



# FOODPATHS FEASIBILITY STUDY

June 2006



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# Introduction and Background

This study was commissioned by a partnership of the three AONBs which are in or partly in the county of Somerset. These AONBs are the Blackdown Hills, the Mendip Hills and the Quantock Hills. The purpose was to identify the viability and potential contribution of food led tourism in the three areas. A Steering Group for the project was formed which included:

- AONB managers and project staff for each area
- Somerset County Council Rights of Way Officer
- Business representatives from the hospitality and food sector in the areas

## Methodology

- 1 The study unfolded in a series of stages, the findings from which form the body of this report. The stages were as follows:
- 2 Databases were created for each area of accommodation providers (bed and breakfast, hotels); hospitality businesses (pubs, cafes and restaurants) and farm-based local food businesses (farm shops, farm attractions). An additional database of local food producers for each AONB was also created (see Appendix 1).
- 3 Criteria for inclusion in the project were drafted (see Section 2 below).
- 4 Questionnaires were sent out to the businesses to ascertain their interest in the proposed project (see Appendix 2).
- 5 Responses from the questionnaires were analysed (see Appendix 3), and a further questionnaire sent to those businesses which expressed interest in participation (see Appendix 7). This second questionnaire sought to establish the potential economic impact of the project by collating information on turnover, employment and capacity to expand the business.
- 6 A survey and analysis of tourism trends at national, regional and local level was conducted (for full report see Appendix 4).
- 7 A survey and analysis of exemplar projects at international, national and local level was conducted (for analysis see Section 3 below and for full report see Appendix 5).
- 8 A field trip to the Bologna Appennino region of Italy was undertaken to examine the structure and contribution of the Agriturismo sector in the area to tourism and rural development (for analysis see Section 3 below and for full report see Appendix 6).
- 9 An analysis of relevant policies in each AONB was undertaken.
- 10 An analysis of Rights of Way policies in the relevant counties/unitary authorities was undertaken.
- 11 A trial “product” was developed – including two specific “Foodpath” trails.
- 12 The trial product and concept of Foodpaths was test marketed directly with potential clients at Farmer’s Markets in Bristol, Exeter and SW London.
- 13 A final report was drafted, including an analysis of all the data and findings, and a series of recommendations for consideration by the client group.

## SECTION 1 Databases, Questionnaires and Responses

### 1.1 Mapping the overall sector

Existing data which has been compiled by a variety of organisations has been used to produce a new database of businesses which are potential Foodpaths participants. This data has been organised into sections based on category of food businesses as follows:

- Accommodation providers hotels, bed and breakfast
- Hospitality businesses cafes, pubs, restaurants
- Shops/farm shops village shops, farm shops
- Farm and food attractions open farms, open food premises

Some businesses fall into more than one of the above categories – e.g. a bed and breakfast provider that is also a restaurant and micro-brewery.

The information was also analysed by the three Areas of Outstanding Natural Beauty.

This exercise suggested a base of 269 businesses engaged or potentially engaged in the local food sector and showed the following details about those businesses (see Table 1 below).

BUSINESS TYPE	BLACKDOWN HILLS	MENDIP HILLS	QUANTOCK HILLS	Total
Accommodation Providers	101	18	40	159
Public Houses	35	14	14	63
Restaurant/Cafes	3	4	8	15
Farm shop/Food sales	20	4	8	32
TOTAL	159	40	70	269

Table 1

Alongside this database there is further information about additional local food producers who do not fall into the above categories. These producers could well form part of a Foodpaths “package” if they wished to host open days, or if they fell on walking routes which were being developed through the project (see Table 2 below and Appendix 1).

	Blackdowns	Mendip	Quantock
Producers	46	20	51

Table 2

### 1.2 Identifying potential participants

A questionnaire was drafted to be sent out to all potential participants, accompanied by an introductory letter explaining the purpose of the Foodpaths project. This mailing also included a draft set of criteria relating to local food (see section 2 below for a discussion of these criteria). The letter and questionnaire are included as Appendix 2.

There was an overall response rate of 35%, with 93 questionnaires returned. During the process, when businesses that had not returned the questionnaire were being contacted, it became clear that a good number had not responded because of time pressure rather than lack of interest in the project. This was especially true of pubs and restaurants. A number of these businesses indicated that should a scheme or “product” come into being they would definitely like to be contacted again. This suggests that potential interest in participation is higher than the figure suggested by the questionnaire response.

AONB	Sent	Returned	Positive/ Maybe	Negative	N/A*
Blackdown Hills	159	48	31	7	10
Mendip Hills	40	14	9	2	3
Quantock Hills	70	31	22	4	5
<b>Total</b>	<b>269</b>	<b>93</b>	<b>62</b>	<b>13</b>	<b>18</b>

Table 3

AONB	Percentage Rate of returns	Positive/ Maybe	Negative	N/A*
Blackdown Hills	30%	65%	15%	20%
Mendip Hills	35%	64%	14%	22%
Quantock Hills	44%	71%	13%	16%

Table 4

### 1.3 Responses to questionnaires

- Whilst businesses suggested that they were sourcing significant amounts of local food already (66% in the case of the Blackdowns) this might be unreliable due to the way respondents completed the questionnaire and on the basis of evidence from other surveys. Nevertheless a significant amount of local food is being sourced.
- Businesses would be encouraged to use greater amounts of local food and drink if there were more convenient and reliable methods of supply – through retailers and wholesale distribution. There were also caveats on price and availability.
- There was overall support for promotion of the scheme through e.g. a window sticker (68% in favour)
- There was a reasonable variety of local recipes – mainly being recipes with local ingredients rather than locally distinctive recipes

There was a good range of local drinks used – beers, ciders, apple juice and some more exotic drinks.

AONB	<£20,000	£20- 50,000	£50- 100,000	£100- 150,000	£150- 200,000	£200- 250,000	>£250,000
Blackdown Hills	6	9	3	2	1	1	5
Mendip Hills	1	2	2	1	0	0	2
Quantock Hills	3	6	6	2	1	1	3

Table 5

Table 5 above sets out annual turnover figures for the respondent businesses. It is interesting to note the clusters at each end of the scale – with some very small businesses and also a fair number of businesses with turnover more than a quarter of a million pounds.

Key issues highlighted included:

- The need for effective distribution of local food
- The likely cost to businesses of being part of the scheme

## SECTION 2 Criteria

The identification of suitable criteria for local food is regarded as central to the Foodpaths concept, as it defines both the Foodpaths “product” and subsequently the likely customer for the product.

The criteria which are shown below were based on a set used in the development in South Somerset of a promotional leaflet called “What’s on the Menu” which listed outlets offering meals based on local sourcing and local distinctiveness. This leaflet was produced in 2001 and reprinted in 2002.

A discussion with the Steering Group was held to agree the draft criteria. Key issues that were raised in this discussion were:

- the need to have criteria which would distinguish Foodpaths as a quality but not exclusive scheme
- the wish to include as many businesses as possible
- to use the criteria to encourage businesses to increase their local sourcing
- that the criteria were easily communicated
- that the criteria were not too bureaucratic and burdensome for participating businesses

### DRAFT CRITERIA FOR INCLUSION IN THE PROJECT

The criteria for inclusion of a local food outlet or accommodation provider in the Foodpaths project are:

1. That the outlet itself should be located in or immediately around (note a) one of the three AONBs.
2. That a minimum of 50% of the food should be grown and/or processed within 40 miles of your establishment. There should be a policy of ‘local first’ whenever possible.
3. That a list of primary producers and suppliers should be on display either on the menu where appropriate or on the wall of the outlet so that it gives the discerning public a greater understanding of what is on their doorstep e.g. cheese makers, butchers, cider makers, etc.
4. That wherever possible dishes that are local, seasonal or have connections to the area are identified on the menu. Some local items, such as meat, cheese and apple juice, may be on the menu all year while others, such as vegetables, only when in season. New recipes are particularly welcomed, particularly if they use predominantly local ingredients.
5. That there should be a statement of intent about increasing the use of local food and a general philosophy about food, its provenance, preparation and presentation.
6. That, should you be interested in the scheme, you would undertake an agreed form of simple monitoring. This would measure the level of use of local ingredients, the percentage increase in turnover and indicate how well the project has worked.

Notes: Immediately adjacent means in a parish that is partly in an AONB

A question relating to the draft criteria was included in the questionnaire sent out to businesses, and the following comments were received:

*Sounds good to me. We didn’t realise how much local produce we actually used until we did this questionnaire.* – Lamb Inn, Spaxton

*I thought the draft criteria were very good.* – Claypits Farm B&B, Rawridge

*There may be some duplication with other organisations. When we were first graded by the AA there was emphasis on local produce which we have used for some years. – Courtmoor Farm B&B, Uppottery*

*I don't think that my guests are interested in local produce more quality and price...'* – Ellishayes Farm, Combe Raleigh

*I would be concerned if the monitoring of the scheme caused any considerable admin burden and would suggest that it should be limited to a review of, say, quarterly spend with local suppliers rather than necessitating detailed tracking of specific ingredients. – Home Farm Hotel, Wilmington*

*An excellent idea. – The Forge, Whitehall*

*It would be useful to recommend customers to local food suppliers which sell locally produced food and drink. Maybe a list or directory. – Ivedon Farm, Awliscombe*

*A very good idea. – The Keepers Cottage, Kentisbeare*

*Sounds interesting but you would need to enforce a compliance regime and perhaps grade establishments by percentage of local produce used. – The Merry Harriers, Clayhidon*

*Point 2 is too restrictive; this needs to be 25% locally grown. - Buckland St Mary PO & Stores*

*It is very difficult to make an accurate judgement on percentage of foods used being local/organic e.g. Is this by number, weight/volume, frequency used...I do think that careful targeting of the population will be necessary for foodpaths to stand a chance of success. - Bay Rose House, Cheddar*

*As a small business cost is very important – the criteria could be too restrictive to us. Our usp is that we use our own flour in bread/cakes served to guests/visitors. – Burcott Mill, Wookey*

*Not sure that you could be sure of 50% in a B&B (no evening meal). Certainly local first. – The Old Stores, Westbury-sub-Mendip*

*I am very interested, being a local farmer, in promoting local produce and being involved in this project. But, please, keep additional paperwork to a minimum. – The Stables Tea Room, West Harptree*

*Cannot guarantee local price and supplier percentage because of product availability. If you were going to proceed with the scheme you need more than 'a meal' (point 7) using local produce. Apple Tree Hotel, Keenthorne*

*Will I have to pay? - The Old Cider House, Nether Stowey*

*I think it can be done – more cafes, more good food at local pubs! More advice to pubs – tell them not to serve frozen foods! - Parsonage Farm, Over Stowey*

*I like the idea – for a small business though, it won't work if I have to travel miles to different suppliers for small ad hoc amounts. Getting local shops involved I regard as essential for this business. – Redlands, Combe Florey*

*Seems well thought out. We have been using local produce for a number of years but we are always grateful to hear about other suppliers. – Stowey Brooke House, Nether Stowey*

*Very good idea – keep pushing the local farms angle. – Prockters Farm Shop, West Monkton*

For Feedback Report see Appendix 3.

## SECTION 3 Tourism Trends, Market Segmentation and Marketing Strategy

An analysis of tourism trends at a local, regional and national level was undertaken and its main findings are outlined below.

### 3.1 Conclusions:

From the general analysis of tourism trends, there are indications of a good prospective market for a “Foodpaths” offer.

- The market for short stay visits is predicted to grow and increase in value by 53% by 2011.
- There is a good potential market for day visitors for each of the AONB areas from urban centres such as Bristol, Taunton and Exeter, which lie within the usual travel to destination time/distance. This can potentially add to the present highly localised pattern of visits.
- There is a predicted growth of 32% in trips made by overseas visitors to the South West of England.
- Special interest holidays will increase, and there will be an increased demand for quality tourism products.
- Walking continues to be the most popular activity for visitors to the countryside. There are much smaller levels of interest in cycling and horse riding.
- Cars are the predominant means of access for visits.
- There is a small cohort of visitors currently using public transport, and opportunities could be developed to work with public transport operators e.g. rail operators on promotional packages
- Many visits are linked to visits to family and friends, making it important to reach local people who can promote the opportunities of the areas.
- Word of mouth is a crucial means of promotion, albeit a very difficult one to target
- A quality product is essential in order to foster personal recommendations and repeat visits.
- Web based marketing is growing in significance, but there is still a need for quality printed information and promotional materials.

For full report see Appendix 4.

### 3.2 Additional conclusions:

The Foodpaths offer can operate at three levels – local for day visits, national for short stays, and international for short stays and visits associated with wider travel.

- Based on the findings relating to average journey times travelled for **day visitors**, defining average journey time of one hour or 17 miles, the following urban centres with populations over 30,000 are associated with each of the AONBs:

AONB	Urban centres within day visit radius
Blackdown Hills	Exeter, Taunton
Mendip Hills	Bath, Bristol, Weston super Mare
Quantock Hills	Bridgwater, Taunton

Table 6

- Based on the findings relating to **short stay visits**, the market is drawn predominantly from London, parts of the South East, the West Midlands and Wales. These markets would apply to all three AONB areas, although arguably access from London and its hinterland is best to the Blackdown Hills.
- There is a small but significant market for **international tourism**, with 8% of current visitors coming from overseas. However there is an excellent opportunity to develop tourism links through the current Leader+ Transnational project which is running in the Blackdown Hills and the Somerset Levels and Moors. The partnership involved in this project includes representatives from Holland, Italy and Spain with further association with groups in France and Ireland. One element of the project is to develop food-led tourism products under the strapline of “food selling its region”.

