



Somerset
Wildlife Trust

ANNUAL REPORT AND ACCOUNTS 2025/26



THANK YOU

Nature is essential to all of us. It underpins our health, our wellbeing, our economy and our ability to adapt to climate change.

But the truth is, that nature is more than a solution to our issues, it is part of us, and we are all part of nature.

When we think about it in this way, we get a renewed sense of why it's so important that we unite to protect the incredible wildlife and habitats around us.

At Somerset Wildlife Trust (SWT), we know we could not exist in isolation. Across Somerset – from the Mendips Hills and Somerset Levels to the coastal communities and the urban streets of Taunton – we hear and witness the passion and commitment of our 22,000 members and the thousands of wider supporters, businesses and landowners across the county.

We thank you for all your efforts.

Somerset Wildlife Trust is a registered charity.

Charity number 238372.

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Registered office:

34 Wellington Road, Taunton,
Somerset TA1 5AW

Created by **Victoria Beard**

Victoria.Beard@somersetwildlife.org

Designed by **Tina Hobson**

tinahobson.com

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PART 1:

Introduction

- ▶ Introduction from our Chair
- ▶ Message from our CEO







INTRODUCTION FROM OUR CHAIR



**“To everyone working
for nature across
Somerset: thank you”**

In May, millions of people around the world paused to celebrate Sir David Attenborough’s 100th birthday. Like many, I’ve grown up with his voice in the background of my life — inspiring, educating, and reminding us that everything we depend on ultimately comes from nature. Human health, prosperity, climate stability, and food security are not separate challenges; they are rooted in the condition of the natural world.

Here in Somerset, we see this every day. Our food systems rely on healthy soils, pollinating insects, clean water and resilient landscapes. When nature declines, farming becomes harder, yields more volatile, and costs rise. When nature thrives, productivity and long term security improve. The same is true for our health: access to green and



blue spaces reduces stress, supports physical activity, and strengthens community wellbeing. And as climate impacts intensify, Somerset's wetlands, floodplains, woodlands and coastal habitats are some of our most effective defences — slowing water, storing carbon, reducing flood peaks and protecting homes.

Nature recovery is not something to tackle once other priorities are solved. It is integral to the solutions themselves. Healthy ecosystems make our county more resilient, more prosperous, and better able to face the future.

This year, I've seen real hope across Somerset. Farmers working with us to restore biodiversity and, in doing so, strengthening their own productivity and profitability. Communities reconnecting with

nature and experiencing the health benefits. Nature based solutions being implemented to reduce flood risk and improve water quality across our catchments. And individuals — members, volunteers, donors, partners — giving their time, money and voice to champion nature.

To everyone working for nature across Somerset: thank you. Your commitment is building a county where wildlife can recover, people can thrive, and future generations can inherit landscapes that are richer, healthier and more resilient.

A handwritten signature in black ink, appearing to read 'Rpt Taylor'.

Rupert Taylor

MESSAGE FROM OUR CEO



“Together, we can help nature recover and influence the decisions that will ultimately see it flourish”

I’ve noticed that as the impacts of the nature and climate crises become more visible, the sector’s sceptics seem increasingly keen to focus on silos. The current rhetoric of nature vs housing or nature vs food isn’t just unhelpful, it is completely wrong. Nature is vital but so is food and housing and infrastructure. We can and should be able to achieve these things together but it does take ambition, courage and collaboration.

These values: ambition, courage and collaboration have always been at the heart of Somerset Wildlife Trust’s approach. We have challenged ourselves to work in stronger and more diverse partnerships, whether through our Wilder Communities approach, our work with farmers, or our strategic partnerships.

Our updated strategy, which launched in 2026, takes this approach even further. Its focus is on

systems change, putting nature at the heart of critical infrastructure and decision making, and underpinning it all with evidence. Our new Impact Measures allow us to report on our progress across critical areas of work and hold ourselves accountable.

The launch of the Local Nature Recovery Strategy (LNRS) for Somerset in 2026 is a milestone for the county, setting out where we should focus action to get the greatest benefit for nature, covering eight important habitats for the county, 42 priority outcomes and actions supporting over 150 species. This was a true work of collaboration with Somerset Wildlife Trust playing a critical role by chairing the LNRS sub-group of the Local Nature Partnership. The LNRS is ambitious in its approach, we now need to work together to be courageous in our delivery, working with communities, landowners,

developers and planners to achieve shared goals.

We have worked with other Trusts this year to challenge the narrative that nature is blocking housing, and while it is a massive challenge, our ambitious focus managed to secure protections to the Habitats Regulations in the Planning and Infrastructure Bill as a result.

Through our work with the Severn Estuary Interests Group to reduce the impact of Hinkley Point C on the vitally important Severn Estuary ecosystems and fish populations, we have taken the approach to hold EDF to account for the decisions they make. We have done this while still offering to work with them to find more beneficial solutions for wildlife, for communities and for their development. We hope moving forwards they will be more willing to work collaboratively on problem solving.



There are plenty of examples in Somerset where farmers are working with us or other environmental partners to achieve great things for nature, including with our Mendip Farm Cluster involving 47 members, managing just over 8,110 hectares.

A great example of the ambition of the Trust is the size, scale and ambition of our project at Honeygar. It truly is unlike any other project and the results will be hugely impactful for nature, for peatlands and for Somerset. Developing our planning application for the UK's lowland peatland research centre has been a massive undertaking, but we have finally submitted the application for the buildings at Honeygar, following consultation with a huge range of groups including the local community. This is a huge milestone for both Honeygar and for the Trust.

The year also brought an important opportunity for nature in Somerset, as the Trust secured an option to purchase Chancellors Farm, a SSSI already closely connected to our work, subject to raising the full funds needed for its acquisition and future care by January 2028.

Lastly, the launch of the first Somerset Wildlife Trust Research Prospectus is another great example from this year of our drive and sense of partnership creating the perfect environment for problem solving. This initiative is key to our work with academics and aims to fill data and information gaps and ensure that our nature recovery efforts are based on robust and up to date evidence. Evidence that can help us drive systems change from Westminster to grassroots delivery.

Yet, possibly our greatest collaboration is with the more than

22,000 members, supporters, communities and volunteers who help shape the work we do. Together, we can help nature recover and influence the decisions that will ultimately see it flourish.

This coming year there will be more opportunities to take action for nature here in Somerset. Opportunities to use your voice, donate your time and money along with thousands of other people. We hope you will work with us bringing your ambition and your courage, to achieve great things for nature.

Let our voices be heard, loudly.



Georgia Dent



PART 2:

Our strategy

- ▶ Our mission, our vision, our approach
- ▶ Our values
- ▶ Strengthening our ambition and focus
- ▶ Our refreshed goals
- ▶ How we measure our success



OUR MISSION

Working for the changes needed for nature and people to thrive together.

OUR VISION

By 2030, Somerset will be a place where wildlife and natural habitats are resilient and thriving, everyone can access and enjoy nature, and communities are inspired to take meaningful action in response to the climate and nature emergency.

OUR APPROACH

In 2021, we launched our Wilder Somerset 2030 strategy. It was co-designed by trustees, staff, volunteers, members and supporters, and remains the guiding star for all that we do.

Since then, we have achieved so much, expanding our resources, our reach and our impact. But the scale and urgency of the nature and climate crises continue to grow, meaning we must be even more focused on where we can make the greatest difference.

We used the mid-point of our strategy, 2025, to review our impact and set out a clear delivery plan to 2030 with a strategy refresh that will help us direct our efforts to areas that need the most attention.



OUR VALUES

We have also taken this period of reflection to look at our organisational values. These underpin the work we do and are the essence of who we are and what we stand for.



1 Ambitious

We are brave for nature, setting bold goals and leading with courage to deliver meaningful impact

2 Collaborative

We aim to build strong, trusting relationships with colleagues, partners and communities, valuing diverse voices in shaping our decisions and actions that are always focussed on achieving more for nature

3 Evidence-led

We seek out robust evidence, stay curious about what works, and use insight to make informed, effective decisions

4 Accountable

We act with integrity, transparency and respect — for ourselves, for each other, and for the natural environment

STRENGTHENING OUR AMBITION AND FOCUS

We have refined our goals to reflect on what we have learned, the progress we have made, and the growing urgency of nature's recovery in Somerset.

At the heart of our strategy is a simple guiding principle: to create more space for nature to thrive.

Everything we do must contribute directly to restoring functional ecosystems, so that wildlife and people can thrive together. Our refreshed goals help ensure that our work, partnerships and resources are aligned with this purpose.

The most significant evolution is Goal 3, and we have also brought Goal 4 to the forefront, recognising the importance of building a strong and resilient organisation to deliver sustainable impact.



OUR REFRESHED GOALS

GOAL 1

Flourishing Natural World – More and Better Nature

Nature is improving everywhere with restored natural processes and functioning ecosystems, with at least 30% of land and sea protected, connected and managed for nature's recovery.

This remains our primary goal. It is the reason Goals 2, 3 and 4 exist: to create the conditions that allow nature to recover at scale across Somerset.

GOAL 2

The Power of People – A Movement for Nature and Climate

Everyone has the opportunity to experience nature, with people in every area of society taking visible, impactful and personally meaningful action for nature.

This goal recognises that nature's recovery depends on people connecting with and valuing nature; communities, volunteers, landowners, partners and supporters, working together and feeling empowered to act.



GOAL 3

Prospering with Nature – Better Understanding and Influencing Systems Change

Robust evidence providing better understanding of the state of nature in Somerset, that transforms policies, decisions and actions, with nature as the foundation of our wellbeing and prosperity.

This is where the most significant evolution has taken place. Previously focused on producing a State of Nature report, the goal now answers the crucial ‘so what’ question, why do we need evidence? This goal also recognises nature is critical to our social, economic and physical wellbeing. The purpose of this work is two-fold:

- ▶ to understand how habitats and species are changing over time, including the impact of our own work, our partners’ work and wider external pressures.
- ▶ to provide a strong evidence base that shapes decisions; our own and those made by policymakers, businesses and communities. This shift ensures that data turns into actionable insights that actively drive better choices and more effective action for nature.

GOAL 4

Thriving Somerset Wildlife Trust – Strengthening Nature’s Core

Somerset Wildlife Trust is a bold, evidence led, inclusive and financially resilient organisation able to lead transformative change, recognised for our expertise, high integrity and collaborative approach, and accountable for our actions.

Although always important internally, we have historically spoken less about this goal publicly. Bringing it forward reflects our belief that a strong, well resourced and inclusive organisation is essential if we are to deliver for nature at the scale and pace required.

HOW WE MEASURE OUR SUCCESS

To support the delivery of our four Goals, we have now created eight Impact Measures (IM) that will help keep us focused on the places, programmes and actions that will have the greatest impact on nature's recovery. They will also ensure we remain accountable to our supporters, partners and communities.

They do not capture everything we do, but they provide a reliable picture of progress towards our Goals and, from next year, we will be sharing how we're performing against each of the Impact Measures as part of our annual report. By tracking them consistently through to 2030, we can make confident, evidence-led decisions about how best to maximise our contribution to nature's recovery and climate resilience.



GOAL 1



More space for nature

Supported by:

▶ **IM1 Nature improving everywhere:** total area of land improving for nature as a result of SWT's direct influence.

▶ **IM2 Land owned and managed:** total area of land that is protected and managed for nature, counting towards international targets, as a direct result of SWT's activity.

▶ **IM3 Marine:** total area of marine environment that is protected and managed for nature, counting towards international targets.

GOAL 2



Grow movement for climate and nature

Supported by:

▶ **IM4 Actions for nature:** the number of people taking meaningful action for nature as a result of SWT's activity.

▶ **IM5 Access to nature:** the number of people from our key audiences taking part in nature experiences supported by SWT.

▶ **IM6 Building support:** the number of decision makers, businesses and organisations making positive changes influenced by SWT, that contribute directly to nature recovery in Somerset.

GOAL 3



Gaining a better understanding of / influence over systems change

Supported by:

▶ **IM8 State of nature:** the amount of robust and long-term data sets collected for priority habitats and species, so that we can demonstrate how the state of nature in Somerset is changing.

GOAL 4



Secure a thriving Somerset Wildlife Trust

Supported by:

▶ **IM7 Income step change:** the increase in the amount of money SWT generates to fund nature recovery in Somerset.

PART 3:

Strategic report

- ▶ Impact measure 1: Nature Improving Everywhere
- ▶ Impact measure 2: Owned and managed land
- ▶ Impact measure 3: Marine and coast
- ▶ Impact measure 4: Action for nature
- ▶ Volunteers
- ▶ Impact measure 5: Access for nature
- ▶ Impact measure 6: Building support
- ▶ Impact measure 7: Income step change
- ▶ Impact measure 8: State of Nature
- ▶ Developing Somerset Wildlife Trust
- ▶ How we raised and spent our money
- ▶ Financial review
- ▶ Objectives and activities
- ▶ Structure, governance and management
- ▶ Statement of trustees' responsibilities





IMPACT MEASURE 1

Nature Improving Everywhere

What does success look like?

An increase in the total area of land that has been improved for nature as a result of the Trust's direct influence.

How will we deliver it?

We will advise and influence others on policy, planning and decision making to restore natural processes, connect habitats, and protect nature through more, better quality connected land for nature.



WHAT PROGRESS HAVE WE MADE IN THE PAST YEAR?

Improving nature *everywhere* is a bold ambition. While we can't do it all at once we can focus our efforts where we can have the greatest results. We have identified three strategic areas that will enable us to engage with landowners, decision makers and communities, and develop the right mechanisms to deliver nature's recovery. Over the past year, we've continued to expand our work with landowners to deliver nature recovery at scale:

Expanding wetlands in the Tone Vale

Within the Tone Valley, we've been working with landowners to develop nature-rich riparian woodland corridors (the riverbanks that act as bridges between rivers and the land) alongside the River Tone. These rich, natural habitats act as 'buffer zones' along the river. This benefits wildlife but also reduces flooding by slowing the flow of water and reducing run off.

Supporting farming clusters in the Mendips

It's been ten years since we started facilitating the Mendips Hill Farm Cluster, a group that now includes 47 members who manage just over 8,100 hectares of Somerset farmland. One of the key benefits of the Cluster is the ability to share best practice in land management and collaborate on landscape scale nature recovery projects. For example, this year we supported members in East Mendip that delivered farm habitat baseline surveys, providing a better understanding of the nature on their land.

Over in West Mendip, we've been able to use the Farming in Protected Landscapes scheme to deliver similar collaborative projects with Cluster members. Projects include habitat works to support dormouse and returning pine marten, the sharing of wildflower seed to create new wildlife rich grassland sites, and a wide variety of farmland bird, mammal, as well as amphibian, moth, butterfly and soil survey projects.





Peat and species restoration on the Somerset Levels and Moors

Protecting Somerset's rare peatland habitats has been the focus of our work on the Somerset Levels. Again, collaboration is key and we have completed site habitat plans for landowners under the development phase of our Adapting the Levels Landscape Recovery project.

We've extended our hydrological monitoring network, so we have a better understanding of how peat and hydrology are working across the Brue Valley. Furthermore, in collaboration with the Somerset Peatland Partnership, we've undertaken pioneering lowland peat restoration on our own reserves at Honeygar and Westhay Moor. With our partners and the support of volunteers, academics, universities and researchers, we are establishing sophisticated monitoring systems that provide a clear understanding of how peat works. Following analysis, this becomes evidence that can inform decisions to restore our precious peatlands at scale.

We've also worked closely with our partners (The Friends of Brides Mound and South West Heritage Trust) in Glastonbury at the Brides Mound site. With funding through the Species Survival Fund 'Bogs to Bittern' and Glastonbury Town Deal Fund, we have co-created a ten-year management plan and undertaken extensive habitat work. This includes creating a large seasonal scrape, the removal of invasive plants, tree and yellow rattle planting, and enhancement of the pond and ditch network. As a result of piecing together this complex jigsaw of differing habitats, the Brides Mound site has been extensively surveyed and declared a new Local Wildlife Site.

LOOKING TO THE YEAR AHEAD

Our next year is set to be another ambitious one. We will be working with a greater number of landowners and communities to achieve more for nature and climate resilience. We already have several important projects lined up within our 'Wilder Landscapes' work. These include supporting rare birds and peat restoration on the Somerset Levels, delivering riparian corridors around the upper reaches of the Brue and slopes of the Mendip Hills, alongside continued work on the River Tone.

We will be rolling out our 'Wider Landscape Action Plans' that aim to bring different communities, landowners, planners, decision makers and businesses together to achieve more for nature. For example, in the Mendip Hills we aim to develop climate resilient, nature-rich corridors. These will stretch from the shores of the Bristol Channel across the Mendip escarpment towards Frome, Selwood and Cranbourne Chase in the east, ultimately uniting north to the Chew Valley and the Somer Valley to the South.

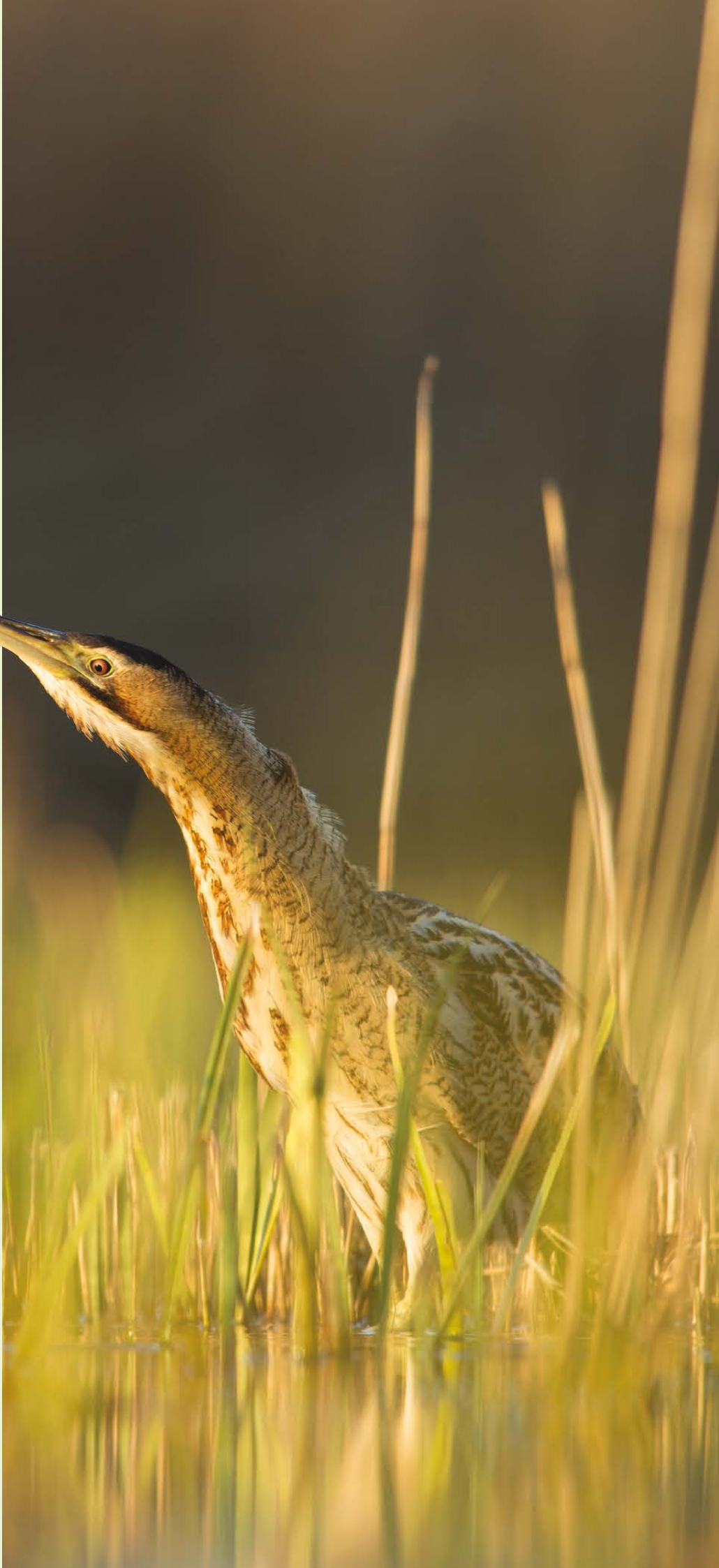
CASE STUDY:

Species Survival Fund - 'Bogs and Bittern'

In February 2026, we completed the 'Bogs and Bittern' project, which aimed to enhance and restore over 41 hectares of wetland habitats in the Brue Valley. Funded by Defra, the project included creating better habitats for rare species, such as the European eel, as well as the creation of wetland features such as scrapes, ponds and leaky dams. The work also involved tree planting, hedge management and grassland restoration.

