



A vision for Exmoor's economy - 2030



August 2021

What this document is about

- a vision to provoke discussion and guide future activity

This Vision has been commissioned by Rural Enterprise Exmoor (REE) - a partnership that includes Devon County Council, Exmoor Hill Farming Network, Exmoor National Park Authority (ENPA), Federation of Small Business, Heart of the South West LEP, North Devon Council, Somerset County Council, Somerset West and Taunton Council, Visit Exmoor and West Somerset Business Group. REE have produced this document to stimulate discussion on the ways forward for Exmoor's economy. It does not aim to be a conventional economic strategy in either its tone, format or content. The vision will be used to guide a co-ordinated approach amongst partners, businesses and communities and will provide the basis for an Exmoor input to the work of local and regional organisations.

It builds on a number of other reports, strategies and existing activities - aiming to provide an overarching vision which all partners can support, as well as a number of principles, priorities and propositions. In particular, it follows on from a research report completed by Wavehill and the Covid Impact Study. This work, like others has relied on a great deal of consultation with businesses, community organisations and young people throughout Exmoor and beyond. We are very grateful for their time and ideas.

The context for this work is the special status of Exmoor National Park which is designated to conserve and enhance Exmoor's natural beauty, wildlife and cultural heritage, and to provide opportunities for greater understanding and enjoyment of the park's special qualities. In fulfilling these purposes there is a duty on ENPA to foster the social and economic wellbeing of Exmoor's communities. Of course, the local economy does not work to neat boundaries, so this vision covers the Greater Exmoor area. In addition, the Vision takes account of the strengths and weaknesses of the place and the potential opportunities and threats to a thriving economy on the Moor.

STRENGTHS

- Rich and varied wildlife
- Wild and remote natural environment
- High quality natural resources
- Exceptional heritage
- Thriving rural culture
- Pride in the area
- Tranquillity
- Loyal visitors and some high quality offerings
- Excellent local community services
- Low crime levels / high public safety
- Supports prosperity in wider areas

WEAKNESSES



- Insufficient affordable housing
- Reliance on tourism-based economy
- Patchy digital infrastructure
- Low wages and limited social mobility
- Declining population
- Older demographic
- Limited transport infrastructure
- Variable quality of tourism offer
- Access to suitable training
- Limited access to childcare
- Employment space for growing businesses

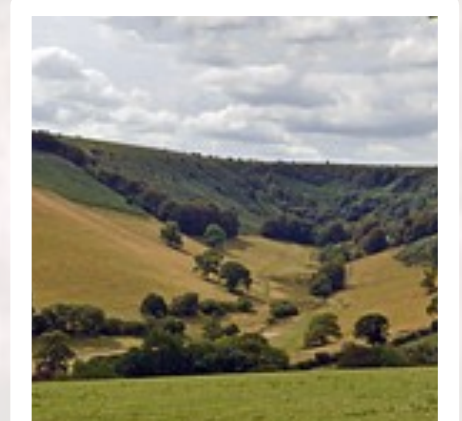
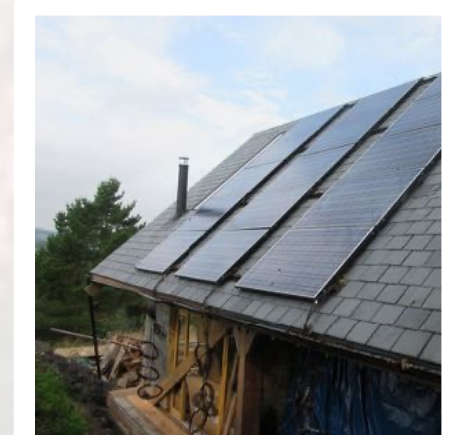
OPPORTUNITIES

- Shared leadership
- Increased self-sufficiency
- New models for affordable housing
- Strong sustainability offer
- Support for environmental land management
- Adding value to low carbon agenda
- Growth in green tourism
- Place to pilot new ideas
- Increased remote working
- Training for future economy
- Building local supply chains

THREATS

- Increasing competition from other destinations
- Reducing public investment
- Radical changes to farm support
- Reducing viability of services
- Continued depopulation
- Wider impacts of climate change
- Volatility in post-Brexit environment
- Training provision not keeping up with future needs
- Viability of local primary schools

This is an interactive document when viewed onscreen. You can navigate around the document using the menu and arrows at the bottom of each page. The section you are in will be highlighted on the menu. There are also a number of clickable links, indicated by  which will take you to other parts of the document and by  which will take you to external resources.