### 3.3 Outline Marketing Plan

#### Target Audience

The target audience can be broken down into three main groups:

- 1 Day visitors (from Somerset and surrounding counties)
- 2 Domestic tourists (staying within Somerset or neighbouring counties)
- 3 International tourists

There is not scope within the brief to undertake detailed marketing segmentation eg by lifestyle or demographics however based on research we have undertaken we can ascertain that it is likely that the target audience for Foodpaths would be:

Primarily car owning couples or small groups of friends (two or three) without children in 30-60 age group with a fairly high disposable income. Their interests are eating out, looking at the scenery and walking less than seven miles. Walking should not be hard work but more of a means to get to the good food pub. They believe that good food will contribute positively to their trip and are happy to try local produce (if it's easily accessible). Quality and value for money are key to this group of people. A Foodpaths holiday would be a short break of 2 to 3 days rather than the main annual holiday. A small subsection would want to be able to take their dogs with them and another to be able to cycle between routes

A secondary market would be those with children however there would be a need for a different range of products eg child friendly facilities and attractions, level access for buggies and shorter walks.

#### Day visitors

40% of day visitors come from Somerset and the remainder from Bristol and the surrounding counties. On average day visitors will travel for about an hour for a day out then spend two and a half hours in their destination. This would include areas such as Exeter, Taunton, Bath, Bristol, Weston super Mare, Bridgwater and surrounding towns and villages depending on which AONB you were visiting.

#### Domestic tourists

The catchment area for tourists is about 150 miles and would include South West London, the South East, South West, Surrey, West Midlands and Wales.

## **International tourists**

International tourists are a far smaller potential market and one that although forecast to grow in the South West is expensive to reach.

## **General comments**

There were a couple of really important messages that kept coming across during interviews which were:

- People chose a destination mainly because they have always known about it
- Although during the surveys the Internet was stated as a source for finding out about Foodpaths it actually wasn't the main medium used when booking their last holiday. The main method of finding out was word of mouth/recommendation.
- There are high levels of repeat visitors to the AONBs.
- There were no negative comments about Foodpaths during any of the surveys.
- The passion of the producers and providers is a strong brand image that could be used for Foodpaths.

## **The guide**

There could be two key marketing tools:

1 Full colour guide showing themed walks or cycle routes, attractions, relevant events and markets, accommodation and eating places with a clear map and, if possible, with testimonials or awards about the places featured. Web address, tourist information centres and contact details for more information should be included along with high quality images that stimulate an emotional response eg relax, unwind, comfort, fun, educational.

2 Website featuring all above information in an easily searchable form, with contact details, pod casts (a growing area) and ability to order or download a brochure. The website should be linked to main tourism sites eg Visit Britain and South West Tourism as well as walking, general tourism, destination and foodie sites.

## **Launch**

High profile launch with celebrity endorsement lots of local and national pr and opportunities for resident population to be involved eg a weekend of Foodpaths?

## **Targeted promotion**

### **Day Visitors**

- Through tourist information centres in Somerset and surrounding counties, libraries, community offices, doctors, dentists, post offices.
- Via local food, walking initiatives and events
- Local PR to increase awareness amongst local population which will promote word of mouth recommendation
- Attend local events/markets with marketing material
- Promote to local businesses eg through in house mailing lists

- Contact local authorities PR/tourism officers for additional marketing support
- Personal selling by giving talks/tastings to local associations eg Ramblers, town and parish councils etc
- Promotional stand with samples at local tourist information centres eg Bath, Bristol and Taunton (suggested by one of partners)
- Familiarisation trips for TIC and accommodation providers
- Website and web links
- Due to high levels of repeat visitors it will be important that new Foodpaths are developed to encourage visitors to keep coming back.
- Posters
- Through the Foodpaths network

### **Domestic tourists**

- Through destination marketing material eg Somerset, Bath or Bristol guides
- Links and inclusion on websites eg <http://www.naturesouthwest.co.uk/>, [www.visitbritain.com/VB3-en-US/experiences/Taste/news\\_and\\_features/news\\_features.aspx](http://www.visitbritain.com/VB3-en-US/experiences/Taste/news_and_features/news_features.aspx)
- Editorial in national press (may be necessary to appoint a specialist PR consultant for maximum benefit)
- If budget allows a direct mail campaign could be undertaken to particular postcodes and in the target area (or you could purchase names from a particular special interest magazine or particular interest from SWT) with eg a postcard with bold image and invitation to visit not only Foodpaths but also website. Word of caution this needs to be researched very thoroughly as can be very expensive
- Exhibitions with other partners eg food or tourism
- Emarketing campaigns with SWT and VB and form links with their marketing campaigns
- Packaging Foodpaths with rail companies
- Inclusion in guidebooks

### **International tourists**

- Through destination marketing material eg Somerset guides
- Website and links to websites
- Exhibitions with other partners eg Op Pad in the Netherlands
- Emarketing campaigns via SWT and VB
- Work with SWT and VB to form links with their marketing campaigns
- Inclusion in guidebooks
- There is an opportunity to develop tourism links through the current Leader+ Transnational project which is running in the Blackdown Hills and the Somerset Levels and Moors. The partnership involved in this project includes representatives from Holland, Italy and Spain with further association with groups in France and Ireland.

### **Recommendations**

- That a brand is developed for Foodpaths at the earliest possible stage and is used consistently throughout the marketing.
- That a fully costed marketing plan is produced in consultation with the partners which will look at the above areas in more depth as well as use of new media eg pod casting.

## **SECTION 4 Project Exemplars and Linked Local Food Initiatives**

A review was carried out of:

- Food related tourism initiatives, undertaken to identify potential exemplars for the Foodpaths approach
- Related local food initiatives which would link to or affect a Foodpaths project
- Related trails

The food tourism initiatives fell into several categories:

- Commercial companies offering continental “gastro-tours” – mainly in Italy
- Initiatives to promote local food within the context of protected landscapes (e.g. the Peak District Foods for Tourism project)
- Specific trails with food (not necessarily promoted as local) as a sideline (e.g. the Coleridge Trail)
- International exemplars such as the Italian “Agriturismo” model, the French “Accueil Paysan” model, and a Spanish initiative which is engaged in a partnership with a local food project in Shropshire/the English Marches (Interco-op and Ruralscapes). The Agriturismo model is examined in detail in Section 5 below.

Related local food initiatives included:

- Farmers markets, country markets and village produce markets
- Food festivals
- Local food guides and other publications
- Local food distribution businesses

Related trails include:

- The Sustrans national cycle route, and local on and off road cycle trails
- Waymarked and partially waymarked footpaths
- Horse riding routes

### **4.1 Food related tourism initiatives:**

- Commercial companies are offering high quality packaged gourmet food trips which are relatively expensive (e.g. £1,345 per person per week). These appear to meet a specialised market demand.
- There have been a number of food promotion initiatives within the context of protected landscapes, often supported by the Countryside Agency under the “Eat the View” programme. Anecdotal evidence is offered to support the success of such schemes, but there appears to be little hard evidence of their success in adding value to local food businesses.
- It is possible to add a strong local food dimension to a well promoted existing trail. This was demonstrated by the Parrett Platter project that formed part of the South Somerset Food Festival. A group of businesses on and just off the Parrett Trail offered a local menu for the period of the Festival.
- The closest match to the Foodpaths concept was that represented by Interco-op in the Valencia province of Spain. The initiative is at a very early stage, and offers the opportunity for mutual support and development, as Interco-op are part of the Leader+ Transnational project. See Section 11.3 for details.

## 4.2 Related local food initiatives

The Table below summarises the relationship between each AONB and the proximate local food initiatives:

<b>Initiative</b>	<b>Blackdown Hills</b>	<b>Mendip Hills</b>	<b>Quantock Hills</b>
<b>Farmers Markets</b>	Axminster Cullompton Honiton Wellington	Axbridge Cheddar Wells Weston super mare	Cotford St Luke Bridgwater Dulverton Taunton
<b>Country Markets/WI</b>	Chard Taunton	Cheddar Chew Valley Wells Weston super Mare	Bridgwater Williton
<b>Village Produce Markets</b>	All Saints Churchinford Hemyock Luppitt Stockland Yarcombe		
<b>Food Festivals</b>	Devon Celebration of Food South Somerset Food Festival	Mendip Food Festival	Quantock Food Festival Exmoor Food Festival
<b>Local food directories and other publications</b>	Blackdown Hills Food and Drink Group	North Somerset Food Leaflet Go Zero/Chew Valley Food Directory	Exmoor and Quantock Food Guide
<b>Distribution</b>	Note: a feasibility study into local food distribution is currently being undertaken and is due to report in May 2006	Somerset Local Food Direct offers a doorstep delivery service in the Mendip Hills area	Source delivers local food from 25 producers to businesses in the Quantock Hills

Table 7

See Appendix 5 for full report on Exemplar projects.

## 4.3 Related trails

The Table below summarises the relationship between each AONB and the proximate trails:

<b>Initiative</b>	<b>Blackdown Hills</b>	<b>Mendip Hills</b>	<b>Quantock Hills</b>
Walking trails	Channel to Channel	West Mendip Way Limestone Link Monarchs Way Strawberry Line Samaritans Way (SW)	Coleridge Way Channel to Channel Celtic Way MacMillan Way West Samaritans Way Quantock Green Way
Cycle trails		Westcountry Way (Sustrans National Cycle Network)	
Horse riding trails	Ride UK		Ride UK

Table 8

#### **4.4 Overall conclusions:**

- Whilst there is no one clear exemplar for the Foodpaths project, there is clear learning from a range of related projects
- Foodpaths has the opportunity to develop a unique and ground breaking package of food-led tourism
- There is the chance to work creatively with a wide variety of existing trails and events and to make use of existing local food publications and services that will add to the Foodpaths offer

## **SECTION 5 Agriturismo – Learning from Italy**

As part of the feasibility work, a study tour of food tourism initiatives in Italy was arranged. The purpose of the tour was specifically to evaluate the Agriturismo model of farm-based tourism and to stimulate “champions” among the businesses and agencies in the three AONB areas. The tour was based in the Modena province in the Emilia Romagna region of Italy. Typical products include Parmesan cheese, Balsamic vinegar and chestnuts.

Participants: Nell Barrington, Food Links  
Iain Porter, Quantocks AONB  
Ian Pearson, B and B and walking holiday company, Nether Stowey  
Sue Milverton, restaurant and B and B, Lower Clavelshay Farm  
Catherine Leach, Blackdown AONB  
Ellen Brown, B and B and outside catering company, Sampford Arundel  
Nick Strange, smallholder, Beech Hayes Farm  
Jim Hardcastle, Mendip AONB  
Linda Mogford, The Old Stores B and B  
Steve Dawson – Acting as interpreter/guide

The participants in the trip represented the three AONB organisations and five businesses located in the three areas. The tour was accompanied by a member of the Somerset Food Links consultancy team and was led by an expatriate English businessman who runs a microbrewery in the area selected for the tour.

During the tour, two registered Agriturismo businesses were visited, as well as a Parmesan cheese producer, a Museum of Balsamic Vinegar, and an agricultural school. In addition, the group met the Director of the local Regional Park (an equivalent designation to AONB) and a Provincial Councillor with responsibility for food and agriculture.

### **5.1 Definition of Agriturismo:**

An Agriturismo is a working farm (with a farmer’s license) which as a secondary activity can have a restaurant and guest rooms that are complementary. It is based on a national law passed in 1985 that laid out specific and detailed criteria.

### **5.2 Observations made about the Italian model included:**

- There are very specific and potentially restrictive rules which apply to the Agriturismo designation. For example – in the valleys 40% of the value of the food has to be produced on the farm holding, while in the mountains this is reduced to 30%. There is a perception among some practitioners that these rules are frequently broken.
- There is state funding of up to 40% of capital costs for restoration of buildings.
- Businesses can be successfully created around just one product e.g. chestnuts.
- The passion of the producer and their ability to communicate this is key to success.
- Much of the custom for the 100 or so Agriturismo establishments in the Province of Modena was local trade, or from people passing through en route to Tuscany.

### **5.3 Observations about the potential to transfer the Italian Agriturismo model to the UK included:**

- A UK/Foodpaths version would need to be less regulated and bureaucratic.
- “Packaging” of the offer, and effective publicity is crucial. A Foodpaths “package” could include festivals, food fairs and markets.
- Marketing, rather than control, should be the driver for a Foodpaths initiative.
- Key products would need to be identified in the Foodpaths area. Cheese and cider were amongst those suggested.
- Foodpaths would need to be positioned as a product focused on the local market as a first stage.
- There are opportunities to develop new products.
- Personality and passion are crucial ingredients.

For full report see Appendix 6.

