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**Wildlife Trust**

**The Great Fen Socio  
Economic Study**

**Final Report- SUMMARY**

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A report prepared by

**PACEC**

on behalf of  
The Wildlife Trust

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# Conclusions and Development Implications

## Summary of main findings

<b>Panel 1.1</b>	<b>The Economy of Cambridgeshire, Rural Cambridgeshire and the Local Area (Chap 3)</b>
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| <ul style="list-style-type: none"><li>• Rural employment remains significant in the local area but Rural Cambridgeshire is a diverse and well balanced economy.</li><li>• Both the local and rural Cambridgeshire economies are participating in the emerging sectors and clusters which underpin the dynamism of the Cambridgeshire economy.</li><li>• The whole sub-regional economy is not over-dependent on a particular sector, it is robust and well integrated.</li><li>• Unemployment in the local area stands at just 2.5% and all the social indicators are positive.</li><li>• The local area and rural Cambridgeshire are nicely nested in a dynamic economy. Any short term job losses that may arise as a result of the implementation of the Great Fen project may be easily reabsorbed into the labour market.</li><li>• An economy characterised by rising incomes and broad based prosperity will increase the underlying demand and support for ecological and environmental initiatives.</li></ul> |
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**Panel 1.2 Trends in the Agricultural Sector in Rural Cambridgeshire (Chap 4)**

- There are currently 8,289 people employed in agriculture in Cambridgeshire, of which 46% are farmers, directors or partners and 20.5% are seasonal and casual workers.
- Agricultural employment down 33% [in Cambridgeshire] since 1990 with the largest fall found in regular full time workers.
- 525 are employed in agriculture in the area local to the Great Fen project site. 74% of these are farmers, directors or partners. Only 8.5% are seasonal and casual workers.
- 6.3% of Cambridgeshire's agricultural workforce is found in the local area.
- Agricultural employment has fallen 47% [in the Local Area] since 1990 with the 'upland' defined wards in the local area having seen a 33% decline in agricultural employment while 'Lowland' defined wards in the local area have seen a 52% decline in agricultural employment. The largest fall found in regular part time workers.
- Fen Arable farms suffer from larger fluctuations in net farm income than mainly cereal farms but their net farm income per hectare is generally greater than that of mainly cereal farms and thus the rewards are potentially significantly higher. An increasing amount of land is being given over to set aside.
- The percentage areas given over to potatoes and sugar beet on a typical Cambridgeshire Fen farm are higher than that found in Cambridgeshire, and indeed in the Eastern region as a whole. The percentage area of oilseed rape on a Cambridgeshire Fen farm is lower than that found in Cambridgeshire (and the Eastern region) as a whole.
- Sugar beet and potatoes show the highest yields but they are also volatile yields.
- 2001 was an exceptionally bad year. The persistently wet conditions during the autumn of 2000 hindered winter cropping. Yields for 2002 are likely to be more typical of the average.
- The number of farms has fallen by approximately 25% over the last 10 years at both local and Cambridgeshire levels.
- The declining total number of farms at the Cambridgeshire and local levels is not typical of England as a whole, where the total number of farms has actually increased over the period 1990-2001, largely due to a massive increase in farms with less than 5 hectares.
- The national trend over the last 10 years seems to be that of extensification.

**Panel 1.3      The Agricultural Economy in the Great Fen Project Area  
(Chap 5)**

- The land on the Great Fen project site is typically classified as excellent or good quality agricultural land (grade 3a and above).
- The main crops grown in the area are onions, potatoes and sugar beet. Wheat is used as a break crop. There are some peas and oilseed rape.
- Generally, farming on the Great Fen site has been profitable.
- The Great Fen project area currently employs approximately 22 full time equivalents. Of these, five-sixths may be termed farmers/directors and there are approximately 17 full time workers. There are also three known part time workers and there are likely to be an additional number of seasonal/casual workers, the exact numbers of which are unknown.
- The majority of input expenditure is spent either in areas outside Cambridgeshire or in the local area. A comparatively small percentage is spent in the remainder of the Cambridgeshire area.
- Total crop volume for the Great Fen project site can be estimated to be somewhere between 72,700 and 90,435 tonnes per annum.
- Generally there have not been many attempts by farmers in the area to diversify. Returns on agricultural production have been good up until about three years ago and therefore there has not been the need. Nor, it seems are there many opportunities to diversify.