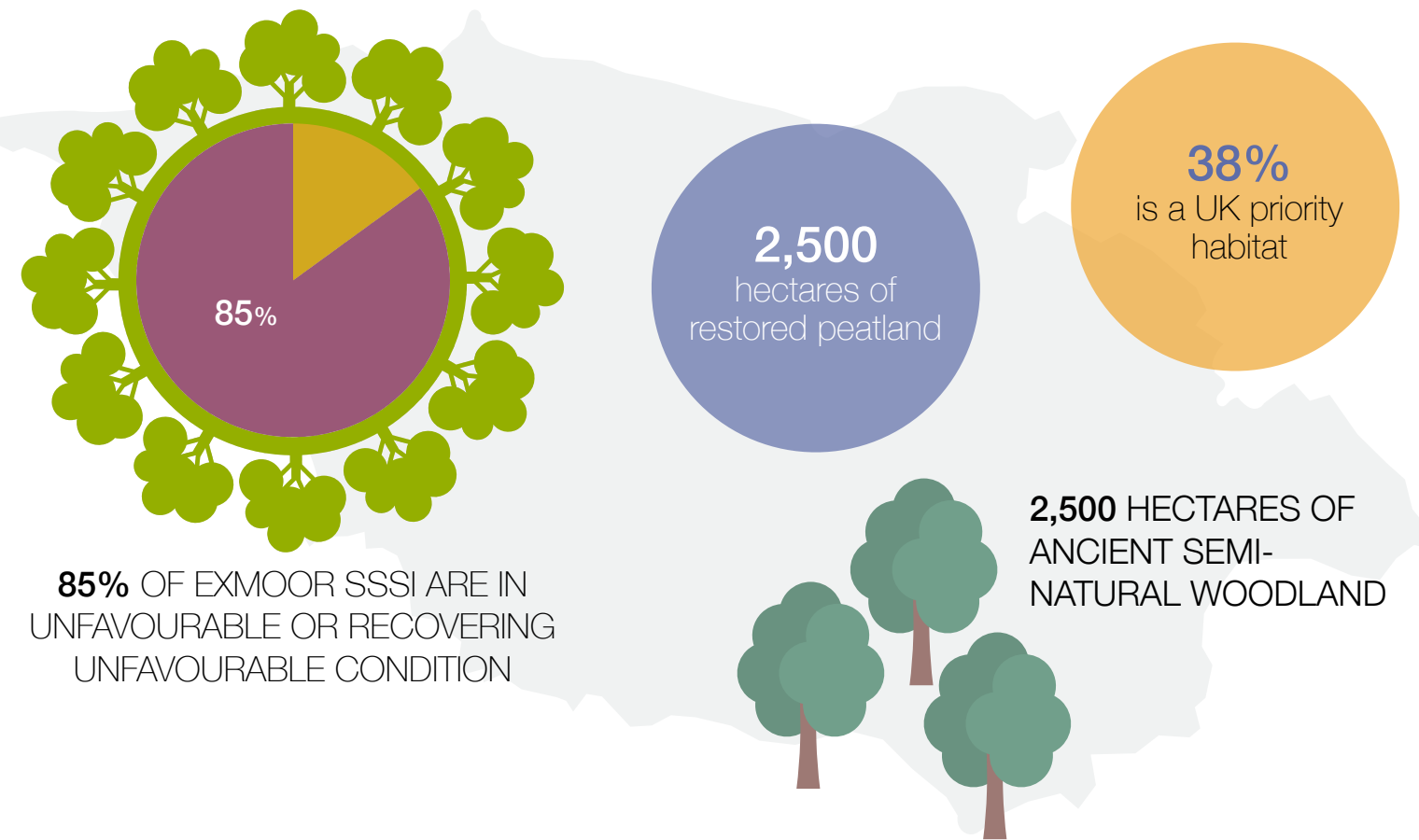


Background: Exmoor heather

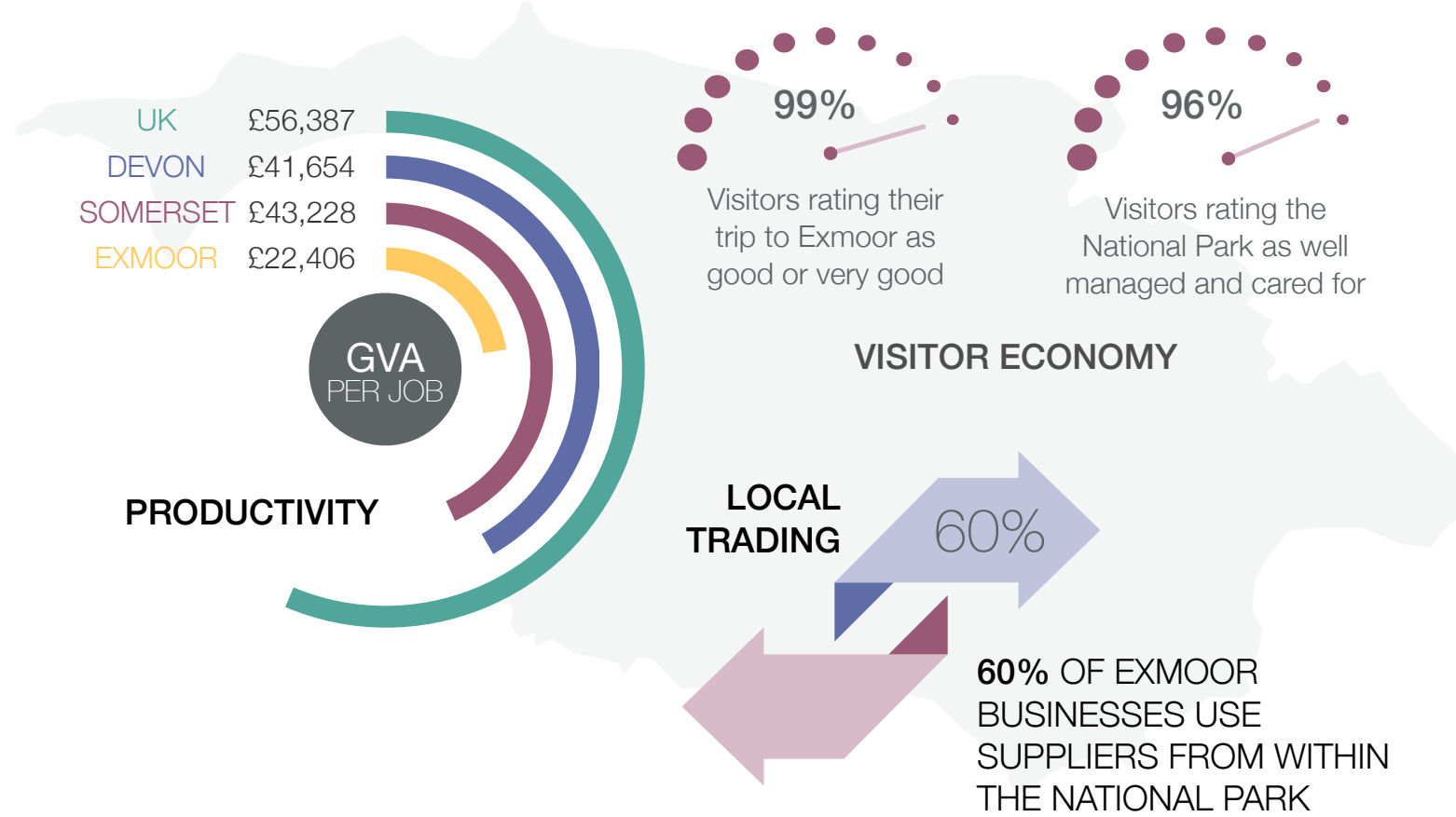
Exmoor - a snapshot

For data sources - see page 24

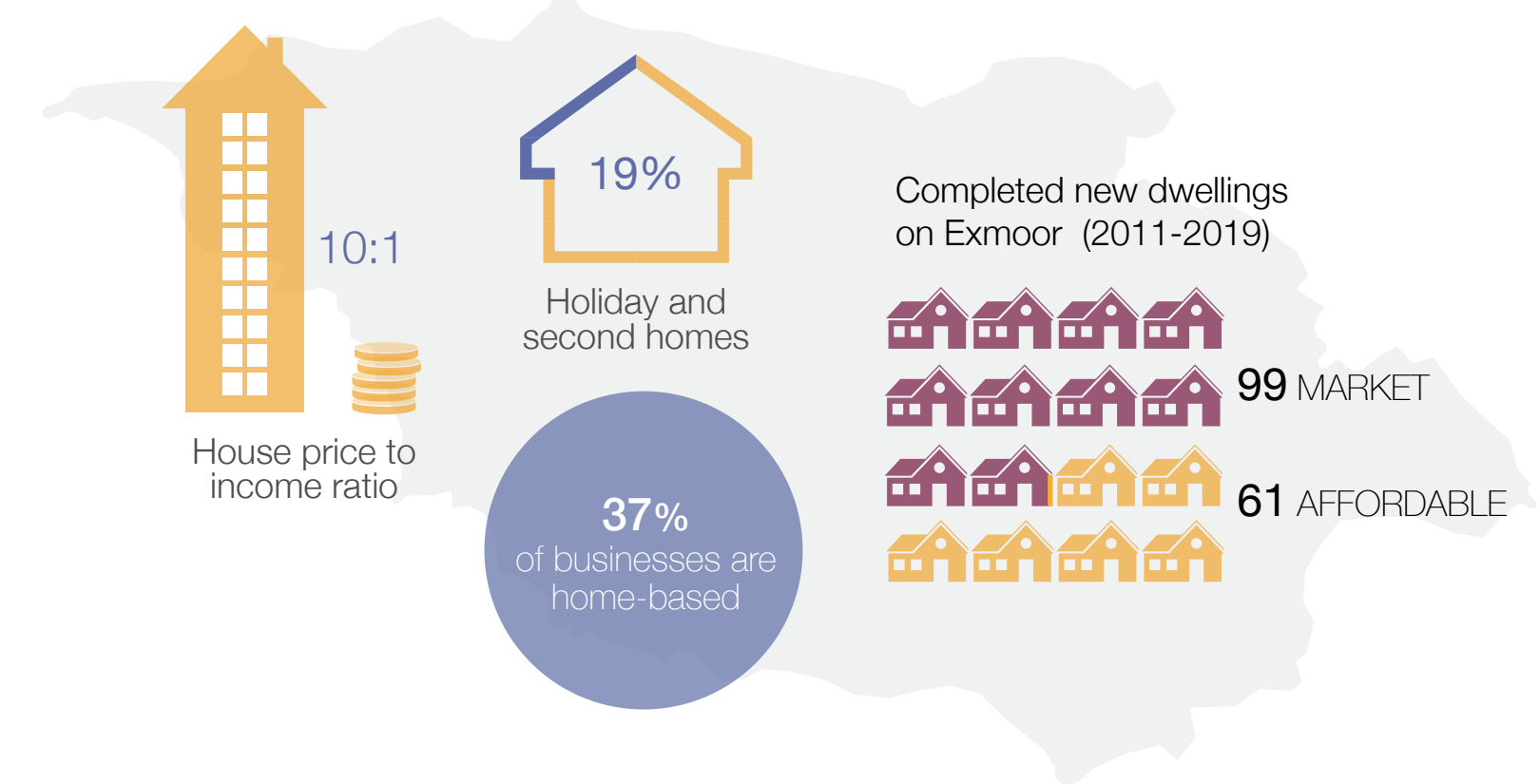
ENVIRONMENT ON EXMOOR



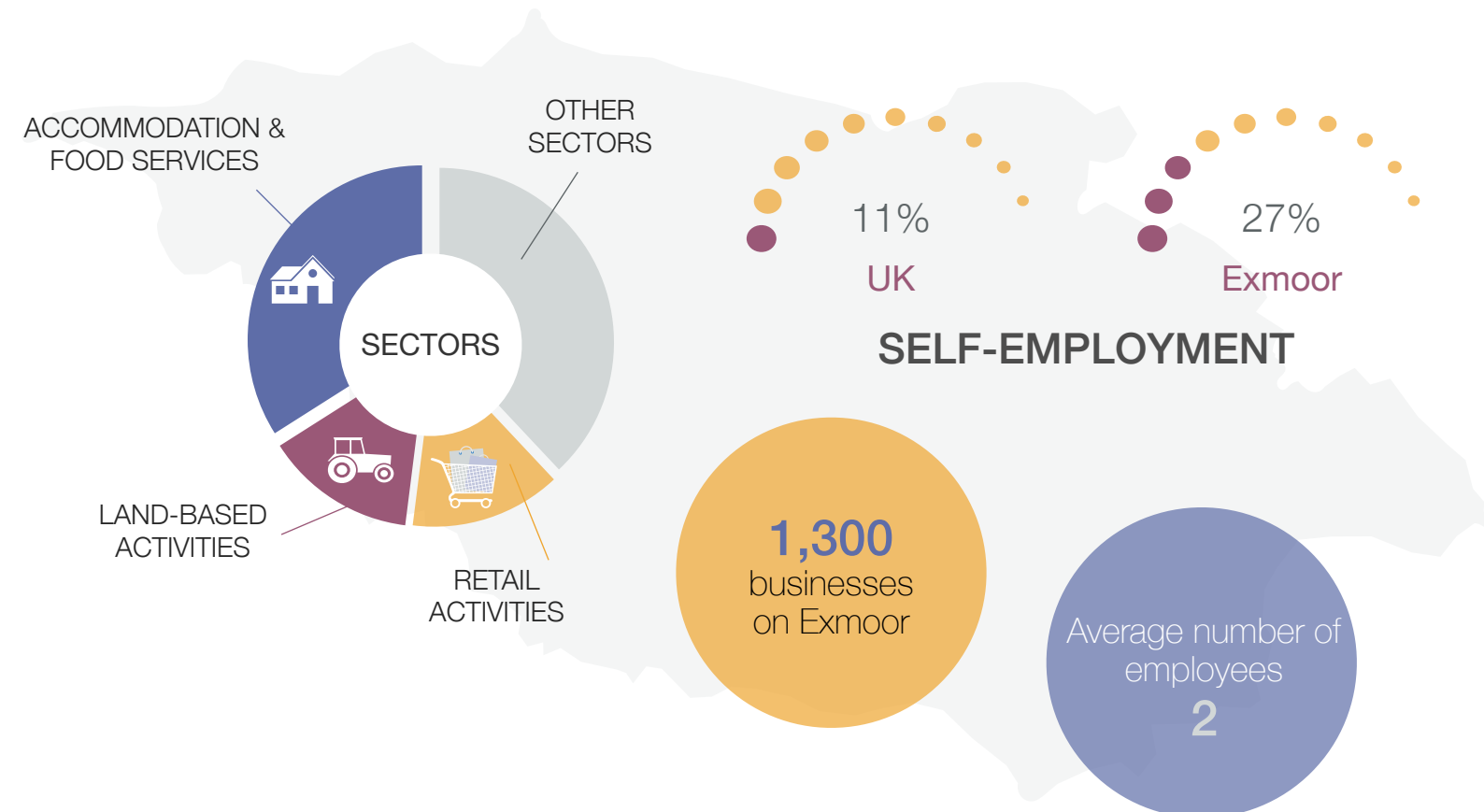
ECONOMY ON EXMOOR



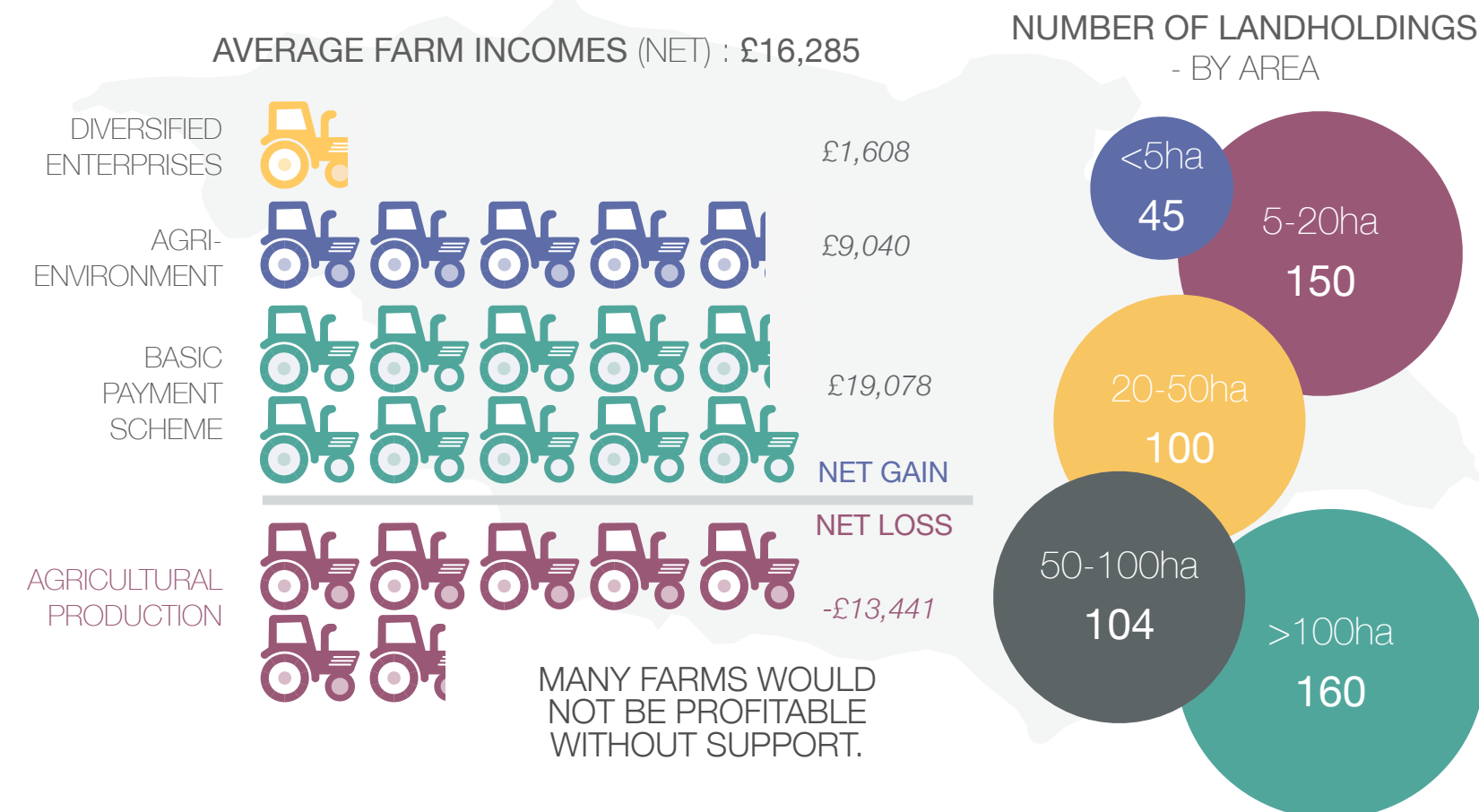
HOMES ON EXMOOR



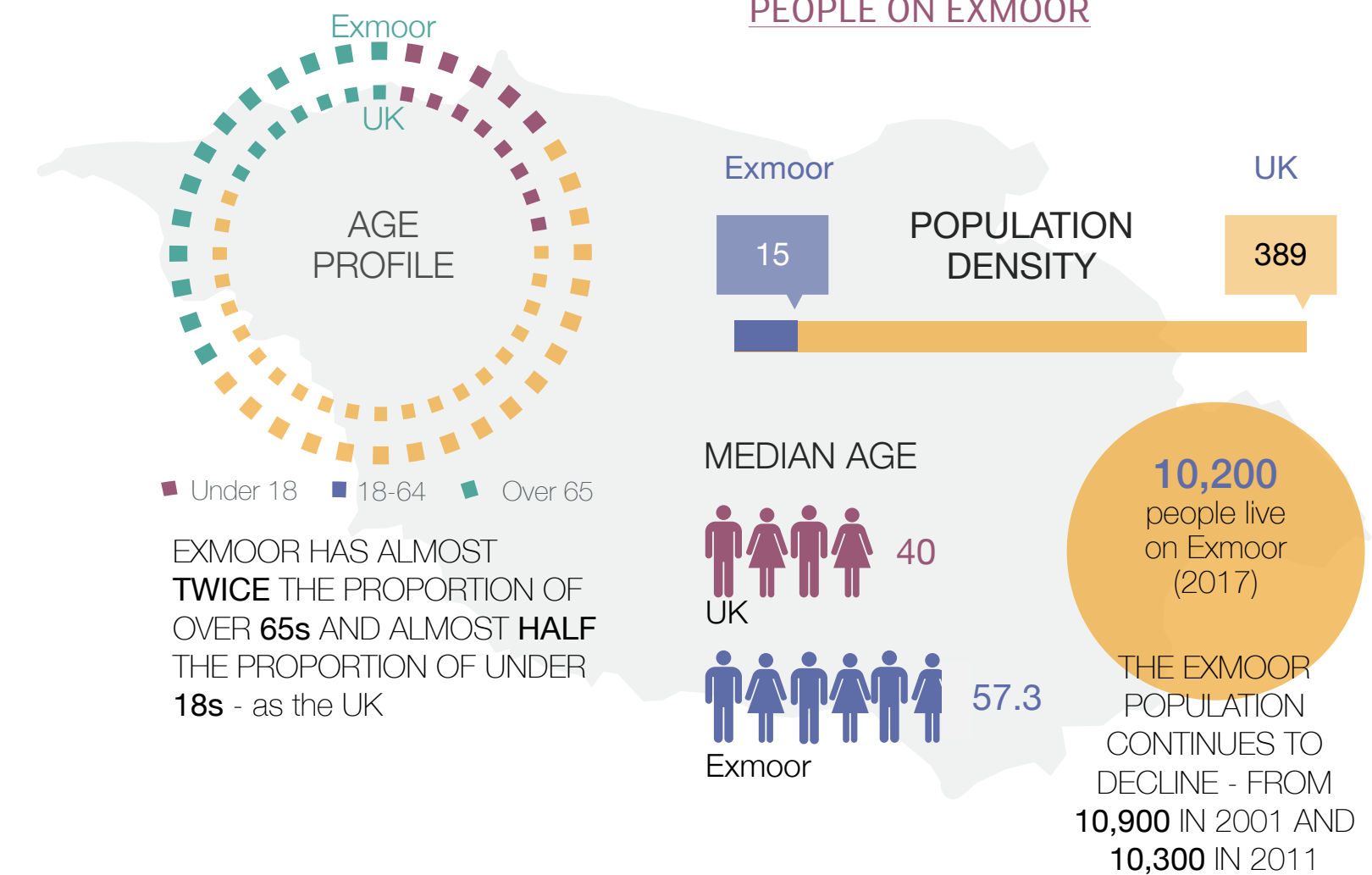
BUSINESS ON EXMOOR



FARMING ON EXMOOR



PEOPLE ON EXMOOR



Keeping it live

This document is a starting point. A starting point for a 'live' vision, one that will be constantly checked and updated by the people, communities and businesses of Exmoor.

The next ten years and beyond will bring unprecedented levels of change for all of us. No place, no community, no business can stay static. Change is needed to adapt to the rapidly changing world and change is needed to ensure that local working people will continue to have a future on the Moor. We will need to do things differently - being open to new ideas, new types of investment and new entrepreneurs - adding to the rich mix that is Exmoor.

- Changes to our environment have finally started alarm bells ringing with policy makers and politicians around the world. They realise that the way we are treating nature, both wildlife and natural resources, is already causing actual harm to communities and economies. They realise that the climate crisis is poised to cause major disruptions in a multitude of ways. Adapting to the climate and nature crises is a 'given'. Over the next 20 years, they will become dominant drivers of economic development and government policy.
- The pace of disruptive new technologies is increasing - changing the way markets and sectors work. The need to change, adapt and learn new skills will be paramount for a successful business or economy - in any sector. Whether it is robotics and sensor technology for farming; data analytics and augmented reality for the visitor economy; or artificial intelligence and big data to manage complex supply chains.
- As populations age and lifestyle diseases increase, we need to find different ways to manage health and wellbeing. Delivering care services will become more expensive, with the increased costs falling on the working population. While social media has opened up virtual communities without boundaries, young people feel increasingly isolated. The continuing pressures and challenges of modern life have left many with profound mental health issues.
- Inequality in the UK is at the highest level for over 50 years. Poverty is no longer just a factor of worklessness but a more complex set of circumstances. Government's ability to respond is likely to be reduced as public debt has increased massively following the pandemic. As this will have to be reduced, we can expect higher taxes and reduced public expenditure.