## SECTION 6 Economic Analysis

A survey of 31 food and accommodation businesses was used to estimate some first order economic impacts of the proposed foodpaths development scheme. Scenarios were built around two key factors: increase in total turnover and increase in the percentage of local food and drink purchased by food and accommodation businesses. Results indicated that:

1. Over the three areas, a 15%<sup>1</sup> increase in the turnover of approximately 260 accommodation and food businesses would translate into £272,000 of additional local food purchases and £869,000 of additional local wages (total impact £1.14m). By area, the total impact of a 15% increase in turnover is estimated to be £630,000 for Blackdown Hills, £199,000 for Mendip Hills and £203,000 for Quantock Hills.
2. In terms of food, it was estimated that the proportion of local food and drink offered to consumers would have to double (100% increase) in order to meet the target of 50% local food and drink content. If this target were to be met by all 260 businesses without increasing overall turnover, the economic benefit to the three areas would be £1.8m (£1m, £314,000 and £491,000 in Blackdown, Mendip and Quantock respectively).
3. As is to be expected, the economic impact of combining a 15% increase in turnover with a doubling of local food and drink content is considerable. For the three areas combined, these benefits are estimated to be £2.1m in additional local food and drink purchases and £869,000 in additional local wages (total estimated impact £2.95m). By area, the total impact of this combined scenario is estimated to be £1.6m for Blackdown Hills, £513,000 for Mendip Hills and £794,000 for Quantock Hills.

What has been estimated here are only first order economic impacts because a significant proportion of the money entering the local economy through increased purchase of local food and drink and increased local employment would be expected to circulate in the local economy, thus creating an important local multiplier.

This analysis also does not take into account the potential for new business activities which will arise from the opportunities created by the development of a Foodpaths project. These are likely to fall into two categories:

- On-farm accommodation and restaurants based loosely on the Agriturismo model. It is reasonable to anticipate that at least one such venture could start in each of the three areas.
- Food providers along agreed trails – e.g. tearooms and cafes. There might over a period be opportunities for three such businesses in each area.

The questionnaire for this survey is shown as Appendix 7.

The full tables showing the basis of this analysis are included as Appendix 8.

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<sup>1</sup> The model used hypothesised three levels in increase in turnover and three levels in increase local food content. For simplicity here, we refer only to the case of a 15% increase in turnover.

## **SECTION 7 AONB Policies**

A Foodpaths project would be a good way of meeting the need in each AONB to promote economic development in the context of sustainability. By its emphasis on growing indigenous businesses and promoting local products and local distinctiveness Foodpaths has the potential to fit well within the policies contained in the management plans for each of the three AONBs.

In the South West Protected Landscape Forum's analysis of the Management Plans for the 13 AONBs, the theme of "Tourism, Recreation, Rights of Way and Access" came top of the list of numbers of related issues/actions identified, with a total of 88 references. (see Table 2 , p19 of Prospectus for protected Landscapes in the South West).

A summary of the match between Foodpaths and the AONB plans is shown below.

### **7.1 Formal AONB policies**

A scrutiny of the three management plans was undertaken to identify policy fit with the Foodpaths proposal. There is a very close fit with the Plans of the three AONBs. Although the primary purpose of the AONBs relates to landscape, a sustainable farming sector is crucial to that landscape. There is also need to create and underpin sustainable employment through appropriate small business and tourism enterprises. Foodpaths has great potential to achieve these objectives.

The other key aspect concerns information and education about the areas. The promotion of locally distinctive and locally sourced food and drink – and the encouragement of walking through the areas – together can lead to a far greater understanding of the landscape and heritage of the three AONBs.

### **7.2 Informal AONB plans and practice**

Interviews were held with a member of the AONB team in each area to identify fit between Foodpaths and current plans for, and projects operating in, each AONB.

#### **7.2(i) Blackdown Hills**

The Blackdown Hills AONB look to a pragmatic approach, that reflects strong community involvement and that demonstrably works. Having the Leader+ programme has taken the work of the AONB into the economic sphere. There has been a strong local products development strategy supported by the Leader+ funding, implemented by a team of four part time sector development workers, and included in this has been the local food and drink sector.

The character of the area is one of quintessential countryside in steeply folded valleys – which is sensitive to large scale visitor numbers. As a consequence, the community does not want mass tourism and 'honeypot' sites; they wish for genuinely sustainable tourism on a scale compatible with the area.

Two areas were identified for the development of Foodpaths routes and project work:

- The area covered by the Neroche project on the northern fringe, which will be creating new routes
- The corridor of the A303 and A30 in the southern part of the Hills

### **7.2(ii) Mendip Hills**

The Mendip Hills AONB have had little record of engaging with local food and drink producers in the area. The area's strength and main focus has been around outdoor activities – which is a major revenue earner and employer in the AONB. Linking Foodpaths work to this sector would be highly desirable.

The plateau at the heart of the AONB is very sparsely populated and the food producers linked to the area are located around the periphery of the area on the northern and southern slopes. The major hotspots for visitors are Blackdown and Burrington, the top of Cheddar Gorge, Crooks Peak and Wavering Down.

The Public Rights of Way system in the area is fragmented. There is a backlog of maintenance – and many of the routes are steep. Although not formally contracted the AONB service undertakes some maintenance.

Three areas were identified for the development of Foodpaths routes and project work:

- Circular walks off the West Mendip Way – which moves between the edge of the plateau and the southern slopes of the area. Also linked to this is the Strawberry Line – running at the base of the southern slope
- The Limestone Link, running through the northern part of the AONB and linking Dolebury Warren and Compton Martin
- Adding value to the outdoor pursuits sector and the residential centres at Charterhouse and Swallet Farm

### **7.2(iii) Quantock Hills**

The Quantock Hills AONB see the potential of the Foodpaths project to add value to their other work, and specifically to existing promoted routes such as the Coleridge Way and Quantock Greenway. It could act as a launchpad for the next phase of work to promote increased access, and greater use of local products.

In terms of visitor management, they would like to draw people away from the northern end of the hills to the southern end. There are existing strong tourist attractions in and adjacent to the southern area of the Hills which could be a link for this – Fyne Court (owned by National Trust and tenanted by the Somerset Wildlife Trust), Hestercombe House and the West Somerset Railway.

On Public Rights of Way, the AONB service audits existing promoted routes. The Greenway has a backlog of maintenance but could be reprioritised in the context of Foodpaths development.

The area identified for the development of Foodpaths routes and project work:

- Circular walks based on the southern route of the Quantock Greenway
- Enhanced local food offer on the Coleridge way from Nether Stowey to Bicknoller, other parts of the northern route of the Quantock Greenway and West Somerset Coast path

See Appendix 9 for full summaries.

## **7.3 Regional and national policy context**

The Foodpaths proposal fits with the **Strategy for Sustainable Farming and Food** and the **South West Regional Implementation Plan** by shortening supply chains, linking producer and consumer, and enabling co-operation. Specifically it will deliver against the following Objectives identified:

Under The Food Chain theme:

- Increase the share of South West regional food and drink entering the **local**, regional, national and international retail and food service markets
- Assist the reconnection in the food chain from producer to consumer
- Increased viability of local and regional food and farming businesses
- Educate consumers, tourists and the food and drink sector itself about environmental qualities and links to local products

As regards the SW Regional Implementation Plan – “**Making a Difference**” – the Food Chain proposals include the following objectives for Natural Unit Based Brands:

- “Research, develop and strengthen local markets, and the food, drink and other enterprises that supply them. To provide clear environmental progress organised around brands and environmental standards, set within local natural units.”
- Educate consumers, tourists and the local food sector itself about environmental qualities and links to local products.”
- Develop natural unit based brands and environmental standards which combine a fairer return to the producer with environmental protection and management.”

The Rural Tourism section includes the following objective:

“Develop the skills and resources to instigate and sustain successful projects.”

The Foodpaths proposal fits within the **South West Regional Development Agency's** strategy:

The Strategy recognises the environment as a key driver for the SW regional economy – “Where the region's unique environmental and cultural assets are protected and enhanced so that they will continue to attract investment and develop economic advantage”. The Strategy also “recognises the important contribution that community and environmental assets make to achieving economic prosperity.” Specifically, the Strategy proposes:

Under the Strategic Objective 1 – To Raise Business Productivity

- Priority is “to support the development of key sectors”. These currently include both the food and drink sector, and the tourism sector, as two of 6 such key sectors
- Further priority is to “Promote the development of regional and local supply chains” – by “increasing local sourcing “
- 

Under the Strategic Objective 2 – To increase Economic Inclusion

- Aim: Accelerate economic participation by working locally to stimulate employment and business start-ups
- Priority is “to address the changing needs of rural economies” through “Develop and implement sustainable projects to enhance the economic future of rural communities”

The Foodpaths proposal fits with the **Countryside Agency's** Eat the View Programme. It fulfils the following goals of that programme:

- The development of systems for marketing, distributing and selling produce which can enable customers to demonstrate their support for local produce and sustainable production methods by the development of new supply chain partnerships between retailers, processors and producers which will increase the proportion of locally sourced, sustainable products (CAX 34 July 2000)

In the most recent regional targeting statement for the **England Rural Development Programme Project Based Schemes – Summer 2005** – Better food Projects were

identified with the following priorities for support:

- Projects that promote local, regional and speciality foods, especially those that are farm based
- Projects that seek to encourage collaboration between primary producers or which enable producers to move closer to their markets
- Projects that link a product to the local landscape or environment and reinforce the sense of regional and local identity
- Projects that support farm related food processing and retailing

The Foodpaths proposal fits with the **Somerset Economic Strategy**, which identifies the Food and Drink sector as one of “three key business sector’s in Somerset’s economy in which the county has an established and regionally significant competitive advantage.” It goes on to state “Key issues include moving production up the value chain, developing local branding...” 3.5 Importance of support.

The Foodpaths proposal fits with the **South West Food and Drink Strategy** and specifically the following Strategic Objectives:

- Developing local sourcing within the South West e.g. Food tourism
- Connecting farmers to the needs of consumers and processors and educating and connecting consumers and their children about food and drink E.g. Food fairs, education initiatives
- Developing the understanding of the links between the environment and the heritage of the SW of England with its food and drink E.g. Food tourism, natural unit based brands, food trails, Eat the View

## **National Policy**

In 1999 the Department of Culture Media and Sport (DCMS) and Visit Britain set out their policies for tourism development. This was updated in Tomorrow’s Tourism Today statement, DCMS, July 2004.

The key areas that relate to Foodpaths are that:

- interest in outdoor activities such as walking and cycling is increasing significantly, and we are well placed to capitalise on this; and
- rural tourism continues to be significant, underpinning much of the economic activity of the most beautiful parts of the country.

The document also identified that the means by which customers access information, and plan and book their visits, has changed fundamentally eg by increasing use of the Internet. It stresses the importance of improving the quality of the product; not just accommodation, but all tourist services.

In addition to the Government’s overall strategy for the development of tourism in England, set out in Tomorrow’s Tourism in 1999, are the priorities for delivering:

- Marketing and e-tourism
- Product quality
- Workforce skills
- Improved data
- Advocacy across Government

Visit Britain has also developed a range of niche websites which include Taste England and Outdoor England.

## Regional Policy

In 2005 South West Tourism set out in Towards 2015 their key aims which are to:

- Drive up Quality
- Deliver Truly Sustainable Tourism
- Create Superior Destination Management Arrangements

This document also recognises that “it is our natural and built environment which is, for most visitors, the single strongest draw. So we have turned vague talk about nurturing the environment into plans which, we are convinced, will make a real difference on the ground. This is a big and important agenda, and one which supports many of the other priorities of the region including helping rural regeneration - notably by promoting local food and drink - offering opportunities to improve health and fitness, and backing those with cultural and sporting interests.”

South West Tourism has developed a range of “Brand Clusters” which market specific experiences and has recognised the importance of local food across these sectors eg Sheer Indulgence is about luxuriating in the best the South West has to offer including dining brought to the customer by leading chefs, featuring the best of the region’s food and drink or Close to Nature which is all about fresh air, wildlife and stunning views, with accommodation and food that speak of the region. Across all sectors there is an emphasis on authentic, quality and appropriate local food and the criteria for inclusion requires a commitment for local purchasing as much as possible.

South West Tourism are an active partner in the increasingly popular Trencherman’s guide which features award winning restaurants that have made commitment to top quality and local purchasing. There is increasing media interest in this year on year.

Research shows that satisfaction levels over the past few years on the quality of food has risen to higher levels than before and perception research, which is informing the South West brand marketing campaign, has shown that the South West is becoming a destination for foodies in particular for those with an interest in seafood.

## **SECTION 8 Rights of Way Policies**

### **8.1 Somerset County Council**

Somerset County Council (SCC) are the Rights of Way authority for the entire Quantock AONB, and for significant parts of the Blackdown Hills and Mendip Hills AONBs. As such, SCC are ultimately responsible for the maintenance of the rights of way in those areas.

If Foodpaths routes are to be promoted, and to enjoy priority status in terms of maintenance, signage and waymarking, then it is essential that SCC endorses those routes. Their draft policy statement – Fourth Draft Rights of Way Maintenance and Enforcement Policy (02/06/2005) – states in section 1.2:

“Where the right of way forms part of a promoted route (e.g. National Trails, regional routes, other long distance paths or **local circular walks**) the Council will consider more detailed signage and waymarking, such as named routes, specific destinations, distances etc. and will seek to meet the extra costs involved either from internal or external funding sources.”

The implications of promoting routes through the Foodpaths project are also covered by Section 1.13, which states:

“All new promoted route road junction and crossings will be inspected and approved by SCC Transport Development Group prior to their publication. The Somerset County Council RoW Group will require evidence of agreement of permissive paths as part of a promoted trail for a period of a minimum of 10 years from date of endorsement, and be satisfied with the terms of any such agreement. Routes developed by individuals/organisations without prior consultation with the Highway Authority will not be endorsed for inclusion on O.S. maps, and unauthorised waymarking may be removed. Individuals and organisations will be encouraged to discuss such ideas with the Highway Authority in the first instance to assess how their proposal fits with the strategic RoWIP.”

