0%	0%
Total	**1,765**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	1,765	91%	88%	83%
10-49 employees	155	8%	10%	14%
50-249 employees	10	1%	1%	3%
250+ employees	0	0%	0%	0%
Total	**1,930**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

There is a strong concentration of agricultural businesses in the Yorkshire Dales and the data in Table A1.95 show that 40% of local businesses are in the 'agriculture, forestry and fishing' sector, compared to 24% across the English National Parks and 5% across England as a whole. However, the Yorkshire Dales also has a diverse range of businesses and the distribution of these businesses across all other sectors is broadly in line with the average across the other National Parks, except for a relatively low number of 'professional, scientific and technical' businesses.

Table A1.95 – Businesses in the Yorkshire Dales National Park by Sector, 2012

Businesses	**Yorkshire Dales National Park**		**All England National Parks**	**England**
Agriculture, forestry & fishing	705	40%	24%	5%
Production	65	4%	5%	6%
Construction	175	10%	10%	12%
Motor trades	20	1%	2%	3%
Wholesale	45	3%	3%	5%
Retail	120	7%	7%	9%
Transport & Storage (inc. postal)	45	3%	2%	3%
Accommodation & food services	140	8%	9%	6%
Information & communication	50	3%	5%	8%
Finance & insurance	5	0%	1%	2%
Property	45	3%	3%	4%
Professional, scientific & technical	120	7%	13%	17%
Business administration & support services	80	5%	6%	7%
Public administration & defence	10	1%	0%	0%
Education	20	1%	2%	2%
Health	35	2%	3%	4%
Arts, entertainment, recreation & other services	90	5%	6%	7%
Total	**1,770**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Employment

The 1,770 businesses located in the Yorkshire Dales provided employment for more than 6,900 people in 2012. Employment in the Yorkshire Dales has fallen by around 0.8% since 2009. The average local business employs fewer than four people and the data in Table A1.96 show that more than half (58%) of employment in the Yorkshire Dales is within businesses with fewer than ten employees, which is significantly higher than the other National Parks and national average.

Table A1.96 – Employment in the Yorkshire Dales National Park by Size of Business, 2012

	Yorkshire Dales National Park		All England National Parks	UK
0-9 employees	4,030	58.3%	35.1%	14.1%
10-49 employees	..C	..C	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	..C	..C	17.6%	59.0%
Total	**6,908**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Yorkshire Dales and England National Park figures do not sum to the totals.

The data in Table A1.97 show that more than half (52%) of all employment in the Yorkshire Dales is in 'agriculture, forestry and fishing', 'accommodation and food service' and 'wholesale and retail' sectors, compared to 35% of employment across all England National Parks and 24% of all UK employment. In contrast, employment in the Yorkshire Dales is relatively low in 'information and communication', 'professional, scientific and technical', business administration and support services' and 'health' sectors compared to the other National Parks and the UK as a whole.

Table A1.97 – Employment in the Yorkshire Dales National Park by Sector, 2012

	Yorkshire Dales National Park		All England National Parks	UK
Agriculture, forestry & fishing	1,582	22.9%	9.6%	0.9%
Production	527	7.6%	5.9%	10.2%
Construction	471	6.8%	4.9%	4.5%
Wholesale & retail (inc. motor trades)	933	13.5%	11.7%	16.5%
Transport & Storage (inc. postal)	240	3.5%	1.6%	4.2%
Accommodation & food services	1,072	15.5%	14.7%	6.4%
Information & communication	131	1.9%	2.0%	3.9%
Finance & insurance	..C	..C	0.1%	3.9%
Property	121	1.8%	2.3%	1.6%
Professional, scientific & technical	296	4.3%	5.0%	6.3%
Business administration & support services	249	3.6%	3.9%	8.1%
Public administration & defence	..C	..C	0.0%	4.0%
Education	439	6.4%	15.6%	12.9%
Health	400	5.8%	10.9%	12.5%
Arts, entertainment, recreation & other services	407	5.9%	5.2%	4.1%
Total	**6,908**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Yorkshire Dales and England National Park figures do not sum to the totals.

Turnover and GVA

The 1,770 local businesses are estimated to have generated a combined annual turnover of more than £420 million in 2012. This equates to an average turnover of approximately £61,000 per employee, which is lower than the English National Park and UK averages of £68,000 and £167,000 per employee respectively. The data in Table A1.98 show that turnover of businesses in the Yorkshire Dales is also concentrated amongst smaller businesses with fewer than ten employees.

Table A1.98 – Turnover (£m) in the Yorkshire Dales National Park by Size of Business, 2012

	Yorkshire Dales National Park		**All England National Parks**	**UK**
0-9 employees	244.5	57.9%	37.9%	12.6%
10-49 employees	..C	..C	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	..C	..C	4.6%	62.2%
Total	**422.4**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Yorkshire Dales and England National Park figures do not sum to the totals.

