CHAPTER 5

THE STATE OF FARMING ON DARTMOOR: SPECIALIST GRASS AND SPECIALIST HORSE FARMS

Of the 1,122 agricultural holdings covering the National Park there are 311, rather more than a quarter, that are classified as being either ‘specialist grass and forage’ (hereafter ‘specialist grass’) or ‘specialist horses’. Although these holdings may be involved in some agricultural activity, it is not at a level sufficient to allow classification into the main livestock or crop farm types. It is known that the former category in particular, specialist grass farms, are often associated with changing patterns of farm ownership (Turner, 1990). For example, where farmers have retired from full-time farming but either lack a successor or wish to maintain some connection with farming, they may choose to let their grazing land as ‘grass keep’ whilst remaining on the farm themselves. Later in this process of progressive disengagement from farming, farms may be sold to non-active farmers – perhaps bought primarily for the farmhouse – and the new owners may let the land to neighbouring farmers.

The other category considered separately in this chapter, ‘specialist horses’, is defined as such because the predominant business activity – but not necessarily the *only* activity - is associated with horses. Because a small number of ‘horse’ type holdings were present in the full-time holdings group, which were drawn at a higher sampling rate than the part-time category, the overall responses from ‘horse’ holdings has a marked bias. This has been corrected by weighting the responses up to population numbers.

On closer examination, two of the 17 grass holdings looked as if they were more active in agricultural terms than their census return had indicated and these have been excluded from the following analyses. Clearly some caution needs to be exercised when interpreting the results from small samples and, therefore, only selected analyses for specialist horse and specialist grass farms are presented.

Farm size, location and tenure

At around 20 hectares the average area of both ‘grass’ and ‘horse’ holdings is considerably smaller than the average for full-time farms (at 124 hectares). In fact, 37 per cent of the specialist horse and 27 per cent of the specialist grass holdings are of 10 hectares or less. Being much smaller holdings on the whole there is far less scope for such businesses to incorporate land which lies outside the Park boundary and indeed, as discussed above, many of their occupants probably have no interest in business expansion. On average, as Table 5.1 shows, the area of farmed land which lies outside the Park is less than one hectare for specialist horse farms and virtually non-existent for specialist grass farms. Similarly, the taking of grass keep and the use of commons grazings are not significant practices on either of these types of holdings.

Table 5.1 Farm size, location and tenure: 'specialist horses' and 'specialist grass and forage' holdings

	Specialist horses		Specialist grass and forage	
	Average area (ha)	As % of total area	Average area (ha)	As % of total area
Within the DNP	20.2	*99*	22.0	*100*
Outside the DNP	0.2	*1*	0.0	*0*
Total	20.4	*100*	22.0	*100*
Of which				
Owned	16.1	*79*	16.5	*75*
Tenanted	3.5	*17*	5.5	*25*
Grass keep	0.8	*4*	0.0	*0*
	20.4	*100*	22.0	*100*

The great majority of these types of holding are wholly owned, with about four out of five of the sample holdings so classified; the equivalent figure for specialist grass holdings is 75 per cent. Nevertheless there is a small number of tenanted holdings in both groups, and these are usually of larger than average size, with the remainder of the holdings being of mixed tenure.

Involvement with agri-environment schemes

Clearly, by their nature, the majority of both of these types holdings are not usually eligible for any of the livestock-related agri-environment payments, leaving the ESA scheme as the principal vehicle for state support. On this sample of specialist horse holdings the level of participation in this scheme, at 65 per cent, is virtually identical with that of full-time farms, while the survey indicates that specialist grass holdings are rather less likely to participate. These comparisons and other relevant findings are presented in Table 5.2.

Table 5.2 Receipt of agri-environment support: 'specialist horses' and 'specialist grass and forage' holdings compared with full-time farms

	As percentage of all:		
	Specialist horse holdings	Specialist grass holdings	*Full-time farms*
Hill Farming Allowance	8	7	*76*
Extensification	5	7	*79*
ESA on commons	8	0	*27*
ESA on own ground	65	47	*66*
SSSI	0	7	*5*
DNP agreement	4	0	*14*
Organic Aid Scheme	0	7	*5*
Other schemes	0	0	*4*
Any scheme	69	47	*92*
Any scheme excluding HFA or Extensification	69	47	*75*

The incidence of non-farming activities

There are some interesting findings in relation to the question concerning reliance on sources of non-farming income. With the exception of a small number of *commercial* equestrian enterprises, it might have been expected that most of the specialist grass and specialist horse holdings, as relatively small businesses in terms of DEFRA's standard classification, would declare a strong reliance on non-farming income. In fact, this expectation is confirmed to the extent that much greater proportions of respondents in both groups are dependent on non-farming income sources – 47 and 42 per cent respectively identified such income as 'crucial', with a further 25 and 20 per cent, respectively, regarding it as 'very important'. However, substantial proportions of both groups reported no other business activity, broadly similar to the findings on full-time farms.

Table 5.3 Respondents' assessments of the importance of non-farming income, 'specialist horses' and 'specialist grass and forage' holdings compared with full-time farms

	Highest level of importance			
	No activity	**Not very**	**Very**	**Crucial**
Specialist horses	33%	0%	25%	42%
Specialist grass	27%	7%	20%	47%
Full-time holdings	*32%*	*13%*	*26%*	*29%*

To the extent that some, if not most, of these holdings are occupied by people making a phased withdrawal from active farming (or, indeed, from any other gainful economic activity), it may be surmised that (unearned) income sources are likely to be important characteristics in many cases. Focusing on the type of non-farming business activities that specialist horse and specialist grass farms have, respondents cited non-farm income as being crucially important. Table 5.4 shows that respondents on specialist horse holdings reported that 28 per cent of their income comes from off-farm sources, while the corresponding percentage in Table 5.5 for respondents on specialist grass holdings is 20 per cent. However, equally crucial on the latter holdings is the income that received from tourist accommodation.

Table 5.4 The significance of non-farming sources of income on specialist horse holdings, by type of non-farming business activity

	Any activity	Importance		
		Not very	Very	Crucial
Processing and retailing	0%	0%	0%	0%
Tourist accommodation	20%	4%	12%	4%
Rents other than tourism	24%	4%	12%	8%
Recreation	5%	0%	0%	5%
Rural crafts	0%	0%	0%	0%
Contracting	4%	0%	0%	4%
Forestry	16%	8%	8%	0%
Off-farm income	37%	4%	5%	28%

Table 5.5 The significance of non-farming sources of income on specialist grass holdings, by type of non-farming business activity

	Any activity	Importance		
		Not very	Very	Crucial
Processing and retailing	0%	0%	0%	0%
Tourist accommodation	27%	0%	7%	20%
Rents other than tourism	27%	7%	13%	7%
Recreation	13%	0%	13%	0%
Rural crafts	13%	13%	0%	0%
Contracting	20%	13%	7%	0%
Forestry	27%	20%	0%	7%
Off-farm income	40%	7%	13%	20%

Employment characteristics: farming and non-farming activities

The essentially part-time nature of many of these holdings can be seen in Tables 5.6 and 5.7, which record that only 21 per cent of specialist horse holdings and 20 per cent of specialist grass holdings consider are operated as full-time farms, as compared to 84 per cent across all the other farm types. The number of regularly paid full-time workers on specialist horse holdings is very small (only 4 per cent with such employment), while there are no regularly paid full-time workers on specialist grass holdings although 7 per cent of respondents indicated that they employ paid workers on a part-time basis. This lack of workers on grass specialist holding clearly reflects the nature of the farming system on such holdings, perhaps also linked to their association with structural change in agriculture.

Table 5.6 Full-time and part-time employment on specialist horse holdings, by category of worker

	Farming		**Non-farming on farm**		**Off-farm**	
	Full-Time	**Part-time**	**Full-time**	**Part-time**	**Full-time**	**Part-time**
	Percentage of holdings					
Principal farmer(s) and spouse(s)	21	35	10	21	8	8
Other farmers, partners & directors	4	0	1	0	4	4
Regular paid workers and managers	4	4	1	5	0	0
Regular unpaid workers (inc. Unpaid family)	4	4	1	4	0	0
Casual workers	0	13	0	4	0	0

Table 5.7 Full-time and part-time employment on specialist grass holdings, by category of worker

	Farming		**Non-farming on farm**		**Off-farm**	
	Full-Time	**Part-time**	**Full-time**	**Part-time**	**Full-time**	**Part-time**
	Percentage of holdings					
Principal farmer(s) and spouse(s)	20	27	20	20	13	7
Other farmers, partners & directors	7	0	0	0	0	0
Regular paid workers and managers	0	7	20	0	0	0
Regular unpaid workers (inc. unpaid family)	0	0	0	0	0	0
Casual workers	0	13	0	40	0	0

Attitudes to countryside management issues

Again, this study identifies quite marked differences between the occupiers of these groups of holding and those on full-time farms, since respondents on both specialist horse and specialist grass holdings consider themselves to be markedly less restricted in their countryside management intentions than do full-time farmers. This finding could, of course, be a reflection of a number of different factors, including (a) a more limited scope for countryside management activities on the holdings concerned; (b) a lower level of interest in such activity among the occupiers of these holdings; or (c) a genuinely higher level of countryside management. In practice, while all of these possibilities may apply on different holdings, it is likely that many are operated with countryside management outputs relatively higher (than on full-time farms) as a management priority, simply because of the function of many such holdings as being less important as a means of earning a living (Turner, 1990). For instance, Table 5.8 shows that while nearly two thirds of the operators of specialist horse holdings regard inadequate financial returns from farming as a barrier to countryside management, the majority of them feel that the availability of labour, skills, appropriate advice and grants provide no such obstacle. However, whilst the operators of specialist grass holdings also consider themselves as less restricted than do full-time farmers, Table 5.9 suggests that there is a significant proportion who are undecided about the barriers to countryside management.

Table 5.8 Perceived restrictions on countryside management activities on specialist horse holdings

	Yes	No	Don't know
Inadequate financial returns from farming	63%	29%	8%
Availability of labour	8%	90%	3%
Availability of skills	18%	80%	3%
Availability or cost of appropriate advice	21%	76%	2%
Availability of appropriate grants	36%	62%	2%

Table 5.9 Perceived restrictions on countryside management activities on specialist grass holdings

	Yes	No	Don't know
Inadequate financial returns from farming	40%	40%	20%
Availability of labour	9%	64%	27%
Availability of skills	0%	70%	30%
Availability or cost of appropriate advice	10%	60%	30%
Availability of appropriate grants	18%	55%	27%

Attitudes to Dartmoor ponies

Dartmoor ponies are found on only 4 per cent of specialist horse and 7 per cent of specialist grass holdings in the sample. Despite this, the occupiers of both of these types of holding - particularly the specialist horse group - are in general more 'pro-ponies' in their attitudes than full-time farmers. It can be seen in Table 5.10 that 90 per cent of respondents on specialist horse holdings agree that ponies on Dartmoor portray a positive image, as compared to 76 per cent of respondents on full-time farms. In terms of the need to improve the breeding of Dartmoor ponies, 92 per cent of the occupiers of specialist horse holdings agreed with and none disagreed with this statement. Similarly, a higher proportion of the occupiers of specialist grass holdings agreed with the statement than full-time farmers. Finally, it will not be surprising that respondents on nearly half of the specialist horse holdings support the suggestion that subsidies should be paid to encourage the keeping of Dartmoor ponies (only 28 per cent of full-time farmers agree with this)!