Initial discussions have been held with SCC who in principle endorse the Foodpaths project and approach. However, individual routes which will form part of Foodpaths will need to be specifically assessed and endorsed by the authority.

### **8.2 Devon County Council**

Approximately two thirds of the Blackdown Hills AONB is within the area covered for administrative purposes by Devon County Council.

Devon adopted a Rights of Way Improvement Plan in 2005. Policies relevant to the Foodpaths project include:

#### **Section 4.1C Maintenance**

“There are also specific maintenance implications for the promoted strategic recreational networks. Their maintenance has to be to a very high standard as the promotion effectively invites visitors to use the routes. These routes will require special maintenance arrangements.”

#### **Section 4.1D Signing and Waymarking**

SW1C “The feasibility of, and demand for, adding route specific information (for example, distance and destination) at selected sites using separate plates attached to the post will be assessed.”

SW1D “Additional funding sources will be investigated to improve signpost information, particularly in tourist areas (for example nationally and

	regionally promoted routes and in the World Heritage Site) “
SW3A	“Misleading signs and unauthorised waymarks will be removed from public rights of way and appropriate enforcement action taken.”
SW4A	“AONBs may add their logo to signposts to assist with branding.”
SW4B	“Consistent signing and waymarking of promoted routes will be encouraged, taking account of permissive and on road sections.”
SW4C	“The indication of promoted and/or branded routes on OS mapping will be supported only where the highway authority has approved the promotion and branding in advance.”
SW4D	“Individuals and organisations planning to promote routes will be encouraged to consult the County Council beforehand.”

### **8.3 North Somerset and Bath and North East Somerset**

The northern section of the Mendip Hills AONB is covered by the two unitary authorities of North Somerset and Bath and North East Somerset.

#### **8.3(i) North Somerset**

The PRoW officer at North Somerset Council stressed the distinction between the obligatory maintenance of public rights of way, and the discretionary enhancement of promoted routes. North Somerset has no capacity to resource the enhancement of any routes, and external funding would have to be identified if enhancement was to take place.

#### **8.3(ii) Bath and North East Somerset**

Bath and North East Somerset do not have any specific policies regarding the establishment of new promoted routes, and their waymarking. They are generally supportive of any initiative that is likely to encourage greater use of the PROW network but would want to ensure that any projects do not conflict with existing schemes.

### **8.4 Conclusions**

- It is essential to consult the relevant highway Authority with responsibility for Public Rights of Way before determining exact routes for any promoted Foodpath walks.
- Consultations with the relevant PRoW Authority will also determine whether there is any budget for necessary improvements and the higher level of maintenance required for a promoted route.
- It is likely that some of the routes will partly coincide with existing promoted routes.

## **SECTION 9 The Trial Product**

The potential Foodpaths product has developed during the course of this study beyond the concept of a guided route to a mixed “package” of local food experiences.

Such a package for a specific area might include:

- A number of Foodpaths “trails” – circular walks of approximately 5 miles, with opportunities for local food meals or snacks and/or visits to open farms on the route.
- A linked guide to accommodation in the area which met “Foodpaths” standards for use of local food and drink.
- A guide to other local food outlets and attractions in the area – including farm shops and other local shops which stocked a high level of local foods; demonstration farms which welcome visitors; farmers’, country and village produce markets; food festivals and special events.
- Details of access arrangements by public transport.

To refine the approach outlined above and to trial such an approach in the market research undertaken, two “Foodpaths” products were drafted for routes in the Blackdowns and the Quantocks. These are shown in full in Appendix 10.

Undertaking the drafting of these leaflets, and testing the routes, raised the following issues which are indicative of both the potential of the Foodpaths approach and some of the problems its implementation would need to overcome:

For the Blackdowns example based around Stockland:

- There were tea rooms and a farm shop en route.
- There was a pub in the village at the start/end of route. It was not open all day so timing was important if it was to be used for refreshments or a meal.
- There was an additional farm shop and tea rooms just off the route – but the approach was through an uninviting yard. An alternative route to approach the site would be needed.
- Some parts of the route were poorly marked.
- There were some waterlogged sections by a stream.
- The walk was hilly and fairly arduous.
- Some clearing and waymarking would be necessary.

For the Quantocks example based around Fyne Court and Goathurst:

- There was a tea room just off the route, and the nearby Fyne Court offers tea at weekends.
- The route went past a farm that markets crayfish and potatoes, and offers grass boarding to visitors.
- There was a farm with fishing lakes that might have potential to become a destination on the route.
- There was a farm which is planning a farm shop, tea room and offering courses.
- The general state of the paths was reasonable.
- There was one poorly marked section near Fyne Court.
- The walk was moderate in strenuousness.

A third trial was planned for the Mendip Hills – based on a route starting in the Wookey/Wookey Hole area – but time did not allow for its development.

The principle purpose of the trials was to get transferable learning about the Foodpaths approach rather than develop specific routes. Such learning included:

- Some work on footpath improvement and waymarking will be needed.
- There will be clear opportunities for existing businesses along routes to adapt the service they offer and increase their market.
- There will be clear opportunities for farms along a route to develop a service or new business.

## **SECTION 10 Test Marketing**

### **10.1 Market Research**

Sixty-eight questionnaires were completed at Bristol, Exeter and Ealing Farmers markets in the week commencing 24 April 2006. A further 15 were completed by friends and colleagues from London and Somerset. Although this is a fairly small sample the responses all followed a similar pattern with all giving support to the Food Paths project (see Appendix 11 for Questionnaire and Appendix 12 for results).

#### **Bristol**

According to the traders this was quieter than usual due to lack of fruit and vegetable stalls. The profile was 70+ till about midday when it changed to 30+ on their lunch breaks. Unfortunately there were also language students carrying out a questionnaire. The weather was fair.

#### **Exeter**

Very busy small market. The traders said that the sunny weather drew lots of new visitors and tourists to the market. The profile was 30+, lots of mums with children and retired couples.

#### **London – Ealing**

Was sunny and busy due to plant sale taking place in the same area. Shoppers were mainly couples 30+ or dads with children. There was lots of interest - people were much happier to spend time talking about the project and were by far most receptive audience. This may be due to the fact that it was a weekend and people had more time.

### **10.2 Summary**

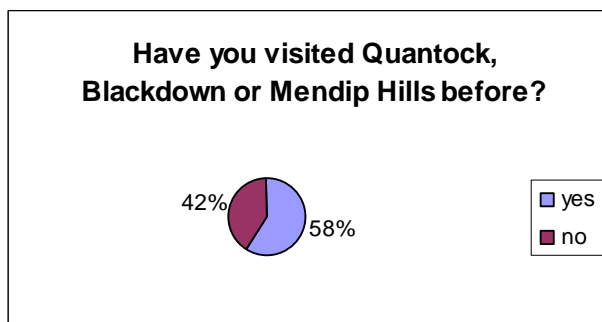
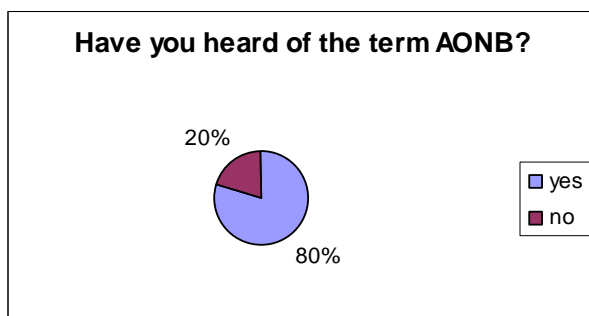
80% of completed questionnaires were from those between 30 and 60 with 65% completed by females and 35% by males. About 12% of these were in couples where females always answered the questions.

12% didn't take a short break and 20% took more than five. The order of preferred destination was Cornwall (17%), Scotland (14%), Devon (11%), and Dorset (10%). Somerset received 6% of those questioned.

Visiting friends and family was the most important reason for taking a short break followed by the fact that it was close to home (less than 3 hours), child friendly and they hadn't been before.

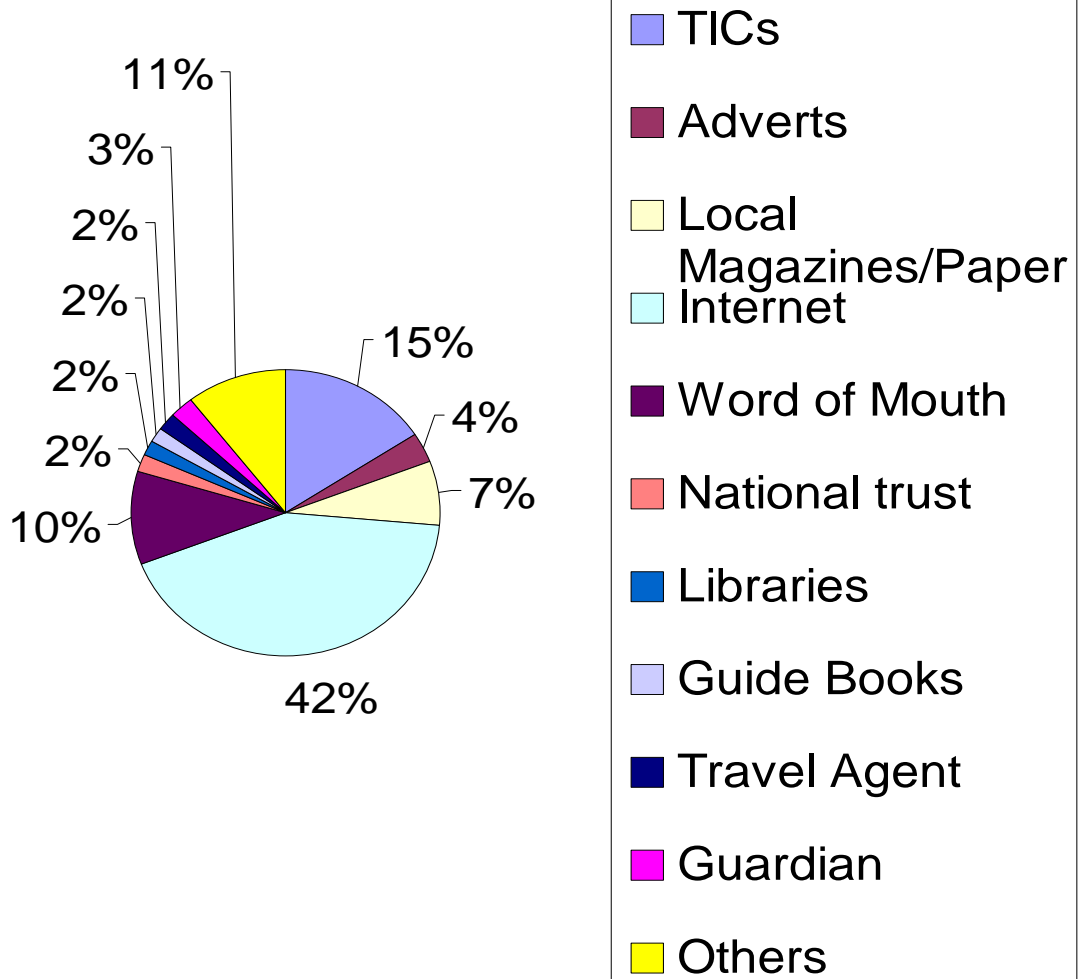
When asked what people enjoyed doing (unprompted) 21% said walking, 4% cycling, 1% riding, 12% relaxing, 6% buying local produce and 16% eating out.

Those from London and Exeter were more likely to have heard of and visited one of the Somerset AONBs albeit infrequently – just over a third had visited once and just under a third visited annually. 37% of activities undertaken were walks under 7 miles.



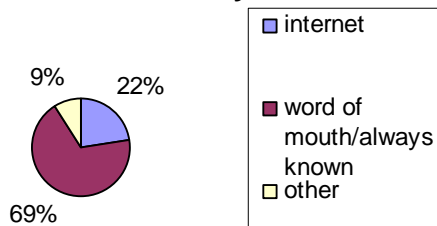
The most important factors that would encourage people to take a Foodpaths holiday were cost/value for money, quality food and accommodation and being less than three hours from home. Other factors of lesser importance included being accessible by public transport, child friendly, able to do the routes by bike, ensuring the routes were well signed and that the visitors were not too packaged. This last point suggests that they wanted to be treated as individuals to be able to pick up a walk and go by themselves not be part of a larger group.

### Where would you expect to find out about a Food Paths holiday?



When asked about their last holiday none of the respondents used a TIC or travel agent.

### How did you find out your last UK holiday?



### 10.3 Conclusions

The overall response to Foodpaths was very positive, both from potential day trippers and staying visitors questioned.

The findings are surprising in several ways in that the responses were very similar from the potential day and staying visitors. The notable exceptions were that those from London were slightly more likely to travel to visit friends and family and use the Internet to find out about their holidays. They also placed greater importance on the need for value for money in a Foodpaths holiday. Potential day visitors are more likely to look for information in a tourist information centre.

Although the Internet is a very important marketing tool it is worth noting that although 42% **said** that they would look on the Internet for information about Foodpaths only 22% **actually used it** to find out about their last holiday. There were also respondents who were adamantly opposed to the internet and wanted a brochure.

Word of mouth came across as an incredibly powerful motivator, as did the importance of those visiting friends and family. This highlights the need for the host population to act as ambassadors for the project. Local PR will play an important role here. Visitors who state they have always known about a destination base this on holidays they have taken as a child. A large sector of the market (69%) found out about their holiday this way or by recommendation/word of mouth. The Guardian was the only mentioned national paper that would be used in London. People wanted editorial rather than adverts.