**Panel 1.4 Trends in Tourism in Cambridgeshire and the Local Area (Chap 6)**

- Tourism is now one of the five largest industries in the UK, accounting for 10% of all consumer spending and one in five of all new jobs.
- There has been an increase in the number of visits to the countryside following recovery from foot & mouth. In 2002 farm visits were up 50% having been down 20% in 2001. Visits to country parks were up 13% having been down 10%, wildlife attractions were up 13% having been down 5% and historic properties were up 8% having been down 6%.
- Retail makes up the largest proportion of jobs of all tourist-supporting sectors and retail employment in all the local and Cambridgeshire areas is typical of the national pattern.
- In the local rural area the number of employees in the accommodation sectors is well below average, while the number employed in the sports sector is nearly three times the national average.
- The sports industry is also well represented in Huntingdonshire, with the number of employees in this sector in rural Huntingdonshire being well above average.
- Tourism employment shows a massive increase in the local area, mainly due to the large increase in the number of people employed in the sports sector in the local area. Ramsey Leisure Centre alone has 10 full time staff, 5 part time and about 50 variable-hours staff.
- UK residents' visits to Cambridgeshire make up approximately 19% of the trips to the East of England and the tourism expenditure in the eastern region.
- Overseas residents to Cambridgeshire make up 25% of the total overseas visits to the East of England and account for almost 30% of overseas residents' expenditure in the eastern region.
- UK residents made 2.8 million trips to Cambridgeshire in 2002 (an increase of 43% on 1999), spending £332 million (an increase of 62% on 1999).
- Overseas residents made 0.41 million trips to Cambridgeshire in 2002 (a fall of 18% on 1999), spending £180 million (a fall of 2% on 1999).
- In 2002 UK residents were more significant in terms of trips, nights and spend in the Cambridgeshire area.
- In 1999 the overall value of tourism to Cambridgeshire and Peterborough was £775.3 million and the tourism sector supported 21,530 jobs in this area. The overall value of tourism in Peterborough was £170 million in 1999, making up 21.9% of the total value of tourism in Cambridgeshire.
- There were 0.47 million visits and 4.1 million day visits to Huntingdonshire in 2001. Total spend for staying and day visitors was £158.4 million in 2001.
- As with Cambridgeshire, UK residents were more significant than overseas residents in terms of trips, nights and spend in the Huntingdonshire area in 2001.
- Most visitors chose to stay with residents in Huntingdonshire.
- Countryside trips accounted for 44% of all day visits to Huntingdonshire and 29% of day visitors' spend.
- Ramsey and its surrounding villages have a number of historical links.
- A large proportion of the visitor attractions in and around Ramsey are leisure/sports attractions.

**Panel 1.5 Wetland Reserve Attractions and Visitor Analysis  
(Chap 7)**

- Similar sites in the UK, with appropriate visitor facilities, receive visitors in a range between 25-35,000 per annum. Entry fees are within a £2-£4 range.
- Similar sites identified in Europe receive higher numbers of visitors but are more extensive in nature and have national park status.
- The PACEC survey of current visitors to Woodwalton/Holm Fen indicates that the majority of respondents are averse to the commercialisation of these sites. Wider surveys indicate that a simple and peaceful atmosphere is seen as a key attribute for this type of site.
- Visitors can be divided into two broad categories, special interest and general visitors. The latter category tends to include family groups and have an expectation of a visitor centre/tea room and other facilities.
- The majority of visitors to Fen and similar sites are males over 25 and in good health, with a relatively high proportion of older and retired visitors. Seasonal factors come to bear with families tending to predominate in the summer and other main holiday periods. Generally, wetland reserves seem to attract visitors all year round.
- The origin of visitors varies according to the reserve and whether or not its location is within an established holiday destination area. In Cambridgeshire, the evidence indicates a high proportion of day visitors travelling relatively short distances. The great majority of visitors to wetland reserves appear to be from the UK. The origin of visitors is largely influenced by the extent to which the sites are publicised.

**Panel 1.6 The Future of Agriculture and Impacts on the Great Fen Project Area (Chap 8)**

- The most fundamental change under reform of the Common Agricultural Policy (CAP) is the decoupling of support payments to farmers. Farmers will no longer be required to grow crops in order to receive payment and a farmer's decision to grow previously supported crops will now be influenced by market prices.
- The value of the aggregate single farm payments to farmers on the project area will vary according to the method of allocation. If payments are to be allocated on a historical basis, total payments to the project area would be lower than if they were allocated on a regional basis since the area grows a comparatively large proportion of unsupported vegetable crops. Other effects on the future of agriculture include changes in policy, soil quality and cropping patterns.
- If the status quo in terms of land use is maintained, in 2018 it is estimated that the total number of jobs supported by agricultural activity on the Great Fen site will be 50. In 2030 the number of jobs supported would be 51 and in 2050 the number of jobs supported would be 65.
- Under the assumption that 25% of the site will be restored by 2018, it is anticipated that 13 jobs will be lost as a result of the restoration. Under the assumption that 50% of the site will be restored by 2030, it is anticipated that 25 jobs will be lost as a result of the restoration. Under the assumption that 100% of the site will be restored by 2050, 65 jobs will be lost as a result of the restoration.
- The number of jobs lost varies under alternative scenarios, with different assumptions about the future of agriculture. The model shows declining soil quality and replacement of root crops with wheat would result in the greatest loss of jobs if 25% restoration were to take place by 2018.

**Panel 1.7 The Potential for Tourism and Scenarios after Reserve Creation (Chap 9)**

**Scenario 1 – Low Impact Scenario**

- A small visitor centre built in 2009 is upgraded to a medium centre in 2030.
- By 2050 the site is anticipated to support 41 jobs. Of these 20 are expected to be in the local area and 17 in the rest of Cambridgeshire.
- There is also the potential for 53 jobs-years associated with the construction of the visitor centre.
- When tourism and wetland management job gains under the low impact scenario are compared with agricultural job losses for the local area, there is an average job loss of 3 over the period to 2050.

**Scenario 2 – Medium Impact Scenario**

- A medium visitor centre built in 2009 is upgraded to a large centre in 2030.
- By 2050 the site is anticipated to support 82 jobs. Of these 41 are expected to be in the local area and 30 in the rest of Cambridgeshire.
- There is also the potential for 109 job-years associated with the construction of the visitor centre.
- When tourism and wetland management job gains under the medium impact scenario are compared with agricultural job losses for the local area, there is an average job gain of 14 over the period to 2050.

**Scenario 3 – High Impact Scenario**

- A large visitor centre is built in 2009 and lasts at least until 2050.
- By 2050 the site is anticipated to support 90 jobs. Of these 44 are expected to be in the local area and 33 in the rest of Cambridgeshire.
- There is also the potential for 69 job-years associated with the construction of the visitor centre.
- When tourism and wetland management job gains under the high impact scenario are compared with agricultural job losses for the local area, there is an average job gain of 22 over the period to 2050.