47 Local Wildlife Sites (LWS) covering over 883 hectares were surveyed during the project, with a grant being allocated to a small number of landowners to enhance their LWS land. Amazingly, 4,806 new LWS species records were also submitted. The project also included a wealth of training and engagement opportunities, with events and courses covering orchard management, hedge laying, tree identification and bird ringing. Activities included foraging, dragonfly events, BioBlitzes, sphagnum planting, and nature-based wellbeing sessions.

The BioBlitz, held in Glastonbury and based around Bride's Mound, was a flagship event for the project. It enabled the public to participate in an eclectic mix of nature connection and climate adaptation activities, these included species surveys, a guided walk to learn about soil types and hydrology, and film screenings on a variety of themes including beaver reintroduction and soil management.





IMPACT MEASURE 2

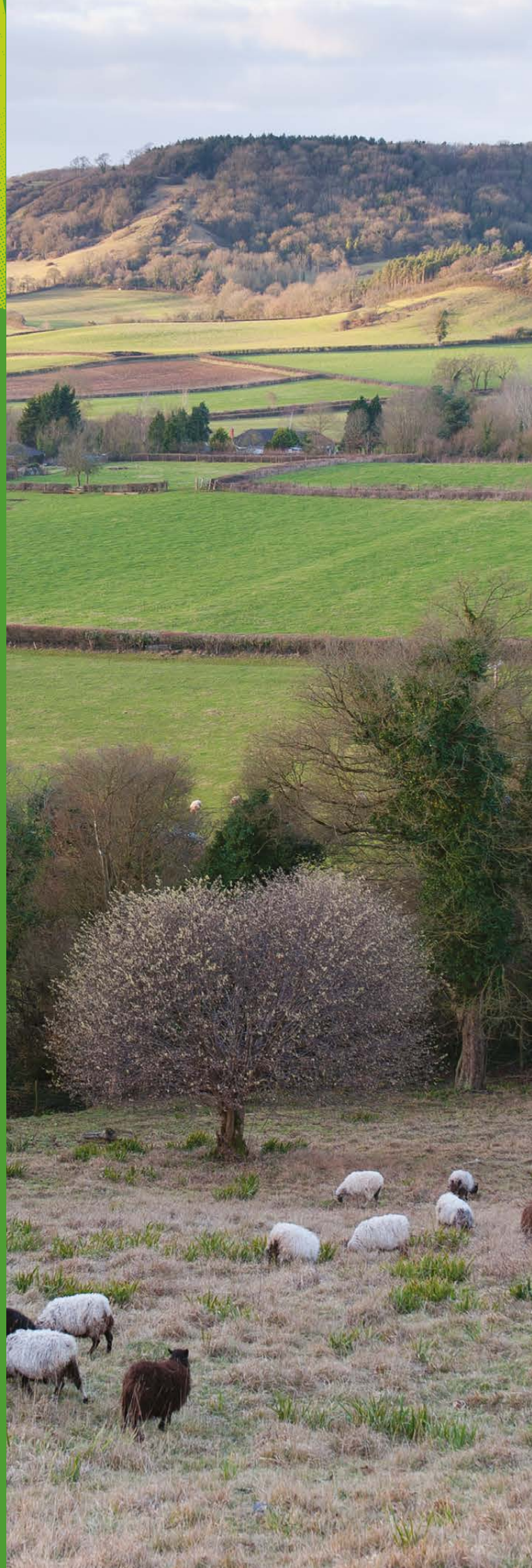
Owned and Managed Land

What does success look like?

An increase in the total area of land that is protected and positively managed for nature and counting towards international targets, as a direct result of the Trust's activity.

How will we deliver it?

We will contribute to the Somerset and UK shared target of 30% of land being protected and positively managed for nature directly through our own land management. We will seek to support and influence other land managers to do the same through our advisory, advocacy and planning work, and through leadership with partners including through the Local Nature Partnership.



WHAT PROGRESS HAVE WE MADE IN THE PAST YEAR?

To increase the amount of land across Somerset that's managed for nature, we have to use a number of measures. These include funding schemes and programmes, along with practical demonstrations of success that can act as inspiration for others. This year, the Trust has focussed on four main areas to deliver this:

Land management and ownership

Somerset Wildlife Trust has expanded its reserve network to over 1,800 hectares. These reserves continue to showcase the very finest examples of biodiversity-rich places across the landscapes of Somerset. **Around half of our reserve area is designated as Site of Special Scientific Interest (SSSI).** Where the status of these sites is in our control we are managing them so well they are considered either in 'favourable' or 'recovering' condition. Any areas that are considered 'unfavourable' are due to circumstances outside of our direct control, such as off-site pollution issues on the Levels and Moors.

Demonstrating nature recovery

Over the last four years our land acquisition has centred on purchasing land that is relatively poor in terms of biodiversity. Our work then is to transform it by actively restoring land, reducing intensity of management and restoring ecological function. The geographical focus of acquisition this year has been in and around the Somerset Levels and Moors, which has prioritised the restoration of peatlands.

Somerset Wildlife Trust
has expanded our reserve
network to over

**1,800
HECTARES**





Collaborating with partners

Through our leadership of the Local Nature Partnership, we bring together a wide range of government and non-government organisations, businesses, and stakeholders to deliver nature's recovery in Somerset. In collaboration with these partners, we have established a comprehensive, coordinated approach. As a result, the Somerset environmental community now has a clear, shared vision and a unified framework for achieving this ambitious goal.

Clarifying the process with landholders

We have committed to testing green finance mechanisms, seeking to prove the concept and share our learning with other land managers. These include testing the creation and sale of carbon credits at our Honeygar site, developing the ability to generate and sell Biodiversity Net Gain units at Sharpham, exploring the market for nutrient reduction at Westhay South, and maximising nature recovery opportunities via government Agri-Environment funding across several of our reserves.

We have developed a better understanding of these mechanisms, how they contribute to diversified income streams for land management, and how to ensure they deliver for nature. We share our learning with others through our land advice, community and advocacy work. As a result, we are now working closely with selected influential farmers in strategic locations in Somerset to support them in using these mechanisms to finance nature recovery outcomes.

LOOKING TO THE YEAR AHEAD

Next year, we will continue our focus on proactive acquisitions to establish bigger and better-connected nature in the Mendip Hills and Avalon Marshes. We will pursue further acquisitions in other areas on a more reactive basis, when opportunities arise.

We will seek to engage four farm cluster areas within the priority landscapes (in partnership with the Local Nature Partnership) to develop Defra-funded Environmental Land Management schemes that will support farmers to deliver strategic land use change in line with 30x30 criteria.

Furthermore, we will pilot a scheme whereby Local Wildlife Site owners are better supported to protect, improve and, where possible, expand these special areas across the county. Lastly, we will work with individual landowners to identify, develop and confirm off-site Biodiversity Net Gain areas with appropriate financial, advisory and legal arrangements for the long term.

CASE STUDY:

Demonstrating nature recovery through the carbon markets

Our nature recovery reserve at Honeygar, on the Somerset Levels, offers the opportunity to generate robust evidence about how lowland peatlands can be managed to support wildlife, sustainable land use and local economies. However, it also enables us to bring to market a carbon- and nature-based product that generates income for the Trust while also aiding nature's recovery.

Working in partnership with Wilder Carbon, a subsidiary of Kent Wildlife Trust who facilitate carbon credits, we generated a robust monitoring framework at Honeygar that enables us to clearly evidence how our actions reduce carbon emissions. It also allowed us to capture and demonstrate associated biodiversity benefits.

This has formed the basis of our product – the Wilder Carbon Unit – that is now available for businesses to buy to offset their carbon emissions. As a result, income from selling these units will help ensure Honeygar is properly funded for the long term. The model also gives us a strong basis for open, evidence-led conversations with farmers across the Somerset Levels, showing how they can stay financially viable while also protecting the area's valuable peatlands.





IMPACT MEASURE 3

Marine and Coast

What does success look like?

An increase in the total area of the marine environment that is protected and positively managed for nature and counting towards national and international targets.

How will we deliver it?

We will contribute to the national and international target of 30% of sea protected and positively managed for nature for at least 20 years.



WHAT PROGRESS HAVE WE MADE IN THE PAST YEAR?

Our current marine and coast projects focus on the protection and improvement of designated sites on the Somerset Coast and in the Severn Estuary marine environment.

Held major developments to account

Reducing the impact of major infrastructure and developments on marine life has been a top priority this year. We have tackled this issue by providing advice to the Severn Estuary Commission on potential hydro/ tidal energy projects as well as supporting the potential for renewable energy.

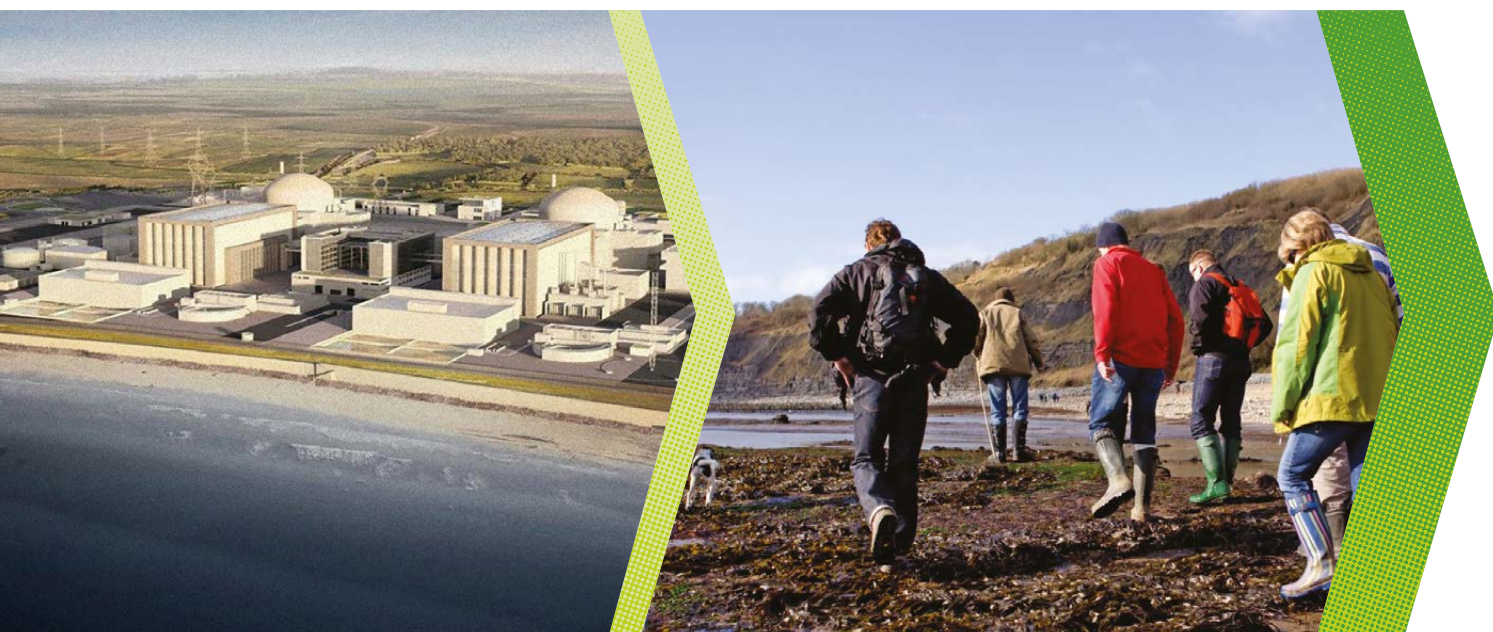
We have also continued to work on the details of the Hinkley Point C development. Our focus has been holding EDF to account to deliver the mitigation measures they proposed, and on government agencies to ensure these mitigation measures are appropriately implemented and will achieve the stated aims of reducing harm to wildlife. Lastly, we have been reviewing the preliminary plans for the development of a tidal lagoon from Minehead out into the Severn Estuary.

Improving data monitoring and assessment

Monitoring the success of these sites is only possible when data is up to date and effectively assessed. Currently, these sites are defined as being in 'favourable condition' but recent assessments have called this into question due to the age and low volume of data. Subsequently, a key focus of this year has been influencing stakeholders to ensure the proper monitoring, assessment and sustainable management especially in the Severn Estuary designated area.

We have worked with other Severn-bordering Wildlife Trusts and NGOs to hold Natural England to account and ensure it undertakes a full Severn Estuary and coastal condition assessment over the next two years. This will initially be on bird sites protected under the Special Protection Area and then move onto the more complicated assessments of marine habitats and fish species.

We have also been limiting the impact of developments and extraction from the Severn Estuary, by revising the processes used by the





Environment Agency to monitor existing licenses and permits. Through this, we hope to ensure that businesses will be more transparent with their data.

Coast and Marine Wilder Landscape Action Plan

Our Coast and Marine Action Plan focuses on advocacy for proper assessments and monitoring of the marine environment. It also addresses the need for campaigning for sensitive development that protects and restores coast and marine protected features. Lastly, it ensures we're working with communities on the coast to protect, enhance and adapt to climate change. We are developing an exciting new project with the Somerset Activity and Sports Partnership (SASP) where we will focus our efforts to deliver improved habitat on the coast and build the case for the improvement of nature rich access experiences along the coast path.

LOOKING TO THE YEAR AHEAD

We will maintain our efforts to ensure Natural England and the Marine Management Organisation undertake a timely and comprehensive review of the condition of designated features on the marine and coastal areas. Not only that, but that the final decision of condition should be based on full evidence base.

We will continue to work proactively with communities on the coast - from Minehead to the Quantocks; and Berrow to Brean - to support the better use of the coastal environment, expand nature rich areas and to enhance abilities to adapt to climate change. One eventual outcome of this work will be a nature-rich vicinity from coastal cliffs and the coast path that could eventually be appropriate for the colonisation by the red billed chough.

Lastly, we will continue to focus on major developments occurring in the coastal zone that could negatively impact on designated coastal and marine wildlife.

CASE STUDY:

Hinkley Point C

Over a period of many years, we have engaged with the development and construction of Hinkley Point C to reduce the harm to the estuarine ecosystems and species within. EDF proposed three mitigation measures designed to work together as part of their planning application, including an Acoustic Fish Deterrent, which at the time was untested.

Our response has always been that while there is a lack of concrete evidence in the Severn Estuary, however, it is one of the most protected landscapes in the world and home to a wide range of species. It is also important migration route for many protected species such as salmon, shad and eel, therefore, mitigation thresholds for harm must be high. Our role has been to work with partners to hold EDF to account for delivering the level of mitigation they proposed at the outset, and to require the statutory agencies responsible for condition monitoring and evidence gathering to improve the evidence base.

This year, we have worked with the Severn Estuary Interests Group to hold EDF to account when it explored alternatives to the Acoustic Fish Deterrent. We have brought together partners to align our approach and communications, prepared media and MP briefings on the topic and have plans to mobilise our supporters, should this be necessary.

We will continue to stand up for the species and ecosystems of the Severn Estuary to reduce the impact a nuclear power station will have on this special and highly protected environment.





IMPACT MEASURE 4

Action for Nature

What does success look like?

An increase in the number of people taking meaningful action for nature as a result of the Trust's activity.

How will we deliver it?

We will enable people to take visible, meaningful action for nature, in order to reach a social tipping point, a movement of people in Somerset driving positive change.



WHAT PROGRESS HAVE WE MADE IN THE PAST YEAR?

This year, we completed our final year of the 30x30 Wilder Communities project funded by the National Lottery Heritage Fund. The project aimed to stimulate and coordinate engagement, to connect spaces for wildlife and provide resource to help people take action to restore nature. The project worked with 14 communities, supporting them to co-design and deliver local actions for nature, including creating wildflower meadows, orchards, community gardens and growing spaces.

We have delivered almost 150 events over the project period, supporting people to feel part of nature, building connections with local wildlife and learning practical skills. This project has helped us test and learn and this has been built into our Wilder Communities programme going forwards.

Quote from event attendee of hedge laying course

"Just back (& showered, into dry clothes & washing machine going!) Fab session. Chris was fab - so generous with his knowledge, and such a kind heart. I learnt so much and it completely took

the 'scaries' out of doing my own hedge in future (maybe that's not such a good thing...!) Thank you so much for arranging - something I've been wanting to try for ages."

Our **Act to Adapt** work (supported and funded through Somerset Rivers Authority) is designed to help communities across Somerset come together. We support communities to hold events and workshops that empower people to understand and respond to challenges brought about by the climate and nature crises. This might include issues such as flooding, drought, and increased heat, and looks at ways where nature can provide solutions.

Over the last year, we've worked with communities in the Under Hamdon Parishes, Burnham on Sea and Highbridge, Spaxton and Wells.

Under Hamdon Parishes have delivered a range of small-scale climate adaptation actions across multiple villages, with a strong focus on biodiversity enhancement and community-led planting. Activities include tree surveys, orchard development, and





signage to support interpretation of local green spaces.

In Burnham on Sea and Highbridge, a “Foster a Tree” initiative successfully engaged approximately 30 participants and is planned to be repeated as part of the EATS festival.

In Spaxton, progress has been made through voluntary ditch clearance work carried out with local farmers. This demonstrated effective low-cost natural

flood management solutions. There were additional activities including engagement with the local school through the Flower Show, and helping to embed long-term community links.

And finally in Wells, a cross-sector group planted hedgerows, created wildflower habitats and developed a memorandum of understanding between landowners and Sustainable Wells, enabling coordinated “Slow the Flow” interventions.

LOOKING TO THE YEAR AHEAD

In the last year, we’ve learnt a huge amount about working with communities. Now we want to use that knowledge to continue building deep-rooted, lasting relationships with local people that lead to sustained action for nature. With three permanent Wilder Communities Officers now in post (look out for Guy, Hannah and Dan working across Somerset) we are now in a position to support even more communities. Over the next year, we’ll be building on our successes with Parish and Town Councils, integrating the Local Nature Recovery Strategy into our Wilder Communities and Act to Adapt work to help guide communities to create sustainable action plans.

We also want to build on the successful Wilder Communities Awards, which celebrates action for nature where people live. We awarded our first ever Wilder Communities award to Wilder Enmore

this year, with several other communities following closely, and we’re planning to award many more this year. Communities across Somerset (whatever their size) can gain an award through 25% of gardens or private outdoor spaces achieving a Wilder gardens plaque and taking action for nature in their shared community spaces.