With regard to the actual product those questioned wanted a clear map with all the details shown. They also wanted recommendations on places to eat and quality accommodation. A couple of people actually wanted to be able to cycle the routes whereas horse riding generated little interest. Other suggestions for marketing included joint promotions with rail operators and marketing through large employers.

### 10.4 Marketing Strategy

A detailed and costed strategy should be based on the following principles:

- There are four layers of market for a Foodpaths product – local people, day visitors, short break visitors, overseas visitors.
- Information about Foodpaths would need to be disseminated at local level within the areas, to encourage individuals and participating businesses to be champions for the concept.
- Information for day visitors from outside the area would need to be focused on the gateway towns and cities such as Exeter, Taunton and Bristol as well as the smaller and nearer “gateway” towns.
- Short break promotion would need to focus on areas of London and parts of the South East, the South West, the West Midlands and Wales.
- Overseas promotion can be initiated through the use of the European Sustainable Food Producers Network project.
- Web promotion will be essential, but quality printed materials remain very important.

## SECTION 11 Conclusions and Recommendations

### 11.1 SWOT

<p><b>Strengths:</b></p> <ul style="list-style-type: none"> <li>• Cohort of interested business identified</li> <li>• Champions of the project</li> <li>• Linked local food initiatives in each area</li> <li>• Research shows demand for product</li> <li>• Adds value to existing walking routes</li> <li>• Lengths of Rights of Way network in Somerset</li> </ul>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Growing market for quality short stays</li> <li>• Growth in visits to family and friends</li> <li>• Growing interest in local food and local distinctiveness</li> <li>• To provide direct and indirect economic benefit to the areas</li> <li>• Leader+ Transnational project</li> <li>• Agriturismo type developments in each of the areas</li> <li>• Size of potential market within three hour travel time for short breaks</li> <li>• To enhance and add value to existing routes/trails</li> </ul>
<p><b>Weaknesses:</b></p> <ul style="list-style-type: none"> <li>• Overall quality of restaurants and dining experience</li> <li>• Lack of distribution infrastructure for local food</li> <li>• Unknown brand</li> <li>• Gaps in provision in some areas</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Other areas marketing their food (Ludlow)</li> <li>• Possible unavailability of funding</li> <li>• Avian flu or other food and farming scare</li> <li>• Economic recession</li> </ul>

Table 9

### 11.2 Economic and non-economic barriers to joining Foodpaths

**Background:**

The 2003 report into the local food sector in the South West – “Local Food Businesses in SW England 2003” - gives some context for the historic support received by the sector, and the future support needs of local food businesses if they are to develop and capitalise on opportunity. It reports:

Sector support has been an important element of success to date

- 59.2% of businesses had received support since 1998
- 15.5% have received grants
- 41.0% have taken bank loans
- 37.8% have received formal accredited training
- 52.2% received non-accredited training
- 55.7% received advice
- 63.2% received marketing and promotion support

A high proportion (59.2%) of businesses have received support since the establishment of the first local food projects in 1998. Marketing and promotion, advice, training and bank loans are the most common types of support received. This demonstrates the importance and effectiveness of high quality support services, such as those provided by Local Food projects, to the growth of the local food sector.

To enable growth in the future, support businesses said they needed:

- 73.1% of local food businesses need marketing and promotion support
- 54.7% need specialist advice
- 52.7% need to borrow investment capital
- 51.2% need help to collaborate with other businesses

- 49.3% need informal training
- 41.3% need formal training
- 46.3% need help to comply with regulation
- 45.3% need help to access specialist infrastructure

A wide range of future support needs was identified. Marketing and promotion support (73.1%) and specialist advice (54.7%) were the two most commonly quoted types of support required. It is encouraging to note the high proportion of businesses (52.7%) who expect to need to borrow investment capital, pointing to the growth potential within the local food sector.

The development of the Foodpaths project would need to address the types of support which are outlined above.

#### **11.2(i) Economic Barriers:**

- **Investment**

For businesses to take advantage of the potential offered by the Foodpaths project, financial investment in their businesses is likely to be necessary in many cases – in terms of buildings and equipment. In a climate of uncertainty, it is hard for businesses to make such investment without some external support or subsidy.

In the recent past there has been such support available for farm based businesses through the England Rural Development Programme and specifically the Rural Enterprise Scheme. This funding is in temporary abeyance, although a successor scheme should be in place during 2007 for a further five year period.

Additionally, in Devon, Dorset and Somerset loan finance has been available to borrowers who found it hard to access mainstream finance through the Wessex Reinvestment Trust. This fund again is currently very limited in its investment capability, although new resources are being actively sought by WRT to meet future demand.

#### **11.2(ii) Non –economic Barriers:**

- **Capacity/time to engage**

Experience in the development of collaborative projects involving small rural businesses shows that the beneficiary/participant businesses often have very limited capacity – mainly in terms of time - to engage in the processes necessary for the establishment of such collaborative ventures.

- **Onus of expansion**

Businesses are likely to need to expand to take advantage of the opportunities offered by the Foodpaths project. Apart from investment, such expansion might mean facing new issues for the first time e.g. employment, specific regulation relating to scale of operation

- **Legal compliance**

Taking part in promoted schemes such as Foodpaths can mean that the profile of the business – which might be currently very low – will be raised. One consequence of taking this step is that some businesses will need to register with their local authorities as food businesses and be subject to the regulation and inspection regime that comes with this registration. In practice the onus of this – especially for low risk businesses, is not hugely significant; nevertheless the perception of regulation is frequently negative in small business circles.

In addition **planning** issues might occur if involvement in Foodpaths constitutes a change of use, or requires new buildings or adaptation of existing buildings. Such planning issues are going to be exacerbated by the AONB status of the areas

potentially involved in the Foodpaths project. There is no doubt that engagement with the statutory planning system can be both time consuming and costly. Finally, the **Health & Safety** implications of inviting the public on site are a potential concern for businesses.

- **Staffing**

In remote rural areas, with high house prices, finding appropriate staff in a sector which in general does not pay high wages can be problematic.

In addressing these barriers, it would be very helpful to design into the project development proposal a service which would address the major issues involved.

- **Training**

Whilst the importance of training when setting up new ventures or expanding existing businesses is recognised – see the Background section above, where very nearly half of all businesses questioned said they would need training – experience suggests that it is difficult for small businesses to find the time to make use of training opportunities.

### **11.3 Supply Issues**

- **Gaps in local production**

As the three AONBs are primarily upland areas, there is very limited immediately local provision of fruit and vegetables. There are also limited supplies of dairy produce within some of the 3 areas.

Generally it is best to regard “local” as a concept of “proximate” rather than something operating within absolute boundaries e.g. an AONB or a County. In other words, a local supply is from the nearest feasible source. Using this basis or definition the majority of food and drink can be locally sourced by businesses within the AONB, and at the same time allow for the landscape type and the specific food production within the AONB.

- **Opportunities in distribution networks**

Distribution has constantly recurred as a fundamental issue for the growth and development of the local food sector. There is a fundamental inefficiency in distribution being carried out by each individual producer. Surveys have revealed that a major barrier to the use of local food and drink by local businesses is the lack of a one stop/one invoice delivery service for local food and drink products.

A new collaborative business called Source based in Lydeard St Lawrence– on the edge of the Quantocks AONB – has been set up in the past year to meet this need in the Exmoor and Quantock area. A feasibility study has recently been undertaken for a similar service in the Blackdown Hills AONB. At present there is only a direct to consumer/retail service in the Mendip Hills AONB – called Somerset Local Food Direct.

If Foodpaths is to be an effective project, a strategic approach to distribution is clearly needed. This could build on, and complement, the existing infrastructure of Source and Somerset Local Food Direct and provide a one stop distribution service for local food and drink in all the three AONBs. There might be opportunities for businesses to act as agents for a network of distributors, using joint web based programmes for ordering, and having interconnected distribution hubs.

- **Opportunities for growers/producers**

There are some potential gaps in supply for local food and drink – subject to the caveat contained in the section above “Gaps in local production “. A detailed analysis of the

producer database for each area would need to be assessed against a list of key local food and drink ingredients to identify the gaps, and these gaps in turn would need to be assessed in terms of feasibility due to constraints of landscape and environment. This could identify opportunities e.g. for production of free range eggs in an area which could be taken up as a diversification by an existing producer.

There are also potential opportunities for holdings on or close to a Foodpaths walking route. These might be for direct marketing of their products, or for a new service such as a tearoom.

- **Local products of excellence**

It is difficult to identify obvious and locally distinctive “products of excellence” in the way that was apparent in e.g. the Appennino area of Italy which was visited (Chestnuts, Parmesan cheese). Somerset generally is identified with cheddar cheeses, cider and apples, but there is no clear differentiation in the three AONBs of characteristic and historic specialist products.

Because of this, much needs to be made of the “new” production which has occurred over the past decade as a result of the pressures on mainstream farming and food production, and the concurrent renaissance of speciality food. Examples of this might be the bison produced by Wallaces of Hemyock; the rare breed farms and meat production; the crayfish of John Hardwick; the stone-ground flours of Burcott Mill.

#### **11.4 Funding potential**

- **Somerset Rural Renaissance Partnership** – full bid to follow feasibility

There is potential for a full bid for the implementation of the Foodpaths scheme to the SRRP, subject to meeting the partnership’s criteria for any specific proposals and to achieving satisfactory outputs. However, the fund is very nearly fully committed, and at present there is no clear timetable for the fund to be “topped up” by the South West Regional Development Agency.

- **Blackdown Hills** – various funding routes

There is an allocation of £10,000 earmarked for the development of the project from AONB core funds. There is potential for a Leader+ Key Fund bid (<£8,000), and the possibility of a main Leader+ programme bid – subject to there being available funds.

- **Sustainable Development Funds for each AONB**

- The Mendip Hills SDF is fully committed for 2006/7, but a marker can be made for funding through the SDF in 2007/8.
- Quantock Hills: The Quantock Hills SDF is nearly fully committed for 2006/7 but there will be further opportunity for funding in 2007/8.
- Blackdown Hills: The SDF is nearly fully committed for 2006/7 but funding could be available for 2007/8.

- **Successor RES and Leader+ programmes**

The England Rural Development Programme project funding has been a major source of grant aid for farm diversification and rural development over the past few years. The current programme will be closed for new applications after 30 June 2006 and is being reviewed and redesigned, with a new programme due to run from 2007-2013. There is a consultation exercise underway to establish priorities for this new programme.

- **Rural Enterprise Gateway**

Support is available to small groups of businesses in the region through the Rural Enterprise Gateway. This support includes small grants (£1500), training, and a technical information service.

**Contact details:**

Business Link Somerset  
Creech Castle  
Taunton  
Somerset  
TA1 2DX  
Tel: 08457 211 112

Ann Guilding is the Project Officer for Somerset and can be contacted for information about group support and training through the project, and for help with applications and the claim procedure to access funding through the project.

Tel: 08457 211 112  
Mob: 07971 136590  
Email: [ann.guilding@blsl.co.uk](mailto:ann.guilding@blsl.co.uk)

Nick Webber is Project Officer for Exmoor  
Tel: 07811 344765  
Email: [nick.webber@bldc.co.uk](mailto:nick.webber@bldc.co.uk)

Catherine Harris is the Information Officer on the Enhanced Rural Information Gateway in Somerset.

Tel: 08457 211 112  
Email: [catherine.harris@blsl.co.uk](mailto:catherine.harris@blsl.co.uk)

Helen Thomson and Lee Richards are Project Officers for Devon and Cornwall. They can also be contacted for information about group support and training through the project, and for help with applications and the claim procedure to access funding through the project.

Email: [helen.thomson@bldc.co.uk](mailto:helen.thomson@bldc.co.uk)

Email: [lee.richards@bldc.co.uk](mailto:lee.richards@bldc.co.uk)

Caroline Hanlan is the Information Officer for Devon and Cornwall.

Email: [Caroline.hanlan@bldc.co.uk](mailto:Caroline.hanlan@bldc.co.uk)

- **Membership**

It is important in the medium and longer term to establish a subscription/membership base for the Foodpaths project. At the first stage, the subscription level would need to be kept low – until the scheme has proved its worth to the participating businesses. Initial subscription could be pitched at e.g. £25, with a staged increase and a future sliding scale according to turnover of the member business.

Membership could also be used to raise a one off share issue – if the network of businesses was constituted as an Industrial and provident Society with withdrawable shares.

- **Loan finance**

Over the last two years Wessex Reinvestment Trust has been able to offer discounted loans to collaborative local food enterprises – in Devon, Somerset and Dorset. Although there is a temporary shortage of funds available, it is very likely that this situation will change in the future.

- **Tourism specific grants**

There do not appear to be any tourism specific grants that would meet the criteria of the Foodpaths remit.

If Foodpaths was focussed on a heritage angle (eg preservation of the countryside) the Heritage Lottery Fund may be worth looking at, see outline below.

“Your Heritage provides grants of between £5,000 and £50,000 to support community-focused heritage projects. To qualify for a grant, projects should conserve and enhance our diverse heritage or encourage communities to identify, look after and celebrate their heritage or both. Projects should also ensure that everyone can learn about, have access to, and enjoy their heritage. These can include caring for the natural landscape, conserving historic buildings, places and objects, involving people in exploring local cultures, traditions, languages and ways of life. Local authorities can apply but priority will be given to not for profit agencies.” (Source: HLF website)

For small businesses that have been trading for less than 5 years and employ under 5 there is the Rural Business Chest. Businesses can apply for 50% up to maximum of £750 for capital equipment or new marketing material.