Table 5.10 Attitudes to the keeping of Dartmoor ponies, 'specialist horse' and 'specialist grass and forage' holdings compared with full-time farms

	Agree	Disagree	No opinion
	Specialist horses		
The ponies on Dartmoor portray a positive image	90%	0%	10%
Keeping of ponies on Dartmoor needs encouragement	51%	36%	13%
Subsidies should be paid on keeping ponies	48%	36%	16%
The breeding of ponies on Dartmoor needs improvement	92%	0%	8%
	Specialist grass		
The ponies on Dartmoor portray a positive image	71%	14%	14%
Keeping of ponies on Dartmoor needs encouragement	50%	36%	14%
Subsidies should be paid on keeping ponies	33%	40%	27%
The breeding of ponies on Dartmoor needs improvement	79%	7%	14%
	Full-time farms		
The ponies on Dartmoor portray a positive image	76%	9%	15%
Keeping of ponies on Dartmoor needs encouragement	42%	36%	23%
Subsidies should be paid on keeping ponies	28%	49%	23%
The breeding of ponies on Dartmoor needs improvement	68%	14%	18%

CHAPTER 6

FACING THE FUTURE: THE RESULTS OF THE TELEPHONE SURVEY

Overview of the survey results

In this chapter the detailed findings of the telephone survey are presented and discussed. It may be useful first to restate the purpose and role of the telephone survey in this research. Part of the overall brief for the study, drawn up in the immediate aftermath of the FMD epidemic and in full awareness of the severity and longevity of the farming recession (University of Exeter, 2002), focussed on the need to look forward to possible development paths for Dartmoor's farming sector. Thus, inter alia, the research needed to explore the *drivers* of recent trends on the moor; farmers' current involvement in, and attitudes to, collaborative activity; and to assess farmers' own views of the strengths and weaknesses, opportunities and strengths, of their farms. The principal findings of the telephone survey, based on in-depth structured interviews with fifty Dartmoor farmers, are reviewed in turn. The selection of the interview sample is described in Chapter 1, and a copy of the questionnaire used can be found in Appendix 3.

The nature and causes of recent business changes

The interviewees were asked what, if any, changes there had been in their total business interests (including farming, non-farming activities on the farm and off-farm business activities) over the past five years. The responses were split roughly three ways: while 30 per cent of respondents indicated 'no change', 36 percent reported 'increased business activity' and 34 percent reported 'reduced business activity'. Each of these groups of respondents is considered in turn.

Businesses with increased activity

The principal reasons for farmers having increased their business activity over the last five years are given in Table 6.1. This shows that over half of the respondents followed this strategy as a result of the prolonged fall in farm incomes, most commonly through buying more land. Slightly fewer respondents, 39 per cent, suggested that farm activity has increased as a result of any move off-farm employment or self employment.

These survey findings strongly support the observation that many Dartmoor farmers are heedful both of government policy which is encouraging structural adjustment in farming (leading to fewer but larger and more competitive farm businesses) and a general consensus among industry experts that business survival will be more likely for larger farms. For this group, diversification represents less an alternative to farming than an addition to their business interests, relief from financial pressures is sought through expansion (presumably to reap economies of scale) and the need to accommodate the next generation of the family remains a significant driver for expansion.

Table 6.1 Driving factors associated with a recent increase in business activity

	As per cent of those who had increased activity
A response to the fall in farm incomes	54%
Bought extra land	52%
Off-farm employment/ self employment	39%
Following government policy to diversify	15%
Cash flow pressures	12%
Expansion through taking extra grass keep	8%
Business expansion the only direction to go	8%
Lost staff	8%
Work on farm part time	8%
Opportunistic - land up for sale	8%
Chasing expansion through more sales	8%
An important element of job satisfaction	8%
Building up livestock numbers	8%
Expansion to accommodate extra partners or family members	6%
Following government policy to encourage farming in a sustainable and environmentally friendly way.	6%
Finishing more animals to gain extra margins	6%
Moving into direct sales	4%
Pressure to employ extra staff	4%

Businesses with reduced activity

The principal reasons for a decrease in the business activity of Dartmoor farms over recent years are given in Table 6.2. Contraction prior to retirement is seen to be the main reason for decreasing farm activity (32 per cent) with, interestingly, nearly one in four responding to the fall in farm profitability through *decreasing* their business activity (as seen in Table 6.1, 54 per cent have *increased* their activity as a way of dealing with this pressure). This neatly illustrates the divergent strategies that farmers employ in reaction to economic and other pressures, the choice of response being influenced by a wide range of factors including the needs of the farm family. One very important finding is that an important causal factor associated with decreasing farm business activity is that of following government policy for the promotion of sustainable, environmentally friendly farming systems. Nearly one on four of the respondents cited this as a factor in the decrease in their business activity. Only 6 per cent of farmers interviewed suggested that the consequences of the FMD epidemic were a principal reason for a decrease in farm activity.

As might be expected, there is an overall impression of considerable diversity in the underlying reasons for Dartmoor farmers reducing either the scale or intensity of their farm businesses. Even so, two fairly distinct strands emerge. First, many of those who have recently reduced their farming activities have done so for reasons associated with their eventual withdrawal from full-time farming (including responses such as 'prior to retirement', or 'for health reasons', or 'no successor'). Secondly, some responses suggest a certain re-orientation of their farming in ways broadly in accord with government policy (including responses such as 'sustainable farming', diversification', 'better quality product' and 'stocking limits'). In other cases, the response appears to have been a forced and unwelcome adjustment under duress (including 'gloomy outlook', 'economics forced change' and 'financial pressures').

Table 6.2 Driving factors associated with a recent decrease in business activity

	As per cent of those who had reduced activity
Contraction prior to retirement	32%
A response to the fall in farm incomes	23%
Following government policy to farm in a sustainable and environmentally friendly way.	23%
Associated with a reduction in the area farmed	13%
Following government policy to diversify	13%
Need to concentrate on diversification	10%
DEFRA suggested overgrazing and also ceased to pay	6%
Response to gloomy outlook	6%
Modernisation requires too large an investment	6%
Lack of interest in farming by potential successor(s)	6%
Reduction in area - lost grass keep	6%
Opportunity to sell quota - no money	6%
Gave up one tenant farm	6%
Health problems forcing reduction in farming	6%
Getting older	6%
Didn't want to replace staff	6%
Stocking limits on common	6%
Economics forced change of farm system (out of dairying)	6%
FMD and its consequences	6%
Off-farm employment/ self employment	6%
Financial pressures	6%
Farm not big enough for two people	3%
Produce a better quality product	3%

Attitudes to collaborative activities

As noted above, this is a key area of the research. The interviewees were asked about their views on farmer-owned collaborative activities and what they consider are the attractions, and the downside, to becoming more involved in some form of collaborative activity.

Farmers' views on farmer-owned collaborative activities

Judged on the basis of the telephone sample, Dartmoor farmers hold quite varied views on collaborative activity. Indeed, Table 6.3 sets out in full the forty different views expressed by respondents. Just under half of the farmers (46 per cent) suggested that collaborative activity enables the more effective involvement of farmers in the supply chain so as to have more control over prices. Another important reason given in support of collaborative enterprises was that they help to create a balance of power with the buyers (21 per cent), while 8 per cent suggested collaboration can help traceability and thus strengthen consumer confidence.

Despite some very positive responses, many farmers were realistic enough to recognise that such ventures have often been beset by problems and some were sceptical about their prospects for success. Less favourable views regarding collaborative activity include the 22 per cent of respondents who suggested that farmers are too independent and individualistic to collaborate effectively while 10 per cent pointed out that, in terms of success, the historical record of collaborative ventures is poor. The responses have been reproduced in full because of the insight they give into the range of Dartmoor farmers' opinions on this important topic.

More positively, about one third of the surveyed farmers volunteered that collaborative activity is a good idea if its members can agree. This indicates that farmers' view the management of collaborative ventures as being an important element in their success, and is further reflected by the 10 per cent who suggested that the size of the group matters. Five per cent indicated that much planning is necessary in the initial stages of collaborative ventures and that a clear vision, perhaps through having an overall leader, is vital.

Overall, the range of views expressed may be summarised as follows: the group of respondents showed that they have a generally favourable view of the prospects for better collaboration, and that they have a good appreciation of both its potential benefits and its downside, while remaining determinedly realistic in their assessment of the factors which would count against its long term survival. On the basis of the survey findings, it seems clear that it is farmers' perceptions of the nature of the UK food chain, as it stands at present, that provides the bedrock of support for more farmer collaboration.

Table 6.3 Farmers' views on farmer-owned collaborative activities: all telephone interviewees

	As % of all interviewees
Allows farmer involvement in the supply chain so as to have more control over prices	46%
Good idea if can agree	31%
Farmers too independent/individualistic	22%
Essential to balance the powers of the buyers	21%
The record of such ventures is poor	10%
Does work if big enough group	10%
Buying groups work well, but not Selling Groups	9%
Gives traceability and consumer confidence	8%
Marketing strategy	7%
Needs a lot of planning initially	5%
Not enough bargaining power	5%
Need overall leader	5%
There just needs to be a catalyst to start the process	4%
Lose control of business	4%
Premium prices	4%
No view either way	4%
Take out the middle man	4%
Not sure about them	4%
Maintaining and sustaining it	3%
Reduced input costs - increased outputs	3%
Farmers do not trust each other or the management sufficiently for it to work	2%
Collaborative ventures are never large enough to gain any marketing advantage	2%
"Better to keep 3p of own than share 6p"	2%
If co-op too big forces prices down	2%
Machinery - all wanted it at same time	2%
Farmers not very good business men	2%
Benefits bigger farms more	2%
Disillusion because of past experience	2%
Not enough knowledge of markets	2%
No-one can farm on big enough scale to give quantity regularly	2%
Brought up to be independent	2%
Finances once up and running it	2%
Never found it successful	2%
Looking forward	2%
Global economy	2%
Needs to be a fair price for fair product	2%
Too many people fall out	1%
Try to make too much money	1%
Creates competition	1%
Not always consistent	1%

Farmers planning to start or increase their involvement in collaborative activity

Looking at the distribution of farmers' views on collaboration, Table 6.4 focuses on the responses of those farmers who are planning to start or to increase some form of group activity. Two thirds of these respondents supported the view that collaborative activity is a good idea providing members can reach agreement (presumably about the iwde range of strategic and managerial issues involved in such a venture) while 44 per cent of this sub-group of respondents suggested that such initiatives enable farmers' to have more control over prices through greater involvement in the supply chain. However, more than one in five of even this group regard (many) farmers as too independent and individualistic to make collaborative ventures work.

