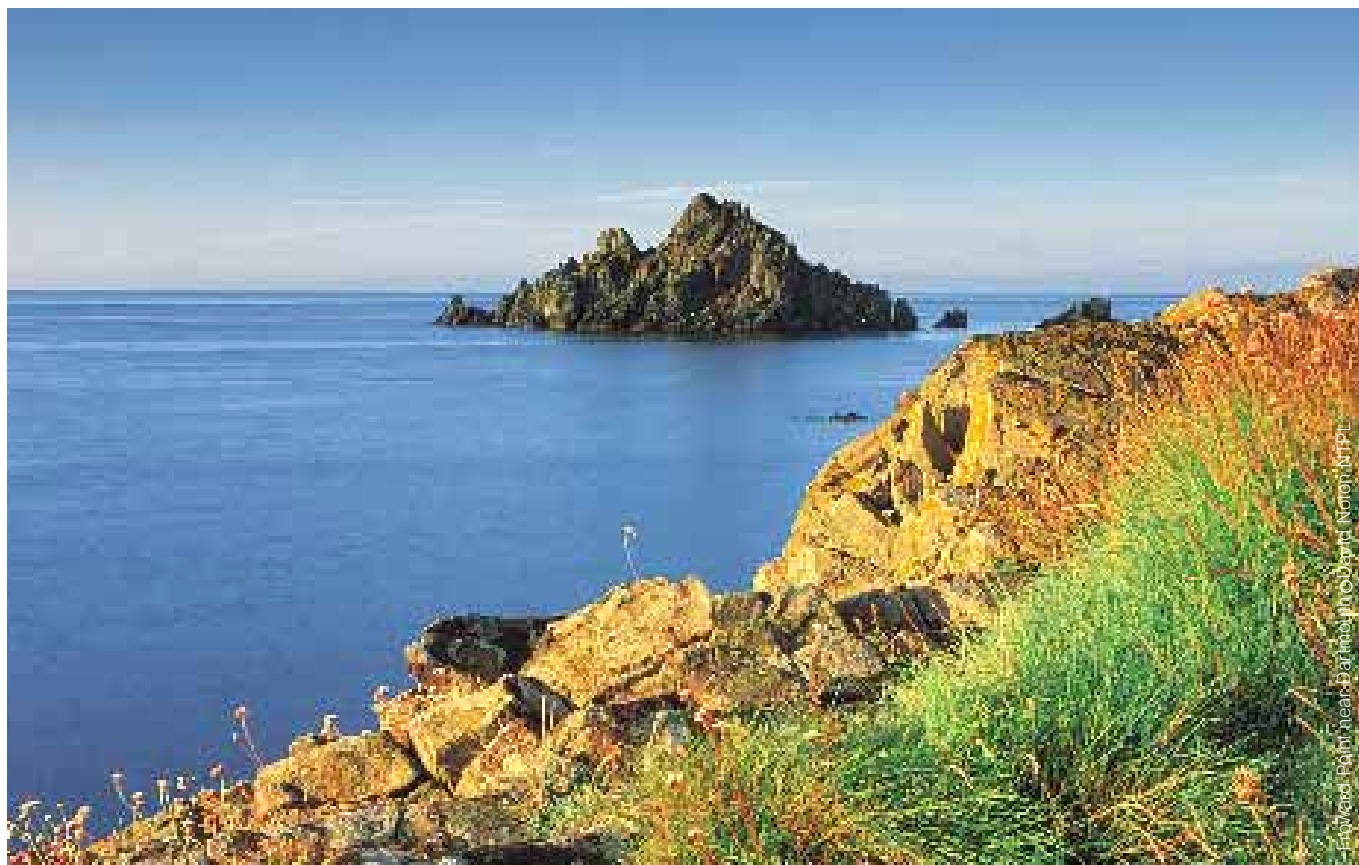




# VALUING OUR ENVIRONMENT



We all value our environment; this study gives new and concrete meaning to those words

## Just a Pretty Face?

The natural environment of the South West of England is one of its great assets - indeed, many would say its greatest.

But just what does this mean to the economy of the South West?

How can we put a value on it?

A major study, the first of its kind, sponsored and funded by the National Trust with the support of PROSPER and the European Union gives some important answers. The study has revealed that 12.6 million holiday trips or 78% of all such holiday trips each year are motivated by 'conserved landscapes' - the coast, moors, woods, villages and similar rural attractions that can be enjoyed whether as a

family holiday or for quiet relaxation. Surveys were undertaken with hundreds of visitors to establish exactly why they chose to come to the South West.