The other grant that the Foodpaths partnership is aware of is Rural Renaissance.

### **11.5 Next Steps**

If the momentum of the current initiative is to be maintained and the interest in the project be maintained, work will need to continue in the short term on the overall development of the project. Key tasks would need to include:

- Detailed planning of routes, and consultation on their development
- Convening of groups in each area of businesses interested in being part of a Foodpaths project
- On-going support for those groups
- Test marketing of “Foodpaths” products

In order to take the Foodpaths project to this next stage, assuming that it is determined to do so, the following is an appraisal of potential human and financial resource for short term development – i.e. within the financial year 2006/7.

#### **Blackdowns:**

- There is some allocated core AONB budget for the development of the Foodpaths project
- There will be some officer capacity to further the Foodpaths project

#### **Mendips:**

- There will be some officer capacity to take Foodpaths forward over the next year
- There is some budget for signage and for publications
- New guide books for the West Mendip Way and the Limestone Link are due

#### **Quantocks:**

- There will be some officer capacity to take Foodpaths forward over the next year
- There is specific capacity to work on routes and planning

There is potential for more significant cash funding for the development of the Foodpaths project beyond 2006/7.

## 11.6 State Aid issues

Financial support from statutory agencies, which will aid individual businesses within the three AONB areas, would be covered by State Aid regulations. Certain principles apply which are outlined below:

- Different rules apply to businesses which are agricultural and those which are not
- The majority of businesses in the project are non-agricultural
- Under de minimis rules agricultural businesses can benefit from up to Euro 3,000 of support and non-agricultural businesses up to Euro100,000 over a three year period
- Promotion of local goods and services outside the region is permissible
- Promotion of local goods and services within the region is technically not permissible
- No aid can be given for advertising
- All benefits and support must be offered on an open basis with clear criteria for eligibility
- Any ineligible expenditure would need to be wholly financed by participant businesses
- Specific advice might need to be sought from the DEFRA State Aids team to see if any exemptions are required. If so there is a specific process which will take approximately six months to achieve. It might be possible to operate the whole scheme under the de minimis ruling

### **Conclusion:**

State Aid regulations are highly technical and there are no clear published guidelines, so interpretation is key. Given the small sums that are allowed under de minimis ruling for agricultural businesses, it is probably sensible to consult with the DEFRA State Aids team before any applications for a support and development programme for Foodpaths are submitted to public funding bodies.

## **SECTION 12 Summary of Findings**

### **Section 1**

- 269 businesses were identified as potential players in a Foodpaths project in the three AONB areas. In addition to these 117 local food producers were identified in the three areas.
- 93 businesses or 35% returned the questionnaires, and of these 62 or 66% were positive about potential participation in the project.
- From follow up contacts, it is clear that there is a larger number of businesses who would be interested in participating if the project developed, but had not returned questionnaires.

### **Section 2**

- A set of criteria that make plain to the client/consumer what they will get from a Foodpaths product are essential.
- Criteria need to be low key, simple, easily communicated, and not burdensome on the participating businesses.
- There should be flexibility to enter the Foodpaths scheme and progress on a scale.

### **Section 3**

- Market trends indicate growing demand for a Foodpaths type product.
- There is a good urban catchment for day visitors to the three areas.
- Walking is the most popular activity in countryside visits.
- Cars predominate as a means of access, with very limited use of public transport.
- A perception that Foodpaths offers “quality” is essential.

### **Section 4**

- There are no obvious complete exemplars for Foodpaths, but elements of the scheme are present in a number of food and tourism initiatives.
- The Spanish Interco-op programme for food led tourism offers the best exemplar of an approach to packaging elements of a Foodpath product.
- There are a significant number of complementary initiatives in local food, access and recreation that can potentially be incorporated into a Foodpaths product.

### **Section 5**

- The Italian Agriturismo model has many elements from which Foodpaths can learn, notably the quality and value of the food offered, and the passion of the owners.
- The model is regarded as over bureaucratic, and is generally perceived as being poorly marketed.
- Much of the demand for Agriturismo services is from local people.
- There are opportunities for Agriturismo type developments in the three areas, especially in relation to on farm restaurants.

### **Section 6**

- The overall impact in the three areas of a 15% turnover increase among the target businesses would be £1.14 million.
- If the 50% target for local food supplies set out in the draft criteria were to be achieved by all businesses, then the direct benefit to the three areas would be £1.8 million.
- The combined effect of these two increases would be £2.95 million.
- These increases in local trading are directly attributed the potential Foodpaths

scheme, and do not take into account the added benefits of the “local multiplier” effect, nor of the opportunities for new business start up.

#### **Section 7**

- The Foodpaths scheme would fulfil a good number and range of the policy objectives set out in the Management Plans for the three AONBs.
- The Foodpaths scheme would fit with many of the operational developments and workplans currently underway in the three areas.

#### **Section 8**

- There are four different authorities with responsibility for the Public Rights of Way in the three areas.
- It is essential to plan Foodpaths routes using PRoWs with these authorities in advance of any developments on the ground.
- There will be some resource implications to fund improvements necessary to have Foodpaths routes adopted as actively promoted routes.
- Foodpaths routes are likely to be linked to, and in some cases follow, existing promoted routes.

#### **Section 9**

- Trial products were developed to test the concept in practice.
- Testing these products showed the need for some improvements in PRoW, but not on major scale.
- Testing these products showed that there were significant opportunities to develop existing businesses and to start new businesses.

#### **Section 10**

- Public response to the Foodpaths product was on the whole very positive.
- Personal recommendations, and links to people living within specific areas, are crucial to the way people select their destinations for day visits and short stays.
- People access information through printed material and the internet. More people say they access information from the internet than actually do in practice.
- People would on the whole want to access Foodpaths products on an individual rather than group basis.
- Marketing would need to follow the very specific geographic and demographic profiles which have been suggested.

#### **Section 11**

- There are funding opportunities both in short term (2006/7), medium term (2007/8) and beyond for the development of the Foodpaths project.
- There is capacity within the three AONBs to facilitate some first stage developments within the next year.
- There are potential State Aids issues if public money is to be used to develop the scheme.

## **SECTION 13 Recommendations**

### **13.1 Short/medium term**

1. Form an association of interested businesses in each area which will become the driver for the development of the project. Have an initial low threshold membership fee during the development phase.
2. Get agreement with participating businesses on the criteria and standards to be adopted – based on the draft criteria. Agree a mechanism for policing the standards – either by peer inspection or appointment of lay/community inspection team.
3. Use the human and short term financial resources within each of the AONBs to support the development of the project in the remainder of 2006/7.
4. Seek funding for a facilitator role and to support the development of the project starting in April 2007.
5. Plan a series of up to three circular routes in each area, getting agreement of the PRoW authority and establishing the improvements needed for their adoption as promoted routes. Identify public transport links to these routes where possible.
6. Identify the potential business opportunities which these routes specifically offer, and work to develop those opportunities with the landowners/businesses involved.
7. Hold a meeting to promote the idea of Agriturismo type on farm businesses, and support any subsequent interest by farm businesses.
8. Work with the Leader + Transnational Project to further develop and market to overseas customers the Foodpaths offer, specifically initially in the Blackdowns AONB.

### **13.2 Longer term**

1. Develop the Foodpaths “product” incrementally, starting with a cohort of accommodation and meal providers in each area, and a small number of Foodpaths routes and trails.
2. Establish a joint Foodpaths website for the three areas, with links to accommodation booking and the websites of member businesses.
3. Develop a printed brochure to complement the web marketing, and concentrate its distribution in the target areas for day and short stay visits.

# **APPENDIX 1 – Local Food Producers**

**Supplied in electronic format**

# APPENDIX 2 – Letter and Questionnaire

## FOODPATHS IN HILLS AONB

Somerset Food links have been commissioned by the three Areas of Outstanding Natural Beauty which cover Somerset – Blackdown Hills, Mendip Hills and Quantock Hills - to carry out a feasibility study for a project to promote tourism and local food in the area.

The purpose of the proposed project would be:

- to support local businesses to increase their trading
- to promote local distinctiveness
- to reduce food miles and negative environmental impacts
- to protect the landscape of the area
- to promote sustainable and enjoyable visits to the area

The project would promote day visits and short stays and encourage people to walk, cycle and ride along paths and bridleways, staying locally and using local pubs, restaurants and cafés. The theme would be local food, and it is proposed that all businesses taking part would “sign up” to a set of criteria about the use of local food and drink.

We are writing to find out:

- (a) If your business is interested in principle in being part of this proposed project
- (b) Your reaction to the draft criteria which are enclosed

We would like to emphasise that this is a feasibility study to see if a project of this type is viable and will benefit the businesses supplying accommodation and food in the Hills area. Nothing is set in stone – and your feedback is essential to make a project work.

So, please could you spare a minute or two to fill in the enclosed questionnaire and return it to us in the envelope provided. We need to have the forms returned by 3 March 2006. **All responses will be entered into a free draw for a £50 voucher to be redeemed at a local restaurant.**

If you have any queries about this please call 01458 259485 and ask to speak to Vikki Taylor, or email [vikkitt@foodlinks.org.uk](mailto:vikkitt@foodlinks.org.uk)

Yours sincerely

## FOODPATHS QUESTIONNAIRE

Name of Business:

Type of Business:

Hotel       B&B       Pub       Café       Farm Shop

Other Food Outlet (please specify):

Opening Hours/Days:

Proprietor(s):

Address:

Postcode

Tel:

Fax:

Email:

Website:

Would you be interested in being part of a 'Foodpaths' project?    Yes/No

In order to get a picture of the extend to which businesses are already using and promoting local food and drink, could you please answer the following questions about your business:

- 1      What approximate percentage of food and drink served/sold is grown and/or processed within 40 miles of your establishment? Please include the names of your most frequently used suppliers.

- 2 What approximate percentage of food and drink served/sold is grown/produced over 40 miles but still with the South West (Cornwall/Devon/Dorset/Glos/Somerset/Wilts)?
- 3 Do you have any distinctive **Somerset (Somerset and Devon for Blackdowns)** dishes on your menu?
- 4 Do you display a list of local suppliers within your establishment? Yes/No
- 5 What local drinks do you stock? Cider, wine, beer, soft drinks etc.
- 6 Could you give us an approximate figure for the current annual turnover of your business?
- £20-50,000 per annum  
£50-100,000 per annum  
£100,000-150,000 per annum  
£150,000-200,000 per annum  
£200,000-250,000 per annum  
More than £250,000 per annum
- 7 Are you inspected by the local authority Environmental Health Officer? If so, when was your last inspection?

Thank you for completing this form. Please note that all responses will be treated in the strictest confidence and no individual details will be shared with other parties. Please return it in the enclosed envelope not later than 3 March 2006.

# APPENDIX 3 – Feedback form Questionnaire

## FEEDBACK FROM FOODPATHS QUESTIONNAIRE

### Response Rate:

AONB	Sent	Returned	Positive/ Maybe	Negative	N/A*
Blackdown Hills	159	48	31	7	10
Mendip Hills	40	14	9	2	3
Quantock Hills	70	31	22	4	5
<b>Total</b>	<b>269</b>	<b>93</b>	<b>62</b>	<b>13</b>	<b>18</b>

Overall response rate: 35%

### Percentage Rate of Returns by AONB: Nature of Response (as percentage)

AONB	%
Blackdown Hills	30
Mendip Hills	35
Quantock Hills	44

AONB	Positive/ Maybe	Negative	N/A*
Blackdown Hills	65%	15%	20%
Mendip Hills	64%	14%	22%
Quantock Hills	71%	13%	16%

\*Returned questionnaire no longer applicable due to change of business use or no longer trading

### QUESTIONS 1 AND 2: LOCAL SOURCING OF FOOD AND DRINK\*

Area	<40 miles	SW>40 miles	Other
Blackdown Hills	66%	29%	5%
Mendip Hills	35%	39%	26%
Quantock Hills	53%	30%	17%

\*These figures should be treated as unreliable due to the fact that not every business returned percentages for each question. For future questionnaires would suggest using tick boxes for 'approximate percentages'. This also applies to Organic Produce below.

A list of named sources available in each AONB.

### QUESTION 3: PERCENTAGE OF ORGANIC PRODUCE

Area	%
Blackdown Hills	17
Mendip Hills	17
Quantock Hills	19

### QUESTION 4: WHAT WOULD ENCOURAGE GREATER USE OF LOCAL PRODUCE

In general most businesses were using locally sourced produce to some degree. The following gives a brief insight into reasoning behind sourcing.

### **B&Bs:**

- Four B&Bs kept own chickens for eggs
- Three claimed to use all their own produce (farm B&Bs)
- Three used their own meat
- One used their own flour to make break and cakes
- Those who used 'cash & carry' or supermarkets did so for 'convenience', packaging (for freezing), and cost

### **What would encourage greater use:**

- Customer demand
- A 'convenient' local farm/village shop with reasonable variety of stock
- Delivery service – reliable, regular and prepared to do small orders
- Regularly updated local supplier list
- Availability
- Price

### **Hotels/Restaurants/Pubs**

The majority sourced at least some produce locally (eg local beers) but all claimed lack of time to shop as fundamental drawback to using local produce.

### **What would encourage greater use:**

- Availability
- Reliable delivery service (including delivery at short notice)
- Regularly updated local supplier list
- Price - Trade pricing

### **Shops**

Farm Shops who responded primarily sold their own produce plus other locally sourced items. Two of the three village shops sold a very small proportion of locally sourced goods – the exception being Mendip Heights Camping & Caravanning Park shop (50%).