Table 6.4 Farmers' views on farmer-owned collaborative activities: interviewees planning to start or to increase group activities

	As % of interviewees planning to increase or start group activities
Good idea if can agree	67%
Allows farmer involvement in the supply chain so as to have more control over prices	44%
Essential to balance the powers of the buyers	33%
Farmers too independent/individualistic	22%
Marketing strategy	22%
The record of such ventures is poor	11%
Gives traceability and consumer confidence	11%
Needs a lot of planning initially	11%
Not enough bargaining power	11%
Need overall Leader	11%
Maintaining and sustaining it	11%
Does work if big enough group	11%
Too many people fall out	11%
Try to make too much money	11%
Creates competition	11%
Not always consistent	11%
Reduced input costs - increased outputs	11%

Principal attractions to getting involved in group activity (pull factors)

Respondents' perceptions of the attractions to becoming more involved in collaborative ventures are given in Table 6.5. Clearly not all respondents view collaborative ventures as attractive, with about one in three firmly indicating quite the opposite. However, 42 per cent of those who are attracted believe that such involvement has the potential to produce an economic advantage for their business, while 14 per cent suggested that the experience gained, and the access to the knowledge of a group, are also important. Other attractions to joining a collaborative venture suggested include the principle that it is good for farmers to work together (9 per cent) and that it provides a better channel to sell farm products (9 per cent).

Table 6.5 Perceived attractions to getting involved in collaborative ventures: all telephone interviewees

	As % of all interviewees
This would lead to an economic advantage to the business	42%
Not attracted at all!	34%
Experience and knowledge of group	14%
The principle that it is good for farmers to work together	9%
A good way to sell farm products	9%
A desire to work together (but not hopeful!)	7%
Buying groups work better than selling groups	5%
Controlling product and giving consumers what they want	4%
Co-op has greater appreciation of product	3%
Fall back if present arrangement fell down	2%
Difficult to market prime animals except in larger numbers	2%
Improved flexibility	2%
Good standard of product	2%
Encouragement of better breeding	2%
Desperation!	2%
Margins insufficient	2%
Would make a contribution if could	2%
Employment of extra staff	2%
Difficult as few livestock finished	2%
Do better on my own	2%
Provide a reliable market	2%

On the basis of the evidence in Table 6.6, interviewees who are planning to start or increase group activities identify the experience and knowledge of a collaborative group as crucial. Far less important are the principles that it is good for farmers to work together and that collaboration would lead to an economic advantage to the farmer’s business. Paradoxically, 11% of interviews planning to start or increase group activities are not attracted to them at all.

Table 6.6 Perceived attractions to getting involved in collaborative ventures: interviewees planning to start or increase group activities

	As % of interviewees planning to start or increase group activities
Experience and knowledge of group	78%
The principle that it is good for farmers to work together	22%
This would lead to an economic advantage to the business	22%
Better way to sell product	22%
Provide a reliable market	22%
Not attracted at all!	11%
Co-op has greater appreciation of product	11%
Buying groups work better than selling groups	11%

Help needed in running businesses

The telephone interview explored the needs of Dartmoor farmers for additional support through this period of transition on farming and, in particular, the extent to which respondents recognise and acknowledge their need for such help. The identified areas for additional help was divided into (a) training needs, (b) assistance in management and (c) the ability of farmers to access rural development funds. These three aspects of farmers' support needs are considered in turn.

Training needs

About one in four of the telephone interviewees admitted to staff training needs, with the types of the needs being indicated in Table 6.7. Clearly, additional training in the use of computers is shown as being of the highest priority, identified as such by 58 per cent of respondents. If the use of the internet is added to this, the proportion of farmers with a perceived ICT training need rises to 66 per cent. In contrast, the second most acknowledged training need is the development of woodland skills, albeit much lower at only12 per cent.

Table 6.7 Acknowledged training needs: all telephone interviewees

	As % of interviewees with training needs
Use of computers	58%
Woodland skills	12%
Use of the internet	8%
Managing 'diversified' enterprises	8%
Planning	8%
Marketing	8%
Business management	4%
Rural skills	4%

Assistance in management

The demands of managing larger and more complex, or diverse, businesses were widely recognised, and 27 per cent of interviewees recognised one or more areas of their businesses in which they require help in their management: these are listed in Table 6.8. As with training needs, the use of computers is highlighted as being the most important area in which assistance is required for management. Closely following this, help in the development and running of diversified enterprises and in marketing farm products were each identified by 20 per cent of respondents.

Table 6.8 Acknowledged areas for assistance with management: interviewees with management needs

	As % of interviewees with management needs
Use of computers	24%
Managing 'diversified' enterprises	20%
Marketing	20%
Business management	12%
Environmental maintenance	12%
Use of internet	8%
Technical courses	8%
Would need advice	8%
Planning	4%
Equestrian activities	4%

Access to rural development funds

While it is beyond the scope of this study to review the difficulties which farmers have in effectively accessing rural development funds, the 'second pillar of the CAP', it is widely recognised as an issue in which the agricultural industry is less well – placed than some others. Three quarters of the telephone respondents reported not having access to rural development funds. Of those who do feel able to access these funds, 60 per cent relate them to environmental issues or schemes. As Table 6.9 shows, while 16 per cent of interviewees believe they have access to such funds they are unsure as to what they include and a further 8 per cent have not closely considered the possibilities of this source of funding.

When respondents were asked about which agencies might assist in accessing rural development funds, DEFRA was the most frequently suggested (30 per cent indicating this), followed by the NFU (11 per cent) (Table 6.10). However, well over a quarter of interviewees were not sure who to ask for advice and assistance regarding rural development funds.

Table 6.9 Respondents' views about their access to rural development funds

	Not able to access fund	Able to access funds
	73%	27%
	Of which cited	Of which cited
Only ESA schemes	15%	32%
Don't know what is included	11%	16%
Not looked into it	11%	8%
Would be worse off	11%	0%
No suitable idea	6%	0%
Not in right area	6%	0%
On environmental issues only	5%	28%
Too complex	3%	0%
Not suitable to my business	3%	0%
Need advice / help	3%	0%
Not accessible	3%	8%
Not enough of them	3%	0%
Already on a lot of schemes	3%	0%
Not involved at the moment	3%	0%
Will look in the future	3%	0%
Over-rigorous in regulation	1%	16%
Got to get different funding	1%	0%
Access all that I can	1%	0%
Investigating Countryside Stewardship	1%	0%
Only a small farm	0%	8%

Table 6.10 Suggested agencies to assist in accessing rural development funds, and other relevant responses

	As % of all interviewees
DEFRA	30%
Not sure	28%
NFU	11%
FRCA/RBA	9%
National Park Authority	9%
Local auctioneers	8%
Independent body	8%
Agri-BIP	5%
Government funded	4%
University	4%
CLBA	2%
Need quality data	2%
Ex- ministry men	2%
Business Link	1%

Farming support and agri-environment schemes

Farmers were asked about their views on the nature of support for farming, both with regard to the current situation and their participation, or otherwise, in agri-environment schemes.

Views on the current system of farm support

One of the purposes of the research is to inform the Authority, and the 'Moor Futures' initiative, about the views of Dartmoor farmers towards current policy, which can be used in formulating responses to future policy development as well as guide any local initiatives. A total of fifty-two different views on the current support system are expressed by farmers and these are detailed in Table 6.11. The most popular view expressed is that current policy needs to be refined to target support better, which is held by 47 per cent of respondents. Only 21 per cent of the telephone respondents were in favour of any further move towards area payments and only 14 per cent of respondents supported the priciple of modulation and the redirection of funds to rural development. One in eight respondents favour making improvements in the quality of farm products.

Table 6.11 Farmers' views on the current system of agricultural support

	As % of all interviewees
The current policy needs refining to target support better	47%
The move to area payments will help farming on Dartmoor	21%
Modulation and redirection of funds to rural development is a good idea	14%
Should be more emphasis on quality	12%
Direct support to small farmers	10%
Environmental payments not good	9%
Cap total 'subsidy' per farm	9%
Very few farms can survive without subsidies	8%
The level of support needs increasing in hill areas	8%
Remove all farm support	7%
Environmental support better for public image	5%
Should be based on production	5%
Should be more environmental cross compliance	4%
Need level support within EU	4%
Area payments will discourage keeping too many stock	4%
Help for maintenance to keep it like it is	4%
To many payments go to land owners	4%
Prices still an issue	4%
Rewards people who don't farm properly	4%
Target support to small farms	3%
Reduce food imports	3%
Pro-rata on size of farm environment	3%
The current system should not be changed	2%
Emphasis on finished stock weight	2%
Help for young farmers needed	2%
Early retirement scheme needed	2%
Don't like way people farm because of subsides but don't need them	2%
Management subsides for environmental improvements good	2%
Headage payments encouraged bad practice	2%
Money confiscated – we don't see it again	2%
Less money to spend on conservation	2%
Moorland farmers get more money than National Park	2%
Need total return at end of the day	2%
Getting worse with subsidies cut	2%
Need to educate the public	2%
Need to stop changing schemes	2%
Subsidies should be tied to employment	2%
Should no longer payment on finished stock	2%
Dairy sector gets insufficient subsidies	2%
Not aware of all the changes	2%
A poor situation with no support	2%
Over the top with environmental issues	2%
In favour of environmental subsides	2%
Stop rule breaking!	1%
Big farms doing OK - don't need to diversify	1%
Headage subsidy – crazy	1%
Should be more market based	1%
Imbalances in system	1%
Too many controls!	1%
Should be more organised	1%

Should pay for environmental work	1%

Participants in agri-environment management agreements

Eighty-two percent of those interviewed said they are currently participating in agri-environment management agreements. Of these, nearly all respondents believe that the schemes help to sustain the environment, as shown in Table 6.12. Fewer, but still the majority of respondents, consider that the impact of their participation in the schemes enhance or improve the environment; and only a minority regard the schemes as having a negative impact on their farming business.

Table 6.12 The impact of participation in agri-environment management agreements

	Yes	No	Don't know
	As % of those in agreements		
Scheme(s) helped sustain the environment	97%	3%	0%
Scheme(s) enhanced or improved the environment	61%	33%	6%
Scheme(s) had negative impacts on business	24%	62%	14%

The impacts from participating in agri-environment management agreements were explored in more detail by asking the respondents about their thoughts regarding each of the alternative identified in Table 6.12. Table 6.13 details the opinions of those who thought the schemes help to sustain the environment. Half of these respondents consider the major benefit to have been in preserving the condition of hedgerows but, clearly, farmers' hold a wide range of views about the actual benefits of agri-environment schemes.