Because the way these crucially important issues are evolving is uncertain, we need to keep testing, keep talking, keep adapting. Exmoor, for all its outstanding landscape, its natural capital, its rich culture and heritage, its community spirit and its innovative businesses, is vulnerable. It is small and remote. It will require all the determination and ingenuity of its people and institutions to keep it as a place where communities can increase their wellbeing, where businesses can continue to thrive and where nature can be at the centre of recovery.



🔍 MORE INFORMATION

🔍 MORE INFORMATION

Background: Two Moors Way boundary stone at Badlake Moor Cross

A different approach

A successful economy is one that aims to give people meaning and purpose. It is one where everyone is able to participate and share in the common wealth that is created. A successful economy is one that values the health and wellbeing of the whole population. It is one that understands the critical relationship with nature.

Exmoor's status as a National Park demands a special approach to measuring its economic development that is based on much more than just money and financial wealth.

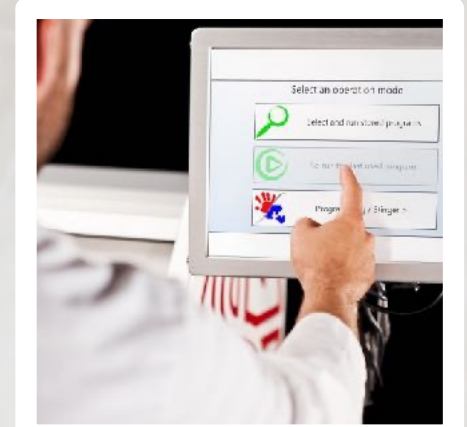
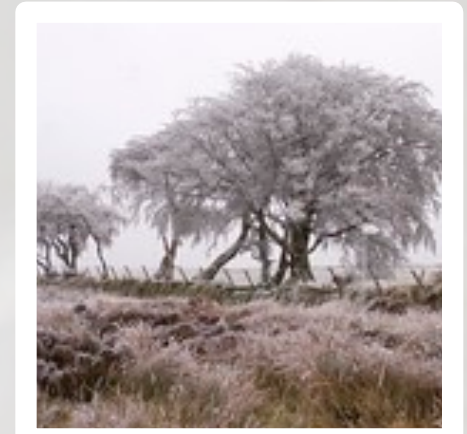
This vision is about creating opportunities for entrepreneurs to develop their ideas, for people to thrive and for the environment to recover. On Exmoor especially, there is a strong connection between these three things. Only if they work together will we have an economy that is forward looking, open and innovative, inclusive and just. The Wellbeing of Future Generations Act in Wales is a groundbreaking piece of legislation which requires all public bodies to take account of the long-term impacts of their decisions. A Commissioner has been appointed to be the guardian of future generations and who advocates a long-term view, an integrated approach, involving people in decisions, and collaborating on solutions. There could be a voluntary equivalent for Exmoor to ensure plans and policies are sustainable over the long term.

Collective wellbeing is the ultimate indicator of progress. Therefore the measure of our success will not be increases in profits or GDP; it will be in the wellbeing of the people of Exmoor, in the health of nature and in the dynamism and resilience of its businesses. By putting people and the environment at the heart of the vision we can build an economy of lasting value. In doing so we understand that:

- the scale and pace of change is challenging and we will all need support on this journey
- we are on the journey together - businesses, communities and public bodies
- we need to deliver meaningful public participation at every opportunity.
- there is boundless local wisdom and knowledge - so we should keep people involved
- the co-creation of ideas, policies and projects builds understanding and involvement
- we need to pay more attention to marginalised communities and young people in creating and implementing our future plans
- we should support a regenerative economy - one that uses resources in a way that helps them replenish
- we need to examine every policy through the lenses of wellbeing and environment - in how we measure, monitor and evaluate progress.

 MORE INFORMATION

 MORE INFORMATION



Background: Exmoor wool

At the heart of it

The essence of the Vision for Exmoor's economy is set out on the following pages.

It is built on extensive consultation, on considerable research, on good practice from elsewhere and on the experience and expertise of many people.

Exmoor's special qualities and assets are important. They are what attracts people to live, work and visit. The history and heritage, the communities rooted in the land and landscapes, the wildlife and wild places are important - and they are why the area was designated a National Park in the first place. However, to thrive in a rapidly changing world requires change. Exmoor will need to be more self-sufficient, more resilient to future threats and more willing to grasp opportunities.

Our overall aspiration is for Exmoor to have:

an economy building community wealth, sitting lightly in its environment and creating opportunities from its special qualities

The diagram on the following page summarises the elements of this Vision, distinguishing between:

- ☛ The two major factors which are **driving change** both in the economy and wider society and which demand a response.
- ☛ The few things which seem essential for the future economy on Exmoor - enabling other opportunities to happen. These are called **Priorities**.
- ☛ Ideas that will have significant impact on the success of businesses and communities. These are called **Propositions**.
- ☛ Activities that will be important for specific sectors or parts of the economy. These are called **Proposals**.

All these are suggestions - to be discussed, agreed and delivered in ways which are appropriate to Exmoor and its particular circumstances.

This vision is based on two fundamental principles: that everyone on Exmoor should have the essentials for a good life; and that together we do not put more pressure on the environment upon which all of us depend.

This is best shown using the doughnut model.

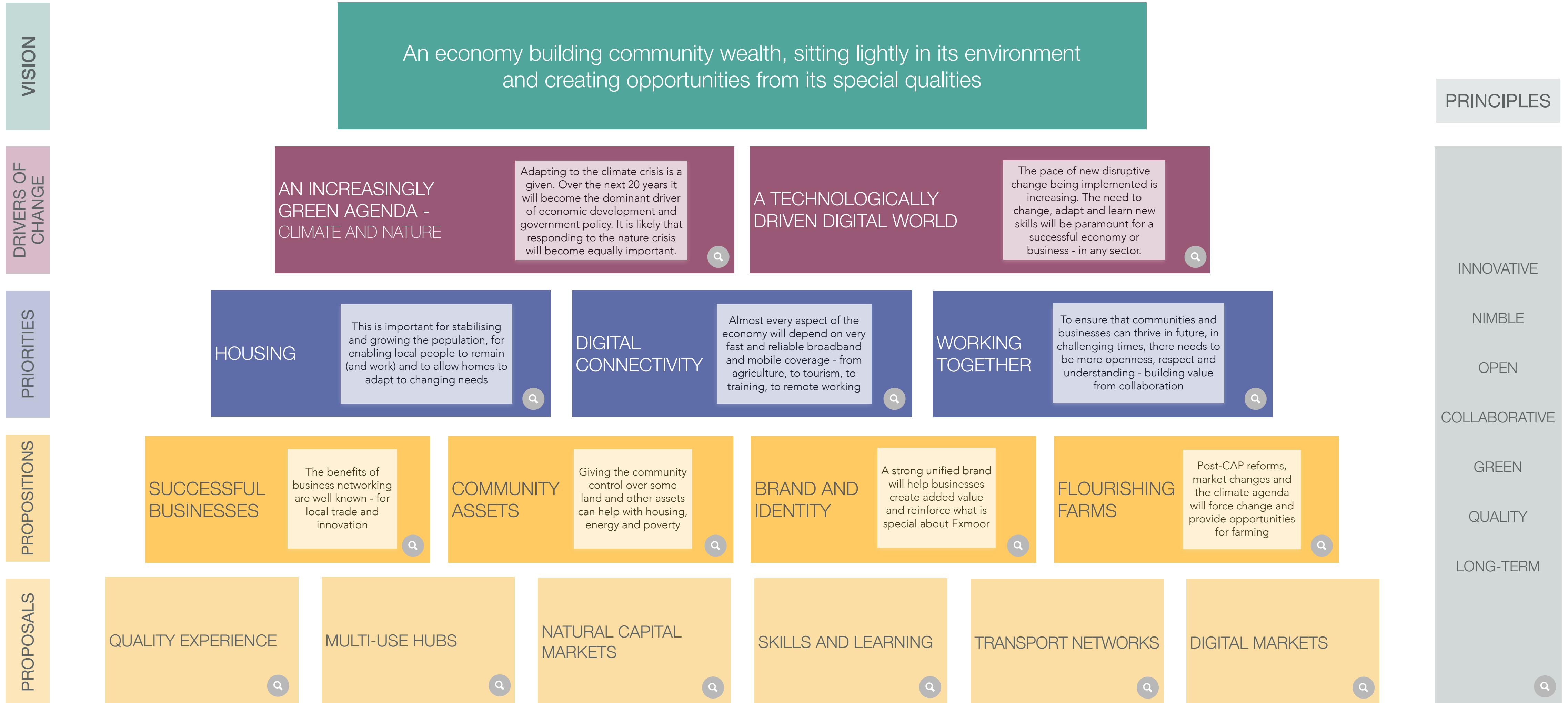


Exmoor, like the rest of the UK, is overshooting many of the environmental limits and is failing to deliver some of the social and economic needs for everyone on Exmoor. This is not a sustainable situation and should not continue.

Any economic plan, any recovery for Exmoor, should aim to tackle the climate emergency, improve the prospects and wellbeing of local people, create meaningful jobs and secure a green future.

Background: Bossington Beach, Porlock

Summary



Principles

“Open your arms to change but don’t let go of your values.”

DALAI LAMA

The way in which an economy is managed and businesses are run is critically important to long term success.

This vision identifies a number of principles which should guide the way in which we take forward the economic vision and how we make change happen.

Nimble

Change is happening quickly. In order to keep up with change and make the most of opportunities, Exmoor has to be nimble in all that it does - willing and able to act as quickly as possible on new ideas and opportunities.

Collaborative

Partnership and collaboration has to be at the core of all economic activity – our businesses must work together and with other stakeholders – it is a shared endeavour. Collaboration within and beyond Exmoor will drive innovation and resilience.

Open

Exmoor has to be open to new ideas and opportunities, looking forward to the future with confidence. The most successful economies are outward looking, finding value in connections with others.

Quality

Quality has to underpin all that we do – it is essential for the visitor economy and for building a strong brand. Whatever the activity, we need to drive for quality.

Green

Exmoor is ambitious for a net zero carbon economy and to improve the natural environment on which so much depends – so whatever we do in and for the economy, we need to do this in as green a way as possible. All new developments on Exmoor should be net-zero carbon.

Innovative

Businesses on Exmoor can be very innovative and we can do more to encourage this – so in whatever we do, we need to embrace new ideas and be creative in response to the challenges and opportunities that lie ahead.

Long-term

Any developments and policies should consider the long-term impacts on the environment and communities of Exmoor. Thinking and planning for the needs of future generations remains important.



Drivers of change

Change is the law of life and those who look only to the past or present are certain to miss the future

JOHN F KENNEDY

It is not an exaggeration to say that the next 10 years will define our future on this planet.

Climate - 'Code Red for Humanity'

The IPCC has warned that exceeding 1.5°C warming will push us into "a highly uncertain world" - adding that "the current global commitments are not sufficient to prevent temperature rise above 2°C, let alone 1.5°C. The critical issue is whether, and how soon, we reach some of the major climate 'tipping points'. These include the melting of polar icecaps and glaciers; the melting of permafrost. and subsequent release of methane and the loss of forest cover.

The biggest ever global survey on climate change, in December 2020, has found that almost two-thirds of the 1.2 million people asked think it is a global emergency. In the UK, voters believe that the government should be more radical and a 2020 survey by Opinium found 48 per cent of the public agree that the government should respond "with the same urgency to climate change as it has with Covid-19".

Nature

We are approaching critical tipping points for nature as well as climate. Over half of the world's GDP is moderately or highly dependent on nature while the 2021 WEF Global Risk Report has extreme weather, climate failure, human environmental damage and biodiversity loss as four of the top five most likely global risks - from a survey of over 800 business and political leaders. Business as usual is no longer good for business.

The HM Treasury/Dasgupta report on the Economics of Biodiversity was released in February 2021 and makes sobering reading. Biodiversity is declining faster than at any time in human history. Current extinction rates, for example, are around 100 to 1,000 times higher than the baseline rate, and they are increasing. The safeguarding of natural ecosystems is crucial if we are to meet both biodiversity and climate goals.

Technology

The empowered consumer and emerging technologies have sent businesses scrambling to find new strategies and business models for creating consumer value. At the same time, businesses have to overhaul their operating models to drive innovation and increase their market agility. This potentially disruptive phase is being termed the 'Fourth Industrial Revolution' and will affect systems of production, distribution and consumption. These new technologies (e.g. robotics, the internet of things, artificial intelligence) are driving a step change in business performance, and allowing businesses to offer once-impossible services.

The World Economic Forum projects that consumer industries will change more in the next 10 years than in the last 40. Businesses that thrive over the next 10 years will embrace new technologies, will be driven by data and will be externally oriented.

Opportunities from change

While there is no doubt that adapting to future changes will be challenging, there are a huge range of opportunities from that process - new business ideas, new ways of running existing businesses, new jobs and new courses for students and workers.

There is little doubt that a growing number of consumers would like to buy products and services from companies that exhibit socially and environmentally responsible behaviours. According to a new survey of 6,000 people worldwide by Accenture, more than half of consumers are willing to pay more for sustainable products that can be recycled or reused.

Eco-friendly business measures can also lead to savings. Practices such as energy conservation, recycling, use of water-saving devices, energy-efficient equipment, solar power and reduced waste have been proven to be more efficient and cost-effective.

The OECD has recognised the economic opportunity alongside the environmental necessities. They advocate that cleaner air quality, healthier water, effective waste management, and enhanced biodiversity protection not only reduce the vulnerability of communities to pandemics and improve resilience, but have the potential to boost economic activity, generate income, create jobs, and reduce inequalities.

Artificial Intelligence (AI) has been positioned as a major commercial opportunity for companies across the world, particularly as a result of the COVID-19 pandemic. AI can be used to enhance and improve many different aspects of business for SMEs including making marketing and sales smarter and more insightful, reducing repetitive, tasks, managing back office functions, tracking and analysing a website user's journey, and much more.