### **What would encourage greater use:**

- Demand
- Reliability of supply – had often experienced unreliable deliveries due to small producers being tied to production and unable to deliver on time
- A distribution service – to collect from small producers and deliver to shop (no time to go and pick up supplies)
- Price

### **QUESTION 5: DISTINCTIVE DISHES**

Various - List available.

### **QUESTION 6: DISPLAY LIST OF LOCAL SUPPLIERS**

Only a two businesses currently displayed a list of local suppliers used, but three said that having completed the questionnaire they now would. Two B&Bs mentioned they offered information to guests on local farmers markets and farm shops alongside other tourist information (this number may be greater as the information was not requested).

## QUESTION 7: LOCAL DRINKS

Various – List available.

## QUESTION 8: ACCREDITATION

Various accreditations – List available.

## QUESTION 9: WINDOW STICKER SCHEME

AONB	Yes	%	No	Maybe
Blackdown Hills	17	68%	5	3
Mendip Hills	8	80%	2	0
Quantock Hills	13	61%	5	3

## QUESTION 10: ANNUAL TURNOVER

Three businesses who responded chose not to select an annual turnover figure.

AONB	<£20,000	£20-50,000	£50-100,000	£100-150,000	£150-200,000	£200-250,000	>£250,000
Blackdown Hills	6	9	3	2	1	1	5
Mendip Hills	1	2	2	1	0	0	2
Quantock Hills	3	6	6	2	1	1	3

## QUESTION 11: LAST INSPECTION BY ENVIRONMENTAL HEALTH

The Local Authorities have said that there is now a backlog in registering B&Bs and that it will take some months to clear. They have been very helpful in supplying lists of registered businesses and where this information has been received it has been recorded and is available on the database.

## QUESTION 12: COMMENTS REGARDING THE DRAFT CRITERIA

- *An excellent idea*
- Duplication with other organisations – AA also places emphasis on local produce when registering B&Bs
- Monitoring of the scheme:
  - concerns over additional paperwork
  - difficult to calculate percentages of local produce used
  - suggestion that scheme be linked to quarterly spend with local suppliers
  - suggestion that Point 2 should be 25% locally grown
  - should adopt 'local first' policy rather than percentage
  - suggestion that establishments be graded by percentage of local produce used
- Non-producer businesses that promote 'The West Country' produce should be included in the scheme somehow (suggested by Internet retailer of West Country cheese)
- Criteria could be too restrictive for small businesses as will increase cost
- Essential to get local shops/deliveries involved so that accommodation providers, cafes etc do not have to drive round to all producers
- What will it cost to join?

**General Note:** On chasing unreturned questionnaires it was found that pubs and restaurants in particular were very interested but said they did not have time to complete the questionnaire. Pubs and restaurants who did not complete the form invariably said that should a scheme or 'product' come into being they would definitely like to be contacted.

**See maps (supplied in electronic format entitled Blackdown, Mendip & Quantock by CATEGORY maps – Microsoft MapPoint)**

**INSERT BLACKDOWN, MENDIP & QUANTOCK HILLS MAPS (in hard format version MapPoint)**

## **APPENDIX 4 – Assessment of tourism trends for Foodpaths Project**

**Supplied separately in electronic format**

## **APPENDIX 5 – Examples of Food and Farming Projects**

**Supplied separately in electronic format**

# APPENDIX 6

## Field Trip to Italy 6 - 9 March 2006

### Attendees

Nell Barrington, Food Links  
Iain Porter, Quantocks AONB  
Ian Pearson, B and B and walking holiday company, Nether Stowey  
Sue Milverton, restaurant and B and B, Lower Clavelshay Farm  
Catherine Leach, Blackdown AONB  
Ellen Brown, B and B and outside catering company, Sampford Arundel  
Nick Strange, Farmer, Beech Hayes Farm  
Jim Hardcastle, Mendip AONB  
Linda Mogford, The Old Stores B and B

The guide/translator for the trip was Steve Dawson, who has set up the only real ale brewery in the region.

### Aims of visit

To create champions in industry for the Food Paths project and develop an understanding of the strengths and weaknesses of the Agriturismo (AT) project.

### Findings

The base for this trip was three hours from Venice airport at the Hotel Belvedere, Guiglia (tel: 059792451). This hotel also ran an organic restaurant in the town.

#### 1 **Giovanni and Nada Zanardi - Il Cotto (Chestnut Farm)** Tel: 059982316, Email: [fattoriailcotto@tiscali.it](mailto:fattoriailcotto@tiscali.it)

Giovanni and Nada set up their business 4 years ago. They have been harvesting chestnuts for the last two years and can not keep up with demand.

They graft old varieties onto the new ones to ensure continuity as the chestnut woods were abandoned after the second world war. The chestnuts are harvested in autumn the roasted over open fires for one month, when they lose two thirds of their weight. The harvest used to be 3,000 now is 50,000. The chestnuts are taken to a watermill nearby and made into flour which is then made into bread, biscuits and cakes.

Giovanni is a part time fireman but we did not find out if this was for financial reasons or because you are committed for a certain number of years. His grandfather taught him everything he knows about chestnut production.

They appear to have tapped into a very lucrative market with chestnut flour selling at 6 euros a kilo (6 times more than wheat). They are also the only people in the area doing this. It is very much a family business of husband, wife and father and the finished product is sold through a cooperative. They are not generally open to the public but do host school visits. Their literature also promotes a picnic and barbeque area.

**2 Stephano - Azienda Agrituristicca (AT) Tizzano (restaurant and accommodation)**  
**Tel: 059989581**  
**Email: [agriturismo.tizzano@libero.it](mailto:agriturismo.tizzano@libero.it)**

This is a traditional rural agriturismo that is still a working farm. They grow cherries, maize, wheat, Alfa Alfa, dairy, goats and have a chestnut wood.

On arrival you are greeted by a variety of dogs, ponies and a muddy yard surrounded by tall shuttered buildings which house a variety of family sized rooms and a restaurant (cosy, dark and partially used as an office when we arrived). The bedrooms are basic but clean with new bathrooms.

The product appears to have very broad appeal and attracts young, old, families, friends and walkers. The trend appears to be short breaks (“getting away from the city”) or people stopping off en route to Tuscany (similarities with Somerset here).

Stephano tells us that appearing in the Food and Wine guide does not bring in business but word of mouth does. He has for at least the past 3 years featured in Alistair Sawdays “Special Places to Stay in Italy”. He is only full a couple of days a year and pointed out that tourism in Italy has been in decline for the past two years. He was one of the first ATs and set up 20 years ago. They grow nearly everything on site with the exception of sugar, salt, wine and a few other consumables. Because of regulations he cannot serve some products eg dairy however he does.

They do not have a formal referral scheme between the ATs and this rarely happens. Stephano does not have time to market his business to its full effect. Stephano, his mother and a young Albanian couple work on the farm. He commented that AT has always existed but was only formalised recently. He runs the business because he wants to but feels that many others do better because they have more time. He has time constraints when farming is busy in summer so is tourism and when it’s quiet in winter so is tourism so not perfect match.

Capital grants were given by government for the renovation of buildings; this would not have been possible otherwise and has enabled Stephano to expand number of rooms available. He feels that most ATs try to replicate restaurants which is something that he does not. He went on to say that anyone who wants to work the land should be cooperating to the maximum. He felt it was also important that people in the city understood why ATs operated.

We had a typical meal that someone coming for lunch would have (9 courses) which included stuffed pigs trotters, pasta, raw beef, cheeses, wine for 22 euros a head. If you were staying overnight the menu would be smaller.

**3 Caseificio Rosola - Parmesan producer**

This is a husband and wife team with one helper that produce 10 cheeses a day. A typical day would be 5am – 8pm 7 days a week. It is very labour intensive once the cheeses have been made they are stored in brine for 21 days then stacked on wooden boards for at least a year; they are individually turned every 4 days. Some of the cheeses are aged for 18 months or three years. These cheeses are harder with a stronger flavour and command a higher price. A small amount of the cheeses are sold through the farm shop and the remainder through a cooperative. They also keep 900 pigs that eat the residual cheese.

Parmigiano Reggiano is marketed strongly through individual leaflets. The cooperative of Caseificio Santa Rita also has literature available in English promoting the cooperative and the fact that it is mountain cheese from organic agriculture. The leaflet explains that the cheese comes from a geographically defined area because of the unique flora. It goes on to say "it is the world's best cheese".

**4 Agricultural and food Councillor for the Province - John Luca**  
[www.agrimodena.it](http://www.agrimodena.it) has links to Italian AT pages and  
[www.ermesagricoltura.it/documenti/normativa/agriturismi/L73085.pdf](http://www.ermesagricoltura.it/documenti/normativa/agriturismi/L73085.pdf) to  
the criteria

The definition of AT is a working farm (with a farmers licence) which as secondary activity can have restaurant and rooms that are complimentary. A law was passed in 1985 to specify the criteria and this is being reviewed at present. There are restrictions on how many people you can cater for based on how large farm is and how much land you are cultivating. 51% has to be typical food from the area. In the valley 40% of the value of the food has to be produced on the farm and in the hills it reduces to 30%. This means that you often find same food is served in different establishments. Although it is a condition in some ATs that only local wine can be served. In the Province of Modena there are over 100 ATs that pay membership. There is not enough income generated for research into the effectiveness of their marketing. They feel that most people that use ATs are locals or passing through en route to Tuscany

ATs are audited by looking at books and checking invoices. There is a lot of competition between restaurants and ATs because AT get funding for advertising, and internal and external renovations. This means that some ATs get reported by restaurateurs. State funds will cover 40% of the restoration of existing buildings but they can add to by 20%. They province have a list of what the renovations should cost.

There are four national organisations that can provide advice to ATs although the Councillor expressed little faith in their ability and stressed that they were lobbying bodies and aligned with political groups. They all have guides as well attend different trade fairs. Cuts in the overall budgets mean they will get 20% less.

The main purposes of ATs are to preserve historical country homes, to bring in another income for farmers and as a method of control as people started doing it on their own.

The problems are that the larger ATs want to reduce amount of local produce where as small businesses want to increase it.

**5 Museo del Balsamico Tradizionale (Balsamic Vinegar Museum),  
Spilamberto**  
**Tel: 059781614**  
**Email: [info@museodelbalsamicotradizionale.org](mailto:info@museodelbalsamicotradizionale.org)**  
**[www.museodelbalsamicotradizionale.org](http://www.museodelbalsamicotradizionale.org)**

There are two types of Balsamic one that is sold in supermarkets and the other "Traditional Balsamic Vinegar de Moderna" which is made in the attics of 10,000 private houses in the Moderna region. Many of these don't sell commercially as don't want to have to adhere to the very strict guidelines. The traditional vinegar is used in cooking, on ice cream, strawberries or most usually on parmesan as a starter. It is made by process of passing boiled grape must through up to 9 barrels the process taking at a minimum 12 years. A premium price is charged for this product.

The museum was well laid out and very informative. This in the main was due to the fact that we had an enthusiastic guide and translator who was able to give a fascinating insight into this unique product.

## **6 Fabio Minelli – Director of Regional Park**

There are 13 regional parks. This one is the smallest at 1,190 hectares with two staff plus volunteers. They are funded by the region 50%, municipality 30% and income 20%. They sell tickets for 2.5 Euros and this entitles visitors to go to 4 attractions, last year they sold 8000, entrance is free to residents. They have a shop selling organic (not local) produce and a museum of the park. They organise themed walks at about 6 Euros eg night under the stars with poetry and local food, or a night time safari and they usually have 25 – 30 people. They also have a park festival, offer consultancy services, conference facilities and guided walks for schools (the guides are self employed with their own insurance).

50% of their visitors come from Modena and 30% Bologna. They have 3 or 4 B and B s in the area and one AT. Their website attracts 18,000 visitors a year. They promote themselves in other people's publications and at local fairs. They are trying to open a shop which is stocked by local produce eg chestnuts, cherries and parmesan. Planning regulations in the park mean that for farmers the amount you can expand depends on the land you own. There is no new building and non historic buildings can only increase by 20%.

## **7 Agriturismo Ca'Monduzzi Tel: 059986206**

This AT was in Zocca and had a restaurant and a variety of high quality en suite rooms/apartments of that appealed to mainly 30-35 age groups. The clientele also included walkers and Dutch cyclists as they are located on a cycle route that goes from Amsterdam to Rome.

The farm harvests chestnuts and cherries and served an excellent meal that used chestnuts in one of the courses.

## **8 Graziano Poggioli - Istituto per Agricoltura (agricultural school) Tel: 059 209777 Email: [poggioli.g@provincia.moderna.it](mailto:poggioli.g@provincia.moderna.it)**

This is a vocational school where all subjects are covered but there is an emphasis on agriculture. They have several farms which the 130 students take a practical role in running. Produce includes Alfa Alfa and medicinal herbs and the reintroduction of the rare Modernese chicken. They tend to focus on crops that don't need treatment or are threatened varieties.

An onsite shop sells these produce grown on the farm plus ancillary products, liqueurs, wines, cosmetics and essential oils. All the produce is organic but only the vegetables are certified due to the cost. They will also process other producer's goods. The shop is very successful and they are at present deciding whether to operate it in a more commercial way. The shop enables the school to pay the children to work on the farm albeit a third of the minimum wage.