And we’ll be running our successful Wilder Together event for another year. This brings communities together across Somerset to share, support and learn from each other, reinvigorating confidence and passion to support sustained action. We’re seeking to find ways to build more self-guided tools, refreshing our existing toolkits and training opportunities as well as offering on the ground staff, so we can support as many people as possible to take action for nature.

CASE STUDY:

Heads Up Wells

Heads Up is a mental health and wellbeing charity, supporting their clients to feel part of nature. Wilder Communities Officer, Guy, offered a series of practical training days and engagements aimed at improving a small but valued space for people and wildlife – including companion planting, hibernaculum creation and wildlife ponds.

Guy worked with clients at Heads Up, talking about how they feel being in nature, how nature is complementary to us and how we are part of it. Some said they feel better the longer they spend in nature and outside. The group then came up collectively came with “be long in the landscape” (belong).

“Thank you very much for your time and a very informative hour session at Heads Up today. It was great to see people engaging in this activity and taking an interest in the diversity and companion options of growing in their gardens.”

**Programme and Engagement
Manager Heads Up**





VOLUNTEERS

Our commitment to our volunteers

We wouldn't be able to do what we do without our wonderful volunteers. Over 60 years ago, back in 1964, volunteers founded Somerset Wildlife Trust and remain fundamental to our work today. The time and expertise volunteers share with us every day is essential, and we rely on their support to help achieve our goals to create a Somerset rich in wildlife for everyone.

Volunteers carry out a wide variety of roles, from practical habitat management and field surveys, to supporting our Membership and Communication teams in the office, as well as advocating for nature and

engaging with individuals and communities across the county. In 2025 alone, volunteers contributed nearly 15,000 hours.

With the launch of the Volunteer Action Plan in January 2025, we continue to work towards achieving an inclusive culture of volunteering, embedded across the Trust. We are committed to making sure volunteers' involvement is utilised, funded, planned for and celebrated. Each team has specific responsibilities and commitments, which we will be working towards achieving over the next four years. The Volunteering & Community Support Officer will work with each team to support staff and review progress on an annual basis.

Our plans for next year

A priority for the next year will be delivering volunteer management training for all staff who work alongside and manage volunteers. The purpose of this training has been to ensure everyone is familiar with volunteering processes, best practices, opportunities and culture. So far, we have

24 members of staff signed up for training in spring 2026, with hopes to train another 15 members of staff later in the year.

"How accepted I was from day one, even without experience I was welcomed with open arms, you embraced my enthusiasm and gave me platforms/opportunities to learn and grow not only my knowledge but appreciation for nature leading me to be part of some fantastic projects, workshops and events which will stay with me for the rest of my life!"

Anonymous quote from the 2025 volunteer satisfaction survey, when asked 'Is there anything about volunteering with us that you particularly enjoy and/or value?':

24 members of staff have signed up for training in spring 2026, with hopes to train another 15 members of staff later in the year





IMPACT MEASURE 5

Access for Nature

What does success look like?

An increase in the number of people from our key audiences taking part in nature experiences facilitated and supported by The Trust.

How will we deliver it?

We will create accessible opportunities for a range of diverse audiences and support partners to help more people engage with and value nature across Somerset.



WHAT PROGRESS HAVE WE MADE IN THE PAST YEAR?

The final year of the 30x30 Wilder Communities Project, funded by the National Lottery Heritage Fund, also saw us deliver a the youth element of the project. It enabled young people take part in ecology and practical conservation sessions and training, including bittern surveys with the reserves team and the Toad Patrol with Froglife. The group were able to build their knowledge and connection with nature through sessions from local authors and influencers working in the sector, and support and mentoring from the Trust's staff team.

This year, we continued to support people wanting to enter nature-orientated careers with job application guidance and interview prep. This resulted in some of the group securing paid roles such as a countryside ranger, Forest School leader and National Park apprentices. This year also saw agreement that the Wilder Youth role is essential in supporting young people across Somerset to access and take action for nature and we have made this role permanent, retaining the existing staff member.

Our Wilder Wellbeing project, funded by the

Ninesquare Trust, has gone from strength to strength. Connection is key to this project – be it meeting new teams and people or creating connections between organisations and communities to find the best route for supporting wellbeing through and with nature. This year, we have made connections with 38 teams and organisations, including Somerset NHS foundation, Somerset Mental Health forum and other local health and conservation organisations.

Our focus has been on blending a balance of theory, practical application and time spent outdoors to ensure people fully experience the benefits of being in nature firsthand and build confidence to put that lived experience into action for others. This has included working with staff and volunteers to embed wellbeing and nature inclusion practices into the culture and delivery of the Trust, as well as providing training to multidisciplinary participants. It has also involved in-depth engagement with groups and communities to demonstrate these approaches and build confidence within existing settings such as memory cafés and support groups.





LOOKING TO THE YEAR AHEAD

We want to focus on inspiring and engaging people from all backgrounds, cultures, identities, and abilities to play their part in nature's recovery. Over the next year, we'll be building our Access to Nature programme that widens access in ways that are self-directed, meaningful and achievable to communities. This will involve learning alongside other organisations across Somerset through training, networking, and mentoring programmes to address the ongoing barriers in the environmental sector. It will work with managers of public land, including Parish and Town Councils, and local community groups to improve the management of land for nature and public access. It will also empower local people to take action to enhance the community spaces where they live.

Alongside this, we'll be working with and learning from other sectors (such as arts, sport, health and food) to better understand what matters to Somerset communities and how intertwined nature, wildlife,

climate, health, and happiness are. By better understanding the relationships people have with nature, and how they feel part of nature, we can build a range of pathways to action and truly inspire the movement we need for nature to recover.

We also plan to make changes to our events delivery, being present at other organisations' events across the county as well as running a varied programme of our own. Events will include opportunities for feeling part of nature through art experiences and guided walks, as well as opportunities to learn practical skills from local experts and increase knowledge of the most important topics facing Somerset wildlife through our Wilder Matters online webinars. We'd like to try new storytelling methods in our communications, building on our New Year Wilder You campaign to tell the many stories of what nature means to people across the county, as well as showing the wide variety of actions people take.

CASE STUDY:

**Catrin Poole @teethworms:
Young Artist**

Catrin joined us as a volunteer artist after just finishing their degree. They moved back to Somerset and were keen to get involved in nature and wildlife-based projects in Somerset, ideally in a way that allowed them to share their art skills.

After supporting voluntarily with designs and other pieces of work, Catrin joined the bank of paid designers used by the communications and engagement teams and was commissioned to focus on key pieces of work for engagement projects including:

- ▶ 2 designs for advertising events and activities on Westhay Moor
- ▶ 4 seasonal images for Nature Connection guides as part of a project with the NHS in Somerset
- ▶ Various illustrations for a children's book as part of the Blue Influencers Project with Bishop Foxes School
- ▶ Facilitating 2 nature-based zine workshops at Strode College
- ▶ Zine Artwork for sharing Beth Calverley's Poems

They are an incredibly talented artist and Somerset Wildlife Trust will continue to work with them beyond this project.





IMPACT MEASURE 6

Building Support

What does success look like?

An increase in the number of decision makers, businesses and organisations making positive changes influenced by the Trust, that contribute directly to nature recovery in Somerset.

How will we deliver it?

The Trust is working with others to build support for nature's recovery across Somerset through advocacy and influencing change across sectors.



WHAT PROGRESS HAVE WE MADE IN THE PAST YEAR?

Over the last year, we have strengthened support for nature's recovery and climate resilience in Somerset by building relationships, improving evidence, influencing decisions and when needed, holding decision makers, businesses and regulators to account.

Largescale infrastructure projects

Somerset currently has two of the largest building sites in Europe: HPC (as outlined in Impact Measure 3 – Marine and Coast) and the Agratas electric car battery factory site. We are engaging both with Agratas directly and with the local planning authority and regulators to ensure nature is appropriately planned for with the build of the electric car gigafactory.

The factory will have significant impact on water availability in surrounding catchments and it also has a requirement to deliver biodiversity enhancements in the Development Consent Order. We are committed to ensuring suitable mitigation for nature, as well as compensation for the three Local Wildlife Sites that will be lost as part of the development.

Supporting business change

A key focus of this year has been to reshape our work with Somerset businesses to have a positive impact for nature. We have relaunched our improved corporate membership programme, which we believe will offer easier and more diverse ways for businesses across the county to engage with us and nature's recovery.

We are also working with businesses on the ground, helping well-known brands like Mulberry on its sustainability approach and providing feedback on Wessex Water's next five-year biodiversity plan.

Influencing developments at the beginning

We have also used this year to review how we work with key stakeholders in planning and development. Following evaluation of the process, it was clear the key moment to intervene to influence design is before a planning application is submitted. As we look to the year ahead, we will be trialling different approaches to maximise this. Key to the approach will be using a new data collection



process, using Somerset's planning portal to create a consistent baseline of information on applicants, habitats, species, statutory input and provision for nature. The aim is this will help us identify trends, priority projects and potential biodiversity risks earlier in the process.

Somerset Wildlife Trust Consultancy (SWTC) has become an important delivery mechanism for our strategy. During the year it enabled us to influence decisions affecting priority habitats, support organisations seeking to reduce their impact on nature, develop nature-based solutions projects and attract investment into habitat restoration. Through this work, SWTC has helped extend the Trust's reach beyond the boundaries of our own reserves, ensuring that more businesses, landowners and decision-makers are actively contributing to nature recovery in Somerset. It has also generated income that can be reinvested into our charitable work, strengthening the Trust's long-term capacity to deliver conservation impact.

Local and National Government engagement

Our work with local government has always featured at the core of our work. This year, we supported the development of the Local Nature Recovery Strategy aiming to ensure the strategy is both ambitious for wildlife and uses the best possible evidence, including data collated by Somerset Environmental Records Centre (SERC) and provided by our fabulous staff, members, supporters and partners.

We also continued to partner with Somerset Council and other organisations to ensure SERC can provide critical data on habitats, species and Local Wildlife Sites to inform decision making. While also holding them to account as Local Planning Authority on the continuation of peat extraction, lack of progress on effective Biodiversity Net Gain systems, as well as pushing for monitoring of and progress towards Somerset's Nature and Climate Emergency Strategy.

LOOKING TO THE YEAR AHEAD

Across all this work, our focus for the next year will be to build broader, deeper and longer-term support for systems change across Somerset. We want more of the county's institutions, businesses and decision-makers to recognise and understand the role they can have in nature's recovery, and to take practical steps that contribute to a nature-rich future. With a clearer approach to organisational engagement, and a stronger offer for businesses and partners, we are confident we can grow support for nature-positive action across sectors.

A key priority will be to engage more organisations that want to invest directly in nature recovery in Somerset. We will continue to broaden our carbon credits pipeline through Wilder Carbon, while also developing a Biodiversity Net Gain unit pipeline that can help secure long-term funding for habitat creation and restoration. This work will be supported by more active business development with larger corporate organisations, particularly those seeking to respond to changing legislation, reduce nature-related risk, strengthen climate commitments and demonstrate credible environmental leadership.

Our role will be to help these organisations move from ambition to action. We will provide practical, evidence-led advice on nature-based solutions by understanding their needs, assessing opportunities and risks, and developing strategies and delivery plans that are appropriate to place. Crucially, this will not be limited to advice alone. Where funding is secured, we will work to turn plans into tangible outcomes, delivering habitat creation, ecosystem restoration and long-term management that benefits wildlife, climate resilience and communities.

Much of this practical delivery will be supported by SWTC, which will continue to grow and expand its services in nature-based solutions design, ecological advice, green finance, Biodiversity Net Gain and habitat delivery. This will strengthen the consultancy as a resilient and purposeful commercial business, generating income to support the Trust's charitable work while delivering lasting, measurable nature-positive impact on the ground.



CASE STUDY:

Creating Temperate Rainforest on Exmoor

The Royal Society of Wildlife Trusts, has a partnership with Aviva to create Temperate Rainforest in the UK. We have identified and developed a project in Somerset that will be funded by Aviva on Exmoor National Park. We have used this opportunity to build a partnership with Exmoor National Park Authority to acquire land on Exmoor to create this amazing habitat.

The National Park Authority will take on the management of this site, that will be owned by the Trust. This relationship has led to us being involved with the Exmoor Nature Conservation Plan and has potential for us to develop further projects together in support of improving Local Wildlife Sites on Exmoor.





IMPACT MEASURE 7

Income Step Change

What does success look like?

An increase in the amount of money the Trust generates to fund nature recovery in Somerset.

How will we deliver it?

We will grow our financial capacity through a model that sustains core operations and enables strategic growth.



WHAT PROGRESS HAVE WE MADE IN THE PAST YEAR?

Despite challenging times across the sector, supporters of the Trust continue to astonish us with their commitment and generosity. In return, we continue to be committed to being careful stewards, ensuring every gift achieves the maximum possible impact.

Despite this generosity and good income performance, it is fair to say that nature's recovery needs conservation and recovery work on a massive scale, and to achieve this, we need to find new ways to increase the funding. Diversity is key, and this year, we have been maximising efforts across our entire income portfolio, including:

Membership

Our members enable us to stand up for nature and continue to be critical to the funding of the Trust's strategic work, with regular gifts helping us make long term plans and take steps forward in our priority work areas. Whilst we did see a small reduction in the number of members between 2025 and 2026, we still saw an increase in membership donations and our Members contributed 14% of all of the income generated in 2025/26.

With the cost of living still increasing for many, we've been humbled by the members who have chosen to increase their monthly contribution or boost their support by signing up for Gift Aid.

Trusts and grants

Following several years with a reduced number of grant opportunities, this year has seen an unprecedented increase in new prospects and potential funding, both amongst private opportunities and government led initiatives

During the 2025/26 year, we received income from over 50 Trusts, Foundations and Grant giving bodies, which supported work in areas such as our ongoing youth work, providing defibrillators for our volunteer teams and supporting our Catcott Infrastructure Project.

Major gifts

Significant philanthropic gifts are a major component of our work for wildlife in Somerset. This year, these gifts have helped us purchase strategically significant areas of land to bolster our nature reserves and protect key habitats, as well as contributing to replacing key infrastructure at our Catcott nature reserve. We are lucky to have such passionate individuals to support our work, inspiring us with their commitment, ideas and determination to recover nature in Somerset.

Patron scheme

Our 65 patrons are highly devoted individuals that support us not only through regular significant gifts to our core work, but often beyond that in the form of their time, influence and in gifts to our appeals and projects. Our Patrons enjoy a close and special relationship with Somerset Wildlife Trust, meeting the people involved in our conservation delivery plans and getting a behind the scenes glimpse at some of our most vital work.

Legacies

Our legacy scheme saw a significant increase this year, firstly in income – with an astonishing **£908,000 of legacy income**, but also in the number of legacy pledges from our Wildlife Guardians, the amazing 139 people who have made the decision to leave a gift in their Will to Somerset Wildlife Trust. Legacy gifts are especially valuable to us, they help support our core work: managing habitats, helping people act for wildlife and protecting wildlife for future generations.

We are also excited to announce that our Legacies Manager Lucy Marsh was celebrated nationally at the Institute of Legacy Management Conference for receiving the highest score in the UK for the Diploma in Charity Legacy Management. **Lucy scored 94% for her qualification through the University of Law** and joins a select group of legacy

professionals who hold this qualification.

Commercial income

Our income is generated from a broad mix of sources, and this diversity is central to our financial resilience. While our members, supporters, patrons and grant funders remain vital to our work, around 16% of our income now comes directly from commercial activity. This is an important part of our long-term income strategy, helping us reduce reliance on any single funding source while creating new routes to deliver nature recovery at scale.

Over the past year, we have continued to invest in areas that can generate income while also delivering environmental impact, including green finance, nature-based solutions and the continued growth of our commercial services. Commercial income generated through our charitable activities,

and through Somerset Wildlife Trust Consultancy, has continued to strengthen. This income provides additional funds to support our charitable goals while enabling us to set and maintain high standards for environmental integrity, due diligence and long-term outcomes for nature.

We have also continued to test and secure income from emerging green finance opportunities, alongside delivering high-quality species, land management and ecological advice to a wide range of commercial clients. These include housing and infrastructure developers, utility companies, public bodies and private landowners. Through this work, we are not simply generating income; we are helping clients understand their responsibilities, manage environmental risks and deliver practical improvements for wildlife, habitats and ecosystems across Somerset.

LOOKING TO THE YEAR AHEAD

Looking ahead, our members and patrons will remain a cornerstone of our financial model. We anticipate that they will continue to generate more than £1 million of unrestricted income, giving us the flexibility to focus resources where they can have the greatest impact. This support is particularly important because it enables us to respond to opportunities, sustain essential functions and invest in the work that underpins long-term nature recovery.

Legacy income will also remain a major priority. In recent years, gifts in wills have become an increasingly significant source of support, reflecting the generosity and long-term commitment of people who want to leave a lasting benefit for Somerset's wildlife. We will continue to develop this area carefully and respectfully, while focusing major donor, trust, grant and appeal income on priority projects, including the long-anticipated purchase of Chancellor's Farm.

Commercial income will be a key area of focus in the year ahead, driven by our ambition to deliver and enable nature recovery on the ground, at scale and for the long term. This will include generating further income from our own land through carefully governed green finance initiatives, as well as

growing our commercial services offer where it can deliver both financial return and measurable nature-positive outcomes.

We will extend our engagement with local authorities, public bodies and companies with assets, supply chains or reporting obligations linked to Somerset, particularly in the water, built environment and agri-food sectors. These sectors have a significant influence on the county's landscapes, rivers, soils and habitats, and therefore present important opportunities to secure investment, improve decision-making and deliver practical nature-based solutions.

We will also continue to build on existing relationships and develop partnerships with organisations that are serious about becoming more nature positive. By combining high-quality advice, robust evidence, practical delivery and strong environmental governance, we can help partners move from commitment to action. In doing so, we will strengthen our income base while ensuring that commercial growth remains firmly aligned with our charitable purpose: restoring nature across Somerset for the benefit of wildlife, people and future generations.

CASE STUDY:

Legacies

We would like to thank the family of Chris Chappell, for his wonderful gift in Will. Chris had been a member of the Trust and the Heart of the Levels Group since 2010 when he moved from Sussex to Somerset and could always be found with his camera out on one of our nature reserves. As his photos were of such high standard, Chris became one of the Trust's volunteer photographers, providing many stunning wildlife photos, usually from one of his favourite places on the Avalon Marshes.

His sister, Beth, recounts: *"From an early age Chris developed a passion for anything related to wildlife. He invariably spotted a bird long before I had a chance to focus or even look in the right direction. Emails from Chris were always accompanied by at least one stunning photograph, often more. Even when he couldn't explore further afield, he captured images of local wildlife and was as interested in his friendly pigeon as he was in the elusive bittern".*

We are indebted to Chris for leaving a gift in his Will, as this allows us to keep protecting the local wildlife he loved, right here in Somerset. Income from gifts in Wills is central to our future success and allows us to protect more nature reserves, save more species and ensure future generations can experience nature.

If like Chris, you would like to leave a gift in your Will, please call our Legacies Manager, Lucy Marsh on 01823 652441.





IMPACT MEASURE 8

State of Nature

What does success look like?

An increase in the amount of robust and long-term data sets collected for priority habitats and species, so that we can demonstrate how the state of nature in Somerset is changing.

How will we deliver it?