Table 6.13 Farmers' views of agri-environment schemes: how they help to sustain the environment

	As % of those who think such schemes help to sustain the environment
Hedges are not deteriorating	49%
Field boundaries	17%
Maintaining biodiversity	14%
Money to farm in a particular way - mixture of tiers 1A to 1D	8%
More income to spend on environment	6%
More aware of environment	6%
Preservation of buildings	6%
Grassland quality	6%
Moorland landscape	6%
Less grazing pressure	3%
More income	3%
Farm in an environmental friendly way	3%
Marshland	3%

Remove stock in winter	1%

Turning now to the second of the three propositions, Table 6.14 sets out farmers' examples of the benefits of agri-environment schemes. Hedgerows are thought also to have been enhanced as a result of farmers participating in agri-environment management agreements (43 per cent). Since hedges are highly visible then changes to them are easily seen whereas an improvement in biodiversity is more difficult to assess on a casual basis. Nevertheless, 14 per cent of respondents indicate that, in their view, the schemes have improved biodiversity. Eighteen per cent of farmers believe that they have more income to spend on improving the environment, which is more than the corresponding group who suggest that the schemes serve only to sustain the environment.

Table 6.14 Farmers' views of agri-environment schemes: how they help to enhance or improve the environment

	As % of those who think such schemes help to enhance the environment
Hedges are improving	43%
More income to spend on environment	18%
Better biodiversity	14%
Field boundaries	11%
Moorland	11%
Buildings	9%
Hope so	5%
Visually	4%
Grassland	2%

Finally, despite the positive benefits that farmers perceive from participating in agri-environmental management agreements, what are the negative impacts of agri-environment schemes in the context of farm business management? The survey hasa found that 41 per cent of the Dartmoor farmers involved in the telephone interviews feel that managing the land in a more environmentally benign way often results in less flexibility with regard to their pattern of farm production and, furthermore, 24 per cent suggest they cannot keep as many stock on their land. However, only 6 per cent of respondents think that management agreements necessarily result in lower farm incomes.

Table 6.15 Farmers' views of agri-environment schemes: how they may have negative impacts on farm businesses

	As % of those who think such schemes have negative impacts on business
Less flexibility of production	41%
Cannot keep as many stock	24%
A five year undertaking	12%
Allocation of funds	12%
Planning to do second scheme takes years	12%
Lower farm income	6%

Non-participants in agri-environment schemes

Of the almost one in five who are not currently participating in schemes, 69 per cent have considered becoming involved against 31 per cent who have not. Reasons for deciding not to proceed with their application for involvement include the length of commitment required and restrictions imposed by the schemes. Those who have not considered joining the schemes mention their preference for independence, the complexity of the schemes and their inability to get the necessary permission from their landlords. However, the number of cases involved is too small to produce a meaningful ranking of the relative importance of these factors.

A SWOT analysis of respondents businesses

Farmers involved in the telephone sample were asked to comment on the strengths, weaknesses, opportunities and threats to their businesses. Originally this was tried as part of the postal survey, but at the pilot stage it was found that too many respondents were likely to find the completion of these questions an unwarranted burden, and this area of the research was moved to the telephone survey. This analysis focuses first on factors which are internal to the business and specific to that business (its strengths and weaknesses), though many of the factors are common to a greater or lesser extent. The focus of attention then moves to the industry level (opportunities and threats) and seeks to identify the generic factors which, for better or worse, influence the performance and viability of the individual business. The survey findings on each one of the individual questions – strengths, weaknesses, opportunities and threats - are analysed and presented in turn, with comparisons made where applicable.

Strengths

Respondents views about the main strengths of their farm businesses are summarised in Table 6.16. It appears that most Dartmoor farmers regard as their main strengths (a) the ability to produce quality livestock (30 per cent), (b) the ability to run their business with family labour (25 per cent) and (c) running their business without reliance on borrowed money (20 per cent).

Exploring the latter strength in more detail, at this time of very difficult economic conditions the financial strength of the business is seen to be paramount. This can be enhanced through gaining non-farming income from diversification (14 per cent) and the ability to generate off-farm income (11 per cent) are also notable strengths. Other financial strengths that farmers suggest include: the ability to be self-sufficient, operating with minimal overheads, the ability to draw down subsidies, having low borrowings and keeping costs low relative to output.

Table 6.16 The Dartmoor SWOT analysis: strengths

	As % of all interviewees
Produce quality livestock	30%
Business run with family labour	25%
No borrowed money	20%
Non farming income/ diversified	14%
Farming experience	12%
Ability to generate off-farm income	11%
Location	11%
Farm landscape	10%
'Self-sufficiency'	9%
LFA status	8%
Adaptability	8%
Don't know	7%
Owner-occupied status	7%
Minimal overheads	5%
Determination	5%
Good quality land	5%
Ability to draw subsidy	4%
Low borrowings	4%
Keep staff employed	3%
Hill grazing	2%
Cautious planning within limitations	2%
Keep costs relative to low output	2%
Use of common land	2%
Health	2%
None these days	2%
High Welfare standards	2%
High value breeding stock	2%
Co-operation with farmers	2%
Dedication	2%
Size	2%
Maintaining grasses and hedges under ESA	2%
Look at other types of farming	1%
People skills	1%
Control in market	1%

Interestingly, positive personal qualities of farmers are regarded as strengths by interviewees. For instance, 12 per cent of farmers consider farming experience as a strength with adaptability, determination and dedication also being suggested. More negatively, only one respondent could see no strengths in their current farm business.

Weaknesses

The main weakness, identified by nearly a quarter of the respondents, is that their farm business is too small. However, as Table 6.17 shows, some 11 per cent of respondents did not know of any weaknesses while a further 5 per cent were unable to identify them.

As is the case with regard to business strengths, financial reasons were commonly cited as weaknesses of the farm business. For example, 9 per cent of interviewees consider that too much of their business capital is tied up earning poor returns, while the similar proportion consider themselves to be under-capitalised. Additionally, a small percentage suggest that business viability and a lack of investment are also problems. Associated with these financial aspects of business weaknesses is the reliance of some farmers on the (low) price that they receive for their products. Thus, respondents commented on the unacceptable way in prices are dictated to farmers, too low, that they are unable to receive premium prices for premium products or that they can not see how hill farming as a system pays.

By focusing on weaknesses the negative side of farmers, and their perceptions of their businesses and their abilities, becomes apparent. A number of respondents regard some of their personal characteristics as business weaknesses, including a lack of motivation, not being sufficiently business-minded and the need to put in (even more) time and effort. Such responses are understandable at a time of considerable economic difficulty in Dartmoor's farming industry.

As might be expected in a sample of fifty, some respondents have opposing views about whether particular characteristics of Dartmoor farms are strengths or weaknesses. For instance, while 11 per cent of interviewees consider their location as a strength, 3 per cent see it as a weakness! Also, although 11 per cent regard the ability to generate off-farm income as a business strength, some 3 per cent regard it almost as an encumbrance since they *have to have* off-farm employment. Turning to the issues of land tenure, a slightly different comparison is the contrast between owner-occupiers and tenanted farmers. Seven percent of respondents indicated that being an owner-occupier is a strength while 9 per cent regard being a tenant is provides significantly fewer opportunities.

Table 6.17 The Dartmoor SWOT analysis: weaknesses

	As % of all interviewees
Too small	23%
Don't know	11%
Too much money tied up with a poor return	9%
Under capitalised	9%
Old Age	9%
Tenants have less opportunities	9%
Prices dictated	8%
Low prices	8%
Could do with staff	7%
Lack of investment	7%
Uncertain future	7%
Do not receive premium prices for premium product	7%
Viability	5%
Cannot think of any	5%
Planning restrictions	5%
Insufficient livestock housing	4%
Paperwork	4%
Cannot see a means of hill farming that will pay	4%
Marketing	4%
Location	4%
Borrowings	4%
Ground not so productive	3%
Have to have off-farm employment	3%
Economies of scale	2%
Reliance on quality livestock	2%
Bureaucratic interference	2%
More Labour due to Horses	2%
All we do can be done better	2%
Lost Grass Keep	2%
Restrictions - FMD, BSE	2%
General Public	2%
Only have one product	2%
FMD	2%
Lack of self motivation	2%
Co-operation needed with other Farmers	2%
Not business 'minded'	1%
Time and effort needed	1%

Opportunities

Regardless of whether interviewees are tenants or otherwise, the opportunities that they perceive as being available to them are shown in Table 6.18. While 20 per cent of the respondents identified diversification as an opportunity, a further 20 per cent cannot see that any such opportunities are available in the Park and a further 11 per cent did not know of any. More positively, in addition to the opportunities provided by diversification, marketing is seen as providing important opportunities. In particular, 15 per cent of farmers regard the opportunities to direct market produce as an opportunity, 11 per cent consider the image of Dartmoor as such while one respondent mentioned the image of the South West as marketable; a further respondent suggested that the streamlining of marketing is an important opportunity. Another positive opportunity, regarded as such by one in ten of respondents, is that better co-operation between farmers has potential. Opportunities are also apparent for the livestock enterprises on the Park's farms, with interviewees suggesting the ability the sell finished instead of store livestock, new opportunities to export and the intrinsic quality of the Dartmoor product.

Table 6.18 The Dartmoor SWOT analysis: opportunities

	As % of all interviewees
Cannot see any	20%
Diversification	20%
Direct marketing of produce	15%
Don't know	11%
Market the image of Dartmoor	11%
Co-operation between farmers	10%
Selling finished rather than store livestock	9%
Adapt to new schemes	8%
Better prices	5%
Tourism	4%
Don't know on agricultural side	4%
Keeping eyes open	4%
Exporting	4%
Successors to take on	2%
Remaining businesses will make a living	2%
Not a big future while abundance of food	2%
Make savings	2%
High standards in feeding the nation	2%
Retiring and letting out farm	2%
Streamline marketing	2%
Expansion of land	2%
Selling land for houses	2%
Pretty limited	2%
Image of South West	2%
Not many	2%
Employment off-farm	2%
Not much future in the long term	2%
Contracting	2%
Keeping less and keeping longer	2%
Environmental schemes	2%
Training farm approach	1%
Quality of product	1%

Threats

The converse of opportunities, business threats, are highlighted in Table 6.19. The most significant of these is seen to be more regulation as a result of government policy, with 60 per cent of interviewees identifying this. Much less significant are the regulations associated with farming within the DNP as only 7 per cent indicated this as a problem. The second threat, suggested by 38 per cent of respondents, are those posed by imports, world trade and the effects of globalisation. Clearly, since the viability of hill farming is marginal, and dependent for its prosperity – indeed, for its survival - on state support in some shape or form, threats from these external sources are perceived with as significant with great clarity.