Robotics and Autonomous Systems (RAS) are set to transform many global industries and will have greatest impact on sectors of the economy with relatively low productivity such as food and farming. Whether it is sensing, mapping and monitoring of soils, crops and livestock; or the use of agile, autonomous tractors, emerging technologies can build efficiency and value on upland farms.

FURTHER INFORMATION ON THESE DRIVERS OF CHANGE IS SHOWN ON THE FOLLOWING PAGES

Climate and nature



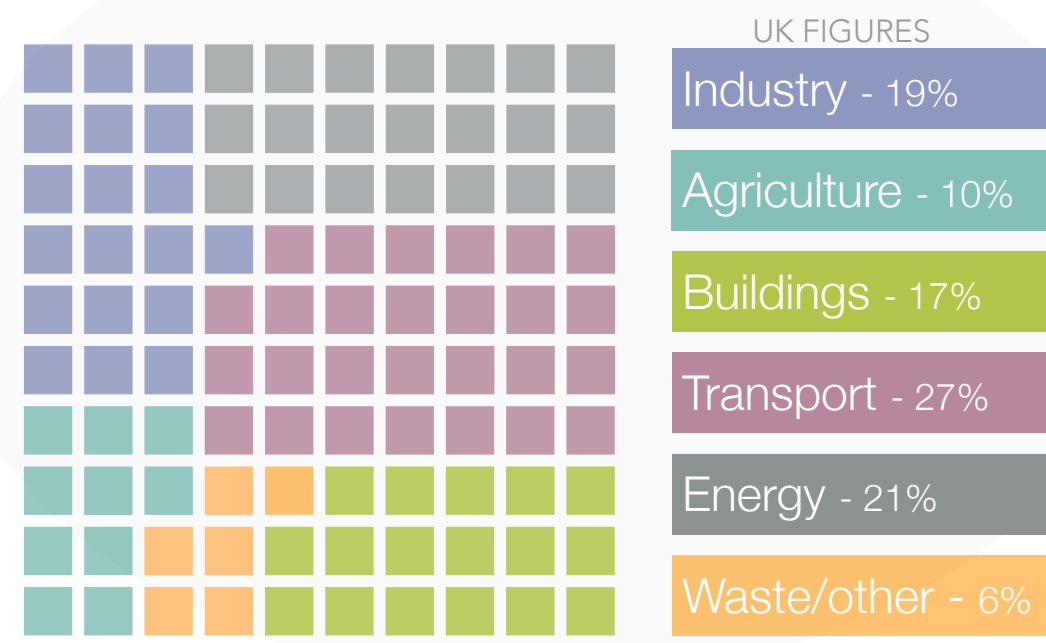
Technology



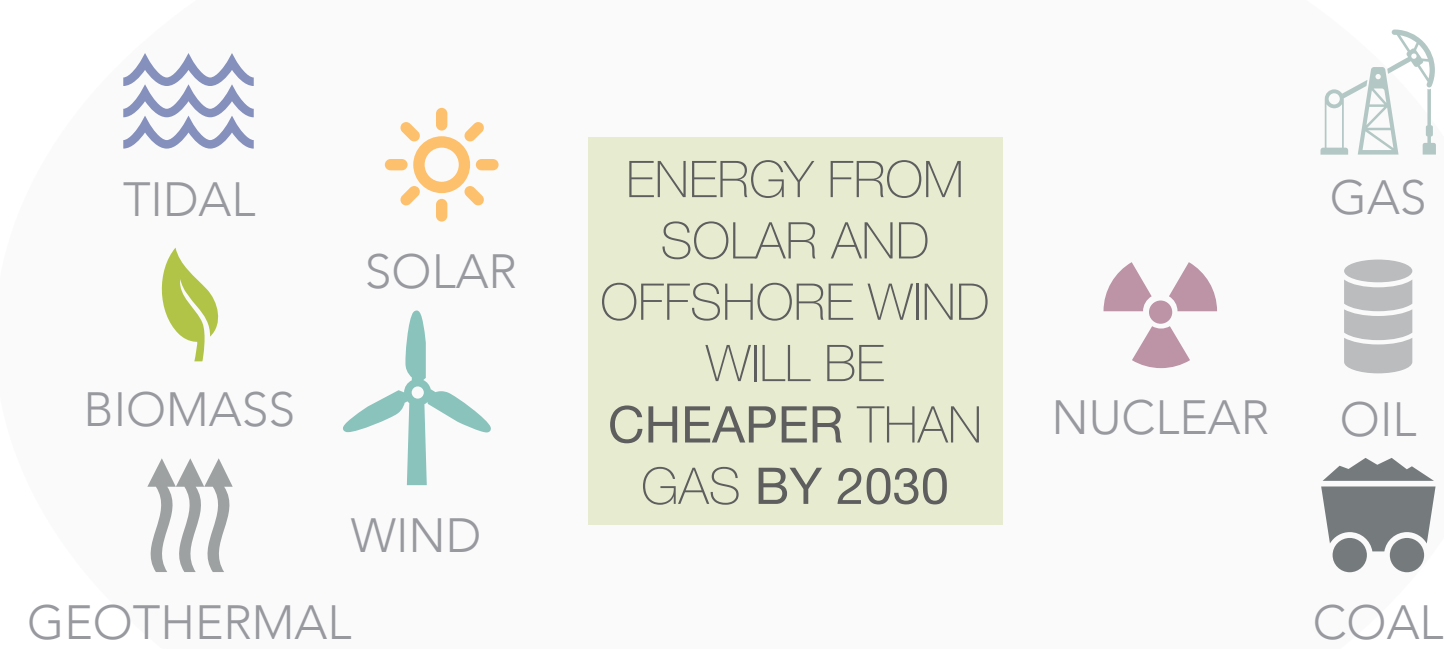
Driving change - climate and nature

For data sources - see page 24

WHERE EMISSIONS COME FROM

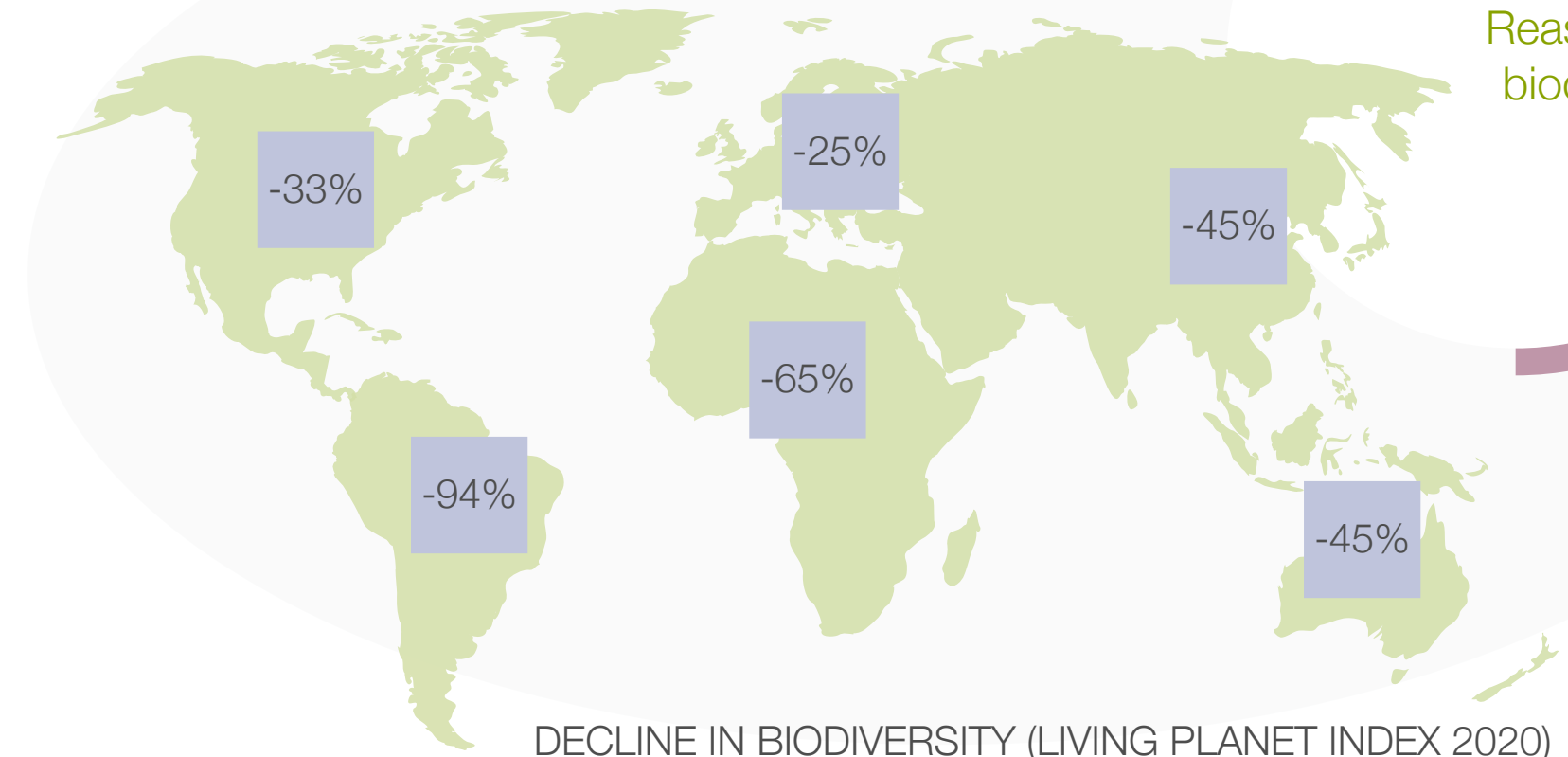


THE RENEWABLES REVOLUTION

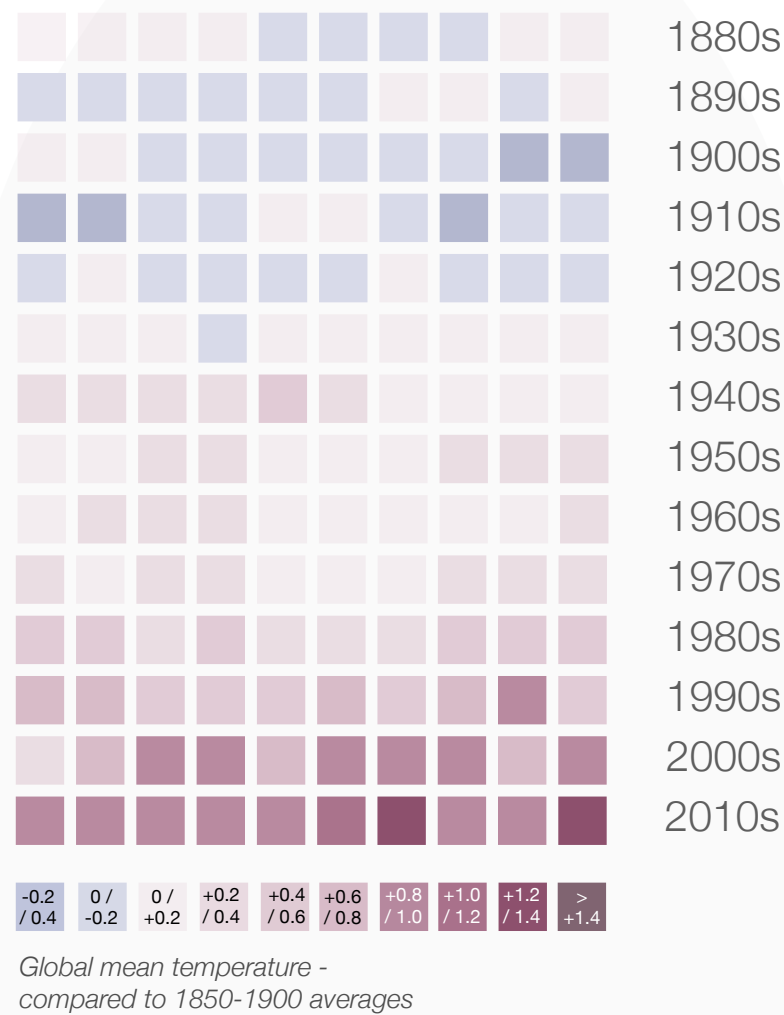


Rising demand, new technology and economies of scale are driving down the cost of renewables. Many are becoming competitive without subsidy.