We will gather, collate, analyse, and report on data to understand nature's changes to guide recovery efforts and monitor our collective progress.



WHAT PROGRESS HAVE WE MADE IN THE PAST YEAR?

Data is at the heart of everything we do at the Trust – after all, the more robust evidence we have, the better our understanding of the state of nature in Somerset, and the greater our ability to help shape policies, decisions, and actions. This year, we have invested further in a wide range of areas, from academic research to advancing the quantity and quality of our environmental data.

Research

Our research work has grown substantially with the launch of the first Somerset Wildlife Trust Research Prospectus and Ideas Portal. This is an initiative that aims to direct partners to work with us on some of our most important challenges, helping to fill data and information gaps and ensure that our nature recovery efforts are based on robust and up to date evidence. Since the launch we have had a number of approaches from interested partners and have put in place an internal governance process to help secure funding where needed, and drive the projects forward.

The Research Prospectus launch was followed by a very successful research day, bringing together a range of stakeholders to talk about the work they have been undertaking on our sites, and discussing where we need to go next with lots of excitement about future ideas.

Engaging with academic institutions is key to our work and this year there were in excess of 30 visits to the Honeygar site, including five active PhDs, one active Post Doctorate, and three active Masters students. We also welcomed researchers to other peatland reserves to look at our wider peatland restoration activities.

State of Nature and Somerset Environmental Records Centre (SERC)

This year, we were very pleased to welcome Ian Egerton as the new manager of SERC. Ian comes with a background of a long and successful career at Devon Biological Records Centre. Having taken the joint lead role at Devon and Somerset Records Centres, his primary focus has been on increasing





data flow from specialist groups to SERC through formal data exchange agreements.

With experienced leadership and a stable team in place, SERC is now better placed to support the Trust and other partners in project delivery, which in turn will provide greater opportunities to target survey and data collection collaboratively.

Having successfully addressed a number of historic challenges this year, SERC is now readying itself for accreditation through the Association of Local Environmental Record Centres (ALERC). This process enables SERC to identify areas for development in systems, processes, policies and ensure its activity are focused. This will improve its overall functionality, data infrastructure, and ability to deliver a quality service for its partnership and clients.

LOOKING TO THE YEAR AHEAD

We expect to see increasing interest in our Research Prospectus as we build our communication efforts. These will include a series of Research Workshops around major programme ideas and the establishment of a science steering group to help guide access to funding opportunities.

We will begin to develop the fundraising approach for the UK Centre for Lowland Peat Research at Honeygar, as well as looking at opportunities to engage in ambitious landscape scale plans for nature restoration accessing both public and private finance. We are also developing a volunteer group and monitoring programme for the Sharpham Park BNG project and for grassland restoration learning at Chancellors Farm.

The Trust has shown leadership in this space across the national Wildlife Trust network and has helped to spearhead the initiation of a planning group aiming to develop a national research prospectus based on our own experience as well as that of Surrey Wildlife Trust. We will complete work on the second Somerset State of Nature report towards the end of the year and will publish, on behalf of the Local Nature Partnership, in early 2027.

CASE STUDY:

Honeygar

Clear monitoring programmes on our sites are core to the early success of our research engagement. A great example is at Honeygar, where we have been able to install 50 new automated water level sensors across the site and broader reserve network.

This has brought in more than two million data points, which we have used to develop a new water table app. This has been demonstrated to the Somerset Nutrients Technical Advisory Group, stimulating lots of interest from stakeholders, including the Internal Drainage Board and Wessex Water.

Additionally, we are continuing to gather various types of data in partnership with Wilder Sensing and now have in excess of six million records of bird song from these sensors, showing changing trends of bird species from woodland/farmland to wetland, in line with the change in habitat as we progress the peat restoration journey at Honeygar.



DEVELOPING SOMERSET WILDLIFE TRUST

At Somerset Wildlife Trust, our work is powered by people driven by a shared commitment to protecting and recovering nature across Somerset and delivering meaningful impact for both wildlife and people. Over the past year we have continued to strengthen the foundations that enable this work: our people, our systems, our places, and our culture.

As the organisation continues to grow in scale and ambition, the People, Culture and Resources (PCR) function continues to ensure that our infrastructure keeps pace with our strategic goals. This has included embedding more consistent systems and processes, strengthening governance, improving facilities, and continuing our journey of digital transformation.

Our focus has been on creating an organisation that is not only efficient and effective, but also inclusive, resilient, and forward-looking. We have placed particular emphasis on embedding existing improvements; ensuring that new tools, policies, and approaches are understood, adopted, and delivering value across teams.

At the same time, we continue to listen

and respond to staff feedback, recognising that organisational success depends on the experience of our people. Through staff surveys, improved communications, and more structured engagement, we are building a more transparent and responsive organisation.

Digital Transformation

Our digital transformation work is strengthening the way Somerset Wildlife Trust operates, helping people spend less time searching for information or completing manual processes and more time delivering impact for nature. The changes made this year are improving confidence, consistency and decision-making across the organisation.

As a result:

Staff can find and share key information more easily, supporting faster collaboration, reducing duplication and helping teams work more consistently across sites and programmes.

Routine administration has been reduced through automation, freeing staff time for higher-



value work with colleagues, volunteers, partners and communities.

Teams now have clearer insight into performance, risk and funding, enabling more evidence-led decisions and stronger accountability for progress against our goals.

Staff have quicker access to guidance and support through new digital tools, including an AI HR agent, improving confidence and reducing barriers to getting the right information at the right time.

Staff and trustees can access essential policies, guidance and organisational information more easily, supporting better governance, consistency and compliance.

Training and support have helped staff, trustees and volunteers adopt new systems with confidence, increasing the likelihood that digital improvements are embedded and deliver lasting organisational benefit.

Looking ahead, we are well positioned to move into more advanced use of data, reporting, and digital tools, building on the strong foundations now in place.

People

Feedback from staff has continued to shape our priorities. Through surveys and engagement, we are refining areas such as performance management, internal communication, and access to tools, ensuring that staff feel supported and equipped to do their roles effectively. Together, these developments reflect a continued commitment to building a capable, supported, and future-ready workforce.

We have:

- ▶ Reviewed our structure and salary bandings to ensure consistency and comparability of roles across all areas of the Trust
- ▶ Invested in building our leadership capability by developing a new and bespoke leadership programme for the Senior Leadership Team which

has been reviewed positively by all involved for developing them as a team, developing their skills and supporting their growth as environmental leaders. This will now be delivered with senior managers.

▶ Taken a lead national role amongst Wildlife Trusts in the Management Development and Competencies Group sharing the new Senior Leadership and Management Programme as a good practice example of investing in our people. This collaborative approach to sharing knowledge and skills is essential in supporting a consistent workforce strategy across the RSWT network. Improved our Performance Management and Development System (PMDS embedding a more structured approach to performance, development, and objective setting across the organisation.

▶ we have strengthened recruitment, induction, and training processes, alongside developing clearer career pathways, salary benchmarking, and benefits considerations as part of a longer-term inclusive talent and retention strategy.

Coming Next

We are launching an in-house mentoring programme. The SWT Mentoring Programme is designed to support employees in learning, growing, and developing their careers by connecting them with experienced colleagues. It will initially run alongside the Management Development Programme for line managers, with a long-term aim to expand access to all employees.

Facilities:

Our facilities play a critical role in enabling our people to work effectively and safely, and this year has seen continued investment in improving both our physical spaces and supporting infrastructure.

We have delivered a range of practical improvements across sites, including office

reconfigurations, painting, repairs, and equipment upgrades, ensuring that working environments are fit for purpose. At our Callow office, significant improvements have been made to optimise the use of space and enhance working conditions.

Health and safety remains a priority, with Display Screen Equipment (DSE) assessments completed for all staff, alongside the development of trackers and systems to monitor compliance, including PAT testing and vehicle management.

We have also strengthened our facilities management processes, including the development of reporting systems and tracking tools, helping to provide better oversight and planning.

Key operational updates include the replacement of infrastructure such as storage containers, improvements to office fittings, and ongoing work to review and plan for the future of key sites such as the Taunton office.

In addition, the People, Culture & Resources (PCR) team has taken on expanded responsibility for facilities management in some areas, ensuring continuity and oversight following changes in staffing.

Looking ahead, we are developing a more strategic approach to facilities, including plans for climate resilience audits, improved reporting processes, and future workplace design, ensuring that our spaces support both our people and our environmental ambitions.

Environmental strategy:

Our aim is that our activities have a net climate cooling effect, helping nature recover while reducing emissions, storing carbon and strengthening climate resilience across Somerset.

Our commitment to environmental responsibility remains central to how we operate as an organisation, and this year we have continued to build the systems and structures needed to support meaningful action.

A key development has been the establishment of a carbon reduction group, bringing together staff to focus on how we reduce our organisational impact and embed sustainable practices across all areas of work.

We have also continued to develop tools to support this work, including carbon tracking systems and data collection processes, enabling us to better understand and report on our environmental impact.

Practical initiatives such as Electric Vehicle mileage tracking and staff carbon data surveys are helping to build a more robust evidence base, which will inform future decision-making and action planning.

Importantly, this work is not being treated as a standalone activity, but is increasingly being embedded into wider organisational processes, including facilities planning, procurement, and staff engagement.



As we move forward, our focus will be on embedding these approaches further, ensuring that environmental considerations are consistently integrated into operational and strategic decisions, and that we continue to reduce our carbon footprint in line with our wider organisational mission.

Culture:

Culture remains a cornerstone of our organisational success, and this year we have continued to strengthen how we listen to and engage with our people.

A key focus has been the development of an updated set of values to strengthen the cohesiveness of our culture and belief. Work will continue to share these values across the staff teams and embed them in our work.

We improved internal communications and staff engagement, including reviewing the structure of fortnightly staff meetings to ensure they are more

meaningful, transparent, and aligned with staff needs.

We have also continued to build feedback mechanisms, including staff surveys and follow-up actions, ensuring that staff voices are heard and that feedback leads to tangible change.

Cross-team collaboration has been a growing strength, supported by improved digital tools and clearer structures for sharing information and working together. At the same time, work has continued on embedding organisational values into policies, processes, and day-to-day behaviours, helping to define a more consistent and shared culture.

There is also a strong focus on ensuring that staff feel valued, supported, and connected to the organisation, with ongoing work to strengthen recognition, inclusion, and opportunities for development.

As a result, we are building a culture that is more open, collaborative, and aligned with our strategic ambitions. One that supports both our people and our mission to deliver nature's recovery.

WHAT WE ARE GOING TO DO IN 2026/27:

Looking ahead, our focus will be on deepening and embedding the progress made this year, while continuing to evolve in response to organisational needs and external challenges.

In digital transformation, this means moving towards more advanced data use, reporting, and Artificial Intelligence-enabled tools, building on the strong foundations now in place. We will also continue to strengthen governance, documentation, and system consistency.

For our people, priorities include the rollout of the Management

Development Programme, Mentoring Programme, further development of our learning culture, and continued work on talent management, retention, and workforce planning.

In facilities, we will take forward a more strategic and sustainable approach, including climate resilience planning, improved reporting systems, and future workplace design, ensuring that our environments support both people and nature.

Our environmental work will focus on embedding carbon reduction actions into everyday

practice, supported by improved data and stronger organisational ownership.

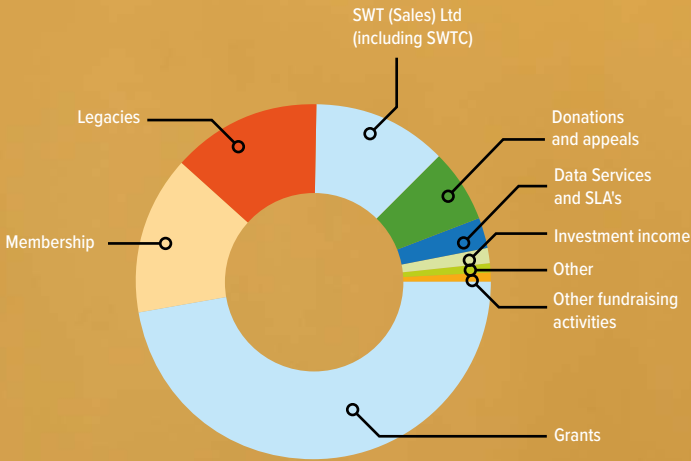
Finally, we will continue to strengthen our culture, ensuring that it remains inclusive, responsive, and aligned with our values. This includes maintaining a strong focus on staff engagement, communication, and continuous improvement.

Together, these priorities will ensure that Somerset Wildlife Trust remains a resilient, effective, and forward-looking organisation, well equipped to deliver its mission for nature and people across Somerset.

HOW WE RAISED AND SPENT OUR MONEY

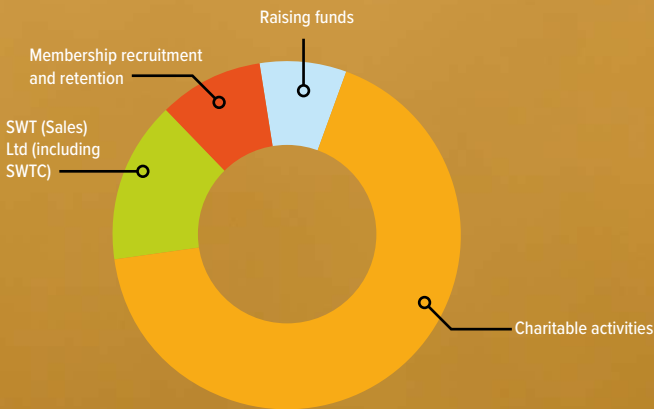


INCOME BY SOURCE



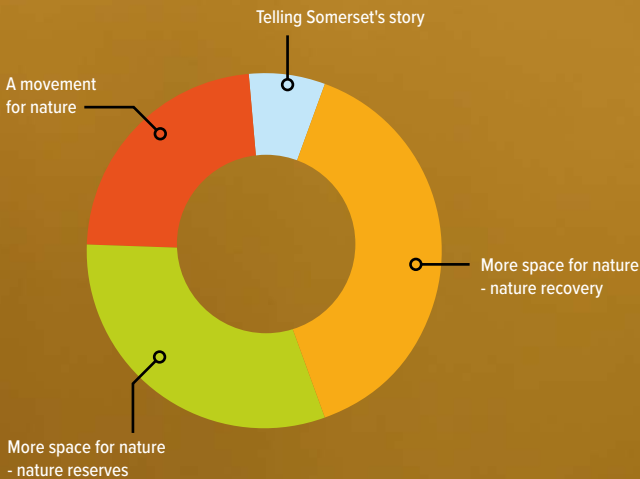
	2025/26 £'000	2024/25 £'000	Change %
Grants	3,163	2,085	52%
Membership	948	919	3%
Legacies	908	538	69%
SWT (Sales) Ltd (including SWTC)	830	623	33%
Donations and appeals	438	702	-38%
Data Services and SLA's	192	195	-2%
Investment income	76	126	-40%
Other	61	106	-42%
Other fundraising activities	49	54	-9%
Total	6,665	5,348	25%

EXPENDITURE BY ACTIVITY



	2025/26 £'000	2024/25 £'000	Change %
Charitable activities	3,396	3,825	-11%
SWT (Sales) Ltd	752	764	-2%
Membership recruitment and retention	501	425	18%
Raising funds	393	382	3%
Provisions	-	376	-100%
Total	5,042	5,772	-13%

EXPENDITURE ON CHARITABLE ACTIVITIES



	2025/26 £'000	2024/25 £'000	Change %
More space for nature - nature recovery	1,329	1,755	-24%
More space for nature - nature reserves	1,049	1,064	-1%
A movement for nature	783	811	-3%
Telling Somerset's story - Somerset Environmental Records Centre	235	195	21%
Total	3,396	3,825	-11%



FINANCIAL REVIEW

The Trust had an exceptional year in 2025/26 and has recognised a surplus of £1.7 million (compared to a £0.5 million net cost in 2024/25). Overall funds have increased to £12.1 million (£10.4 million: 2024/25 as restated) with free financial reserves maintained towards the upper end of our target range.

Summary

Total income grew to £6.7 million (£5.3 million: 2024/25) as a result of the generosity of our funders, members and supporters through grants, membership and donations. In particular, it was an exceptional year for legacy income (£0.9 million) and our wholly owned subsidiary, SWT (Sales) Limited, also had a very good year.

Income includes £1.4 million grant funding specifically for land acquisition - £0.6 million for the purchase of 30 hectares of land in the Avalon Marshes and £0.8 million, that has been carried forward as a restricted fund, to enable the purchase of land on Exmoor for the creation of a temperate rainforest. In addition, on 31 March

2026, the Trust acquired an option to purchase Chancellors Farm for £1.9 million from the Esmee Fairbairn Foundation. Chancellors Farm is a Site of Scientific Special Interest (SSSI), that was previously leased to the Trust from the Wessex Reserve Forces and Cadets Association (RFCA). The Esmee Fairbairn Foundation acquired the farm with the express intention of enabling the Trust to raise funds to purchase it by January 2029.

Total expenditure fell to £5 million (£5.8 million: 2024/25 as restated) which was due in part to several significant grant funded projects being completed (and, as a result, expenditure on charitable activities fell by £0.4 million to £3.4 million). In addition, last year we recognised an exceptional charge of £0.4 million representing the Trust's share of an additional liability of the defined benefit section of the RSWT Wildlife Trusts Pension Scheme.

The Trust continues to maintain a strong balance sheet with overall charity funds increasing by 15% to just over £12 million (£10.4 million: 2024/25 as restated). This includes £8.2 million (£7.1 million: 2024/25 as restated) represented by tangible and heritage fixed assets, £6.2 million (£5.6 million: 2024/25) of which relate to our nature reserves.

Net current assets increased to £4.1 million in the year (£3.7 million: 2024/25).

In accordance with the financial reserves policy the Trust aims to hold between three and six months' core operating costs as free financial reserves. The free financial reserves currently equate to just below 5 months' core operating costs which is therefore a very satisfactory position. The financial reserves are reviewed regularly to ensure that the amount held remains adequate taking into consideration planned investment and future organisational growth.

The year also saw proof of concept of the carbon offset programme at Honeygar with a significant sales contract finalised in April 2026. This resulted in a prior year adjustment to capitalise the start-up costs (£0.2 million) which were initially written off due to uncertainty in demand from the voluntary market and the overall commercial viability of the programme. The financial statements have been restated accordingly.

Income

Grant income totalled £3.2 million (£2.1 million: 2024/25) representing the largest source of income in the year and 47% of overall income. Apart from the grant funding received towards land acquisition the most significant grants in the year included £375,000 from the National Lottery Heritage Fund for the Species Survival Fund project, which was completed in the year, and £136,000 for the Nature for Climate Peatland Grant Scheme.

A total of £533,000 (£484,000: 2024/25) grants were received through agri-environment schemes, which specifically support the management of our nature reserves.

Membership income grew to £948,000 (£919,000: 2024/25) and continues to be a significant and vital source of unrestricted income, representing the second largest source of income in the year and 14% of total income.

It was an exceptional year for legacy income

and £908,000 was recognised from gifts in wills (£538,000: 2024/25) representing the third largest source of income in the year.

Income from other trading activities totalled £879,000 (£677,000: 2024/25); which is primarily external income achieved by the Trust's wholly owned subsidiary, SWT (Sales) Limited, who had a strong year with turnover increasing by 12% to £830,000.

Income from donations and appeals totalled £438,000 (£702,000: 2024/25) and includes £61,000 raised through the Catcott appeal towards the expansion, development and improvement works at Catcott nature reserve.