Most of the children come from farms and will go into farming, gardening or occasionally ATs when they leave. The latter is only likely if they are part of a family business due to the set up costs. They opened an AT on a short term basis and it went well. However it is not viable as they didn't have the proper insurance and the children were under age.

## **So what was learnt from the trip?**

### **Comments from trade**

- Useful to see the ways in which local restaurants are using local produce and see different ways of cooking which can be implemented at home eg Taster menus
- Nice to meet other people from other hills and exchange ideas.
- Food paths (FP) should encourage networking as part of project.
- The trip has highlighted the need to promote local suppliers and food to their visitors eg where nearest farmers market even if they don't ask
- One of the businesses has decided to produce a local food producer's leaflet which he will send out with his marketing material.
- One will create a local produce hamper for their self catering guests which will be included in the price
- Another will revise their welcome hamper to include local food rather than food from Sainsbury's
- Very keen on FP idea however don't think Italian AT model would work in the UK as it is too regulated and bureaucratic.
- The trip raised questions about the practicalities of opening your business to the public. Should there be FP guided walks every Friday so the businesses could be prepared?
- Made one provider realise that without much more effort could use a lot more local produce and encourage their guests to do the same
- That packaging and publicity is very important
- FP should include festivals and fairs
- FP shouldn't be implemented by rules
- Very interesting to see how you can make a business from just one product eg Chestnuts and how this can be creatively used eg to make cakes biscuits etc
- Need to identify which products can FP use to market area specific products eg recipes cheese, cider?
- "We shouldn't get too hung up on tourists, this is a local product which could be used by local people."
- There are lots of simple steps that could be implemented straight away. We have so many things happening that need to be linked up.
- Funding could be sought to assist innovative food producers and products. One area could be Mendips sustainable development fund which could be promoted more widely be used to develop new businesses
- The businesses would be happy to be part of FP eg open up their businesses or develop it to accommodate visitors. Issue would be how to structure as they couldn't cope with people "dropping in".
- How passionate large and small food producers can enthuse visitors eg balsamic vinegar museum.
- That guilt can make people buy more local food
- People want a personal touch and be made to feel special

## Summary

The strengths of AT are the product itself which is of high quality and affordable and the passion of the providers which came across at every visit and is something incredibly appealing for visitors. The weaknesses are that the rules set in place are broken eg local wine not served, some ATs are not using correct % of local produce. ATs appear to be supported by lobbying bodies are working against each other in terms of diluting their marketing eg trying to find information on the web is very difficult. There is no cohesion and little branding other than the name AT eg nothing on signage or any marketing material. It appears that it was not set up as a marketing initiative but rather a control method.

The trade were very supportive of the principles of FP as is shown by their comments above and keen to be involved in its development.

Nell Barrington  
Food Links  
14 March 2006

# APPENDIX 7

## Additional questions for economic assessment

**1. What is your main business activity:**

Food retail (shop, farm shop, etc)  
Bed and Breakfast/Accommodation  
Pub  
Café/Restaurant

**2. What is the total annual turnover of your business?**

Less than £10,000  
11,000 – 20,000  
21,000 – 30,000  
31,000 – 40,000  
41,000 – 50,000  
51,000 – 75,000  
76,000 – 100,000  
101,000 – 150,000  
151,000 – 200,000  
201,000 – 250,000  
More than 251,000

**3. Approximately what % of annual turnover do you spend on food and drink that is then re-sold through your business?**

Less than 10%  
11-20  
21-30  
31-40  
41-50  
51-60  
61-70  
71-80  
81-90  
Greater than 90

**4. Within your present business set-up, do you have any underutilised capacity?**

No\_\_\_\_\_ Yes\_\_\_\_\_

**If Yes**, approximately how much underutilised capacity do you have?

Less than 10%  
11-20  
21-30  
31-40  
41-50  
51-60  
61-70

71-80  
81-90  
Greater than 90

**5. What is your total annual wage bill including earnings you draw as owner?**

Less than £10,000  
11,000 – 20,000  
21,000 – 30,000  
31,000 – 40,000  
41,000 – 50,000  
51,000 – 75,000  
76,000 – 100,000  
More than 100,000

**6. Please fill-out the table below as accurately as possible:**

	Number who live <b>within 40 miles</b> of your business	Number who live <b>further than 40 miles</b> from your business
<b>Full-time</b> employees		
<b>Part-time</b> employees		

## **APPENDIX 8 – Economic Analysis**

**Supplied separately in electronic format**

# APPENDIX 9 – AONB Policy Summaries

## BLACKDOWN HILLS AONB MANAGEMENT PLAN

### Underlying aspirations:

- Diverse economy (p4)
- Primary purpose of ONB “to conserve and enhance natural beauty” (p9)
- “promote sustainable forms of social and economic development that in themselves conserve and enhance the environment” (p9)

### Barriers/issues:

- PROW – variable condition, inadequate off road routes for horses, on road routes dangerous for bikes and horses(p23)
- Impact on sustainability of small farms?

### Employment

- 96% of jobs are in micros – i.e. under 10 employees
- decline in agriculture
- Increase in self employment (36%) (p24)

### PROW

- “There is an opportunity to develop better co-ordination of the PROW network and to look at the area as a whole, in order to overcome fragmentation and develop an identity for signposting and way marking.” (31)
- Ridge Route and offshoots (31)

### Transport

- “Certain (public transport) routes may provide opportunities for tourism and recreational; access which would support their viability and improve non-car access to the area” (33)

### Economy

- Market town links. Economy not stand alone – links with peripheral market towns crucial(34)
- Local products strategy (34)
- Diversification – away from tourism and agriculture 33)

### Tourism

- “Sustainable tourism emerged as one of the top five priority topics from our consultation process.” (35)
- “Quality rather than mass tourism “(35)
- “The area is not currently promoted to visitors in a coherent way and there is potential to improve the links between attraction, events and places.” (35)

### Vision:

- “The local economy will be thriving; jobs will be available for local people and economic activity will make wise use of local resources, conserving and enhancing the landscape and environment.”

### Relevant objectives:

- Awareness and understanding: LAN 2
- Local distinctiveness: LAN 6.1
- Agriculture and its role ENV 3.1

- Recreational Access and PROW ENV 5.1  
ENV 5.2
- Economy – reuse of buildings WB1
- Economy – adding value WB2
- Economy – employment WB3
- Economy – sustainable tourism WB5
- Economy – embedding LPS WB7

## **MENDIP HILLS AREA OF OUTSTANDING NATURAL BEAUTY MANAGEMENT PLAN 2004-9**

### **Relationship with Foodpaths Project**

#### **Heritage:**

- ◆ The area has a strong cultural heritage in local customs and traditions. (p13)
- ◆ The annual Priddy Fair, dating back 300 years retains its sheep trading focus. Ploughing matches and hedging competitions that promote rural skills are community events keeping rural skills alive.

Objective 4.2 Policy 4.2.4.

Enhance physical and intellectual access to the heritage via interpretative material and events aimed at a wide range of different audiences, making use of arts, IT, audio visual aids as well as traditional publication forms.

#### **Agriculture**

- ◆ There are opportunities for developing branding and better marketing of local products from the area (p15)

Objective 5.2.Policy 5.2.2.

Support will be given to the development of marketing opportunities for local products

#### **Recreation, Access and Tourism**

- ◆ The Rights of Way Improvement Plans that each highway authority has to produce and link to the Local Transport Plans are opportunities to attract new funding and address some of the access issues in the AONB

Objective 6.3 Policy 6.3.1.

A workable recreational network will be devised, promoted and maintained, through the Local Access Forums and Rights of Way Improvement Plans, to meet modern recreational needs

Objective 6.4 Policy 6.4.3

Encourage businesses to become more sustainable by maximising their contribution to the local economy and minimising environmental impacts

Policy 6.4.4

Emphasis will be placed on promoting opportunities for new tourism initiatives in Cheddar Gorge that will both attract new visitors to sustain the local economy and assist with the wider management of the Gorge in the interests of conservation and enhancement.

## **Community Settlement and Development**

- ◆ Support is needed to foster the economic wellbeing of the area (p19)
- ◆ Many of the villages in the AONB still retain a village shop , although their viability may be doubtful in the long term.

## **Transport**

- ◆ Many road users, such as pedestrians, cyclists and horse riders, are vulnerable due to speed and traffic volume. More off road routes would enhance enjoyment for off road cyclists, horse riders and walkers
- ◆ The old Cheddar Valley Railway line provides a cycle path and walk into the area from North Somerset. The Sustrans National Cycle route from Bristol to Padstow crosses the Mendip Hills promoting a means to access the area by cycle.
- ◆ There is an opportunity for improved integration of public transport and the Public Rights of Way network through the Local Transport Plans and Rights of Way Improvement Plans.

Objective 8.2 Policy 8.2.2 High priority will be given to the appropriate management of traffic and public transport to enhance visitor enjoyment of the AONB

## **Communication and Interpretation**

- ◆ Interpretation materials and guided walk programmes that encourage understanding about the importance of the AONB and its features, and the need to respect them for future generations to enjoy

## **QUANTOCK HILLS AREA OF OUTSTANDING NATURAL BEAUTY MANAGEMENT PLAN 2004 – 2009**

*Each element of the Management Plan which relates to the Foodpaths project has been extracted.*

### **Purpose of designation as AONB – Countryside Agency guidance 2001:**

- In pursuing the primary purpose of designation account should be taken of the needs of agriculture, forestry, other rural industries and the social and economic needs of the local communities.
- Recreation is not an objective of the designation, but the demand for recreation should be met in as far as it is consistent with the conservation of natural beauty and the needs of agriculture, forestry and other land uses.

### **A Vision for The Quantock Hills**

- Productive farming and forestry businesses that support and enhance the intimate scale, historic character and biodiversity of the Quantock Hills
- A sustainable level of Quantock Tourism and recreation maintaining the quality of experience for AONB users and contributing to the local economy without harming landscape and biodiversity.
- Easily available information helping to protect the Quantock environment and residents, while maximising public enjoyment and appreciation of the area.

- High-quality access across the AONB through a well maintained network of paths and open access areas.
- A reduced level of traffic in the network of Quantock lanes and roads.

### **Visitors, Access and Traffic**

#### **Objectives:**

To protect the sensitive hilltop commons from damaging pressures while accommodating public enjoyment of the AONB particularly where this supports the local economy.

#### **Visitor and Recreation Action Points:**

VAP 1: Maintain and locally promote circular routes including sites of local interest and based on Quantock villages and parking areas off the hilltop.

### **Community and Local Economy**

AONB policy and projects can directly support the local economy and employment.

#### **Objectives:**

To support projects which address village and rural economy and services issues in the AONB

To support the local economy and help development of sustainable marketing initiatives

To encourage the use of local facilities by visitors

To fully recognise the significance of villages in and around the Area of Outstanding Natural Beauty and promote their further involvement in the AONB policies and actions.

#### **Community and Local Economy Action Points:**

CAP 1: Encourage, support and develop partnerships with professional agencies and Local Authority rural development initiatives in Quantock Communities

CAP 2: Continue to develop a Quantock Rural Economy Project supporting the local sale and use of local products particularly through the Exmoor and Quantocks Food Links project investigating and developing food directories, local branding/labelling, promotion and education.

## **APPENDIX 10 – Copy of draft walks**

**Supplied separately in electronic format**

# APPENDIX 11 – Market Research Questionnaire

## Food Paths Questionnaire

Could I have just few minutes of your time and you could win £50 of local food. I am working for Somerset Food Links, a not for profit organisation, which is passionate about local food. We are working on a project called Food Paths - the idea being to package holidays featuring local food and walking. I just have ten questions I would like to ask you.

1 How many short breaks do you take each year in the UK?

0	2	4
1	3	5+

2 Where did you holiday in the UK last year? .....

3 Why?.....

.....

.....

.....

4 How did you find out about your holiday destination?

Travel agent  
Advert (where) .....  
TIC (where) .....  
Internet (which site) .....  
Word of mouth .....  
Other (please state) .....

5 What do you enjoy doing on holiday?

Country walking	Looking at the scenery
Guided walks	Visiting tourist attractions
Cycling	Eating out
Riding	Shopping (non food)
Buying local produce	Visiting f & f
Relaxing	
Other please state	.....

6 Have you heard of the term (AONB) Area of Outstanding Natural Beauty before?

Yes/No

a If no would the term AONB encourage you to visit a place? Yes/No

7 Have you visited the Blackdowns, Quantocks or Mendip Hills before? Yes/No

a If not why not? .....

b If yes how frequently?

Once only

Daily

Once a week

Once a month

Once a year

c what type of activities do you undertake?

Walk > 3 miles

Walk > 7 miles

Walk < 7 miles

Mountain bike/cycling

Watching wildlife

Horse riding

Eating/drinking/picnic

Shopping

Other .....

8 What type of things would encourage you to take a Food Paths holiday - that is one that featured walking routes between pubs, visiting local food producers and farms (show mock)?

1 .....

2 .....

3 .....

9 Where would you expect to find out about this type of holiday?

TIC	Internet	
Adverts (national)	Word of mouth	Local
papers	Please state .....	
Other please state .....		

10 Any other comments? .....

.....

.....

If you'd like to be entered in our prize draw please can I take your details?

Name.....

Address.....

.....

Post code.....

Email .....

Would you like to be added to our mailing list to receive more information about Food Paths

## **APPENDIX 12 – Market Research Results**

**Supplied separately in electronic format**

## **APPENDIX 13 – Graded Response Database**

**Supplied separately in electronic format**