WILDLIFE IN DECLINE



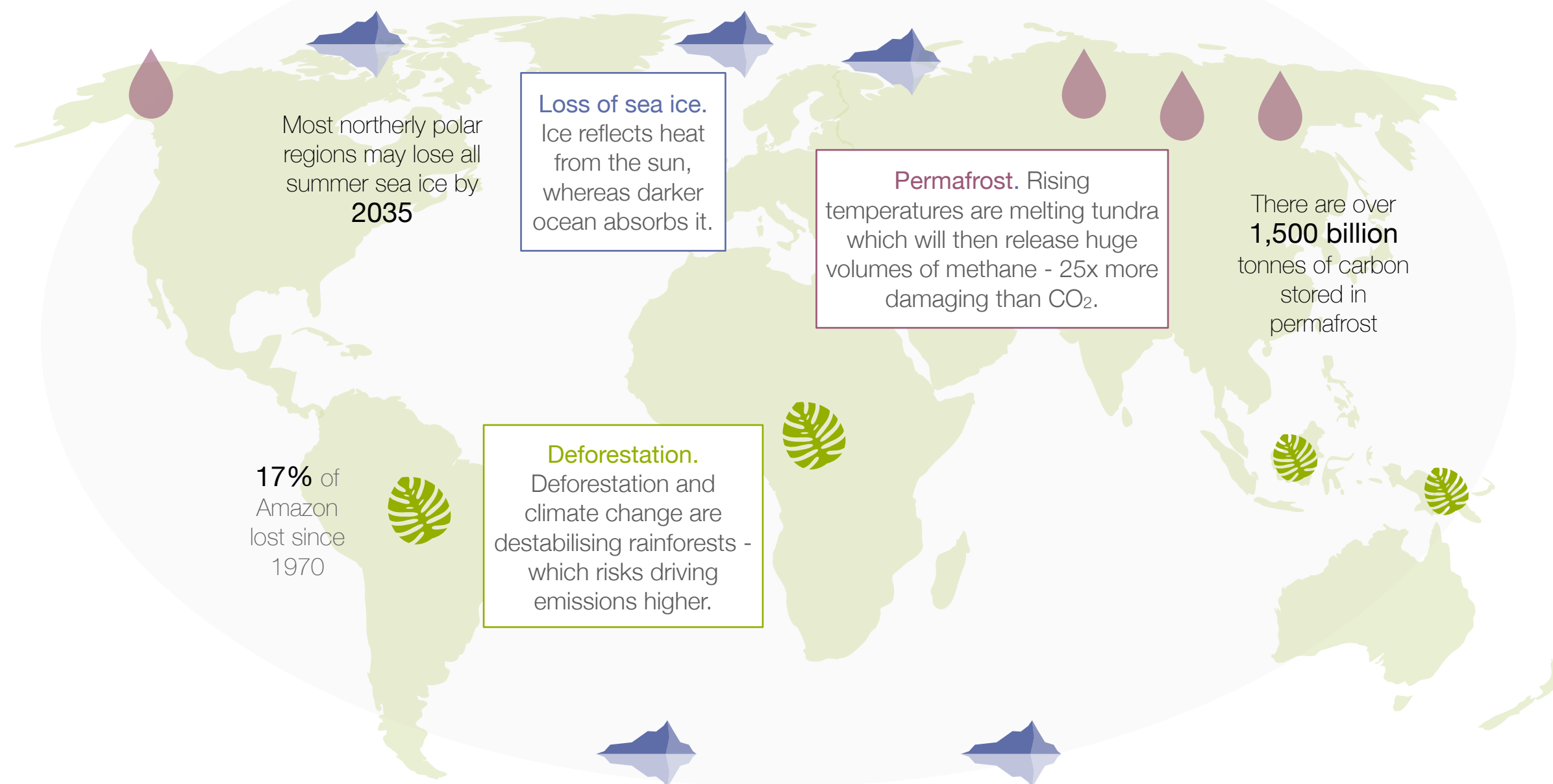
HEATING OUR WORLD



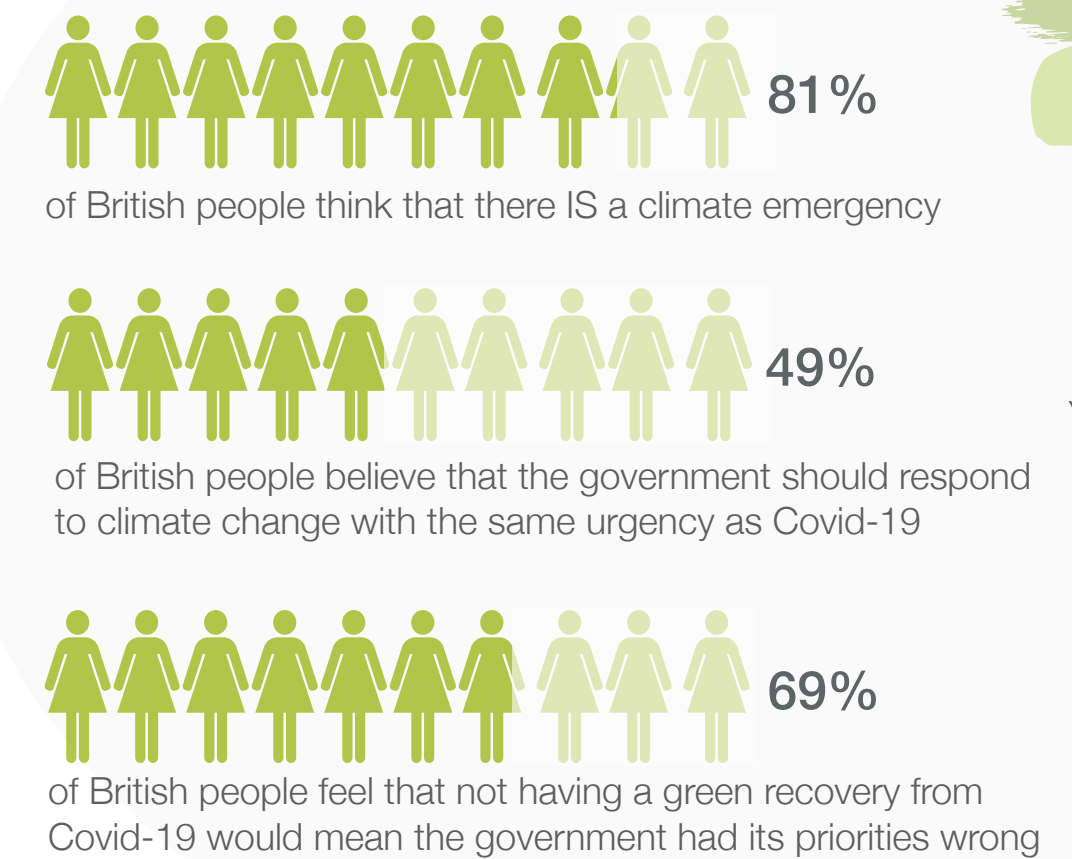
Industrialisation, increasing consumption and fossil fuel use have driven a huge increase in greenhouse gas emissions. Scientists agree that we need to keep global average increases to less than 1.5C and emissions below 400 parts per million. We are already at 419ppm.

TIPPING POINTS

Rising temperatures are triggering 'tipping points' which will accelerate the heating even further.



WHAT DO WE THINK [2020]