Table 6.19 The Dartmoor SWOT analysis: threats

	As % of all interviewees
More regulation / government policy	60%
Imports/world trade/globalisation	38%
Disease e.g. TB	20%
Supermarket control	18%
Government attitude towards farmers	18%
Public interference	16%
Right to roam	14%
Continued low prices for livestock	12%
Government handling if the crisis	9%
View that Government departments are never wrong	7%
DNP regulation	7%
Planning	7%
Reduction in financial support from the government	7%
Economic pressure	7%
Interference with country pursuits	5%
Increasing costs- transportation and regulation	5%
Land prices	4%
Local infrastructure	4%
European Union	3%
Move to area payments	2%
Don't know	2%
Penalised by mistakes	2%
Lack of information/poor communication	2%
Hunting job- too many vermin about	2%
Not enough country people in the Labour party	2%
Old age	2%
Agri-environmental schemes	2%
So much legislation	2%
Low prices	2%
Not sure which way to go	2%
Health and Safety	2%
Land price too high	1%
Not being able to see light at the end of tunnel	1%

The respondents identified a diverse range of threats to Dartmoor's farming. For instance, 20 per cent regard the possibility diseases to be a threat, which may be understandable given the recent history of FMD and the on-going fears about TB. Some respondents also regard the general public as a potential threat, through ill-informed interference and also as a consequence of 'the right to roam'. The government is another source of threats for some interviewees, particularly when government departments behave as if they are never wrong. Moreover, some believe that its handling of the farming crisis is poor; that it is reducing the overall level of financial support for the industry and, more politically, that not enough country people are in the Labour party (so the government is less likely to understand the working of rural areas).

Business viability: sources of income

The telephone survey looked at the principal sources of total household income. Based on the results of the telephone survey, more than two out of three Dartmoor farmers depend entirely on the income generated by their farms with 53 per cent receiving their income totally from farming and a further 15 per cent receiving income from both farming and on-farm non-farming activity (Table 6.22). About one in five indicated that they receive their income from both their farming activities and from off-farm earnings (either non-farming businesses or off-farm earnings). Only 13 per cent of respondents gain income from all three sources.

Table 6.20 Sources of income for Dartmoor farmers

	As % of all telephone interviewees
Farming only	53
Farming and non-farming on the farm	15
Farming and off-farm	19
All three	13

Table 6.21 sets out the survey information on the levels and sources of income in more detail. Over 60 per cent of farmers reported that pre-tax profits from farming sources are £10K or less, with the great majority of these falling into the £0-£5K band. Indeed, Table 6.23 shows that only 18 per cent of respondents report pre-tax profits in the range of £10-£20K, while 16 per cent fall into the top, £20-£50K band. These findings are consistent with the University of Exeter's farm Business Survey (University of Exeter, 2002).

Nearly half of respondents reported having either off-farm income or income from non-farming activities on the farm, or both, but the pattern is very diverse. For example, of the 37 per cent in the £0-£5K band, 23 per cent indicated they receive no income from non-farming on the farm activities while 10% receive somewhere in the range of £0-£5K, 2 per cent have £10-£20K additional income and another per cent receive up to ten times as much income from such sources. Similarly, 15 per cent of interviewees whose farming income is in the £0-£5K band reported that they receive income from off-farm sources. Generally, off-farm and non-farming-on-the-farm activities are equally prevalent (at approximately 30 per cent of respondents), but profits from off-farm activities are three times as likely to exceed £10K as those from non-farming activities.

Table 6.21 Sources of income: farming, non-farming and off-farm: all telephone interviewees

Non-farming on the farm						Income from farming	Off-farm activities				
20-50K	10-20K	5-10K	0-5K	Don't know	None		None	0-5K	5-10K	10-20K	20-50K
						20-50K					
		2%	2%		12%	16%	15%			1%	
						10-20K					
		2%	7%		9%	18%	12%	1%	2%	2%	
						5-10K					
					8%	8%	4%	1%	2%		
						0-5K					
2%	2%		10%		23%	37%	22%	3%	5%	7%	
						-5-0K					
		2%			4%	7%	4%			2%	
						<-5K					
					2%	2%		1%			1%
						Don’t know					
				1%	7%	8%	8%				
						Refused					
					4%	4%	4%				
						Total					
2%	2%	7%	19%	1%	69%	100%	70%	7%	10%	12%	1%

The consequences of the FMD epidemic

The ongoing problems of the FMD crisis are summarised in Table 6.22. It will be seen that while 20 per cent of respondents reported that they do not have any ongoing problems 35 per cent indicated problems resulting from additional paperwork. In particular, 25 per cent reported difficulties with the 20 day standstill on livestock movements and nearly as many were concerned about bio-security measures at livestock markets. Other ongoing problems that are likely to have a lasting effect on the Park include the loss of hefted stock from Dartmoor (4 per cent), late calving due to disrupted breeding patterns during 2001 (4 per cent) and the upsetting of farming patterns (3 per cent). While the number of interviewees reporting each of these is small, it is clear that it will take a considerable time for those affected to re-adjust to a normal farming pattern.

Table 6.22 Ongoing problems caused by FMD crisis

	As % of all interviewees
Volume of paperwork	35%
Difficulties with 20 day standstill	25%
Bio-security at markets	24%
None	20%
Lack of freedom	14%
Livestock management	13%
Increase in costs	12%
Loss of income	7%
Lack of livestock markets	7%
Due to forced sale/slaughter of breeding animals flock/herd size is lower than normal	7%
Still overstocked	7%
Affect on markets	7%
Reduction in prices	5%
Extra costs of livestock haulage	4%
Shortage of winter feed	4%
Loss of ‘hefted’ stock from Dartmoor	4%
Late calving	4%
Psychological	4%
Cannot restock due to commons restrictions	3%
Upset pattern of farming	3%
Delayed retirement	2%
Slaughterhouses’ constraints	2%
Grass keep prices still too high	2%
General lack of confidence	1%

Summary

Changes over the last five years

Roughly, a third of the interviewees fall into each of the following categories: no change, increased activity and reduced activity. From these, the most frequently cited reasons for change are:

Increased activity	Reduced activity
Response to fall in farm incomes (54%)	Contraction prior to retirement (32%)
Acquisition of additional land (52%)	Response to fall in farm incomes (23%)
Increase in off-farm activity (39%)	Moving to environmentally friendly farming (23%)

Collaborative activities

Respondent farmers hold quite mixed views ranging from 'essential' to 'impossible.' The most popular views on collaborative activities are:

- Allows farmer involvement in the supply chain (46 per cent);
- A good idea if agreement can be reached (31 per cent);
- Farmers are too independent (22 per cent); and
- Essential to balance the power of buyers (21per cent).

Aside from those concluding that collaborative activities offer no attraction at all (34 per cent) their principal draw is seen to be the economic advantage they may offer (42 per cent) and the access to knowledge and experience (14 per cent).

Help needed in running businesses

Three areas of potential additional help needed in running their businesses were explored, namely staff training needs, management needs, and access to rural development funds. The findings are as follows:

- About a quarter of the interviewees said they have staff training needs, with over half of the cases in relation to the use of computers;
- About a quarter of the interviewees said they require help with business management. Alongside use of computers, areas identified include managing diversified enterprises and marketing;
- Those who feel that they are able to access rural development funds see these mainly as relating to environmental issues or schemes;
- DEFRA is the most frequently suggested agency for assisting with rural development funds (30 per cent) closely followed by 'not sure' (28 per cent).

State support for farming

The view that current policy needs refining to better target support is widely held (47 per cent) along with backing for the move to area payments (21 per cent) and modulation / rural development (14 per cent).

Participation in agri-environment management agreements is also explored:

- Four fifths of those interviewed are participating in agri-environment schemes;
- Nearly all believe that the schemes have helped *sustain* the environment, in particular hedges (49 per cent), field boundaries (17 per cent) and biodiversity (14 per cent);
- Sixty percent feel the schemes had *improved* the environment, principally in the same areas;
- One quarter identify some negative impact on their businesses, in particular through the loss of flexibility in production and the restriction of stocking levels.

Strengths, weaknesses, opportunities and threats

The main strengths, weakness, opportunities and threats identified by the telephone sample of Dartmoor farmers are summarised below.

Strengths	**Weaknesses**
Quality livestock product (30%) Family labour (25% No borrowings (20%)	Small farm size (23%)
Opportunities	**Threats**
Diversification (20%) Direct marketing (15%)	More regulation / gov't policy (60%) Imports / world trade (38%) Disease (20%) Supermarket control (18%)

Level and sources of income

- Over sixty percent of those who gave an answered this question reported pre-tax profits from farming of £10K or less, with the great majority of these falling into the £0-£5K band;
- Nearly half report having either off-farm income or income from non-farming activities on the farm, or both;
- Off-farm and non-farming on-farm activities are equally prevalent at about thirty per cent of respondents but profits from off-farm activities are three times as likely to exceed £10K as those from non-farming activities.

Impact of the FMD crisis

Although 20 per cent of the interviewees report no ongoing FMD-related problems other are still concerned about:

- The volume of paperwork (35 per cent);
- Difficulties with the 20 day standstill (25 per cent); and
- Bio-security at markets (20 per cent).

7. RECOMMENDATIONS FOR FUTURE ACTION

71. Participation in the ESA scheme is very high at about two thirds of full-time farmers, which reflects well on all concerned with implementing the scheme as well as on the community of Dartmoor farmers. The research has found, moreover, that Dartmoor farmers are generally very positive about environment-friendly farming (providing they can make a reasonable living) and about the impact of the ESA on their businesses. Negotiations are currently underway to extend the take up of the ESA on the commons of Dartmoor.

The 'Moor Futures' initiative should consider ways in which these findings can be used (a) to strengthen the extension of ESA take up on the commons and (b) to encourage further uptake among the third of farmers still not involved. Particular attention should be given to knowledge transfer activities such as demonstrations and farmer discussion groups.

72. The research has provided further evidence, if any were needed, that the Dartmoor farming community is ageing at the same time as economic pressures are encouraging further reductions and 'casualisation' in the workforce with greater reliance on contractors. The continuing lack of involvement in labour sharing schemes and machinery rings seems hard to explain, therefore, other than in terms of a lack of appreciation of their potential role.

The 'Moor Futures' initiative, therefore, should explore ways in which it could co-ordinate and develop such schemes on Dartmoor, using a pilot project backed up by good dissemination of the experience gained.

73. The research focussed particularly on group and collaborative activity among Dartmoor farmers. While the findings show that, to date, this is not a common practice among Dartmoor farmers (only one in four respondents involved in any sort of Discussion group, for example), it is clear that there must be considerable potential for improvement. As an objective of the 'Moor Futures' initiative this could make a very significant difference to the adaptation to the changing economic and policy environment in which Dartmoor farmers will increasingly find themselves over the coming years, through strengthening mutual support in the farming community.

Our recommendations cover several different aspects:

- *Co-operation needs to start with bringing farmers together. It appears that the Dartmoor Hill Farming Discussion Group is not entirely open and, in any case, it probably has a large enough membership. The possibilities for facilitating new groups should be actively pursued (e.g. through PROSPER or SWARD; or setting up a group for younger farmers).*
- *Such a group(s) will need the continuing support of a suitable facilitator, for which funding will be required. Ideally such a person will not be too closely associated with any formal organisation. We are aware of excellent (even pioneering) work being done by staff at the Duchy College in establishing farmers discussion groups (funded by Objective 1 and by the MDC), and by the Exeter Diocese of the Church of England. The advice of Duchy staff and the Diocesan Rural Officer should be sought.*

- *There is an evident need for a co-ordinated approach to the provision and uptake of training. The research found a widely recognised need for training in computing for example, and a perception that this isn't readily available, yet we understand that there is a range of potentially suitable courses available.*
- *There may be a potential role for developing the future range of functions at livestock markets serving the moor. Given the need to foster group activity and co-ordinate training, and markets' traditional role as a meeting place and opportunity for social contact, the possibility of improving links with training provision and of initiating group activity is worth exploring. In this context the involvement of the auctioneers KVN on Bodmin Moor is noted.*

74. The possibility of Dartmoor farmers making effective applications for ERDP funds is not strong, because of a great lack of understanding about their purpose (and potential value in farming) and the application criteria and method. This may be contrasted with farmers' relative familiarity with agri-environment schemes, for example. This situation should be remedied as soon as possible.