**Analysis of these results shows that conserved landscapes in the South West attract a spend of £2,354 million from holiday trips and support 97,200 jobs or 43% of all tourist related jobs in the region.**

Farming is a mainstay of our rural economy but this study proves that the countryside and, in particular, the parts judged to be 'unproductive' are, in fact, major generators of wealth in the South West. Our precious environment, with all its many characteristics, is more than 'just a pretty face'; it is at the heart of the South West economy.



**1 CASE STUDY  
Holnicote -  
A Working Estate**

When the Acland family gave the Holnicote Estate on Exmoor to the National Trust, they were truly handing over one of the gems of the English countryside: a sweep of spectacular moorland incised by deep wooded valleys through which streams tumble to the Vale of Porlock and the Bristol Channel coast.

Small wonder that more than half a million visitors a year come to walk its 100 miles of footpaths and marvel at

the views. But Holnicote is far more than a slice of landscape preserved in aspic. It is a working, thriving estate encompassing 14 farms and four villages with more than 170 cottages, let mainly to local people.

Like the Aclands, the National Trust maintains its own team of specialist craftsmen to repair and renovate its properties and manage its woodlands, while its policy of encouraging local enterprise has led to the establishment of activities ranging from bed

and breakfast to a blacksmith's, a rural life museum, a camp site and a pony-trekking centre, together supporting more than 70 full-time and seasonal jobs.



**2 CASE STUDY  
Protecting Purbeck**

The four miles of beach, heath land, coastal scenery and crowning glory of Corfe Castle, owned by the National Trust at Purbeck are spectacular.

It also includes 3,000 hectares of open space where there is unimpeded 'right to roam', one of the attractions which bring well over a million people to the area every year. Unsurprisingly, nature conservation is high on the National Trust's priority list here. The country's

largest lowland heath restoration project is underway using cattle for grazing to recreate more of this type of rare habitat.



But the National Trust's activities also protect a traditional rural way of life. The Post Offices in Studland and Corfe remain open largely as a result of National Trust generated business.

New workshops are being opened by the National Trust in Studland so that local people can work in the area, in addition to the 12 small-scale stone quarry businesses it supports in Langton Matravers. Income from visitors is worth £80,000 sales every year to a local ice-cream maker.

The vast proportion - £248 million - passes directly into the local economy as a result of the National Trust

**Beauty in Trust**

As one of the major landowners in the South West, the National Trust has always been proud to own a stake in the natural environment. As well as its 71 historic houses, castles and other buildings in the region, it also owns and cares for another 210 sites of countryside from Gloucestershire to the very tip of Cornwall.

It has always been assumed, therefore, that the National Trust plays some part in attracting the holiday makers who now create a £4.6 billion annual tourism industry in the South West, an activity without which it would be much the poorer in more ways than one.

However, while such assumptions have been made, they have never been supported by hard facts.

Now a comprehensive second study has produced the evidence and the

picture it paints is an even more positive one than the National Trust imagined it would be.

The study shows that over 15,500 jobs are linked to the National Trust's activities in the South West and that spending by the Trust itself, and those linked to it, amounts to £304 million per annum in the region. Of that total, £56 million is spent by the National Trust and its tenants on wages, services and supplies within the region and the remainder is spent by National Trust visitors on transport, retail and catering in the South West, over and above what they spend with the Trust. The National Trust, after all, is not in the hotel business, doesn't run buses or trains and isn't a large retail operation.

So the vast proportion of that spend - £248 million - passes directly into the local economy as a result of the National Trust.



**3 CASE STUDY**  
**Stourhead - Fuelling the Local Economy**

The National Trust's Stourhead Estate may justly claim to be one of Wiltshire's most important tourist attractions, with more than 240,000 visitors a year to its gardens, house and King Alfred's Tower.

But success is not just measured in the number of tourists' feet crossing the threshold. The real yardstick is in the contribution that

activity makes to the local economy. There are four farms and 55 cottages on the estate, while the National Trust itself employs 23 full-time and 75 seasonal staff. But its influence spreads much wider.