Investment income totalled £76,000 (£126,000: 2024/25), a reduction compared to the previous year due to lower interest rates. The Trust has committed to review its banking and investment arrangements in 2026/27 to ensure that returns are maximised without compromising on ethical values.

Expenditure

The majority of our expenditure relates to staff costs, representing 63% of the total expenditure at £3.2 million (£3.1 million: 2024/25). Average staff numbers decreased from 93 to 86 as a result of certain externally funded project work being completed. This is reflected in the reduction in nature recovery expenditure which fell by 24% to £1.3 million (£1.8 million: 2024/25 as restated) following the completion of the ELMS Landscape Recovery project funded by DEFRA.

A total of £1 million (£1 million: 2024/25) was again spent in management and improvement works on our land (principally our nature reserves) in the year.

Expenditure on developing a movement for nature, Team Wilder, totalled £783,000 (£811,000: 2024/25), a small reduction compared to the previous year due, once again, to the completion of several grant funded projects.

Expenditure on raising funds totalled £393,000 and was at a similar level to last year (£382,000: 2024/25).

A small 8% increase in support costs was recognised in the year with expenditure totalling £978,000 (£899,000: 2024/25). This was primarily a result of rising costs and continuing investment in the infrastructure of our charity.

The Trust’s wholly owned subsidiary, SWT (Sales) Limited, made an excellent profit of £195,000 (£87,000: 2024/25) which has been Gift Aided to the Trust.

Investments

We have an ethical investment policy that ensures our investment portfolio consists of stocks consistent with the Trust’s values. The Trust’s ethical investment policy seeks to encourage investment in companies with strong sustainability policies and practices that respect and protect wildlife, communities and their wider environment.

The value of the Trust’s investment portfolio increased to £832,000 (£799,000: 2024/25). Investment income totalled £16,000 (£16,000: 2024/25) and the Trust recognised a £40,000 gain (£42,000 loss: 2024/25) arising from revaluations in the year.

Financial reserves

The Trust’s free financial reserves amount to £1,616,000 (£1,630,000: 2024/25 as restated) and represent just below 5 months’ core operating costs.

The Trust has a policy of holding reserves of funds to:

- Enable it to take advantage of unanticipated opportunities to further the aims of the Trust when no other source of income is available.
- Provide adequate working capital to carry out projects for which funds have been granted by external bodies, but for which those funds are payable only after expenditure has been incurred.
- Provide a reserve to cover contractual obligations and short-term payment of essential costs, such as staff salaries, in the event of an unanticipated shortfall in funds and/or fluctuations in income.
- Meet any legal obligation on the Trust to meet any future costs.

Total reserves at the end of the year increased to £12.1 million (£10.4 million: 2024/25 as restated). However, a significant proportion of this total is represented by tangible and heritage (land) fixed assets, restricted funds and designated funds leaving free financial reserves of £1.6 million (£1.6 million: 2024/25 as restated).

	£ million
Total reserves	12.1
Less:	
Tangible and heritage fixed assets	(8.2)
Restricted funds	(1.8)
Other designated funds	(0.5)
Free financial reserves	1.6

Target free financial reserves range 1.0 – 2.0

In accordance with the financial reserves policy, we aim to hold between three and six months’ core operating costs, as free financial reserves which equates to between £1.0 million and £2.0 million. Free financial reserves held in the income fund are therefore currently within this target range and equate to just under 5 months’ core operating costs.



OBJECTIVES AND ACTIVITIES

Charitable purpose

Somerset Wildlife Trust is set up to achieve three charitable objects:

1 For the benefit of the public, to advance, promote and further the conservation, maintenance, protection and enjoyment of wildlife and its habitats, including places of botanical, geographical, zoological, archaeological or scientific interest and places of natural beauty;

2 To advance the education of the public in the principles of biodiversity conservation and of sustainable development;

3 To promote research in all branches of ecology and geology. The Trust delivers its charitable purposes through its strategic objectives as described in this report.

The Trust delivers its charitable purposes through its work to implement the strategic objectives as described in this report.

Measuring our success

- The Trust, through the Executive Team and Council, monitors and reviews its work and progress through quarterly Council meetings and supporting Committee meetings, including review of performance against the annual budget and progress on key strategic initiatives and projects.
- Regular engagement with members of the Executive Team, particularly the Chief Executive Officer, alongside field visits to existing reserves and potential acquisitions.
- Participation by Trustees, the Executive Team and staff in relevant RSWT Communities of Practice and working groups, enabling the Trust to share learning, access best practice and contribute to wider sector collaboration.
- Close working with other Wildlife Trusts in the South West region.
- Engagement with partners, major donors, funders, neighbouring landowners and other Wildlife Trusts.
- Qualitative feedback from members, supporters, volunteers and staff, including through the annual staff survey and annual volunteer engagement event.
- Review of the quality and effectiveness of relationships with partner organisations, funders and neighbours.
- Data and insight provided through Somerset Environmental Records Centre, which collects and shares information on species and habitats across Somerset, including Trust nature reserves.
- Annual endorsement by members of the Annual Report and Accounts, and future plans, at the Annual General Meeting.
- Monitoring and reporting on complaints received.





Measuring our impact

During this year we have worked to develop performance measures to improve our ability to explain the impact of our work and our progress. They will support improved external reporting and internal decision making. As explained in last year's Report, determining meaningful performance measures which are capable of reliable and comparable recording is not straightforward for us, and the sector. However, we have now progressed this work to the point where we have identified 8 Key Impact measures through which we can track and monitor progress against our strategy. These Impact Measures are presented in Part 3, page 18. As we learn more, we will continue to evolve these measures to extend and improve our data capture and analysis.

We continue to work as part of the national Wildlife Trusts working group benefitting from specialist input. The Defra/Natural England guidance on land which can be included as "managed positively for nature" has now been issued. We have adopted this. It is consistent with the WCL (Wildlife and Countryside Link) which in turn had taken the spirit of the Kunming-Montreal Framework which we had followed. We want to achieve balance in our pursuit of data - ensuring we achieve reliable indicators of progress at a strategic and landscape scale combined with specific species and habitat information. It is this combination that ensures we continue to be evidence led in our decision making.

Following from the work completed in the last two years, we will review the role and effectiveness of the Somerset State of Nature Report we issued in Autumn 2023. As the custodians of valuable data within SERC we want to be able to track trends of change, both positive and negative, for the quality, quantity, distribution, connectivity and resilience of our habitats within the wider nature recovery network, alongside the resilience of those habitats. This information needs to be available to help inform decision making by ourselves, but as importantly, other organisations and individuals across Somerset.





Public benefit

The Trustees confirm that they have complied with the duty in section 17 of the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission. The Trust's public benefit is enshrined in its charitable objectives and activities – providing multiple benefits for the public which are wide-ranging and long lasting.

Restoring nature at landscape-scale

The Trust's work aims to restore nature at scale across our landscapes including by restoring, creating and protecting habitats to achieve increased biodiversity and bioabundance. We have identified priority landscapes in Somerset where we are focusing our primary effort; these are explained on pages 20-23.

There is continuing discussion on how we can engage in, and enable, development of 'ecosystem services' which offer public benefit in addition to nature restoration; for example: flood risk management, carbon storage, pollination, pollution control, improved health and wellbeing and aesthetic beauty. Legislation to drive adoption of new mechanisms has not progressed as fast as we hoped but remains under discussion in government.

Land management advice for nature

Through providing advice and assistance to farmers and landowners to manage their land for the benefit of wildlife, the Trust helps to support the rural economy, the countryside and landscapes that are enjoyed and valued by the wider public.

Nature reserves

The Trust's 68 nature reserves, located throughout Somerset, are used extensively by the public for quiet recreation; many have access on clearly marked paths along with information and interpretation for visitors and visiting helps to build connection with nature and supporting health and wellbeing.

Team Wilder – a movement for nature

Team Wilder is supporting people, communities and organisations across Somerset to take action for nature to help us restore, create and protect habitats and build their connection with nature. We are committed to being an inclusive organisation and are actively working to determine how we can be most effective through our engagement work.

Research

Evidence and advice is provided by the Trust to local authorities, landowners and communities with a view to improve decisions on policies such as land management, development, health and wellbeing take full account of the public benefit of wildlife and a healthy environment.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Structure

Somerset Wildlife Trust is a company limited by guarantee and a registered charity governed by its articles of association.

Somerset Wildlife Trust is one of 46 independent Wildlife Trusts working together as a federated movement known as The Wildlife Trusts, covering the UK and Crown Territories. The Royal Society of Wildlife Trusts' role, one of the 46, is defined by the Royal Charter to support The Wildlife Trusts.

Somerset Wildlife Trust has one wholly owned subsidiary, SWT (Sales) Limited. The charity owns 100% of the company's ordinary share capital. The principal activities of SWT (Sales) Limited are that of overseeing the environmental consultancy, trading under the name Somerset Wildlife Trust Consultancy. It is based at the Trust's Callow Rock Offices and is a company limited by shares and registered in England No. 1317396.

Somerset Environmental Records Centre (SERC) was established in 1986 and is a partnership hosted by Somerset Wildlife Trust, funded in part through partnership service level agreements (SLAs) with several organisations including Somerset Council, Wessex Water and the Environment Agency. The core work of SERC is to gather, manage, supply and analyse/interpret biological and geological data and hold the county list of sites recognised for their natural value. Data gathered by SERC is used to build up a comprehensive picture of the biodiversity and geodiversity of Somerset and help to monitor the state of the natural environment. SERC is a member of the Association of Local Environmental Records Centres and has close links to the National Biodiversity Network, and the National Federation of Biological Recorders.

South West Wildlife Fundraising Limited (SWWFL) is an Associate trading subsidiary (set up for mutual trading) and jointly owned by eight Wildlife Trusts, including Somerset Wildlife Trust, to help secure regular financial support through memberships recruited face to face. SWWFL provides membership recruitment services for Somerset, Avon, Cornwall, Devon, Dorset, Gloucestershire, Gwent, Hampshire and Isle of Wight, Herefordshire, Shropshire, Wiltshire and Worcestershire Wildlife Trusts.

Governance

COUNCIL

Members elected to serve on Council have a dual role as a Trustee of the Charity and a Director of the company. There can be no fewer than eight and no more than 12 Trustees. All members of Council are volunteers, give freely of their time and have no beneficial interest in the group or charity. Trustees are elected by the members at the Annual General Meeting and serve for an initial three-year term. Each Trustee can serve for three consecutive terms of three years subject to re-election at the end of each three-year term. The Chair and Treasurer are elected by Council following the AGM and are re-elected for one-year terms. Each new Council member receives an induction into the work and administration of the charity. Council members receive regular updates on the work of the Trust and any training deemed necessary to enable members to carry out their responsibilities. The Council meets quarterly. Council is assisted by Standing Committees which meet quarterly unless otherwise stated

COMMITTEES

The Board of SWT (Sales) Limited meets twice each year. It provides governance and financial oversight of the Trust's wholly owned trading subsidiary, ensuring appropriate



reporting, compliance and accountability to Somerset Wildlife Trust.

Finance, Audit and Risk

Committee: The Finance, Audit and Risk Committee reviews and considers financial performance, such as the 3-year forecast, the annual budget, management accounts, and the audited accounts; financial policies; investment performance and treasury management as well as application of Council's risk appetite, current and potential strategic and operating risks.

Remuneration Committee: The Remuneration Committee is a sub-Committee of the Governance Committee and considers the pay and rewards of the CEO and Directors. There is one annual meeting.

Health and Safety Committee:

The Health and Safety Committee reviews and considers all aspects of health and safety, serious incidents, accidents and near misses. It also reviews Health and Safety Risk Assessments and control frameworks. The committee meets quarterly.

Governance Committee (biannual):

Oversees the Trust's governance, ensuring it aligns with its charitable and strategic goals, manages risks, and complies with relevant regulations. It also monitors how effectively Council operates.

Nominations Committee:

The Nominations Committee is a sub-committee of the Governance Committee, meeting as required. This committee, led by the Chair of Trustees and supported by the

CEO, plans Trustee succession and recruitment including for key roles such as Chair and Treasurer.

People, Culture and Resources

Committee: The People, Culture and Resources Committee reviews key policies and controls relating to the recruitment, development and wellbeing of staff and volunteers, and monitors the Trust's responsiveness to member feedback. The Committee also provides oversight of the Trust's equity, diversity and inclusion commitments. The Committee meets quarterly.

Risk management

The Trust applies a robust risk management process to identify, assess and manage strategic and operational risks. Risks are graded according to their potential impact and likelihood of materialising. Appropriate controls and mitigation actions are then agreed, monitored and reported through the Trust's governance processes.

During the year, we have:

- embedded the risk management framework into business planning processes;
- improved the definition and separation of strategic and operational risks;

- reviewed and refreshed our risk appetite in light of our strategic goals and the external environment; and
- integrated risk consideration into the planning of all major projects.

The Trust will continue to strengthen its capability to manage risk proportionately in day-to-day operations. Effective risk management enables us to take the right risks at the right time, while remaining alert to opportunities that support delivery of our strategic aims. Our risk appetite is underpinned by the need to protect the Trust's financial resilience, reputation, people and charitable purpose.

Some levels and types of risk are more acceptable than others. We are not prepared to take undue risk in relation to governance, compliance, financial security, the safety and wellbeing of our people, or the protection and enhancement of biodiversity across our nature reserves and wider landholdings. However, to make meaningful progress towards our strategic aims, we recognise the need to accept carefully managed risk where this enables us to realise new opportunities — particularly in developing new and expanded income streams, and in working with others to influence nature recovery across land and landscapes beyond our ownership.

PRINCIPAL RISKS AND UNCERTAINTIES

During 2025/26, our principal areas of focus were:

- Strategy review: ensuring that we identified, assessed and appropriately mitigated the key risks associated with refreshing



- our strategy.
- External environment and conditions: maintaining vigilance on economic drivers, policy shifts and market uncertainties to support effective planning and adaptation. Looking ahead, we will continue to respond to changing external conditions in what we do and how we work, recognising that uncertainty is likely to continue for several years.
- Funding diversification and step change: maintaining a strong financial position while recognising that new green finance opportunities have not developed nationally, or within Somerset, as quickly as anticipated. Although we continue to access government funding for nature reserves, there is greater uncertainty over the level of funding that may be available in future. We are undertaking strategic planning to identify substantial new income opportunities for next year and beyond, which will be essential to enable meaningful progress towards our strategic goals.
- Delivery at landscape scale: developing new partnerships and delivery approaches to achieve change at the pace and scale required. We continue to explore opportunities to acquire strategically important land for nature and to work with others to secure meaningful and sustained influence for nature across land beyond our ownership.
- Health, safety and wellbeing, including safeguarding: maintaining this as a constant priority risk area, reflecting our responsibilities to our people, members and the public. No significant incidents occurred during the year.

- Staff satisfaction and resilience: embedding change following growth in staff numbers and continuing to improve how we work internally. Staff satisfaction and loyalty remain positive, but we recognise the need to maintain focus on internal communications, transparency and ensuring our people feel supported, effective and able to thrive.

TRANSACTIONS INVOLVING COUNCIL MEMBERS AND RELATED PARTIES

During 2025/26 a total of £1,000 (2024/25: £1,000) was received from Trustees in respect of donations and membership.

STRATEGY AND POLICY SETTING

Council plays a pivotal role in guiding Somerset Wildlife Trust's strategic direction, ensuring that efforts are focused where they can achieve the greatest impact for nature and people. By regularly reviewing and updating strategic goals, Council steers the Trust to address the urgent challenges of wildlife decline and climate change. This includes prioritising collaboration with communities, landowners, and partners to restore healthy, climate-resilient ecosystems, and to influence decisions that shape Somerset's future. Council also oversees the development and implementation of impact measures, which track progress in areas such as land restoration, community engagement, evidence-led decision making, and financial sustainability.

Through robust governance, Council ensures that the Trust remains accountable, transparent, and resilient. It monitors delivery against strategic objectives, manages resources responsibly,

and champions evidence-based advocacy to influence policy and investment for nature recovery. By fostering partnerships and mobilising supporters, Council helps build a movement for change, aiming for a thriving natural world, empowered communities, and a strong, effective charity capable of leading transformative action across Somerset.

STAFFING AND REMUNERATION

Council appoints the Chief Executive Officer and supports the appointment process for members of the Directors of the Charity. Trustees delegate to the Chief Executive Officer and Senior Leadership Team through agreement of clear strategic objectives for the Trust which have demonstrable outcomes for wildlife in the county. Trustees monitor progress quarterly as well as ensuring that the Trust's financial affairs are managed appropriately.

The Chief Executive Officer reports to the Chair of Trustees. The Chief Executive Officer is responsible for the day to day running of the Trust and has delegated powers of authority approved by the Council. The Chief Executive Officer delegates decision-making powers through the Executive and Senior Leadership Team.

During the year the Trust employed 73 full-time equivalent staff (2024/25:79), of which, 10 work for SWT (Sales) Ltd. The Trust continues to adopt hybrid working, with many staff working primarily from their homes or elsewhere to deliver projects and manage nature reserves, with attendance at their office base and staff meetings held.

The Trust's headquarters is in Taunton with other staff based on

the Reserves, Ford Farm, Honeygar, Chancellors, Avalon Marshes Centre and Callow Rock. The staff are organised into functional teams but work cross-functionally to deliver major projects.

All job descriptions are graded by the Salary Grading Panel. The corresponding salary band which is benchmarked against similar roles in the external market and other Wildlife Trusts.

The pay arrangements for the Executive Directors are determined by the Chief Executive Officer and approved by the Remuneration Committee and Council using external and Wildlife Trusts' benchmarking. The Chief Executive Officer's salary is recommended to Council by the Remuneration Committee and approved by Council.

COMPLAINTS

In 2025/26, the Trust received 14 complaints (2024/25: 3). All complaints were minor, and responded to within seven days, individually reviewed by the relevant Executive, and monitored by the Chief Executive Officer.

HOW WE FUNDRAISE

As a charity, fundraising is essential to Somerset Wildlife Trust's ability to meet our core purpose and deliver public benefit. We receive a significant proportion of our financial support from grants and individuals, including our members.

We are committed to a transparent and ethical approach to all our fundraising activity. We make every effort to ensure that our fundraising activity never feels unreasonably intrusive, persistent or pressurised, but rather focuses on inspiring support and celebrating the impact of fundraised income.

Our members and supporters are the foundation of everything we do, and our work is only possible thanks to their generosity and their commitment to take action locally for nature.

We do:

- ▶ recruit new members face to face at venues and events across Somerset, including Trust nature reserves, and via our website (including as part of national Wildlife Trust campaigns), telephone and occasional targeted door drops;
- ▶ send appeal letters and other fundraising communications to selected supporters who have under strict accordance with GDPR legislation;
- ▶ seek philanthropic support from major donors, patrons, trusts, foundations, companies and other grant givers;
- ▶ invite donations via our website, other giving platforms and collection boxes;
- ▶ promote the importance of supporting our work, including via gifts in wills and gifts in memory;
- ▶ organise online fundraising auctions and other fundraising events; and
- ▶ encourage our members, supporters and local businesses to fundraise in aid of our work (community fundraising) as part of

taking action for nature.

We do not:

- ▶ sell or pass on supporter details to any other organisation or buy lists of other charities' donors.

Our members and supporters have the opportunity to express their preferences on how they are contacted and can change these at any time, by contacting us.