The 'Moor Futures' initiative should be pro-active in examining the potential for greater use of the ERDP in furthering the economic development of the moor. Its most useful role needs further discussion, but one possibility is to facilitate Dartmoor's access to this funding through a 'pump-priming' approach.

75. The SWOT analysis identified a widely held perception of the high quality of Dartmoor livestock and of the potential for an increased involvement in direct marketing. Clearly, there are only so many opportunities for successful lone farmer-initiated enterprises of this kind; but, equally clearly, there is considerable potential for the development and commercial exploitation of the Dartmoor product. An initiative which is researching the market potential is already underway, and there are other similar initiatives elsewhere in the Southwest.

In conjunction with existing regional initiatives, 'Moor Futures' should encourage, if not actively make possible, the co-ordination of a Dartmoor meat marketing initiative with the aim of identifying the best way forward in this very competitive market.

76. There are a number of the **recommendations made by the Task Force for the Hills** which this research has identified as of continuing relevance for Dartmoor:

- Number 1 (short term) – explore the local impact of Hill Farm Allowance payments in terms of winners and losers;
- Number 7 (short term) – encourage the uptake of the ESA scheme as the best way to enhance both farming and the environment;
- Number 10 (medium/longer term) – reward for the production of environmental outputs;
- Number 13 (short term) – investigate the local application of ERDP funds for farming infrastructure;
- Number 18 (short/medium term) – support business and environmental appraisal funded by the FBAS;

- Number 20 (short term) – appraisal (under FBAS) of farm business viability and its interface with farm diversification;
- Number 21 (short term) – re-examine the scope for funding public sector involvement under the ERDP;
- Number 26 (medium term) – delegated grant funds to a 'first stop shop' advisory service;

REFERENCES

ADAS, 2000, *English agriculture: opportunities for change: Diversification*. Report to the Countryside Agency, ADAS, Wolverhampton

Barr CJ (Ed), 1997, 'Current status and prospects for key habitats in England, Part 3', *Upland Landscapes*, Department of the Environment, Transport and the Regions, HMSO, London

Bullen J, Scott A, and Jones E, 1998, *Public Perception of Landscape in Gwynedd*. Report to the Countryside Council for Wales, Welsh Institute for Rural Studies, Aberystwyth.

DETR, 2000, *Accounting for nature: assessing habitats in the UK countryside*, DETR, London, November 2000

DETR & MAFF, 2000, *Our countryside: the future. A fair deal for rural England*, HMSO, London

Cahill, C. (2001) 'The multifunctionality of agriculture: what does it mean?' *EuroChoices*, Spring, 36-40.

Cordrey, L (ed), 1997, *Action for biodiversity in the South-West, a series of habitat and species plans to guide delivery*, June 1997

Dartmoor National Park Authority, 2001, *Action for Wildlife: the Dartmoor Bio-Diversity Action Plan*

DEFRA, 2002, *Redistribution of Hill Subsidies in England: Transition from HLCA to Hill Farm Allowances*, Economics (Farm Business) Division, DEFRA, March 2002

Devon County Council, 1999, *Agricultural Strategy for Devon*, Economy and Europe Office, DCC

Drew Associates and Exeter University,1997, *Economic Evaluation of the Hill Livestock Compensatory Allowances Scheme*, Agricultural Economics Unit, Exeter.

Egdell, J, Smith, D, and Taylor J, 1993, *Agricultural policy in the uplands: the move to extensification*, RSPB, Conservation Review 7

English Nature and Dartmoor National Park Authority, 2001, *The Nature of Dartmoor: a Bio-Diversity Profile*

Hester A J, 1996, *Overgrazing in upland habitats: a literature review*, CCW Contract Survey report 152

Lampkin, N and Powell, D (1998), *Organic Beef Production in Wales*, Welsh Institute of Rural Studies

Midmore P, Sherwood A, Roughley G, 1998, *Greening LFA payments: the environmental dimension of agricultural support in disadvantaged areas of the United Kingdom*, paper presented to 2nd International Conference of the LSIRD network, December 1998

NCC, 1990, *Focus on Nature Conservation: nature conservation and agricultural change*, Report No 25, 1990

Policy and Innovation Unit, 1999, *Rural Economies*

Pretty, J. Brett, C. Gee, D. Hine, R.C. Mason, C. Morison, J. Rayment, M. van der Bijl, G. and Dobbs, T.L. (2001) 'Policy challenges and priorities for internalizing the externalities of modern agriculture'. *Journal of Environmental Planning and Management* 44, 263-283.

Wildlife & Countryside Link, 2001, *Paying for the Stewardship of the Countryside, A Greenprint for Agri-Environment Schemes in England*

Winter M, Gaskell P, Gasson R, Short C, *The Effects of the 1992 Reform of the Common Agricultural Policy on the Countryside of Great Britain*, Volume 2 Main Findings, Countryside Commission, Cheltenham

2001, *A Sustainable Future for the South-West*, The Regional Sustainable Development Framework for the South-West of England 2001

Task Force for the Hills, *Final report*, March 2001

APPENDIX 1

STATISTICS ON DARTMOOR'S AGRICULTURE, 1990 TO 2000

DARTMOOR NATIONAL PARK: AGRICULTURAL STATISTICS[1], JUNE 2000

Land use

	No. of holdings	Hectares
Land rented	280	17157
Land owned	1031	29502
Total crops and fallow (tillage)	217	2523
Recent and temporary grassland (< 5 years)	216	3341
Permanent grassland (> 5 years)	929	26345
Rough grazing (sole rights)	282	11622
Woodand	362	1622
Set-Aside	34	302
All other land	452	687

Cereals

	No. of holdings	Hectares
Wheat	27	586
Winter barley	43	440
Spring barley	39	329
Oats	31	129
Other cereals (excluding maize)	9	44
Total cereals (excluding maize)	**93**	**1529**

Arable

	No. of holdings	Hectares
Potatoes (early and maincrop)	22	32
Sugar beet (not stockfeed)	0	0
Hops and other arable	6	44
Turnips, Swedes, kale, cabbage, savoy, Kohl rabi and rape	55	148
Fodder beet, mangolds and other crops	30	47
Horticultural crops	78	77
Field beans	***	***
Peas for harvesting dry	9	59
Maize	18	121
Oilseed rape	***	***
Linseed	13	229
Bare fallow	14	119

Horticulture

	No. of holdings	Hectares
Peas and beans	***	***
All other veg and salad	***	***
Total vegetables grown in the open	**21**	**16**
Area under glass or plastic	11	1
Top fruit	49	31
Small fruit	9	1
Total fruit	**54**	**33**
Hardy nursery stock	14	28
Bulbs and flowers grown in the open	***	***

Holdings by tillage and grass area

0 < 5 hectares	404
5 < 20 hectares	298
20 < 50 hectares	223
50 < 100 hectares	132
100+ hectares	78

Cattle

	No. of holdings	Number
Dairy herd	56	3173
Beef herd	444	18192
Breeding herd replacements (cows and heifers over 1 year for breeding)	409	6936
Other cattle over 1 year	442	9202
Cattle and calves under 1 year	468	15396
Total cattle and calves	**547**	**52899**

Pigs

	No. of holdings	Number
Breeding sows and gilts in pig (breeding herd)	31	336
All other pigs	53	3009
Total pigs	**61**	**3345**

Sheep

	No. of holdings	Number
Breeding ewes (breeding flock)	460	125947
Lambs under 1 year	437	108766
Other sheep	400	5217
Total sheep	**498**	**239930**

Goats

	No. of holdings	Number
All goats	46	400

Labour force

	No. of holdings	Number
Farmers, spouses, partners and directors – full-time	475	657
Farmers, spouses, partners and directors – part-time	567	779
Salaried managers – full-time	***	***
Salaried managers – part-time	***	***
Male employees – full-time	67	113
Male employees – part-time	75	91
Female employees – full-time	14	16
Female employees – part-time	35	46
Casual workers	106	163
Total labour	**874**	**1880**

Holdings by EC farm type

(Based on Standard Gross Margins)

Cereals	***
General cropping	***
Horticulture	38
Pigs and Poultry	28
Dairy	41
Cattle and Sheep (LFA)	393
Cattle and Sheep (lowland)	168
Mixed	38
Other types	412

*** To prevent disclosure of information about individual holdings the number of holdings has been suppressed and the data averaged over a wider area.

[1]Excluding minor holdings.

Source: *Agricultural and Horticultural Census*, DEFRA

DARTMOOR NATIONAL PARK:
AGRICULTURAL STATISTICS[1], JUNE 1999

	No. of holdings	Hectares
Land use		
Land rented	278	18331
Land owned	1024	30988
Total crops and fallow (tillage)	210	2889
Recent and temporary grassland (< 5 years)	250	3281
Permanent grassland (> 5 years)	1015	26569
Rough grazing (sole rights)	315	13868
Woodand	389	1691
Set-Aside	31	298
All other land	482	724
Cereals		
Wheat	26	613
Winter barley	47	403
Spring barley	45	387
Oats	28	128
Other cereals (excluding maize)	5	46
Total cereals (excluding maize)	**92**	**1578**
Arable		
Potatoes (early and maincrop)	23	40
Sugar beet (not stockfeed)	0	0
Hops and other arable	***	***
Turnips, Swedes, kale, cabbage, savoy, Kohl rabi and rape	59	160
Fodder beet, mangolds and other crops	49	58
Horticultural crops	60	80
Field beans	***	***
Peas for harvesting dry	9	62
Maize	21	180
Oilseed rape	0	0
Linseed	13	256
Bare fallow	22	365
Horticulture		
Peas and beans	5	1
All other veg and salad	14	40
Total vegetables grown in the open	**16**	**41**
Area under glass or plastic	***	***
Top fruit	***	***
Small fruit	***	***
Total fruit	**39**	**27**
Hardy nursery stock	12	11
Bulbs and flowers grown in the open	***	***

Holdings by tillage and grass area	
0 < 5 hectares	283
5 < 20 hectares	358
20 < 50 hectares	281
50 < 100 hectares	152
100+ hectares	56

	No. of holdings	Number
Cattle		
Dairy herd	66	3493
Beef herd	477	19285
Breeding herd replacements (cows and heifers over 1 year for breeding)	437	7254
Other cattle over 1 year	475	9319
Cattle and calves under 1 year	517	16426
Total cattle and calves	**617**	**55777**
Pigs		
Breeding sows and gilts in pig (breeding herd)	33	395
All other pigs	43	3489
Total pigs	**53**	**3884**
Sheep		
Breeding ewes (breeding flock)	491	126182
Lambs under 1 year	468	111268
Other sheep	412	6530
Total sheep	**523**	**243980**
Goats		
All goats	41	337
Labour force		
Farmers, spouses, partners and directors – full-time	557	741
Farmers, spouses, partners and directors – part-time	584	767
Salaried managers – full-time	10	13
Salaried managers – part-time	5	7
Male employees – full-time	82	144
Male employees – part-time	87	98
Female employees – full-time	16	20
Female employees – part-time	49	61
Casual workers	141	224
Total labour	**956**	**2075**

Holdings by EC farm type (Based on Standard Gross Margins)	
Cereals	16
General cropping	5
Horticulture	28
Pigs and Poultry	26
Dairy	49
Cattle and Sheep (LFA)	463
Cattle and Sheep (lowland)	177
Mixed	45
Other types	321

*** To prevent disclosure of information about individual holdings the number of holdings has been suppressed and the data averaged over a wider area.