There are local services and suppliers who benefit from the bulk of the £800,000 a

year running costs of Stourhead, be they builders, caterers, printers or garage owners - the National Trust has a 'buy local' policy for



petrol. Then there's the income from visitors who, research shows, actually spend far more outside National Trust properties than with the Trust itself. That all helps to keep the wheels of the local economy turning - as will a forthcoming £1.4 million investment in even better visitor facilities at Stourhead.

**4 CASE STUDY**  
**Clearing the Clutter on the Lizard**

An eighty year programme to restore the landscape and improve public access has transformed Britain's most southerly point. A disfiguring rash of electricity and telephone poles and cables has been cleared, and a new footpath provided to separate pedestrians and wheelchair users from traffic on the busy approach lane.



The National Trust has worked with tenant farmers to replace unsightly buildings and change farming practices to encourage wild flowers on the cliffs.

More than £700,000 - 40% of it raised through grants - has been spent. In an area where jobs are notoriously

scarce, the Lizard's increased capacity to attract and absorb its 250,000 visitors a year without spoiling the beauty they come to admire, has made a significant contribution to maintaining a stable local economy.

The study shows that 9.5 full time equivalent jobs are supported for every FTE job in the National Trust

**Powering the Local Economy**

One area of accommodation in which the National Trust is active is in holiday cottages, of which it owns 132 in the South West. Guests staying in these cottages spend almost £3 million over and above the cost of accommodation, all of it going into the local economy and supporting an estimated 79 full-time jobs.

The National Trust itself has 1,885 staff in the South West and a £16 million annual wage bill for countryside wardens, gardeners, house custodians and other staff. It spends another £18 million within the region on goods and services such as electricity, plants and building materials. And that money all goes into the economy to create other jobs.

However, its contribution to the South West's economy doesn't stop there. It owns 29,500 hectares of farmland, which leads to the creation of even more jobs.

In fact, the study shows that 9.5 full time equivalent jobs are supported for every FTE job in the National Trust.

Another part of the study measured the particular value of the National Trust's work; in other words, the effect on jobs if the National Trust did not exist. This found that a staggering 7,138 jobs would be jeopardised in the South West.

This is highly significant, particularly in rural areas where the region's only other main industry, farming, is in deep and possibly long-term crisis.



## 5 CASE STUDY Cakes and Ale at Branscombe

Set amid some of Devon's finest scenery, Branscombe, on its south-east coast, may appear to be just another sleepy West Country village. But beneath the veneer, Branscombe is buzzing. The National Trust owns 221 hectares of countryside and spectacular coastline here which attracts thousands of visitors every year. In addition, the Trust owns several buildings in the village and has encouraged their use for a variety of industries.

The picturesque old bakery operates as a tea room, employing three staff and seasonal help. Two local men, Paul Dimond and Graham Luxton, made redundant from their jobs at a milk processing plant have converted one of the Trust's traditional farm buildings into a micro-brewery, producing award winning Branoc ale. Ornamental ironwork is still being

produced in the thatched forge, where one full-time and two part-time staff are employed, and at the National Trust's nearby organic farm - its first in Devon - visitors can see

grain being turned into flour at a restored water-powered mill. Local people are also employed on contract to help the National Trust with countryside maintenance and to look after its holiday cottage in the village.



The National Trust is one of the mainstays of the region's rural economy

### A Key Player

The National Trust is therefore acting as a catalyst in a process which sucks in millions of pounds from other parts in the UK and distributes that money around the region.

Most people surveyed believe that the effects on the countryside would be 'very harmful' if the National Trust no longer existed. But the National Trust is much, much more than merely the pretty face of the South West.

It has now been shown to be a major player in the tourism industry and one of the mainstays of the region's rural economy.

Without the National Trust, tourism would be diminished in both quality and quantity and the income of thousands of people employed in it adversely effected.

At a time when bus services, pubs, post offices and schools are disappearing, **the money the National Trust generates is helping to make communities lively and vibrant and is underwriting the rural way of life.**

The 'Valuing Our Environment' study was produced by Tourism Associates. Copies of the full study, priced £10, are available from:  
Tourism Associates  
West Country Tourist Board  
60 St David's Hill, Exeter  
EX4 4SY

The National Trust  
Created in 1895 to preserve places of historic interest and natural beauty for the benefit of the whole nation, the National Trust is now the country's leading conservation charity. Because it is a charity, independent of government, the Trust relies on voluntary contributions to care for the countryside, coastline, houses, castles and gardens which it safeguards for everyone to enjoy now and forever.  
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