School Strikes for Climate

4,000,000+ young people

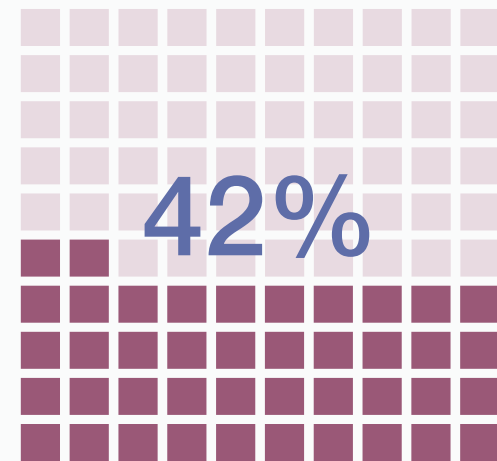
4,500 locations

150 countries

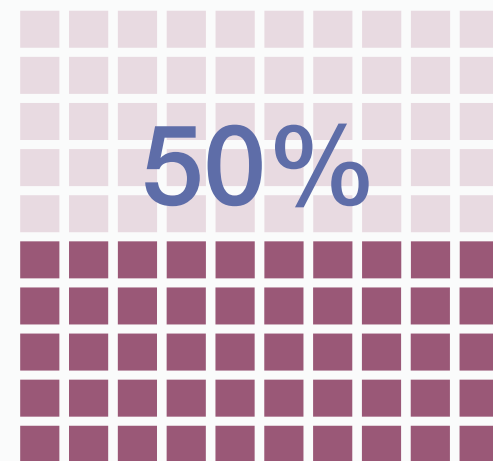
Driving change - technology

For data sources - see page 24

FUTURE SKILLS

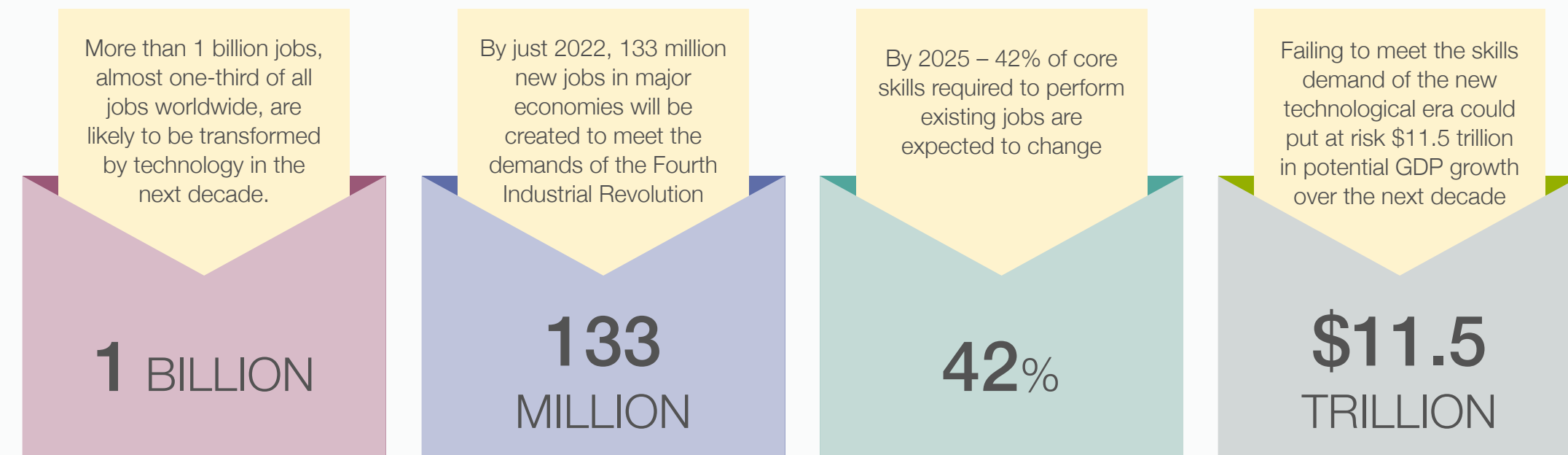


of current workers core skills expected to change by 2025

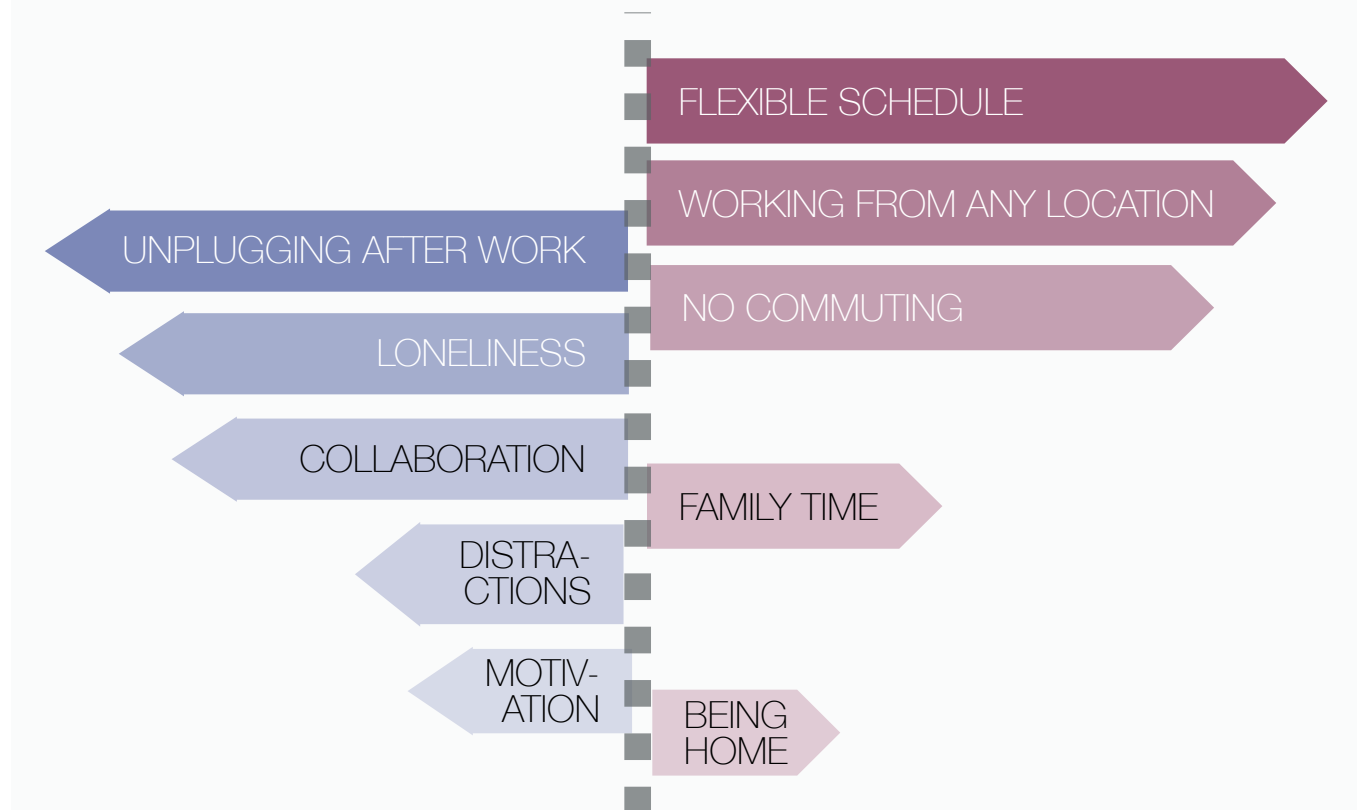


of all employees will need re-skilling by 2025

A RESKILLING REVOLUTION



PROS AND CONS OF REMOTE WORKING

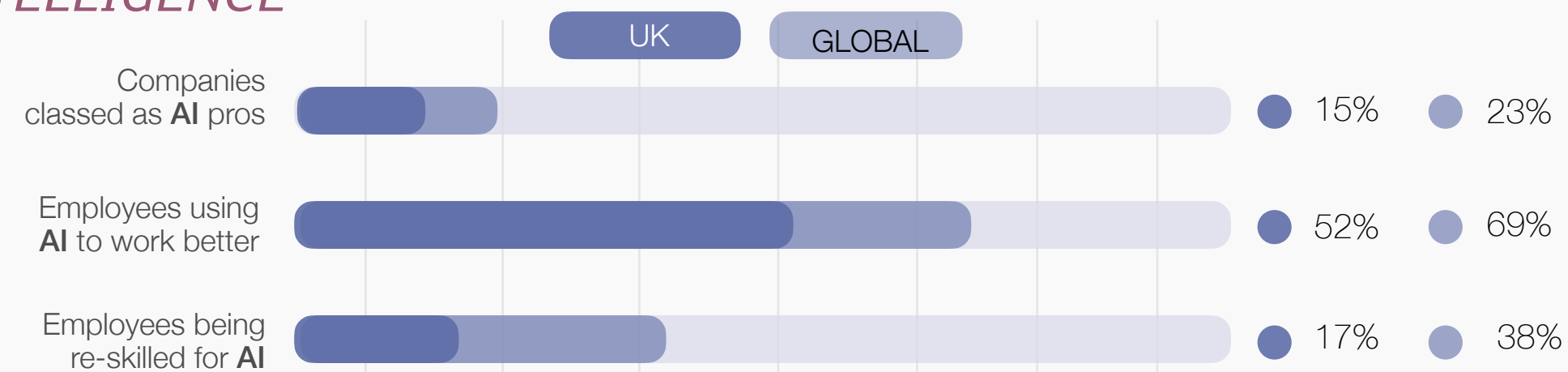


FUTURE JOBS

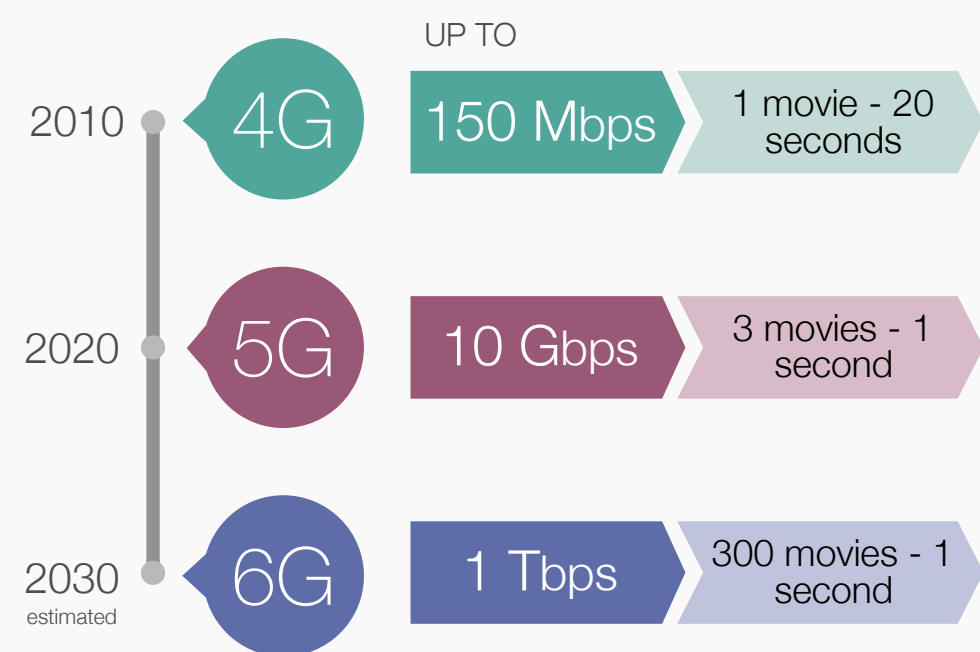
- 1. Data Analysts and Scientists
 - 2. AI and Machine Learning Specialists
 - 3. Big Data Specialists
 - 4. Internet of Things Specialists
 - 5. Digital Transformation Specialists
 - 6. Process Automation Specialists
 - 7. Information Security Analysts
 - 8. FinTech Engineers
 - 9. Database and Network Professionals
 - 10. Business Development Professionals
- FEWER MORE
- 1. Data Entry Clerks
 - 2. Accounting, Bookkeeping, Payroll Clerks
 - 3. Administrative and Executive Secretaries
 - 4. Accountants and Auditors
 - 5. General and Operations Managers
 - 6. Client Information and Customer Service
 - 7. Assembly and Factory Workers
 - 8. Business Services and Administration Managers
 - 9. Statistical, Finance and Insurance Clerks
 - 10. Bank Tellers and Related Clerks

ARTIFICIAL INTELLIGENCE

AI could deliver a **10%** increase in UK GDP in 2030 if approached correctly.

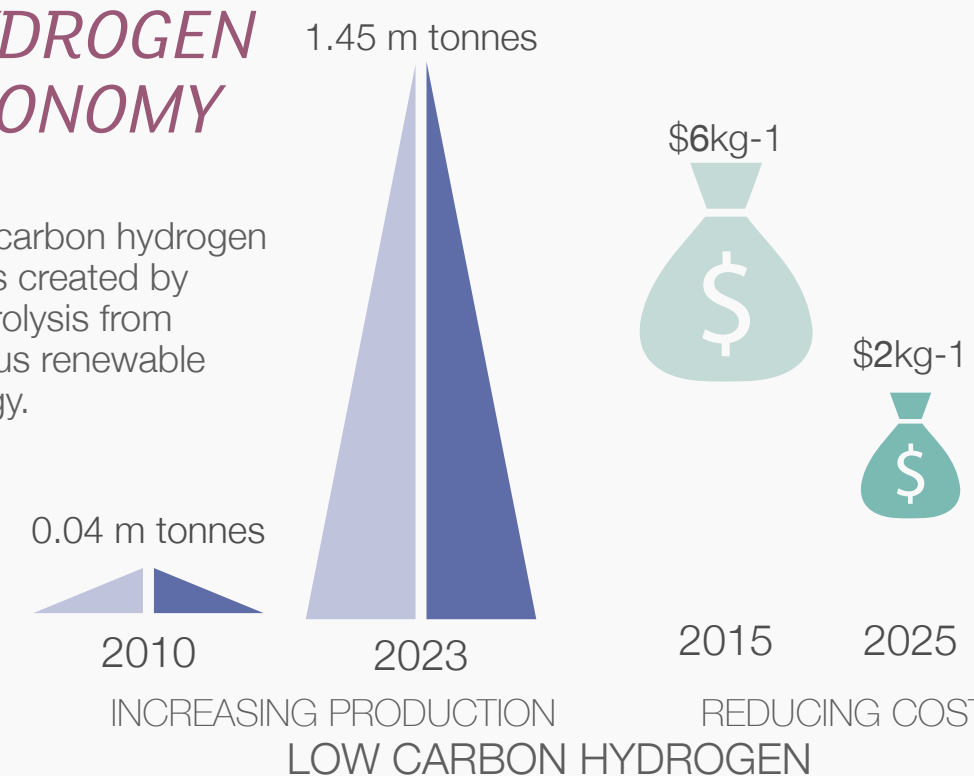


MOBILE SPEEDS



HYDROGEN ECONOMY

Low carbon hydrogen gas is created by electrolysis from surplus renewable energy.



Hydrogen has very high energy content by weight. It can power a range of fuel cells vehicles with virtually no emissions.

- CAR
- TRUCK
- BUS
- TRAIN

TOP 10 EMERGING TECHNOLOGIES

1. Micro-needles for Painless Injections
2. Sun-Powered Chemistry
3. Virtual Patients
4. Spatial Computing
5. Digital Medicine
6. Electric Aviation
7. Lower-Carbon Cement
8. Quantum Sensing
9. Green Hydrogen
10. Whole-Genome Synthesis

In 2020, an expert group from Scientific American and WEF singled out these technologies as ones to watch.

Priorities to enable a thriving economy

“If everything’s a priority, then nothing’s a priority.”

FRANK SONNENBURG

More homes for local people



Housing

More homes for people with a local connection will be needed on Exmoor to help reverse the decline in population. Providing more, and affordable, homes for local people is key to encouraging a skilled local workforce to stay in the area. Given the changes in working practice accelerated by Covid-19, more homes will need to have the capacity for home working. The urgency of the climate crisis demands that all new homes achieve the highest possible sustainable standards. Many of these suggestions are already catered for within the Exmoor Local Plan.

Using digital technologies



Digital connectivity

Almost every aspect of the economy will be dependent on digital communications and other emerging technologies. If businesses on Exmoor are going to be successful in future, broadband and mobile connectivity will need constantly updating and will need more reliable coverage. Equally all businesses will need to take advantage of technologies such as robotics, data analytics and artificial intelligence which will enable them to remain competitive.

Working better together



Working together

In a remote, rural area, such as Exmoor, the opportunities from collaborating more effectively are significant. Change is difficult but needed - both the community and businesses need to come together, virtually and face to face, to understand what will be needed and decide how to respond. That will require greater openness and transparency, more understanding and respect and new ways of involving young people.

Priorities to enable a thriving economy - HOUSING

More homes for people with a local connection will be needed on Exmoor to help reverse the decline in population. Providing more, and affordable, homes for local people is key to encouraging a skilled local workforce to stay in the area. Given the changes in working practice accelerated by Covid-19, more homes will need to have the capacity for home working. The urgency of the climate crisis demands that all new homes achieve the highest possible sustainable standards. Many of these suggestions are already catered for within the Exmoor Local Plan.



More affordable housing

On Exmoor, house prices are impacted by the high demand from people moving to the area or purchasing second/holiday homes which have limited benefit to the local economy. Working with councils, housing associations and community organisations, **more homes need to be built, for sale or rent, which are truly affordable by local working households.** Of course, higher wages would also address the affordability issue.



More homes for local people

Many local people, especially the young, have been forced to move away to the larger towns and cities, around Exmoor and beyond. In doing so, their close ties with the moor can be cut and businesses lose local skilled people. **More homes are needed which are available in perpetuity for people with a history of living and working in the Exmoor area.**



More housing overall

A modest increase in new homes to address the needs of local communities could help to build a sustainable population across all age groups. This needs to respect the heritage and environment of Exmoor and embrace new construction methods to minimise carbon footprints. The population on Exmoor has been declining for the last 20 years or so. If left unchecked, it will continue to affect the viability of local services and businesses.



More adaptable homes

Homes need to be adaptable and sized to suit the needs of local workers and the climate crisis. This also applies to commercial land and property. Covid has accelerated a trend towards more flexible working and home working, reinforcing Exmoor as an attractive place to live and work. **There needs to be support for changes of use, to enable home working, and for retrofitting to make buildings greener.**

- The Passivehaus Trust
- Rural Worker and Succession Farm Dwelling Guidance
- Exmoor Local Plan - housing policies
- Rural housing and rural recovery
- Exmoor Rural Housing Network
- Somerset survey on home working
- Local makers of office pods

Priorities to enable a thriving economy - DIGITAL CONNECTIVITY

Almost every aspect of the economy will be dependent on digital communications and other emerging technologies. If businesses on Exmoor are going to be successful in future, broadband and mobile connectivity will need constantly updating and will need more reliable coverage. Equally all businesses will need to take advantage of technologies such as robotics, data analytics and artificial intelligence which will enable them to remain competitive.



Fast broadband speeds

A deeply rural and fairly remote area like Exmoor will tend to find it harder and more expensive to keep up with the fastest broadband speeds available in larger towns and cities. The commercial decisions taken by providers are stacked against deeply rural areas. Nevertheless, in order for the economy to remain competitive, **partner organisations will need to find new ways and new funding to continually improve coverage and speed.**



Fast and reliable mobile

As with broadband, Exmoor will need to keep up with speeds and coverage elsewhere. Many businesses and visitors rely heavily on mobile coverage. **If it were feasible to roll out 5G coverage across much of the moor, it would allow speeds faster than many broadband services today.** It would also allow for connected agri-technologies and seamless home-working.



New skills for a digital age

There is a surging demand for workers who can fill green economy jobs, roles at the forefront of the data and AI economy, as well as in engineering and cloud computing. The constituent activities of many jobs will go or change, **so workers will require constant retraining in a mix of technical and soft skills.** This will also apply in more traditional sectors such as farming, tourism and retail.



Widespread adoption of new technologies

The next decade will be one of digital disruption affecting whole systems of production, distribution and consumption. It is transforming the way consumers discover, evaluate, purchase and use products and services. **Businesses that thrive over the next 10 years will embrace the empowered consumer and disruptive technologies.** New technologies are changing agricultural production in most areas.

- Gigabit Voucher Broadband Scheme
- Guidance for community-led broadband
- Government's Shared Rural Network plans
- New law to speed up 5G rollout in rural areas
- Digital transformation in business - post Covid
- PWC report on the workforce of the future
- Article on potential for automation in different sectors
- Current work on Superfast Broadband on Exmoor

Priorities to enable a thriving economy - **WORKING TOGETHER**

In a remote, rural area, such as Exmoor, the opportunities from collaborating more effectively are significant. Change is difficult but needed - and the community needs to come together to understand what will be needed and decide how to respond. That will require greater openness and transparency, more understanding and respect and new ways of involving young people.



Shared leadership

No one organisation is responsible for the future of the greater Exmoor economy. The tools and powers to effect change are held by different public bodies, by local communities and by businesses themselves. At a time of diminishing public funds, **a strong and creative partnership is needed** to show what is possible and support future opportunities. Build on the REE partnership to help deliver change.



Involving young people

As younger people will be heavily involved in the future economy on Exmoor, it is important to understand what matters to them, especially the 16-25 age group. **Engaging differently is key, using digital convening tools to bring together the voice of young people to help shape the future they will inherit.** And young people are keen to be involved, to use their ideas and understanding to make change happen.



Shared understanding

Collaboration requires that all the participants have similar levels of knowledge and understanding. This helps to create trust between parties and improves the quality of decision making in fast-changing times. **A regular series of online events, focused on different topics, with examples of good practice, will help to build understanding and explore differing views.**



Regular open forums

Public bodies need to listen actively to the views of businesses and local people and they need to be held to account. An effective way of doing this is to **hold informal 'town hall' meetings both virtually and in different communities** across Exmoor. Once a year, there should be **an Exmoor-wide event to consider and agree changes to the Vision** and propositions that fall from it.

- Exmoor Young Voices
- Exmoor Local Access Forum
- New Forest Green Halo Partnership
- Co-production in policy and research
- Exmoor Parish and Consultative Forum
- Cornwall Council's Decision Wheel (based on the doughnut)
- Cairngorm National Park - Heritage Horizons 2030
- Commissioner for Future Generations in Wales

Propositions

“It’s only by being bold that you get anywhere.”
RICHARD BRANSON

To deliver a step change for Exmoor’s economy, we are proposing four important and strategic interventions. Each will provide local benefits and will create ways to strengthen the economy as well as building natural capital and community wellbeing.



Successful businesses

Businesses are the lifeblood of any economy. They are the wealth generators - contributing to prosperity and wellbeing. The Exmoor economy is characterised by small and micro enterprises, with many dependent on traditional activities such as agriculture and tourism. In a post-CAP, post-Covid world, businesses face an uncertain environment over the next few years. Nevertheless, Exmoor has a progressive entrepreneurial spirit with many businesses finding opportunity in change.



Community assets

Communities that have some control over land and other assets tend to be stronger, more resilient and more engaged. They can also provide local services that are needed by that community, such as local housing, community energy and growing food. In a remote, rural area such as Exmoor, a community development trust, or similar model, could help create and manage a range of initiatives as well as becoming a focus for community leadership.