[1]Excluding minor holdings.

Source: *Agricultural and Horticultural Census*, DEFRA

DARTMOOR NATIONAL PARK:
AGRICULTURAL STATISTICS[1], JUNE 1995

Land use

	No. of holdings	Hectares
Land rented	285	19074
Land owned	936	30675
Total crops and fallow (tillage)	215	2577
Recent and temporary grassland (< 5 years)	272	3709
Permanent grassland (> 5 years)	965	26786
Rough grazing (sole rights)	328	13942
Woodand	388	1835
Set-Aside	26	293
All other land	483	606

Cereals

	No. of holdings	Hectares
Wheat	28	478
Winter barley	65	754
Spring barley	55	210
Oats	34	150
Other cereals (excluding maize)	13	69
Total cereals (excluding maize)	**114**	**1661**

Arable

	No. of holdings	Hectares
Potatoes (early and maincrop)	27	25
Sugar beet (not stockfeed)	0	0
Hops and other arable	***	***
Turnips, Swedes, kale, cabbage, savoy, Kohl rabi and rape	81	249
Fodder beet, mangolds and other crops	17	54
Horticultural crops	42	43
Field beans	***	***
Peas for harvesting dry	5	40
Maize	25	192
Oilseed rape	***	***
Linseed	***	***
Bare fallow	14	255

Horticulture

	No. of holdings	Hectares
Peas and beans	***	***
All other veg and salad	***	***
Total vegetables grown in the open	**15**	**9**
Area under glass or plastic	8	1
Top fruit	16	20
Small fruit	5	1
Total fruit	**21**	**21**
Hardy nursery stock	12	11
Bulbs and flowers grown in the open	***	***

Holdings by tillage and grass area

0 < 5 hectares	184
5 < 20 hectares	347
20 < 50 hectares	306
50 < 100 hectares	163
100+ hectares	51

Cattle

	No. of holdings	Number
Dairy herd	79	3954
Beef herd	504	19517
Breeding herd replacements (cows and heifers over 1 year for breeding)	463	7103
Other cattle over 1 year	494	8354
Cattle and calves under 1 year	546	17933
Total cattle and calves	**642**	**56861**

Pigs

	No. of holdings	Number
Breeding sows and gilts in pig (breeding herd)	33	533
All other pigs	55	3620
Total pigs	**61**	**4153**

Sheep

	No. of holdings	Number
Breeding ewes (breeding flock)	505	127310
Lambs under 1 year	489	113068
Other sheep	433	4934
Total sheep	**526**	**245312**

Goats

	No. of holdings	Number
All goats	44	379

Labour force

	No. of holdings	Number
Farmers, spouses, partners and directors	889	1414
Salaried managers – full-time	11	12
Male employees – full-time	86	162
Male employees – part-time	106	123
Female employees – full-time	17	17
Female employees – part-time	52	63
Casual workers	**159**	**253**
Total labour	906	2044

Holdings by EC farm type

(Based on Standard Gross Margins)

Cereals	8
General cropping	7
Horticulture	21
Pigs and Poultry	17
Dairy	58
Cattle and Sheep (LFA)	504
Cattle and Sheep (lowland)	129
Mixed	33
Other types	274

*** To prevent disclosure of information about individual holdings the number of holdings has been suppressed and the data averaged over a wider area.

[1]Excluding minor holdings.

Source: *Agricultural and Horticultural Census*, DEFRA

DARTMOOR NATIONAL PARK: AGRICULTURAL STATISTICS[1], JUNE 1990

	No. of holdings	Hectares
Land use		
Land rented	293	18752
Land owned	878	30411
Total crops and fallow (tillage)	253	2942
Recent and temporary grassland (< 5 years)	305	3808
Permanent grassland (> 5 years)	926	25717
Rough grazing (sole rights)	373	14390
Woodand	366	1640
Set-Aside	6	99
All other land	452	566
Cereals		
Wheat	39	530
Winter barley	84	1078
Spring barley	82	429
Oats	43	130
Other cereals (excluding maize)	10	49
Total cereals (excluding maize)	**144**	**2216**
Arable		
Potatoes (early and maincrop)	43	22
Sugar beet (not stockfeed)	***	***
Hops and other arable	0	0
Turnips, Swedes, kale, cabbage, savoy, Kohl rabi and rape	104	315
Fodder beet, mangolds and other crops	26	54
Horticultural crops	32	47
Field beans	***	***
Peas for harvesting dry	8	69
Maize	13	76
Oilseed rape	0	0
Linseed	***	***
Bare fallow	25	119
Horticulture		
Peas and beans	***	***
All other veg and salad	***	***
Total vegetables grown in the open	**12**	**12**
Area under glass or plastic	***	***
Top fruit	***	***
Small fruit	***	***
Total fruit	**12**	**21**
Hardy nursery stock	13	13
Bulbs and flowers grown in the open	***	***

	No. of holdings	Number
Cattle		
Dairy herd	101	4541
Beef herd	499	17651
Breeding herd replacements (cows and heifers over 1 year for breeding)	487	7413
Other cattle over 1 year	516	8165
Cattle and calves under 1 year	561	18672
Total cattle and calves	**677**	**56442**
Pigs		
Breeding sows and gilts in pig (breeding herd)	45	856
All other pigs	60	4031
Total pigs	**69**	**4887**
Sheep		
Breeding ewes (breeding flock)	523	124718
Lambs under 1 year	508	117595
Other sheep	443	7190
Total sheep	**535**	**249503**
Goats		
All goats	33	298
Labour force		
Farmers, spouses, partners and directors – full-time	851	1383
Salaried managers – full-time	14	14
Male employees – full-time	98	176
Male employees – part-time	94	108
Female employees – full-time	18	20
Female employees – part-time	51	58
Casual workers	157	246
Total labour	**864**	**2005**

Holdings by tillage and grass area

0 < 5 hectares	142
5 < 20 hectares	332
20 < 50 hectares	324
50 < 100 hectares	157
100+ hectares	50

Holdings by EC farm type

(Based on Standard Gross Margins)

Cereals	***
General cropping	***
Horticulture	18
Pigs and Poultry	21
Dairy	74
Cattle and Sheep (LFA)	533
Cattle and Sheep (lowland)	100
Mixed	38
Other types	203

*** To prevent disclosure of information about individual holdings the number of holdings has been suppressed and the data averaged over a wider area.

[1]Excluding minor holdings.

Source: *Agricultural and Horticultural Census*, DEFRA

APPENDIX 2

THE POSTAL QUESTIONNAIRE

THE STATE OF FARMING ON DARTMOOR

CONFIDENTIAL

Centre for Rural Research, Lafrowda House, St German's Road, EXETER EX4 6TL
Tel. 01392 263836

Please answer all the questions for all your business activities, including all agricultural holdings

YOUR FARMING ACTIVITIES DURING 2000
(in this section we need to collect information that excludes the distortions of Foot & Mouth Disease)

1. How much land did you farm, excluding the use of commons?

	Acres or	Hectares
Within the Dartmoor National Park (DNP)		
Outside the Dartmoor National Park		
Total		

2. Of this land what was the tenure?

	Acres or	Hectares
Owned		
Tenanted		
Grass keep taken for less than 365 days		

3. What use did you make of commons grazing?
What percentage of breeding animals were grazed on commons at any time in 2000.
If none please put a zero, or leave blank if you do not keep a particular type of stock

	% of breeding stock
Beef cattle	
Sheep	
Ponies	
Other *please specify* ……………………………………………………………..	

4. Where did you keep your *beef cattle and sheep* (if applicable) during the winter?
(Each column should add to 100)

	Percentage of animals			
	Breeding		Store	
	Cattle	Sheep	Cattle	Sheep
Within Dartmoor National Park				
Outside Dartmoor National Park				
	100	100	100	100

5. **What was your farming system?** *Tick all the appropriate boxes*

			Cattle	Sheep
Hill type livestock:	selling mainly stores			
	selling mainly finished			
Lowland type livestock:	selling mainly stores			
	selling mainly finished			
Dairying				
Arable				
Grass keep sold or land let				
Forestry				
Other agricultural enterprise(s)				
Non-agricultural use, e.g. horses				

6. **Did you receive any 'environmental' payments?** *Tick all the appropriate boxes*

Hill Farming Allowance Scheme	
Extensification Payment Scheme	
Environmentally Sensitive Area (ESA) on 'commons' ground	
Environmentally Sensitive Area (ESA) on 'own' ground	
Sites of Specific Scientific Interest (SSSI)	
Dartmoor National Park Management Agreement	
Organic Aid Scheme	
Other *please specify* ………………………………………………………………………….	
Other *please specify* ………………………………………………………………………	

YOUR CURRENT BUSINESS

(for this section we need to collect information that is up to date)

7. **How important are non-farming business activities to your business?** *Tick one box per line*

		Importance		
	No activity	Not very	Very	Crucial
Processing and retailing of farm produce				
Tourist accommodation				
Rents other than tourism				
Recreation, e.g. fishing, nature trails				
Rural crafts				
Contracting				
Forestry				
Other *please specify* ……………………………..				
Off farm income				

8. **How many people work in your 'farm' business?**

	Number					
	Farming		Non-farming on farm		Off farm	
	Full-time	Part-time	Full-time	Part-time	Full-Time	Part-time
Principal farmer(s) and spouse(s)						
Other farmers, partners & directors						
Regular paid workers and managers						
Regular unpaid workers (inc. unpaid family)						
Casual workers						

9. **How old are you and your intended successors?**

	Age			
Principal farmer(s)				
Successor(s)				

10. **With regard to training needs, what is your opinion of the following statements?** *Tick all that apply*

We need more training in:-	Farming		Non-farming	
	Agree	Disagree	Agree	Disagree
Business management				
Livestock and crop husbandry				
Environmental maintenance				
Farm maintenance				
Use of farm equipment				
Use of computers				
'People skills'				
Marketing				

11. **Are you involved in any group or co-operative activities?** *Tick all that apply*

		Area of business	
	None	Farming	Non-farming
Discussion group			
Buying group			
Selling or marketing group			
Sharing machinery			
Sharing labour			
Other *please specify* ………………………………………………..			