The data in Table A1.99 show that the turnover of local businesses is also concentrated in the 'agriculture, forestry and fishing' and 'wholesale and retail' sectors, which account for almost half (46%) of all turnover in the Yorkshire Dales, compared to 25% of turnover across all English National Parks and the whole of the UK. In contrast, turnover is relatively low in 'information and communication', 'professional, scientific and technical' and 'business administration and support services' sectors compared to the National Parks and national averages.

Table A1.99 – Turnover (£m) in the Yorkshire Dales National Park by Sector, 2012

	Yorkshire Dales National Park		**All England National Parks**	**UK**
Agriculture, forestry & fishing	95.5	22.6%	7.8%	0.8%
Production	44.6	10.6%	9.6%	15.9%
Construction	28.6	6.8%	7.1%	4.4%
Wholesale & retail (inc. motor trades)	98.6	23.3%	17.2%	24.6%
Transport & Storage (inc. postal)	18.2	4.3%	1.7%	3.3%
Accommodation & food services	39.2	9.3%	9.2%	1.7%
Information & communication	8.7	2.1%	2.4%	4.1%
Finance & insurance	..C	..C	1.0%	27.3%
Property	5.7	1.3%	1.9%	1.1%
Professional, scientific & technical	15.7	3.7%	5.2%	4.7%
Business administration & support services	15.0	3.5%	4.0%	3.6%
Public administration & defence	..C	..C	0.2%	0.6%
Education	16.5	3.9%	4.0%	1.7%
Health	21.5	5.1%	7.4%	3.6%
Arts, entertainment, recreation & other services	12.9	3.0%	3.0%	2.7%
Total	**422.4**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data
Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Yorkshire Dales and England National Park figures do not sum to the totals.

GVA has been estimated for the Yorkshire Dales using the three different approaches described in Section 2. The above turnover and employment data has only been suppressed for a couple of sectors in the Yorkshire Dales, so the GVA estimates based on turnover and employment are likely to provide a slight under-estimate of the true level of local GVA. However, the GVA estimates based on county level productivity are likely to over-estimate local GVA because of the concentration of low value agricultural and tourism activities in the Yorkshire Dales.

The respective GVA estimates are presented in Table A1.100 below and suggest that businesses in the Yorkshire Dales generated GVA of between £196 and £285 million per annum in 2012. Businesses in the 'wholesale and retail' and 'agriculture, forestry and fishing' sectors are estimated to generate the largest GVA of all sectors.

Table A1.100 – GVA Estimates (£m) for the Yorkshire Dales National Park, 2012

	Turnover-based GVA Estimates (£m)	**Employment-based GVA Estimates (£m)**	**County Productivity-based GVA Estimates (£m)**
Agriculture, forestry & fishing	37	31	
Production	16	38	
Construction	11	19	
Wholesale & retail (inc. motor trades)	50	49	
Transport & Storage (inc. postal)	9	4	
Accommodation & food services	20	18	
Information & communication	5	2	
Finance & insurance	-	-	
Property	4	6	
Professional, scientific & technical	8	15	
Business administration & support services	8	12	
Public administration & defence	-	-	
Education	9	13	
Health	12	12	
Arts, entertainment, recreation & other services	7	11	
Total	**196**	**228**	**285**

Appendix 2: Glossary

Glossary

BDUK	Broadband Delivery UK
BoB	Baseline on the Broads
BRES	Business Register Employment Survey
CAP	Common Agricultural Policy
COA	Census Output Area
DEFRA	Department for Environment Food and Rural Affairs
ELS	Entry Level Stewardship
ENPAA	English National Parks Authorities Association
EU	European Union
EWGS	England Woodland Grant Scheme
FBS	Farm Business Survey
FTE	Full Time Equivalent
GHG	Greenhouse Gas
GVA	Gross Value Added
HLS	Higher Level Stewardship
IDBR	Inter-Departmental Business Register
LA	Local Authority
LEADER	Liaison Entre Actions de Développement de l'Économie Rurale (or Links between the rural economy and development actions)
LEP	Local Enterprise Partnership
LFA	Less Favoured Area
LSOA	Lower Super Output Area
NIA	Nature Improvement Area
NP	National Park
NPA	National Park Authority
NPE	National Parks England
NU	Northumberland Uplands
ONS	Office for National Statistics
PES	Payment for Ecosystem Services
PFE	Public Forest Estate
RCBF	Rural Community Broadband Fund
RDPE	Rural Development Programme for England
SCaMP	Sustainable Catchment Management Project
SDF	Sustainable Development Fund
SME	Small and Medium Sized Enterprise
STEAM	Scarborough Tourism Economic Activity Monitor
UK ANPA	UK Association of National Park Authorities
WFD	Water Framework Directive