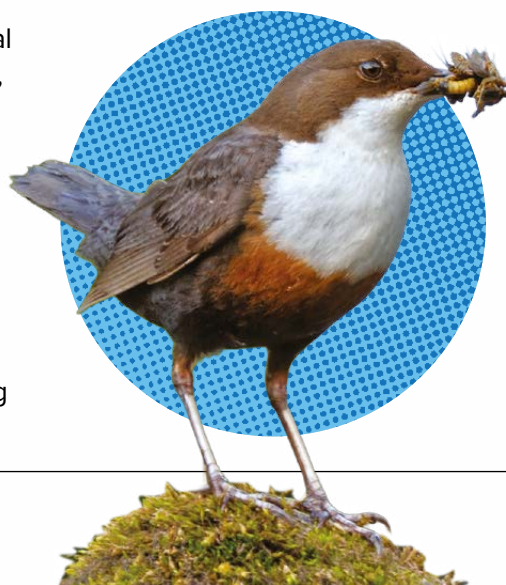
We are registered with the Fundraising Regulator and committed to follow its Code of Practice, which sets out standards of behaviour of fundraisers.

We are signed up to the Fundraising Preference Service to enable individuals to opt out from receiving fundraising communications from us and received no requests from this service to opt out in the year.

We ensure that fundraising is conducted to the highest quality and that individuals who may be in vulnerable circumstances are protected, including by continually updating our database to prevent communications being sent to any vulnerable people who have been identified.

Face to face fundraising at venues and events is conducted on our behalf by staff of South West Wildlife Fundraising Limited (SWWFL), an associate trading subsidiary jointly owned by Somerset Wildlife Trust and seven other Wildlife Trusts. SWWFL is a corporate member of the Chartered Institute of Fundraising which conduct 'mystery shopping' surveys with SWWFL's face-to-face fundraisers to monitor quality.

We seek feedback from all new members. Either through direct communication with our members or through strategically selected





third party operators.

HEALTH AND SAFETY

The Health and Safety Committee meets quarterly and reports to Council. The health and safety of employees, contractors, volunteers and members of the public are of paramount importance to the Trust. During 2025/26, a total of 14 accidents were recorded: 11 involving staff and 3 involving volunteers. None of these incidents were serious or resulted in major injury. The accidents were generally minor in nature and included incidents such as slips, trips and falls, minor cuts and strains, and other low-level injuries associated with practical conservation work, site management and office-based activities. The Trust also records and reviews near misses to help identify potential risks and prevent future incidents.

SAFEGUARDING

As an organisation that works with children and vulnerable adults, the Trust acknowledges its duty of care to safeguard and promote the welfare of children and vulnerable adults. We are committed to ensuring our safeguarding practice reflects statutory responsibilities, government guidance and complies with best practice and regulatory requirements wherever we operate as a charity. Safeguarding is covered through the Health and Safety Committee, with an overview provided to Council. Our safeguarding policy is published on our website at www.somersetwildlife/policies/safeguarding.

We align to RSWT's Safeguarding Framework and are audited to ensure compliance with legislation and continuous quality improvement. Two safeguarding

incidents were reported last year which were thoroughly investigated using our reporting procedure.

EQUALITY, DIVERSITY AND INCLUSION

The Trust is committed to being inclusive in all aspects of our work from staff to trustees, volunteers to participants at our events. By recognising, respecting and valuing differences, and adopting more diverse perspectives, our staff, trustees, volunteers and supporters can become more effective ambassadors for nature as they can reach wider audiences. As such, equality, diversity and inclusion are enshrined in our core values, our Wilder Somerset 2030 strategy, our policies and activities.

Last year we progressed implementing our EDI action plan. The plan provides a framework for the delivery of EDI in support of the Trust's strategy. It places diversity and inclusion at the heart of our culture.

CARBON IMPACT

The Trust is committed to becoming a net zero carbon organisation and to reducing the climate impact of our operations, including our buildings, staff travel, landholdings, purchased goods and services, and waste. Restoring ecological

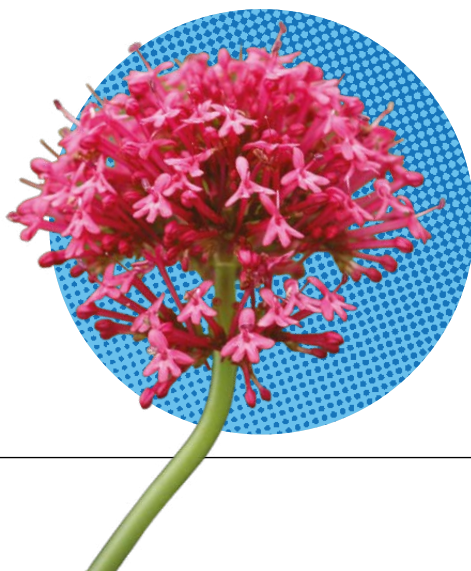
function across our landholdings can also help deliver wider climate benefits. Our priority is to strengthen this contribution by reducing direct operational emissions and by continuing to manage land in ways that protect and enhance natural carbon stores. Carbon release from dried-out peat, including at Honeygar, remains a key area of focus. We are undertaking detailed monitoring and research into the impact of raising water levels on peat, helping to retain carbon, reduce emissions and inform future restoration practice. We are also working with The Wildlife Trusts on annual carbon reporting, which will support greater transparency and consistency across the federation.

The Trust uses the Wilder Carbon process to support robust and comparable carbon accounting. This helps us benchmark our approach with other Wildlife Trusts and measure both our organisational footprint and the carbon benefits of habitat restoration using the best available data and recognised emissions factors.

A Climate and Net Zero Working Group, made up of key staff, monitors progress towards net zero and oversees the annual measurement of the Trust's carbon footprint.

ENVIRONMENT POLICY

Our Environment Policy considers the direct impacts of all our activities including our built properties, landholding and reserves management, purchasing and transport. The Policy is available on our website.



STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees (who are also directors of Somerset Wildlife Trust for the purposes of company law) are responsible for preparing the Strategic Report, Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards including Financial Reporting Standard 102; the Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and the group and of the income and expenditure of the charitable group for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The Trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and the group and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditors are unaware, and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

The Trustees' Report, including the Strategic Report was approved by the Trustees on 29 July 2026 and signed on their behalf by:



Rupert Taylor
Chair



PART 4:

Independent
auditor's report







INDEPENDENT AUDITOR'S REPORT

to the Members of Somerset Wildlife Trust

Opinion

We have audited the financial statements of Somerset Wildlife (the 'parent charitable company') and its subsidiary (the 'group') for the year ended 31 March 2026, which comprise the consolidated Statement of Financial Activities, the consolidated and parent charitable company Balance Sheets, the consolidated Statement of Cash Flows, and Notes to the Financial Statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the group's and of the parent charitable company's

affairs as at 31 March 2026 and of the group's incoming resources and application of resources for the year then ended;

- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the group in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these

requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustee's use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the entity's ability to continue as a going concern for a period of at least 12 months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the directors with respect to going concern are described in the relevant sections of this report.



Other information

The trustees are responsible for the other information. The other information comprises the information included in the Annual Report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work

we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinion on other matter prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

the information given in the Annual Report, which includes the Directors' Report and Strategic Report prepared for the purposes of company law for the financial year for which the financial statements are prepared is consistent with the financial statements; and the Directors' Report and the Strategic Report included within the Annual Report have been prepared in accordance with applicable legal requirements.

In the light of the knowledge and understanding of the group and parent charitable company and their environment obtained in the

course of the audit, we have not identified material misstatements in the Directors' Report and Strategic Report included within the Annual Report.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters where the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept by the parent charitable company, or returns adequate for our audit have not been received from branches not visited by us; or
- the parent charitable company financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.

Responsibilities of trustees

As explained more fully in the Statement of Trustees' Responsibilities, the trustees (who are also the directors of the parent charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the group's and parent charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the group or charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit

conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

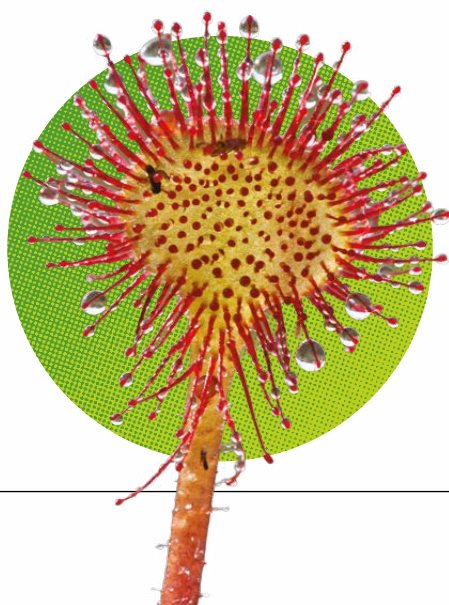
The extent to which the audit was considered capable of detecting irregularities including fraud

Our approach to identifying and assessing the risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, was as follows:

- the engagement partner ensured that the engagement team collectively had the appropriate competence, capabilities and skills to identify or recognise non-compliance with applicable laws and regulations;
- we identified the laws and regulations applicable to the company through discussions with management, and from our commercial knowledge and experience of the charity sector;
- we focused on specific laws and regulations which we considered may have a direct material effect on the financial statements or the operations of the company, including the Companies Act 2006, Charity Act 2011, and employment legislation;
- we assessed the extent of compliance with the laws and regulations identified above through making enquiries of management and considering legal correspondence; and
- identified laws and regulations were communicated within the audit team regularly and the team remained alert to instances of non-compliance throughout the audit.

We assessed the susceptibility of the group's financial statements to material misstatement, including obtaining an understanding of how fraud might occur, by:

- making enquiries of management as to where they considered there was susceptibility to fraud, their knowledge of actual, suspected and alleged fraud; and



- considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations.

To address the risk of fraud through management bias and override of controls, we:

- performed analytical procedures to identify any unusual or unexpected relationships;
- tested journal entries to identify unusual transactions;
- assessed whether judgements and assumptions made in determining the accounting estimates were indicative of potential bias; and
- investigated the rationale behind significant or unusual transactions.

In response to the risk of irregularities and non-compliance with laws and regulations, we designed procedures which included, but were not limited to:

- agreeing financial statement disclosures to underlying supporting documentation;
- reading the minutes of meetings of those charged with governance;
- enquiring of management as to actual and potential litigation, claims and breaches of relevant legislation; and
- reviewing correspondence with the Charity Commission and other relevant regulators.

There are inherent limitations in our audit procedures described above. The more removed that laws

and regulations are from financial transactions, the less likely it is that we would become aware of non-compliance. Auditing standards also limit the audit procedures required to identify non-compliance with laws and regulations to enquiry of the directors and other management and the inspection of regulatory and legal correspondence, if any.

Material misstatements that arise due to fraud can be harder to detect than those that arise from error as they may involve deliberate concealment or collusion.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.



Use of our report

This report is made solely to the group and parent charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the group and parent charitable company's members and trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the group and parent charitable company and the group and parent charitable company's members as a body and the parent charitable company's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

.....
Michelle Ferris BSC (Hons) FCA
DChA (Senior Statutory Auditor)
For and on behalf of Albert
Goodman LLP, Statutory Auditor

Goodwood House
Blackbrook Park Avenue
Taunton
Somerset
TA1 2PX

Date: 29 July 2026

PART 5:

Financial statements

- ▶ Consolidated statement of financial activities for the year ended 31 March 2026
- ▶ Consolidated and Trust balance sheets as at 31 March 2026
- ▶ Consolidated statement of cash flows for the year ended 31 March 2026
- ▶ Notes forming part of the financial statements for the year ended 31 March 2026



CONSOLIDATED STATEMENT OF FINANCIAL ACTIVITIES

(Including consolidated income and expenditure account)

For the year ended 31 March 2026

		Unrestricted Funds		Restricted Funds	Endowment Funds	Total Funds 2026	Total Funds 2025 Restated
	Notes	General £'000	Designated £'000	£'000	£'000	£'000	£'000
Income from:							
Membership, donations and legacies	2	2,023	-	271	-	2,294	2,159
Charitable activities:							
More space for nature - nature recovery	3	48	-	1,849	-	1,897	1,364
More space for nature - nature reserves	3	534	-	633	-	1,167	514
A movement for nature – Team Wilder	3	1	-	159	-	160	283
Telling Somerset's story – Somerset Environmental Records Centre	3	192	-	-	-	192	225
Other trading activities (including SWT (Sales) Ltd)	4	879	-	-	-	879	677
Investments	5	76	-	-	-	76	126
Total		3,753	-	2,912	-	6,665	5,348
Expenditure on:							
Raising funds:							
Cost of raising funds	6	384	-	-	-	384	372
Membership recruitment and retention	6	501	-	-	-	501	425
Other (including SWT (Sales) Ltd)	6	761	-	-	-	761	774
Charitable activities:							
More space for nature - nature recovery	6	94	22	1,213	-	1,329	1,755
More space for nature - nature reserves	6	917	13	119	-	1,049	1,064
A movement for nature – Team Wilder	6	560	-	223	-	783	811
Telling Somerset's story – Somerset Environmental Records Centre	6	235	-	-	-	235	195
Provision for pension scheme liability	17	-	-	-	-	-	376
Total		3,452	35	1,555	-	5,042	5,772
Net gain/(loss) on investments		40	-	-	-	40	(42)
Net income/(expenditure)		341	(35)	1,357	-	1,663	(466)
Transfers between funds	22	157	984	(1,141)	-	-	-
Net movement in funds		498	949	216	-	1,663	(466)
Reconciliation of funds							
Fund balances brought forward at 1 April 2025		2,232	3,589	1,520	3,073	10,414	10,880
Fund balances carried forward at 31 March 2026		2,730	4,538	1,736	3,073	12,077	10,414

All of the above results are derived from continuing activities. All gains and losses recognised in the year are included above. The notes on pages 86 to 102 form part of these financial statements.

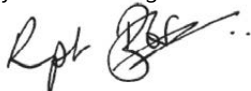
CONSOLIDATED AND TRUST BALANCE SHEETS

As at 31 March 2026

	Notes	Group		Charity	
		2026 £'000	2025 Restated £'000	2026 £'000	2025 Restated £'000
Fixed assets					
Heritage assets	11	6,206	5,597	6,206	5,597
Tangible assets	11	2,028	1,538	2,009	1,518
Investments	12	832	799	832	799
		9,066	7,934	9,047	7,914
Current assets					
Stock	13	1	1	1	1
Debtors	14	1,515	1,677	1,564	1,704
Deposit accounts		1,264	1,901	1,264	1,901
Cash at bank and in hand		1,836	482	1,789	464
		4,616	4,061	4,618	4,070
Liabilities					
Creditors: amounts falling due within one year	15	424	395	407	384
Provisions for liabilities - pension scheme	17	137	-	137	-
		561	395	544	384
Net current assets		4,055	3,666	4,074	3,686
Creditors: amounts falling due after more than one year	16	810	810	810	810
Provisions for liabilities - pension scheme	17	234	376	234	376
Total net assets		12,077	10,414	12,077	10,414
The funds of the charity					
Endowment funds		3,073	3,073	3,073	3,073
Restricted funds		1,736	1,520	1,736	1,520
Designated funds		4,538	3,589	4,538	3,589
Unrestricted funds		2,730	2,232	2,730	2,232
Total charity funds	21	12,077	10,414	12,077	10,414

The notes on pages 86 to 102 form part of these financial statements.

The financial statements on pages 82 to 102 were approved by the Trustees on 29 July 2026 and signed on their behalf by:


Rupert Taylor
Chair


Stephen Rogers
Treasurer

Somerset Wildlife Trust
Registered company number 818162

CONSOLIDATED STATEMENT OF CASH FLOWS

For the year ended 31 March 2026

	Note	2026 £'000	2025 £'000
Cash flows from operating activities:			
Net cash provided by operating activities	25	1,856	590
Cash flows from investing activities:			
Dividends, interest and rental income		76	126
Proceeds from the sale of property, plant and equipment		1	10
Purchase of property, plant and equipment		(1,045)	(937)
Proceeds from sale of investments		216	109
Purchase of investments		(202)	(131)
Net cash used in investing activities		(954)	(823)
Change in cash and cash equivalents in the reporting period		902	(233)
Cash and cash equivalents at the beginning of the reporting period		2,392	2,625
Cash and cash equivalents at the end of the reporting period	26	3,117	2,392

The notes on pages 86 to 102 form part of these financial statements.



NOTES FORMING PART OF THE FINANCIAL STATEMENTS

For the year ended 31 March 2026

1. ACCOUNTING POLICIES

(a) Charitable company status

The Charity is a company limited by guarantee and does not have any share capital. The liability of the guarantors, who are the members, is limited to £1 per guarantor. At 31 March 2026 the Charity had 21,913 members. The Company is registered in England and Wales. The registered office address is 34 Wellington Road, Taunton, Somerset, TA1 5AW. On behalf of the members, the Council controls the company.

(b) Basis of preparation

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice (SORP) applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) – (Charities SORP (FRS 102) 2019 the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

The financial statements have been prepared under the historic cost convention with the exception of listed investments which are included at their fair value.

The Trust meets the definition of a public benefit entity under FRS 102.

(c) Preparation of the accounts on a going concern basis

The Trustees consider that there are no material uncertainties about the Trust's ability to continue as a going concern.

(d) Group financial statements

The financial statements consolidate the results of the Charity and its wholly owned subsidiary SWT (Sales) Limited on a line-by-line basis. A separate Statement of Financial Activities and Income and Expenditure Account for the Charity has not been presented because the Trust has taken advantage of the

exemption afforded by section 408 of the Companies Act 2006. The surplus in the year for the Charity was £1,663,000 (2025: deficit of £466,000 as restated). Note 24 gives full details of the results of the subsidiary undertaking for the year to 31 March 2026.

(e) Fund accounting

Unrestricted funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity. Certain unrestricted funds have been designated by the Trustees for specific purposes.

Designated funds

Designated funds are unrestricted funds that have been set aside by Council for a specific purpose.

Restricted funds

Restricted funds are funds that are used in accordance with specific restrictions imposed by donors or which have been raised by the Charity for particular purposes.

Endowment funds

The nature reserves endowment fund represents amounts received specifically for, and expended on, the purchase of nature reserves.

(f) Income

All income is included in the Statement of Financial Activities (SOFA) when the Charity is legally entitled to the income and the amount can be quantified with reasonable accuracy.

Income for works that have been completed but has not yet been received is included as accrued income. The stage of completion is determined by comparing the services rendered to date to the accepted quotation or contract.

For legacies, entitlement is taken as the earlier of the date on which either: the Charity is aware that probate has been granted, notification has been made by the executor(s) to the Trust that a distribution will be made, and the amount of that distribution can be estimated with sufficient accuracy; or when a distribution is

received from the estate.

Grants are included in the SOFA in the year they are receivable and when any performance conditions attached to the grant have been met.

Income from investments and from rental income is included in the SOFA in the year it is receivable.

The total income receivable in respect of membership subscriptions is included as income from subscriptions within note 2. Income from life membership is included in the SOFA in the year in which it is receivable.

Gifts in kind are included in the SOFA at their estimated current value in the year in which they are receivable.

Trading income is included in the SOFA in the year in which it is receivable.

Income generated through the sale of carbon credits is recognised across the life of the project as receivable.

(g) Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

All expenditure is accounted for on an accruals basis. All expenses including support costs and governance costs are allocated or apportioned to the applicable expenditure headings. Where an employee works in more than one department, their costs are allocated on the basis of time worked in each department. Certain overhead costs, such as relevant insurance premiums, are allocated on the basis of staff numbers, while others are allocated on an actual usage basis.