Brand and identity

Exmoor’s outstanding natural beauty and distinctive rural culture attract its visitors and give its products prestige. A strong, unified brand will help businesses in Exmoor create added value and reinforce the area’s special qualities. This will be most relevant to the hospitality, food, farming, craft and culture sectors. There are merits in using common resources and marketing guidelines to improve consumers’ recognition of, and value for, Exmoor as a place.



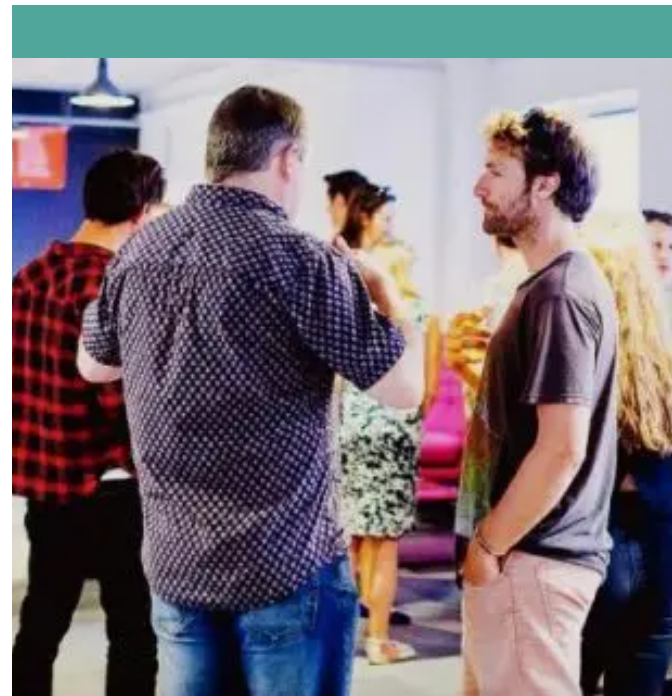
Flourishing farms

Farming on Exmoor is facing a period of major change. Challenges for businesses include how to maintain profitability while moving from subsidies to public good payments; how to replace expensive and high carbon inputs with more cost-effective and sustainable practices; how to adapt to changing markets and how to earn more from farm products and services. Exmoor has a sound base of good practice and a supportive farming community to build from.



Key propositions - **SUCCESSFUL BUSINESSES**

Businesses are the lifeblood of any economy. They are the wealth generators - contributing to prosperity and wellbeing. The Exmoor economy is characterised by small and micro enterprises, with many dependent on traditional activities such as agriculture and tourism. In a post-Brexit, post-Covid world, businesses face an uncertain environment. Nevertheless, there is a progressive entrepreneurial spirit on Exmoor with many businesses embracing change and helping to shape a fairer, greener future.



Business support

Navigating a dynamic and uncertain environment remains important for businesses. Operating within a National Park also presents particular issues. **Locally delivered technical advice will help businesses understand and exploit new opportunities.**

Successful businesses need a mixture of incubation space and move-on accommodation in or close to Exmoor - keeping ties to a local workforce and supply chains.



Collaboration

Working more closely with other businesses has been proven to be a successful way to strengthen local resilience and increase innovation. Exmoor already has successful networks in place, particularly in some sectors.

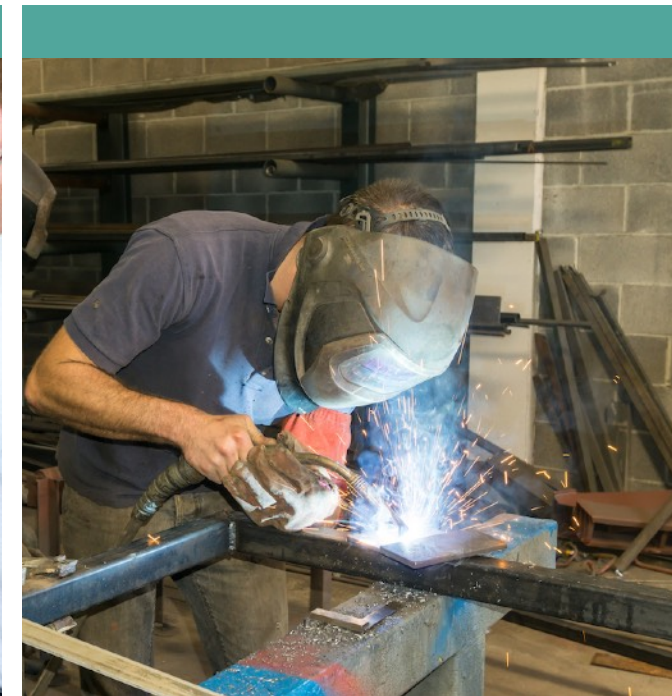
Build on the capacity and capability of existing networks to improve collaborative opportunities further. Add further structures only when required.



Innovation

Productive businesses tend to be those that innovate the most. Exmoor could **act as a testbed for zero carbon options using innovation partnerships** - where rural firms are connected to innovation networks in cities and universities.


Successful, innovative economies are open to new ideas from elsewhere. **The post-Covid world is an opportunity for Exmoor to benefit from new entrepreneurial activity.** The key is how to harness this to build wealth and opportunities within the Exmoor communities.



Good business

Local businesses can play their part in creating a greener, fairer Exmoor. Reducing waste, sourcing locally, using clean energy, developing staff and paying fair wages will all help deliver benefits for a sustainable future.

Exmoor should consider declaring itself to be a fair-trade, living wage, zero carbon Park. Encouraging all organisations and businesses to adopt these principles will give Exmoor a clear aspiration, will position itself for the future and improve community wealth and wellbeing.

-  Heart of the South West Growth Hub
-  New agreement to promote innovation in the area
-  Business as a force for good - B corporations
-  A plan for clean growth in the HotSW area
-  Living Wage Foundation
-  Fair Trade Foundation
-  Low Carbon Devon

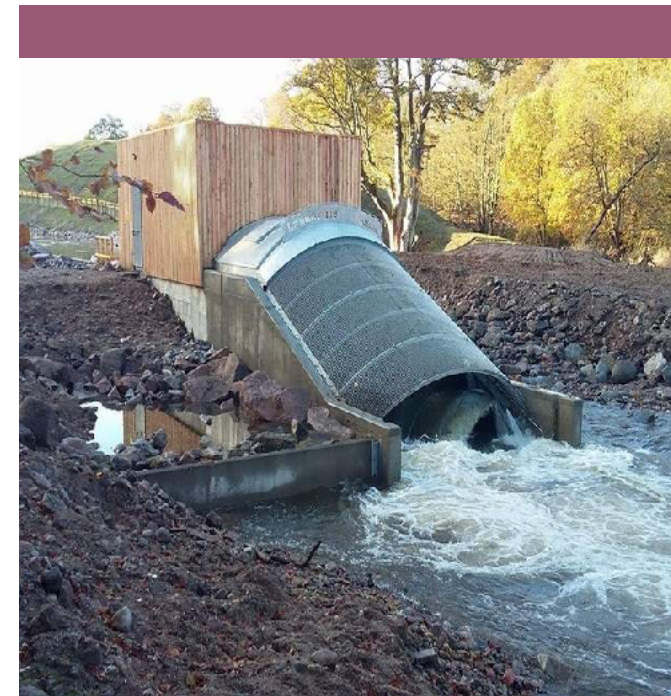
Key propositions - COMMUNITY ASSETS

Communities that have some control over land and other assets tend to be stronger, more resilient and more engaged. They can also provide local services that are needed by that community, such as local housing, community energy, transport and growing food. In a remote, rural area such as Exmoor, a community development trusts could help create and managing a range of initiatives as well as becoming a focus for community leadership. However, they often need support in the early stages.



Local housing

One of the most effective ways of keeping housing for local people, in perpetuity, is for those homes to be owned in trust on behalf of the community. **Local land trusts or community development trusts could provide a vehicle for building and protecting local homes.** Given the size of Exmoor, it might make sense to help create a single 'trust' for the whole of the moor.



Community energy

Given the costs of installing solar PV or small scale wind on individual homes, it would be sensible for **communities on Exmoor to develop small scale renewable energy and storage options in collaboration.** These assets would not only provide zero carbon energy but help provide investment in community projects and alleviate fuel poverty. It may be possible to invest in clean community and shared transport options.



Community food

Many places have shown the value of bringing the community together to grow and share food. If a community trust could acquire land in different locations, it could **provide opportunities for local allotments, for community orchards and even community managed woodlands.** This would support better health and wellbeing, more voluntary activity and community ownership of assets.



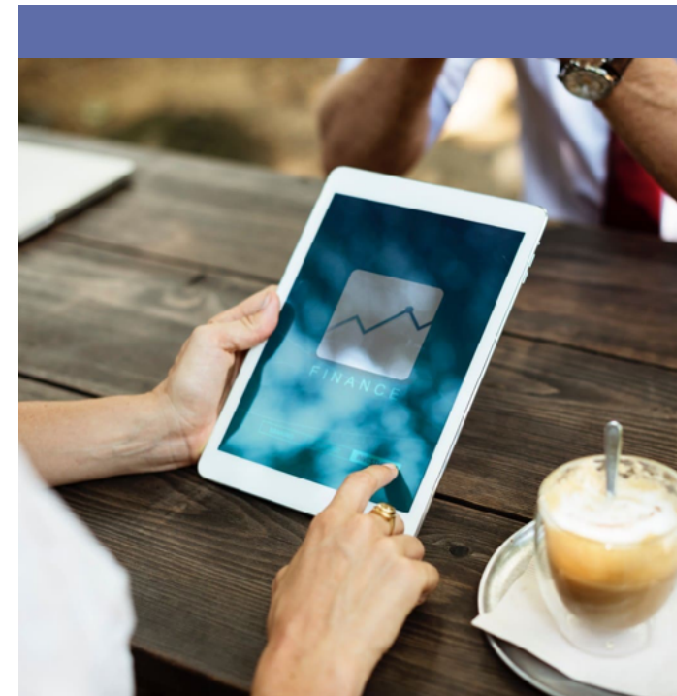
Stronger communities

The ownership of assets, usually in the form of land or property, can help provide communities with a springboard for further activities. As a community-led initiative, this could provide shared income, underpin borrowing for major projects and create a more resilient and cohesive community. **Initially land could be gifted, leased or acquired using grant funding - providing Exmoor with shared assets to build community wealth and wellbeing.**

-  Paper on Community Land Trusts from South Downs National Park
-  Website for Community supported agriculture
-  A community land trust in Dartmoor building homes for local people
-  Website for Devon Community Energy Network
-  Rural Services Network - online reports
-  Directory of social enterprises in Devon and Somerset

Key propositions - BRAND AND IDENTITY

Exmoor's outstanding natural beauty and distinctive rural culture attract its visitors and give its products prestige. Evolving a strong, unified brand will help businesses in Exmoor create added value and reinforce the area's special qualities. This will be most relevant to the hospitality, food, farming, craft and culture sectors. There are merits in using common resources and marketing guidelines to improve consumers' recognition of, and value for, Exmoor as a place.



Market intelligence

Understanding how people perceive Exmoor and what they most value about it is important, particularly during a period of change.

Maintaining the regular surveys of Exmoor's visitors and consumers, and informing businesses of their findings, will help businesses respond to changing demand.



Unified brand

Many local businesses are keen to make better use of the strong Exmoor branding to help market their products and services. Using a consistent set of messages, values and visual imagery, which build on this vision, will help shape consumers' perceptions of Exmoor's and its green credentials.

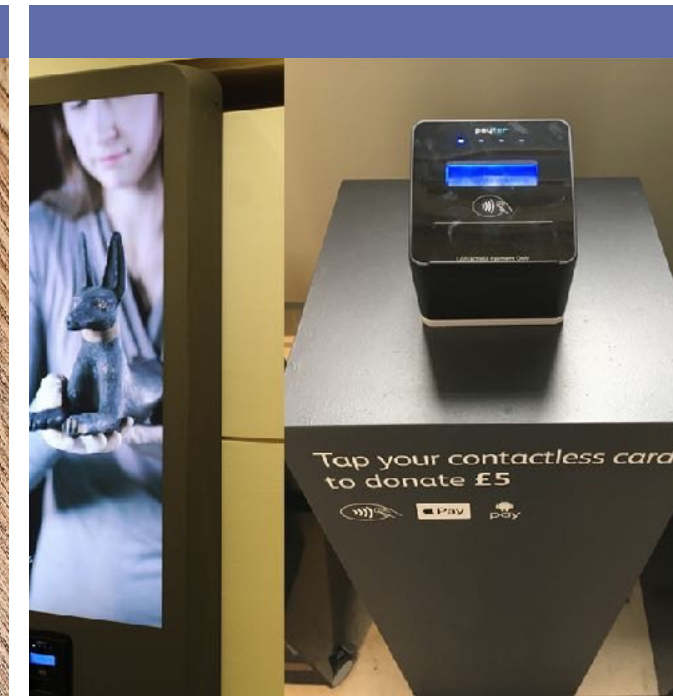
Looking ahead, evolving **the brand identity will help to ensure that all the sub-brands use a shared set of Exmoor resources.**



Promoting Exmoor

Exmoor has taken part in the UK National Parks' 'Breathing Spaces' campaign, English National Park Experience Collection and is promoted through Visit Exmoor. Exmoor businesses can help promote these initiatives by using their resources and linking consumers to them.

Place marketing to attract green, creative and digital companies should be a priority, working with surrounding areas.



Visitor gifting

New technology, particularly cheap contactless card readers and mobile apps, are being used to provide an easy and spontaneous way for visitors to demonstrate their love for a place and support its conservation.

Opportunities should be explored for their use on Exmoor - enhancing the existing scheme.