12. **What is your opinion of the following statements?** *Tick one box per line*

	Agree	Disagree	No opinion
Livestock markets provide vital information on the prices of store stock			
Livestock markets provide vital information on the prices of finished stock			
Livestock markets provide a forum for discussing new agricultural developments			
Livestock markets serve an important social function for farmers			
Livestock markets should be involved in formal group activities			

13. **Have any of the following restricted your involvement in countryside management ?**
Tick one box per line

	Yes	No	Don't know
Inadequate financial returns from farming			
Availability of labour			
Availability of skills			
Availability or cost of appropriate advice			
Availability of appropriate grants			
Other *please specify*………………………………………………..			

14(a) **Do you keep ponies on Dartmoor?**
Tick one

Yes	No

14(b) **What is your opinion of the following statements?** *Tick one box per line*

	Agree	Disagree	No opinion
The ponies on Dartmoor portray a positive image			
Keeping of ponies on Dartmoor needs encouragement			
Subsidies should be paid on keeping ponies			
The breeding of ponies on Dartmoor needs improvement			

RECENT AND FUTURE CHANGE *(in this section we need to follow the development of your business)*

15. Were there any *significant* changes to your business between 1995 and 2000? *Tick one box per line*

		Level of activity				
	Not applicable	No change	Started	Increased	Decreased	Stopped
Land farmed inside the DNP						
Land farmed outside the DNP						
Use made of commons grazing						
Away wintering of breeding stock						
Number of beef breeding cattle kept						
Number of breeding sheep kept						
Number of ponies kept						
Number of hill type cattle						
Number of hill type sheep						
Number of cattle sold finished						
Number of sheep sold finished						
Environmental payments						
Level of labour used						
Use made of contractors						
Machinery sharing						
Non-farming activities						
Involvement in group activities						

16. Were any of your animals slaughtered because of Foot and Mouth? *If none, please put a zero*

	Percentage of total animals kept			
	Breeding		Store	
	Cattle	Sheep	Cattle	Sheep
Enforced cull, e.g. contiguous, on suspicion				
Welfare Scheme				

17. What are the medium and long-term effects of the FMD crisis on your business?

18. Assuming no changes to the 'subsidies' system, do you anticipate any *significant* change to your business by 2005? *Tick one box per line*

		Level of activity				
	Not applicable	No change	Start	Increase	Decrease	Stop
Land farmed inside the DNP						
Land farmed outside the DNP						
Use made of commons grazing						
Away wintering of breeding stock						
Number of beef breeding cattle kept						
Number of breeding sheep kept						
Number of ponies kept						
Number of hill type cattle						
Number of hill type sheep						
Number of cattle sold finished						
Number of sheep sold finished						
Environmental payments						
Level of labour used						
Use made of contractors						
Machinery sharing						
Non-farming activities						
Involvement in group activities						

19. Do you have any other comments or ideas relating to the future of farming on Dartmoor; or the strengths, weaknesses, opportunities and threats to your business?

THANK YOU FOR YOUR HELP

Would you like to receive a summary of the survey findings? *Tick one*

Yes		No	

Please return this form to the University of Exeter in the **FREEPOST** envelope provided.
(NO STAMP REQUIRED)

January 2002

APPENDIX 3

THE TELEPHONE INTERVIEW QUESTIONNAIRE

CONFIDENTIAL

THE STATE OF FARMING ON DARTMOOR

Centre for Rural Research, Lafrowda House, St German's Road, Exeter EX4 6TL
Tel. 01392 263836

QUESTIONS FOR TELEPHONE STUDY

Name of Business:

Address:

Post Code:

ID Number:

Note: Try to record the farmer's response rather than read out the 'lists' of answers

---

Introduction: SEEK OWNER OR MANAGER

Good morning/afternoon/evening. My name is … I am calling on behalf of the Centre for Rural Research (formerly the Agricultural Economics Unit) at the University of Exeter. We are undertaking a survey on behalf of the Dartmoor National Park Authority about Farming on Dartmoor. Thank you for completing the postal questionnaire, which we recently sent out as part of this work. The telephone interview farms have been selected at random from the postal respondents to follow up some issues in more detail. Your help will be greatly appreciated but co-operation is voluntary. Are you the best person to speak to about this? (IF NOT, TRANSFER TO OTHER OR MAKE APPOINTMENT). **Reassure on confidentiality if necessary.**

ALL

Q1 Could I just check your name and position in the business? **Write in**

Name: …

Position:

ALL

Q2 And could you tell me in broad terms what changes there have been to your business (including farming, non-farming on the farm and off farm activities) in the last 5 years?

Please exclude any Foot & Mouth Disease effects

1 No change → Q5

2 Increased activity → Q3

3 Decreased activity → Q4

Increased activity

Q3 What were the principal reasons for the increase in activity?

1 Expansion to accommodate extra partners or family members

2 A response to the fall in farm incomes

3 Finishing more animals in to gain extra margins

4 Following government policy to diversify

5 Following government policy to encourage farming in a sustainable and environmentally friendly way.

6 Off farm employment/ self employment

7 Other, please state

8 Other, please state

→ **Q5**

Decreased activity

Q4 What were the principal reasons for the decrease in activity?

1 Contraction prior to retirement

2 A response to the fall in farm incomes

3 Finishing more animals in to gain extra margins

4 Following government policy to diversify

5 Following government policy to farm sustainably in an environmentally friendly way.

6 Off farm employment/ self employment

7 Other, please state

8 Other, please state

→ **Q5**

All

Q5 (a) What are your views on farmer owned collaborative activities (e.g. co-operatives or ventures such as Triple S Ranch)

1 **Farmers do not trust each other or the management sufficiently for it to work**

2 **Collaborative ventures are never large enough to gain any marketing advantage**

3 **The record of such ventures is poor**

4 **There just needs to be a catalyst to start the process**

5 Would join one, if possible, but nothing suitable is available

6 Essential to balance the powers of the buyers

7 Allows farmer involvement in the supply chain so as to have more control over prices

8 Other, please state

9 Other, please state

Q5 (b) What would attract you to get involved in collaborative ventures?

1 The principles that it is good for farmers to work together

2 This would lead to an economic advantage to your business

3 A way to attract extra funding from the 'Rural Development Schemes'

4 Not attracted at all!

5 Other, please state

6 Other, please state

All
Q6 What help do you need in running your business? [Read out all 4 answers to guide the question]

1 Do any members of your staff need training, in particular to pursue 'new' types of income? If so what type of training?

2 Are there any areas of your business in which you need 'management' help? If so what type?

3 The government is pursuing a policy of moving funds from 'modulated' schemes to 'Rural Development'. Do you feel able to access any of these funds? If not why not?

4 Do you need help from outside agencies to access these funds? If so, who should provide this help?

All
Q7 What are your views on the current system for farm support?

1 The current system should not be changed
2 The current policy needs refining to target support better
3 The level of support needs increasing in hill areas
4 The move to area payments will help farming on Dartmoor
5 Modulation and redirection of funds to Rural Development is a good idea

6 Other, please state
7 Other, please state

All
Q8 Do you have any 'agri-environmental' management agreements on your farm?

1 Yes → Q9

2 No → Q11

With 'agri-environmental schemes'

Q9 (a) Has participation in the scheme(s) helped <u>sustain</u> the environment?

- **1 Yes, (if yes, give details)**
- **2 No**
- **3 Don't know**

Q9 (b) Has participation in the scheme(s) <u>enhanced</u> or <u>improved</u> the environment?

- **1 Yes, (if yes, give details)**
- **2 No**
- **3 Don't know**

With 'agri-environmental schemes'

Q10 Do you feel the scheme has any negative impacts on your business?

- **1 Yes, (if yes what are they?)**
- **2 No**
- **3 Don't know**

→ **Q12**

No 'agri-environmental schemes'

Q11 Have you considered entering a 'agri-environmental' scheme?

- **1 Yes (if Yes, why did you decide not to get involved?)**
- **2 No (if No, can you say why not)**

→ **Q12**

All

Q12 What do you consider to be the strengths of your business?

1 **No borrowed money**
2 **Produce quality livestock**
3 **Business run with family labour**
4 **Ability to generate off-farm income**
5 **Young workforce**
6 **Adaptability**
7 **'Self-sufficiency'**
8 **Hill grazing**
9 **LFA status**
10 **Non farming income/ diversified**
11 **Other, please state**
12 Other, please state
13 **Don't know**

All

Q13 What do you consider to be the weaknesses of your business?

1 **Too small**
2 **Uncertain future**
3 **Too much money tied up with a poor return**
4 **Insufficient livestock housing**
5 **Under capitalised**
6 **Tenants have less opportunities**
7 **Dependent on Government support**
8 **Do not receive premium prices for premium product**
9 Other, please state
10 **Other, please state**
11 **Don't know**

All

Q14 What do you consider to be the opportunities for your business?

1	**Direct marketing of produce**
2	**Entering ESA scheme on home commons and the Forest of Dartmoor**
3	**Market the image of Dartmoor**
4	**Co-operation between farmers**
5	**Selling finished rather than store livestock**
6	**Becoming 'park keepers'**
7	Other, please state
8	Other, please state
9	**Don't know**

All

Q15 What do you consider to be the threats to your business?

1	**Reduction in financial support from the Government**
2	**Lack of suitable labour**
3	**Disease e.g. TB**
4	**Media campaigns against meat**
5	**Public interference**
6	**Increasing costs- transportation and regulation**
7	**The strength of the £ versus the 'Euro'**
8	**More regulation / government policy**
9	**Land price too high**
10	**Continued low prices for livestock**
11	**Modulation**
12	**Move to area payments**
13	**Other, please state**
14	**Other, please state**
15	**Don't know**

All

Q16 Can you please give an indication of your pre-tax profit from farming, and any non-farming activities on your farm; and, also, if possible off-farm income last year? **Reassure on confidentiality if necessary; aim for the pre-FMD situation**

£	Farming	Non-farming on the farm	Off-farm
Over 50K			
20-50K			
10-20K			
5-10K			
0-5K			
-5-0K			
>-5K			
None			
Don't know			
Refused			

All

Q17 Can you please give an indication of ongoing problems caused by the Foot and Mouth Disease crisis?

1 **Difficulties with 20 day standstill**
2 **Lack of livestock markets**
3 **Extra costs of livestock haulage**
4 **Volume of paperwork**
5 **Shortage of winter feed**
6 **Due to forced sale/slaughter of breeding animals flock/herd size is lower than normal**
7 **Lost 'hefted' stock from Dartmoor**
8 **Still overstocked**
9 **None**
10 **Don't know**
11 **Other, please state**
12 **Other, please state**

All

Thank for time and trouble and close interview

CENTRE FOR RURAL RESEARCH
THE UNIVERSITY OF EXETER
LAFROWDA HOUSE
ST GERMAN'S ROAD
EXETER EX4 6TL

TELEPHONE: 44 (0)1392 263836
FAX: 44 (0)1392 263852

www.exeter.ac.uk/crr