(h) Heritage and tangible fixed assets and depreciation

Heritage assets are assets of historical or scientific importance that are held to advance the preservation, conservation and educational objectives of the charity and through public access contribute to the nation's culture and education at either a national or local level. Freehold nature reserves are included in heritage fixed assets at their acquisition costs and they are not revalued or depreciated. The Charity aims to preserve

and enhance its nature reserves, which are not held for their resale potential. The market value of the reserves is of no practical relevance to the Charity's activities. No depreciation is provided because the reserves have an indefinite life.

The costs of leasehold nature reserves are amortised over the period of the lease.

Assets under construction are recognised at cost and transferred to the relevant asset category when completed.

All other tangible fixed assets are held at cost less accumulated depreciation. Depreciation is provided on all other tangible fixed assets as follows:

Freehold property 2% on a straight line basis

Computers on a straight line basis over 3 years

Plant and equipment 15% on written down value

Motor vehicles 25% on written down value

Office equipment, furniture and fittings 15% on written down value

Programme costs on a straight line basis over the life of the project

(i) Investments

Listed Investments are stated at fair value which equates to market value at the balance sheet date. The SOFA includes all net gains and losses arising on revaluations and disposals throughout the year. The investment in the subsidiary is stated at cost.

(j) Stock

Stock consists of publications for distribution to members and purchased goods for resale. Stock is valued at the lower of cost or net realisable value, after making due allowance for obsolete and slow moving items.

(k) Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits and other short-term highly liquid investments that are readily convertible to known amounts of cash with insignificant risk of change in value.

(l) Financial instruments

The Trust only has financial assets and financial liabilities of a kind that qualify as basic financial instruments as defined in FRS 102. The financial

assets and liabilities of the Trust and their measurement are as follows:

Financial assets – trade debtors, amounts owed by subsidiary company, legacies receivable other debtors are basic financial instruments and are debt instruments measured at amortised cost. Investment portfolios are basic financial instruments measured at fair value through the income and expenditure account. Prepayments are not financial instruments.

Cash at bank and deposit accounts are classified as a basic financial instrument and measured at face value.

Financial liabilities which includes trade creditors, accruals and other creditors are financial instruments and are measured at amortised cost.

(m) Pension costs

The Trust operates a defined contribution pension scheme. Pension contributions in relation to the defined contribution scheme are recognised as an expense in the statement of financial activities as incurred. The Trust contributes 7% of gross annual salary for participating employees.

(n) Operating leases

Rentals paid under operating leases are charged to the SOFA as incurred.

(o) Volunteer support

The Trust receives support from a wide variety of volunteers. It is not practical to place a value on the time volunteered by all these persons, due to the variety of duties performed, the differences in time spent, and the sheer number of volunteers who kindly donated their time,

(p) Critical accounting estimates and judgements

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The resulting accounting estimates will, by definition, seldom equal the related actual results.

Recognising income from legacies often entails estimating the time and final amount distributed by an estate to the Trust. The estimate of the amount and the judgement as to whether or not it should be recognised in the accounts could have a significant impact on the reported assets of the Trust.

The liability relating to the, now closed, Wildlife Trusts Pension Scheme is based on the present value of the contributions payable under the Recovery Plan, derived by RSWT and the Scheme Actuaries to eliminate the total deficit over a six-year period and based on the latest actuarial valuation as at 1 April 2024. The actuarial valuations are based on a range of assumptions. Any changes to those assumptions and the discount rate will impact the Trust's liability (see note 17).

Both income and commission relating to the carbon offset programme at Honeygar is currently recognised equally over the 50-year life of the project, which started in 2022. The start-up costs of the project have been capitalised which has resulted in a prior year adjustment and accordingly the financial reserves have been restated (see note 20). The first monitoring and verification of the efficacy of the programme is due in 2027. Until then there remains some uncertainty about the actual quantity of carbon saved, and it is therefore possible that the recognition policy may need further refinement.

The Trustees are of the opinion that, apart from the above, there are no other estimates or assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

(q) Liabilities and provisions

Liabilities are recognised when there is an obligation as a result of a past event and the amount can be measured reliably. Liabilities are discounted where the time impact of money is material.

The Trust recognises a provision where it has a liability which is of uncertain timing or amount. Movements in provisions are recognised in the SOFA in the period in which they occur. Provisions are discounted where the time impact of money is material.

2. MEMBERSHIP, DONATIONS AND LEGACIES

	Unrestricted £'000	Restricted £'000	Total 2026 £'000	Unrestricted £'000	Restricted £'000	Total 2025 £'000
Membership	948	-	948	919	-	919
Donations and appeals	202	236	438	228	474	702
Legacies	873	35	908	502	36	538
	2,023	271	2,294	1,649	510	2,159

3. INCOME FROM CHARITABLE ACTIVITIES

	Unrestricted £'000	Restricted £'000	Total 2026 £'000	Unrestricted £'000	Restricted £'000	Total 2025 £'000
More space for nature - nature recovery						
DEFRA	-	106	106	-	409	409
Natural England	-	166	166	-	370	370
Statutory body grants	-	233	233	-	97	97
Other grants	-	1,344	1,344	-	400	400
Consultancy fees	48	-	48	88	-	88
	48	1,849	1,897	88	1,276	1,364
More space for nature - nature reserves						
DEFRA	522	-	522	445	22	467
Natural England	-	-	-	-	8	8
Statutory body grants	-	8	8	-	13	13
Other grants	-	625	625	-	8	8
Grazing licences and property lettings	12	-	12	17	-	17
Wood and firewood sales	-	-	-	1	-	1
	534	633	1,167	463	51	514
A movement for nature - Team Wilder						
DEFRA	-	-	-	-	8	8
Statutory body grants	-	5	5	-	-	-
Other grants	-	154	154	-	275	275
Consultancy fees	1	-	1	-	-	-
	1	159	160	-	283	283
Telling Somerset's story - Somerset's Environmental Records Centre						
Other grants	-	-	-	-	30	30
Service level agreements	99	-	99	105	-	105
Data services	93	-	93	90	-	90
	192	-	192	195	30	225
	775	2,641	3,416	746	1,640	2,386

4. INCOME FROM OTHER TRADING ACTIVITIES

	Charity £'000	SWT (Sales) Ltd (see note 24) £'000	Total 2026 £'000	Charity £'000	SWT (Sales) Ltd (see note 24) £'000	Total 2025 £'000
Shop sales	2	-	2	2	-	2
Fundraising events	8	-	8	9	-	9
Other fundraising activities	39	-	39	43	-	43
SWT (Sales) Ltd - external	-	830	830	-	623	623
	49	830	879	54	623	677

5 INVESTMENT INCOME

	Unrestricted £'000	Restricted £'000	Total 2026 £'000	Unrestricted £'000	Restricted £'000	Total 2025 £'000
Dividends receivable from equity shares	16	-	16	16	-	16
Interest receivable from bank and deposit accounts	60	-	60	110	-	110
	76	-	76	126	-	126

6. BREAKDOWN OF EXPENDITURE

	Activities undertaken directly £'000	Support costs £'000	Total 2026 £'000	Activities undertaken directly restated £'000	Support costs £'000	Total 2025 Restated £'000
Expenditure on raising funds						
Cost of raising funds	277	107	384	283	89	372
Membership recruitment and retention	437	64	501	366	59	425
Merchandising costs	2	-	2	2	-	2
Investment management fees	7	-	7	8	-	8
SWT (Sales) Ltd	609	143	752	608	156	764
	1,332	314	1,646	1,267	304	1,571
Charitable activities						
More space for nature - nature recovery	1,126	203	1,329	1,556	199	1,755
More space for nature - nature reserves	866	183	1,049	918	146	1,064
A movement for nature - Team Wilder	552	231	783	599	212	811
Telling Somerset's story - Somerset Environmental Records Centre	188	47	235	157	38	195
	2,732	664	3,396	3,230	595	3,825
	4,064	978	5,042	4,497	899	5,396

SUPPORT COST BREAKDOWN BY ACTIVITY

	Costs of generating voluntary income £'000	Membership recruitment and retention £'000	SWT (Sales) Ltd £'000	More space for nature - nature recovery £'000	More space for nature - nature reserves £'000	A movement for nature - Team Wilder £'000	Telling Somerset's story - Somerset Environment Records Centre £'000	Total 2026 £'000	Total 2025 £'000
Finance	18	8	33	48	39	36	11	193	183
HR/staff support	14	6	26	37	31	29	9	152	128
Office costs	9	4	17	24	20	18	6	98	107
Property and motor vehicles	9	4	17	23	19	18	5	95	88
VAT adjustment	1	-	-	-	3	-	-	4	(38)
Marketing	31	30	3	5	19	78	1	167	155
Information technology	15	7	29	41	34	32	10	168	160
National and regional support	5	2	9	13	10	10	3	52	56
Insurance	1	-	1	2	2	1	-	7	9
Governance	4	2	7	10	9	8	2	42	51
	107	63	142	203	186	230	47	978	899

BASIS OF ALLOCATION

Finance	Headcount
HR/staff support	Headcount
Office costs	Headcount
Property and motor vehicles	Headcount
VAT adjustment	Actual
Marketing	Actual resources expended
Information technology	Headcount
National and regional support	Headcount
Insurance	Headcount
Governance	Headcount

7. OTHER COST DISCLOSURES

	Total 2026 £'000	Total 2025 £'000
Depreciation	124	136
Auditors' remuneration:		
Audit fees	19	19
Other assurance services	2	4
(Profit)/Loss on disposal of fixed assets	(1)	3

8. STAFF COSTS

	Total 2026 £'000	Total 2025 £'000
Wages and salaries	2,669	2,696
Social security costs	335	263
Pension costs	181	180
	3,185	3,139

The number of employees whose remuneration exceeded £60,000 was as follows:

	Total 2026	Total 2025
£60,000 - £69,999	3	3
£70,000 - £79,999	-	-
£80,000 - £89,999	1	1
	4	4

Total remuneration of key management personnel in the period was £335,000 (2025: £319,000).

The key management personnel of the group and the parent charity comprise the Trustees, Chief Executive Officer, Director of Nature Recovery, Director of Action for Nature and Director of Business Planning and Development.

The average number of employees during the year, analysed by function, was:

	2026 Number	2025 Number
Charitable activities	76	84
Raising funds	9	8
Governance	1	1
	86	93

The average number of full-time equivalent employees during the year totalled 73 (2025: 79).

9. TRUSTEE EMOLUMENTS

	Total 2026 £'000	Total 2025 £'000
Donations received from Trustees	1	1

Trustees did not receive any remuneration or benefits in kind during either year. Trustees did not receive any reimbursement for travel expenses during either year.

10. PENSION COSTS

Defined contribution scheme

The Trust contributes 7% of annual salary to employees' current pension schemes, all of which are now defined contribution in nature. The pension charge for the year in respect of these contributions amounted to £181,000 (2025: £180,000).

11. TANGIBLE AND HERITAGE FIXED ASSETS

Group

	Nature reserves		Freehold and leasehold property £'000	Assets under construction £'000	Plant and equipment Restated £'000	Vehicles £'000	Office equipment £'000	Programme costs Restated £'000	Total Restated £'000
	Freehold (Heritage funds) £'000	Leasehold £'000							
Cost									
At 1 April 2025 - restated	5,597	103	1,133	-	680	204	256	180	8,153
Transfers	-	-	-	177	-	-	-	-	177
Additions	609	-	-	355	55	-	26	-	1,045
Disposals	-	(102)	-	-	-	-	-	-	(102)
At 31 March 2026	6,206	1	1,133	532	735	204	282	180	9,273
Depreciation									
At 1 April 2025 - restated	-	103	197	-	357	151	201	8	1,017
Charge for the year	-	-	22	-	52	14	33	3	124
Disposals	-	(102)	-	-	-	-	-	-	(102)
At 31 March 2026	-	1	219	-	409	165	234	11	1,039
Net book value									
At 31 March 2026	6,206	-	914	532	326	39	48	169	8,234
At 31 March 2025 - restated	5,597	-	936	-	323	53	55	172	7,136

Charity

	Nature reserves		Freehold and leasehold property £'000	Assets under construction £'000	Plant and equipment Restated £'000	Vehicles £'000	Office equipment £'000	Programme costs Restated £'000	Total Restated £'000
	Freehold (Heritage funds) £'000	Leasehold £'000							
Cost									
At 1 April 2025 - restated	5,597	103	1,133	-	653	204	211	180	8,081
Transfers	-	-	-	177	-	-	-	-	177
Additions	609	-	-	355	51	-	25	-	1,040
Disposals	-	(102)	-	-	-	-	-	-	(102)
At 31 March 2026	6,206	1	1,133	532	704	204	236	180	9,196
Depreciation									
At 1 April 2025 - restated	-	103	197	-	346	151	160	8	965
Charge for the year	-	-	22	-	49	14	30	3	118
Disposals	-	(102)	-	-	-	-	-	-	(102)
At 31 March 2026	-	1	219	-	395	165	190	11	981
Net book value									
At 31 March 2026	6,206	-	914	532	309	39	46	169	8,215
At 31 March 2025 - restated	5,597	-	936	-	307	53	51	172	7,116

Heritage fixed assets

Heritage assets are represented as freehold nature reserves above.

Assets under construction represents the initial costs associated with submitting the planning application for the development of the buildings at Honeygar.

Programme costs represents the carbon offset programme (see note 20).

A summary of transactions relating to heritage assets over the last five years is as follows:

		2026 £'000	2025 £'000	2024 £'000	2023 £'000	2022 £'000
Cost of acquisitions		609	748	323	187	1,144
Value of donated assets		-	61	5	-	-
Proceeds of disposals*		-	-	-	-	35

*Proceeds of disposals in 2022 represents the sale of land that was donated to Trust.

12. INVESTMENTS

Group and Charity

	Listed Securities £'000	Cash holdings £'000	Total 2026 £'000	Total 2025 £'000
Cost				
At 1 April 2025	743	9	752	781
Additions	202	217	419	241
Disposals	(190)	(209)	(399)	(270)
At 31 March 2026	755	17	772	752
Revaluations				
Unrealised gains at 1 April 2025	47	-	47	66
Net gains/(losses) arising on revaluations in the year	40	-	40	(42)
Disposals/reverse revaluations	(27)	-	(27)	23
Unrealised gains at 31 March 2026	60	-	60	47
Fair value at 31 March 2026	815	17	832	799

At 31 March 2026 the Charity had one wholly owned subsidiary, SWT (Sales) Limited. The Charity owns 100% of the company's ordinary share capital. The principal activity of SWT (Sales) Limited is that of environmental consultancy work (see note 24).

13. STOCKS

	Group		Charity	
	2026 £'000	2025 £'000	2026 £'000	2025 £'000
Stocks	1	1	1	1
	1	1	1	1

14. DEBTORS

	Group		Charity	
	2026 £'000	2025 £'000	2026 £'000	2025 £'000
Trade debtors	133	367	58	281
Other debtors	47	88	47	88
Prepayments and accrued income	506	660	382	597
Legacies receivable	829	562	829	562
Amounts owed by subsidiary company	-	-	248	176
	1,515	1,677	1,564	1,704

Other debtors includes £30,000 (2025: £30,000) due after more than one year.

15. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	Group		Charity	
	2026 £'000	2025 £'000	2026 £'000	2025 £'000
Trade creditors	174	239	166	236
Other creditors and accruals	250	156	241	148
	424	395	407	384

16. CREDITORS: AMOUNTS FALLING DUE IN MORE THAN ONE YEAR

	Group		Charity	
	2026 £'000	2025 £'000	2026 £'000	2025 £'000
Other loan	810	810	810	810
	810	810	810	810

A philanthropic loan enabled the purchase of 31.57 hectares at Sharpham in June 2024. The loan is repayable over a 3 year term ending 2027. No interest is payable in respect of the loan.

17. PROVISIONS FOR LIABILITIES

	Group		Charity	
	2026 £'000	2025 £'000	2026 £'000	2025 £'000
Provisions				
Balance at 1 April 2025	376	-	376	-
Provisions recognised in the year	-	376	-	376
Provisions utilised in the year	(5)	-	(5)	-
Balance at 31 March 2026	371	376	371	376
Due within one year	137	-	137	-
Due after more than one year	234	376	234	376
	371	376	371	376

The Trust participates in the Wildlife Trusts Pension Scheme, a hybrid, multi-employer pension scheme which provides benefits to members on a defined benefit or a defined contribution basis. The Scheme is closed to both new and existing members.

As a participating employer the Trust is responsible for a share of the total financial liability which equates to £371,000 (2025: £376,000). In order to address the Scheme liability the pension trustee, working with RSWT and the Scheme's actuaries, has developed a Recovery Plan that aims to eliminate the total deficit over a six-year period.

Information regarding the financial position (as at 1 April 2024 the date of the latest actuarial valuation) of the Wildlife Trusts Pension Scheme (as a whole) is as follows.

The total Scheme deficit was £4.52m on a Statutory Funding Objective Basis. The assumptions that have the most significant effect on the results of the valuation are:

- Discount rate pre-retirement 6.51%
- Discount rate post-retirement 4.26%
- Revaluation in deferment (CPI) 2.95%
- Pension increases: fixed 5% pa and RPI max 3.45%
- Retirement mortality assumptions are based on S2PA tables projected by each member's year of birth.

As permitted under FRS 102 the Trust accounts for the defined benefit scheme as if it were a defined contribution scheme and recognises a liability for the present value of the contributions payable by the Trust under the Recovery Plan. The present value has been calculated using a discount rate of 5.5% (2025: 5.6%) representing the single equivalent discount rates derived using the iBoxx AA-rated corporate bond curve as at 31 March 2026.

18. FINANCIAL INSTRUMENTS

Categorisation of financial instruments

	Group		Charity	
	2026	2025	2026	2025
	£'000	£'000	£'000	£'000
Financial assets measured at fair value through the income and expenditure account	832	799	832	799
Financial assets that are debt instruments measured at amortised cost	1,009	1,017	1,182	1,107
	1,841	1,816	2,014	1,906

Item of income, expenditure, gain or losses

	Group				Charity			
	Income £'000	Expense £'000	Net gains £'000	Net losses £'000	Income £'000	Expense £'000	Net gains £'000	Net losses £'000
2026								
Financial assets measured at fair value through the income and expenditure account	16	7	-	40	16	7	-	40
	16	7	-	40	16	7	-	40
2025								
Financial assets measured at fair value through the income and expenditure account	16	80	-	(42)	16	8	-	(42)
	16	80	-	(42)	16	8	-	(42)

19. OPERATING LEASE COMMITMENTS

Minimum lease payments on non-cancellable operating leases fall due as follows:

	Group		Charity	
	2026 £'000	2025 Restated £'000	2026 £'000	2025 Restated £'000
Within one year	46	44	46	44
Due one to five years	96	33	96	33
	142	77	142	77

The 2025 commitments have been restated to include leases not previously recognised.

20. PRIOR YEAR ADJUSTMENT

Following the purchase of Honeygar in 2022, and as part of the planned wilding and re-wetting of the land, the Trust has been developing a carbon offset credit programme. This 50-year programme has been established with Wilder Carbon and has been subject to independent review by the Soil Association. The intention of the programme is to sell units of saved carbon to organisations who need to offset their unavoidable emissions.