- Exmoor visitor research
- The challenge of recruitment in the hospitality sector
- Guidance on Exmoor brand
- Celebrating business success - We Are Exmoor
- Visit Exmoor site
- English National Parks Experience Collection
- Research on visitor gifting
- Exmoor's visitor giving scheme
- Lake District contactless gifting scheme

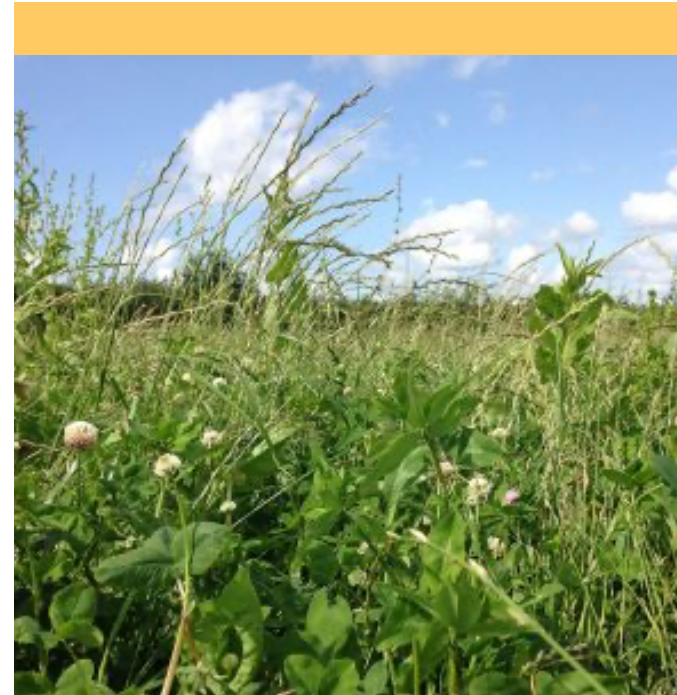
Key propositions - FLOURISHING FARMS

Farming on Exmoor is facing a period of major change. Challenges for businesses include how to maintain profitability while moving from subsidies to public good payments; how to replace expensive and high carbon inputs with more cost-effective and sustainable practices; how to adapt to changing markets and how to earn more from farm products and services. Exmoor has a sound base of good practice and a supportive farming community to build from.



Nature and landscape

Farming will continue to play a pivotal role in the conservation and recovery of Exmoor's habitats, landscapes and natural resources, alongside its core role of providing food. Revenue from the Government's Environmental Land Management (ELM) schemes and, potentially, from new 'green finance' markets should help support this. **Locally delivered advice on schemes and land management options will help farmers make the most of the new opportunities.**



Prosperous livelihoods

Many of the changes facing farm businesses will threaten their existing business models. Reliance on expensive inputs (which often have negative environmental impacts) and on low value undifferentiated markets will make many businesses uneconomic. **New approaches such as agroforestry, regenerative agriculture, direct marketing and the sharing of costs and equity along the supply chain will need to be examined and adopted.**



The next generation

The new farming economy will require new energy and skills, provided by the next generation of farmers from within and without current farming families. **Successful restructuring will be supported by collaborative networking and knowledge exchange, access to exemplars of best practice and appropriate legal and accountancy services.**



Local supply chains

A flourishing farming economy will enrich the wider Exmoor economy both up- and down-stream of land-based activity, including contractors, vets, hauliers, abattoirs, wholesalers and retailers. **Improving the trading connections and retaining as much value within the local economy as possible will require good networking and trusted contractual arrangements.**

- Exmoor Ambition - post Brexit plans
- Certified regenerative agriculture pilot programme
- Regenerative farming and producing sustainable food.
- UK silvopasture trial begins in Devon
- Learning woodland conservation skills
- National Park directories of local food and drink
- Dartmoor
- Pembrokeshire
- Upstream Thinking - the Exmoor Mires partnership
- SW Partnership for Environmental and Economic Prosperity
- Exmoor Nature Recovery Vision

Proposals

“The way to get started is to quit talking and start doing.”
WALT DISNEY

Quality experience

Tourism is a big part of the Exmoor economy and visitors come because of Exmoor's special qualities. To thrive, every aspect of the visitor experience on Exmoor must be high quality - from accommodation to signage and from electric charging points to major events. **An Exmoor synonymous with quality, at whatever price point, brings more value locally and builds respect for the quality of Exmoor's environment.** Building on opportunities post-Covid, the sector should develop a year round visitor offer, extend the 'field to fork' opportunities, and build shared Exmoor standards.



Multi-use hubs

Not everywhere in Exmoor has fast and reliable connectivity for reasons of access or affordability. As more people are working from home, there is a continuing need to meet clients, have contact with other businesses to network and innovate. Education and training is moving towards a hybrid model of remote and in class learning. **These opportunities, and more, could be supported by a network of multi-use hubs using available spaces** - from the back room of the pub, the village hall, or a school classroom.

Natural capital markets

The next few years are likely to see a growing trade in natural capital assets such as biodiversity, clean water and stored carbon. **Land owners and managers on Exmoor who can provide a supply of these assets** to buyers such as developers, utilities and other large companies **will potentially have a new income stream that recognises their stewardship of Exmoor's natural environment.** The administration and contractual mechanisms to this will need to be developed and Exmoor needs to play a part in these national developments.

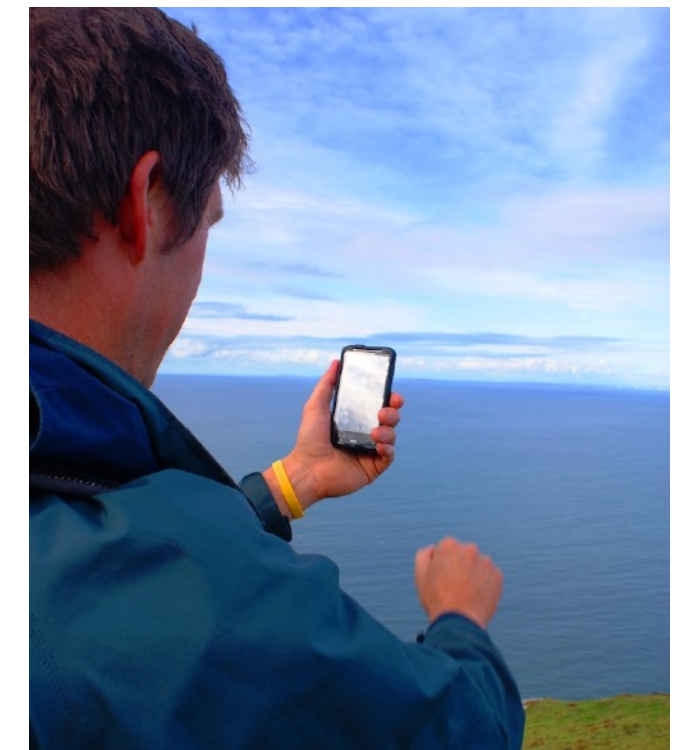


Skills and learning

Retaining and attracting young people within Exmoor remains important – to sustain its communities and ensure a supply of skilled workers. Young people on Exmoor face challenges in travelling further to access work and training. As new hybrid models of learning emerge, Exmoor can be at the vanguard of new models, such as **community hubs that allow young people to access online learning – potentially for part of the week – whilst maintaining important social contact.** Breaking down barriers to learning and improving community cohesion are positive outcomes.

Transport networks

The lack of transport options is seen as a barrier for accessing work and training. While the road network is unlikely to change, there are opportunities to enhance the shared and community transport options across Exmoor. **Mobility hubs offer opportunities to link public transport with low cost solutions** such as e-bikes, scooters and car share schemes. **Exmoor will also need a network of public and private EV charging points** - supporting visitors and local people alike.



Local marketplace

Keeping money circulating locally is an important way to improve the resilience of the local economy. For that to be effective, it requires mechanisms to help people and businesses sell goods and services to one another. **An online directory and trading system is a simple tool to make these transactions easier.** Extending the coverage of physical local markets beyond Dulverton to more locations will help generate further opportunities for farmers, growers and makers. This is particularly important during the tourism season.

Delivering the vision

“Hope doesn’t come from words. Hope only comes from actions.”
GRETA THUNBERG

The real test of this Vision is how effectively it can be realised.

The next 10 years are going to be very challenging for businesses and the economy. The issues we face are multi-faceted and will require many partners offering many solutions. No one idea can provide a silver bullet. Equally, it is clear that making a policy or setting a vision does not in itself deliver change. We will need to work hard to turn good intentions into practice, using new ideas alongside tried and tested methods.

- **Strong Partnerships.** A strong and clear local voice for a shared vision is key. The Rural Enterprise Exmoor initiative is a very positive step in developing a strong local partnership. Continuing and extending that partnership is vital, with everyone sharing responsibility for delivering the vision. There needs to be open dialogue with businesses and other organisations with independent facilitation to manage disparate views.
- **Effective Leadership.** The Rural Enterprise Exmoor initiative has been vital to progressing work so far. Exmoor National Park Authority is an important enabler in this initiative – but is only one of the partners. Maintaining and developing the momentum that has built up through the initiative remains important. There is scope to set up a ‘business sounding board’ to discuss ideas and opportunities for the Exmoor economy.
- **Resources.** Following the pandemic, public funds are likely to decrease. If the Exmoor area wants to get things done it will need to look for new ways of funding as well as be ready to bid for funding from national or local programmes. Working with social enterprises, community trusts and social investment organisations offers a way of securing value in the community. Locally, businesses and other organisations will need to look at what they could fund themselves - perhaps using models such as Business Improvement Districts, adapted for an Exmoor context.
- **Planning.** This Vision is only a first stage. It needs partners to agree which are the important and urgent actions and plan how to make them happen.

Rural Enterprise Exmoor Partnership

www.exmoor-nationalpark.gov.uk/rural-enterprise



Measuring success

“What get’s measured, gets done.”

TOM PETERS

It is now widely argued that traditional measures of economic success such as Gross Domestic Product (GDP), or Gross Value Added (GVA), are poor measures for understanding whether economic growth is resulting in increased prosperity and/or wellbeing for the population. In particular, the benefits of economic growth have been unequally distributed. As a result, several countries have adopted a wider set of indicators that aim to measure success in a more holistic manner.

Given the emphasis of this Strategy, we do not feel that any future growth of the Exmoor economy can be simply measured by a single indicator.

There is one statistical problem which is difficult to address. Exmoor National Park is not a statistical entity. Most published statistics are based at local authority level, so many relevant datasets will only be available for North Devon and Somerset West and Taunton local authority areas. For example, the ONS annually publishes Personal Measures of Well-being for local authorities. This measures changes over time for four well-being domains – ‘Anxiety’, ‘Happiness’, ‘Life Satisfaction’, and ‘Worthwhile’ (whether people feel their life is worthwhile). This would have been a useful resource if available at an Exmoor level. There is a danger that Exmoor would simply be lost in the ‘noise’ of Barnstaple, Taunton etc.

The ONS allows users to request specific datasets on an ad hoc basis and **Exmoor, possibly alongside the other English National Parks, should investigate whether the Personal Measures of Well-being and other indicators could be made available at an ENPA level.** This data could be tracked on an annual basis.

In the absence of published data at an Exmoor level, an alternative is to collect specific data to measure change. This could be done through an annual survey of residents, households or businesses - though there is a risk of survey fatigue.

We propose using existing datasets to understand change, supplemented by surveys if needed. Whilst this may not be perfect, it represents a practical way forward. Potential indicators are outlined below. These could be combined into a dashboard to illustrate progress.

- 🌿 **Landscape and Heritage Quality:** hectares of new woodland; hectares of restored peatland; % of designated sites in favourable condition; scheduled ‘at risk’ monuments
- 🌿 **Community Development:** number of affordable housing completions (from ENPA planning); number of community enterprises (using local intelligence); primary school pupil numbers
- 🌿 **Post-CAP agriculture:** number of ELM schemes (from Defra); upland farm turnover/profitability (from annual Farm Business Survey)
- 🌿 **Digital Connectivity:** proportion of premises with superfast broadband availability (from Ofcom); 4G and 5G coverage (from Ofcom)
- 🌿 **Demographics:** total population (from ONS mid-year population estimates); population of working age and retirement age (from ONS mid-year population estimates)
- 🌿 **Climate change:** parish level CO2 emissions (from IMPACT community carbon calculator)
- 🌿 **Wellbeing:** either ONS Personal Measures of Wellbeing indicator set at Exmoor level, or annual survey to measure similar issues
- 🌿 **Business:** visitor satisfaction (visitor surveys); number of planning approvals providing additional space for enterprise (from ENPA planning).
- 🌿 **Economy:** Gross Value Added; household income (ONS - both currently available at district level)

DATA SOURCES:

EXMOOR SNAPSHOT

Natural England, Mires Project, Forestry Commission, ENPA, REE/
Wavehill Research Report, ONS, Exmoor Visitor Survey, Farm
Business Survey

CLIMATE AND NATURE

DBEIS/National Statistics; Committee on Climate Change Annual
Report 2018; Living Planet Index 2020; Visual Capitalist 2021;
Carbon Brief 2020; UNDP, Opinium, and Ipsos Mori 2020.

TECHNOLOGY

World Economic Forum (WEF) Future of Jobs 2020; WEF Reskilling
Revolution 2020; Microsoft UK 2020; International Energy Agency;
WEF Emerging Technologies 2020; Ozy 2019; SPICA 2020.

OTHER RESEARCH

REE Exmoor Vision survey report, 2021; Rural Enterprise Exmoor
Covid-19 Economic Impact Study, 2020; Rural Enterprise Exmoor
Research Report, 2020

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PAGE 14 - Emerging Europe, Somerset Live, IoT Business News,
Farmers Weekly

PAGE 15 - ENPA, Civil Service Local, Brian Tracy

PAGE 16 - ENPA, Christow Community Land Trust, Everything
Exmoor, South West Farmer

PAGE 17 - Devon Work Hubs, ENPA

PAGE 18 - John Gilbert, ACE, Gardening Knowhow, ENPA

PAGE 19 - B2B Rentals, ENPA, Eat Exmoor, National Museums of
Scotland

PAGE 20 - ENPA, Jeremy Sabel

PAGE 21 - Exmoor Magazine, Devon Work Hubs, Brook Meadow
Conservation Group, Lantra Scotland, Somerset Live, ENPA

Links to relevant policies and strategies

EXMOOR

- Exmoor National Park Partnership Plan, 2018
- Exmoor National Park State of the Park Report 2017
- Exmoor National Park Local Plan 2017
- Exmoor National Park Nature Recovery Vision, 2021

LOCAL AUTHORITIES

- North Devon Launchpad 2030 - Covid Recovery Strategy, 2020
- Team Devon Recovery Prospectus, 2020
- Somerset Growth Plan, 2017
- Somerset Recovery and Growth Plan, 2021
- Somerset West and Taunton Economic Strategy, 2021

HOTSW LOCAL ENTERPRISE PARTNERSHIP

- Local Industrial Strategy, 2020
- Blueprint for Clean Growth, 2021
- Plan to Build Back Better, 2021
- Great South West Securing Our Future prospectus, 2019

NATIONAL

- Agriculture Act, 2021
- National Food Strategy
- 25 year plan for the Environment
- UK Shared Prosperity Fund



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