The start-up costs of the programme, were initially written off or capitalised in accordance with existing accounting policies, due to uncertainty as to the demand from the voluntary market and the overall commercial viability of the programme. However, in April 2026 a significant sales contract was signed that confirms that the programme is viable. Accordingly, the original start-up costs have now been capitalised as a prior year adjustment, with financial reserves restated accordingly. These start-up costs will now be amortised over the 50-year life of the programme.

The prior year comparative figures have been restated as follows:

	£'000
2024	
Movement in fixed assets:	
Plant and equipment cost	(43)
Plant and equipment depreciation	11
Programme cost	180
Programme depreciation	(4)
	144
Reconciliation of funds brought forward at 1 April 2025	
Total fund balance brought forward at 1 April 2025 (as previously stated)	10,736
Movement in fixed assets	144
Fund balance brought forward at 1 April 2025 (restated)	10,880
2025	
Movement in fixed assets:	
Plant and equipment depreciation	5
Programme depreciation	(4)
	1
Reconciliation of funds carried forward at 31 March 2025	
Total fund balance carried forward at March 2025 (as previously stated)	10,269
Movement in fixed assets 2024	144
Movement in fixed assets 2025	1
Total fund balance carried forward at March 2025 (restated)	10,414

21. STATEMENT OF FUNDS

	At 1 April 2025 Restated £'000	Income £'000	Expenditure £'000	Transfers £'000	Investment gains £'000	At 31 March 2026 £'000
Unrestricted funds						
Income fund	2,232	3,753	(3,452)	157	40	2,730
Total unrestricted funds	2,232	3,753	(3,452)	157	40	2,730
Designated funds						
Nature reserves (heritage funds)	2,524	-	-	609	-	3,133
Operating freehold	936	-	(22)	-	-	914
Nature reserves development	13	-	(13)	-	-	-
Development fund	-	-	-	352	-	352
Innovation fund	20	-	-	-	-	20
Somerset Environmental Records Centre	96	-	-	23	-	119
Total designated funds	3,589	-	(35)	984	-	4,538
Restricted funds						
More space for nature - nature recovery	1,009	1,908	(1,213)	(532)	-	1,172
More space for nature - nature reserves	191	841	(119)	(421)	-	492
A movement for nature - Team Wilder	320	163	(223)	(188)	-	72
Total restricted funds	1,520	2,912	(1,555)	(1,141)	-	1,736
Endowment funds						
Nature reserves (heritage funds)	3,073	-	-	-	-	3,073
Total endowment funds	3,073	-	-	-	-	3,073
Total funds	10,414	6,665	(5,042)	-	40	12,077

Unrestricted funds

The unrestricted funds represent the free funds of the Charity, which are not designated for a particular purpose and are maintained in accordance with the policy explained in the Trustees' report.

Designated funds

The nature reserve fund represents funds other than endowment funds that the Charity has used to purchase nature reserves.

The operating freehold fund represents the value of the Trust's freehold property, comprising the main headquarters in Taunton and buildings at Honeygar.

The designated development fund represents funds that the Charity has set aside for investment in delivering the Wilder Somerset 2030 strategy.

The innovation fund represents funds that have been set aside to support strategically important initiatives that will enhance the delivery of the Trust's programme of work.

The Somerset Environmental Records Centre fund represents the cumulative surplus generated through SERC activities which has been earmarked for future investment in SERC activities.

Restricted funds

The restricted income funds of the charity include restricted funds comprising the unexpended balances of donations, grants and other income, which are to be applied for specific purposes within the charity's objectives:

► More space for nature

- Nature recovery – improving nature everywhere through a Nature Recovery Network.
- Nature reserves – manage our nature reserves for conservation purposes.

► **A movement for nature** – taking action for nature's recovery across Somerset as part of Team Wilder.

Nature recovery includes £136,000 (2025: £347,000) from Natural England from the Nature for Climate Peatland Grant Scheme.

22. TRANSFERS BETWEEN FUNDS

	Total 2026 £'000	Total 2025 £'000
Designated funds		
Nature reserves	609	809
Development reserve	352	(500)
Innovation fund	-	(15)
Somerset Environmental Records Centre	23	(36)
Wildlife Trusts Pension Scheme	-	(124)
Restricted funds		
More space for nature - nature recovery	(532)	-
More space for nature - nature reserves	(421)	25
A movement for nature	(188)	(25)
Unrestricted funds	157	(134)
	-	-

The designated nature reserves transfer represents land acquired in the year.

The designated development transfer represents the re-alignment of funds following a review of the Trust's financial reserves holding in the year.

The designated innovation fund transfer in 2025 represents funds that have been set aside by the Charity to support strategically important initiatives that will enhance the Trust's programme of work.

The Somerset Environmental Records Centre fund transfer represents the movement in the cumulative funds which have been set aside for future investment in SERC.

The Wildlife Trusts Pension Scheme transfer in 2025 represents the funds that were set aside and are now recognised as a liability.

The restricted fund transfer represents land and tangible assets acquired in the year and the transfer of funds as agreed with the donor.

23. ANALYSIS OF GROUP NET ASSETS BETWEEN FUNDS

	Unrestricted Funds £'000	Designated Funds £'000	Restricted Funds £'000	Endowment Funds £'000	Total Funds £'000
Tangible and heritage fixed assets	1,114	4,047	-	3,073	8,234
Investments	832	-	-	-	832
Current assets	2,389	491	1,736	-	4,616
Current liabilities	(561)	-	-	-	(561)
Long-term liabilities	(1,044)	-	-	-	(1,044)
	2,730	4,538	1,736	3,073	12,077

24. SUBSIDIARY COMPANY

SWT (Sales) Limited income and expenditure statement for the year ended March 2026

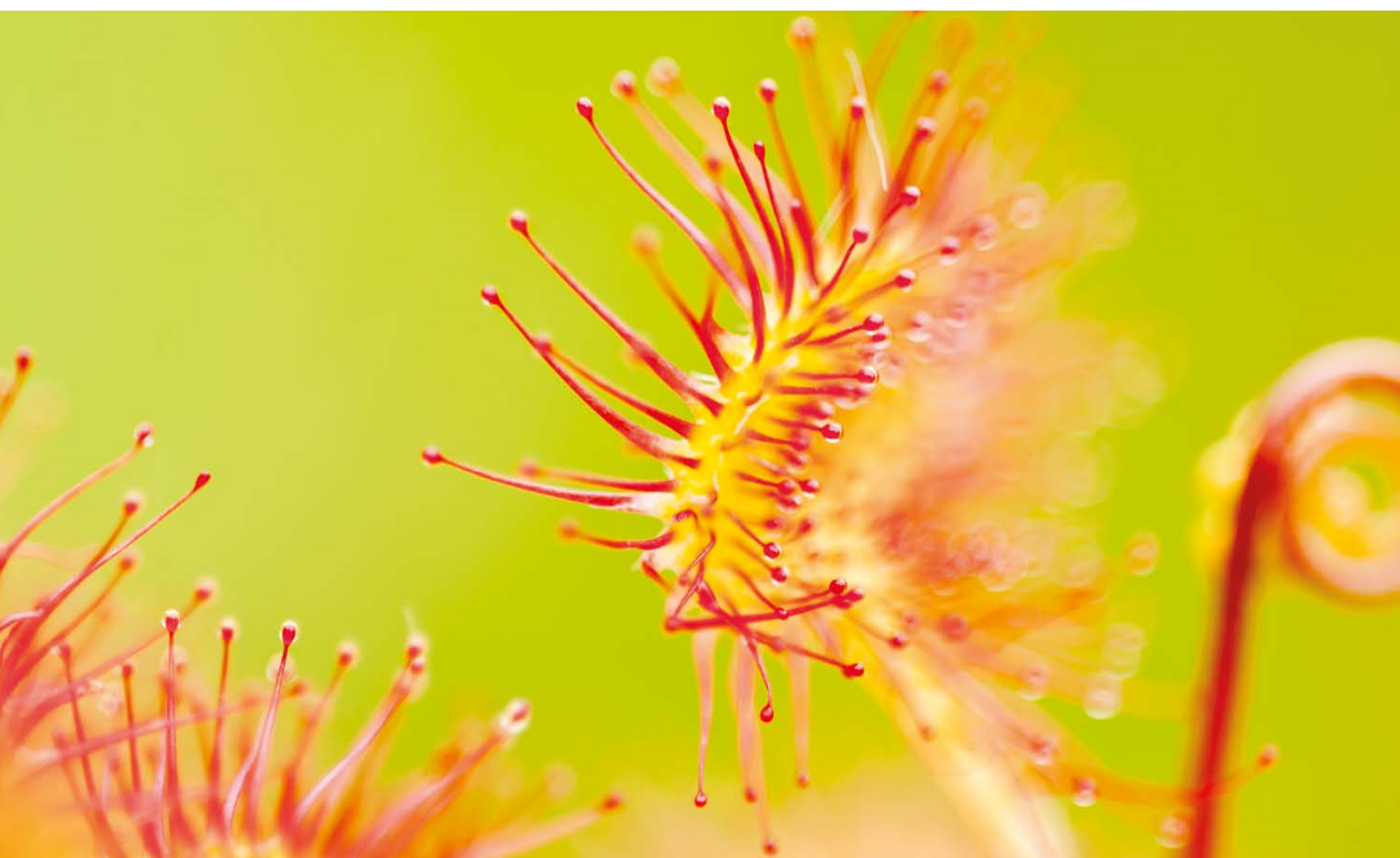
	2026 £'000	2025 £'000
Turnover	856	734
Cost of sales	523	516
Gross profit	333	218
Administrative expenses	138	131
Net profit	195	87
Taxation	-	-
Net profit after taxation	195	87
Paid under gift aid to Trust	195	87
Profit brought forward	-	-
Retained profit carried forward	-	-
Turnover includes a charge of £26,000 (2025: £111,000) for services to the Trust. The aggregate of the assets, liabilities and funds of SWT (Sales) Limited was:		
Assets	264	187
Liabilities	(264)	(187)
Funds	-	-

25. RECONCILIATION OF NET INCOME/(EXPENDITURE) TO NET CASH INFLOW FROM OPERATING ACTIVITIES

	2026 £'000	2025 Restated £'000
Net income/(expenditure) for the reporting period (as per the statement of financial activities)	1,663	(466)
Adjustments for:		
Depreciation charges	124	135
(Gains)/losses on investments	(40)	42
Dividends, interest and rents from investments	(76)	(126)
(Profit)/loss on disposal of fixed assets	(1)	3
(Decrease)/increase in provision for liabilities	(5)	376
Decrease/(increase) in debtors	162	(102)
Increase in creditors	29	728
Net cash provided by operating activities	1,856	590

26. ANALYSIS OF CASH AND CASH EQUIVALENTS

	2026 £'000	2025 £'000
Cash at bank and in hand	1,836	482
Deposit accounts (less than 3 months)	1,264	1,901
Investment cash holdings	17	9
	3,117	2,392



27. STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2025

	Unrestricted Funds		Restricted Funds £'000	Endowment Funds £'000	Total funds Restated 2025 £'000
	Restated General £'000	Designated £'000			
Income from:					
Membership, donations and legacies	1,649	-	510	-	2,159
Charitable activities:					
More space for nature - nature recovery	88	-	1,276	-	1,364
More space for nature - nature reserves	463	-	51	-	514
A movement for nature - Team Wilder	-	-	283	-	283
Telling Somerset's story - Somerset Environmental Records Centre	195	-	30	-	225
Other trading activities (including SWT (Sales) Ltd)	677	-	-	-	677
Investments	126	-	-	-	126
Total	3,198	-	2,150	-	5,348
Expenditure on:					
Raising funds:					
Cost of raising funds	372	-	-	-	372
Membership recruitment and retention	425	-	-	-	425
Merchandising costs	2	-	-	-	2
Investment management fees	8	-	-	-	8
SWT (Sales) Ltd	764	-	-	-	764
Charitable activities:					
More space for nature - nature recovery	14	23	1,718	-	1,755
More space for nature - nature reserves	853	78	133	-	1,064
A movement for nature - Team Wilder	548	-	263	-	811
Telling Somerset's story - Somerset Environmental Records Centre	165	-	30	-	195
Provision for pension scheme liability	-	376	-	-	376
Total	3,151	477	2,144	-	5,772
Net (loss) on investments	(42)	-	-	-	(42)
Net (expenditure)/income	5	(477)	6	-	(466)
Transfers between funds	(134)	134	-	-	-
Net movement in funds	(129)	(343)	6	-	(466)
Reconciliation of funds					
Fund balances brought forward at 1 April 2024	2,361	3,932	1,514	3,073	10,880
Fund balances carried forward at 31 March 2025	2,232	3,589	1,520	3,073	10,414

28. STATEMENT OF FUNDS 2025

	At 1 April 2024 Restated £'000	Income £'000	Expenditure Restated £'000	Transfers £'000	Investment Gains £'000	At 31 March 2025 Restated £'000
Unrestricted funds						
Income fund	2,361	3,198	(3,151)	(134)	(42)	2,232
Total unrestricted funds	2,361	3,198	(3,151)	(134)	(42)	2,232
Designated funds						
Nature reserves (heritage funds)	1,715	-	-	809	-	2,524
Operating freehold	959	-	(23)	-	-	936
Nature reserves development	16	-	(3)	-	-	13
Development fund	500	-	-	(500)	-	-
Innovation fund	35	-	-	(15)	-	20
Nature reserves fund	75	-	(75)	-	-	-
Somerset Environmental Records Centre	132	-	-	(36)	-	96
Wildlife Trusts Pension Scheme	500	-	(376)	(124)	-	-
Total designated funds	3,932	-	(477)	134	-	3,589
Restricted funds						
More space for nature - nature recovery	1,310	1,417	(1,718)	-	-	1,009
More space for nature - nature reserves	123	176	(133)	25	-	191
A movement for nature- Team Wilder	81	527	(263)	(25)	-	320
Telling Somerset's story - Somerset Environmental Records Centre	-	30	(30)	-	-	-
Total restricted funds	1,514	2,150	(2,144)	-	-	1,520
Endowment funds						
Nature reserves (heritage funds)	3,073	-	-	-	-	3,073
Total endowment funds	3,073	-	-	-	-	3,073
Total funds	10,880	5,348	(5,772)	-	(42)	10,414

29. ANALYSIS OF GROUP NET ASSETS BETWEEN FUNDS 2025

	Unrestricted Funds Restated £'000	Designated Funds £'000	Restricted Funds £'000	Endowment Funds £'000	Total Funds Restated £'000
Tangible and heritage fixed assets	602	3,460	-	3,073	7,135
Investments	799	-	-	-	799
Current assets	2,412	129	1,520	-	4,061
Current liabilities	(1,581)	-	-	-	(1,581)
	2,232	3,589	1,520	3,073	10,414



GIFTS AND DONATIONS

We would like to thank all our members, donors and grant givers for their generous support, which is helping nature to recover across Somerset including all those who wish to remain anonymous.

Legacies

Anita Susan Kauth
Anne Pamela Pockson
Barbara Ann Turner
Brian Arthur Collins
Carole Jane Howie
Christopher James Chappell
Collette Honor Clark
David Benjamin Marks
David Ralph Wishart
David Vincent Fryer
Geoffrey Albury Gerosa
James Roger Bowker
Josephine Mary Goldie
Josephine Mary Brookes
Judith Elaine Slade
Julian Rodney Geard
Lois Marjorie Winspear Crisp
Marion Patricia Sellwood
Michael Alfred Sleight
Mildred Elizabeth Kate Sands
Norman William Frank Lees

Patricia Annette Haden
Patricia Shirley Young
Penelope Mary Cudmore
Peter John Woolley
Reginald John Hellings
Rosemary Margaret Morgan
Shirley Frida Moore
Susan Margaret Bates

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Alastair and Sue Marshall
Charles Fattorini
Chris and Maria Thring
Clive Taylor
David and Dana Buchan
Dudley Cheesman
Giles Woodward
Gill Rickards and Simon Hart
Jane Taylor
Janet Robinson and Paul Groom
Jean Mantle
Jeremy Dyson
Jeremy Hawes

John Deverell CBE
Lucy Starling
Mark and Marnie Franklin
Mark O'Neill
Neil and Sarah Williams
Nicola Johnson
Patrick Thomson
Paul and Mona Sinclair
Paul Bateman and Karla Kelway
Paul Sheppard and Lucy Dunford
Pete and Trish Comley
Peter Morris
Phillipa Archer
Robert Unwin
Rohan and Lily Masson-Taylor
Terry and Claire Cawley
Tim and Dede Sanderson

*We would like to acknowledge
all donations made in memory of
Heather Corrie*



Friends of Chancellor's Farm:

Susan Shaw
Donors who wish to remain anonymous

Corporate members

Classic Cottages
Habitat Aid
John Fowler
Melhuish & Saunders
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Stay Original
YTL Group

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Glastonbury Festivals
Somerset Council
Somerset Rivers Authority
Wessex Water

Grants and Trusts

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AJH Ashby Will Trust
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Battens Charitable Trust
Belsize Charitable Trust
Blackdown Hills National

Landscape
Bristol Airport Diamond Fund
Chard Community Hub
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#iwill Fund



KEY PEOPLE AND ADVISERS

Key people

Patron

Simon King OBE

President

Position currently vacant

Vice-Presidents

Dudley Cheesman

Roger Martin

Chris Sperring MBE

Directors and Trustees

The directors of the charitable company ("the Trust") are its Trustees for the purpose of charity law. The Trustees on the date of approval of this report, all of whom were members for the whole of the financial year in question unless stated otherwise, were as follows:

Chair

Rupert Taylor

Treasurer

Stephen Rogers

Elected Trustees

Matthew Bell

Barnaby Briggs

(appointed 15 November 2025)

Stuart McBride

Amy Coulthard

Charlie Fattorini

(appointed 15 November 2025)

Holly Purdey

Stephen Rogers

Dr Richard Scarlett

Dr Daniel Skinner

Dr Mark Steer

Rupert Taylor

Tina Trickett *(resigned 20 January 2026)*

Somerset Wildlife Trust is a registered charity.

Charity number: 238372.

Company number: 818162.

Registered office: 34

Wellington Road, Taunton, Somerset TA1 5AW

SWT (Sales) Ltd Directors

Georgia Dent *(resigned 2 December 2025)*

Prof Malcolm Hutton

(resigned 2 December 2025)

Stuart McBride *(resigned 2 December 2025)*

Damien Read *(resigned 2 December 2025)*

Stephen Rogers *(appointed 3 December 2025)*

Paul Smith *(appointed 3 December 2025)*

Peter Solly *(resigned 2 December 2025)*

Patrick Vandestein *(resigned 2 December 2025)*

Tina Trickett *(resigned 2 December 2025)*

Executive Team

Georgia Dent,

Chief Executive Officer

James Grischeff,

Director of Nature Recovery

Adam Murray,

Director of Action for Nature

Paul Smith,

Director of Business Planning & Development

Advisers

Senior Statutory Auditor

Michelle Ferris, Albert

Goodman, Goodwood

House, Blackbrook

Park Avenue, Taunton,

Somerset, TA1 2PX

Bankers

Lloyds Bank, 31 Fore

Street, Taunton, Somerset

TA1 1HN

CCLA Investment

Management Limited,

One Angel Lane,

London, EC4R 3AB

Solicitors

Clarke Willmott,

Blackbrook Gate,

Blackbrook Park Avenue,

Taunton, Somerset

TA1 2PG

Investment Managers

Rathbones Investment

Management Limited,

10 Queen Square, Bristol,

BS1 4NT

Land Agents

Greenslade Taylor Hunt,

1 High Street, Chard,

Somerset





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