

The Ashford Ambition:

Shaping a prosperous,
sustainable & inclusive future
for the Borough in 2030 &
beyond

Final Report, July 2020





About us



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advance

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The Ashford Ambition

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Executive Summary

In October 2019, Ashford Borough Council appointed Work Advance Ltd and Experian PLC to undertake a major futures study for the local area. The work has encompassed a blend of research, forecasting, scenario planning and extensive engagement with local stakeholders, to understand their views and aspirations for the future.

This process has supported the development of the Ashford Ambition: a strategic framework to shape a prosperous, inclusive and sustainable future for Ashford, Tenterden and the surrounding villages and rural areas in 2030 and beyond.

The work was commissioned during a period of considerable uncertainty: a new Government and policy agenda; Britain's exit from the European Union (EU); growth stalling in the global economy.

Since then of course, the world has shifted even more dramatically in the face of the Covid-19 pandemic. The rapid spread of the novel virus is creating unprecedented challenges for national and local government across the UK, as well as Governments around the world. Paramount among these concerns are treating the sick, enforcing social distancing, supporting the vulnerable, maintaining vital community services, ensuring public safety, and mitigating the economic fallout for local businesses and residents.

While minds are undoubtedly focussed on responding to the current crisis, once the situation begins to stabilise longer-term strategic planning will be vital.

Now more than ever Ashford will need an agreed direction of travel: to act decisively to drive the recovery and exploit opportunities; to prioritise fiercely, focussing finite resources and funding on those actions that will move Ashford towards a prosperous, inclusive and sustainable future.

There was a strong sense amongst local stakeholders that while it was clearly vital to consider and respond to the changed context the Covid-19 pandemic presents, that it was important not to let the current crisis knock Ashford off the ambitious path it has forged.

Many of these local stakeholders - though themselves busy dealing with the immediate fallout of the pandemic - emphasised that having a clear view of the future of the Borough was made more vital. That the aspirations articulated - the Ambition of a *"caring and supportive place; where local businesses, social enterprises, communities and the public sector come together to promote shared prosperity, happiness and wellbeing"* - feel all the more compelling as we reflect on these unprecedented times. That this work could in fact galvanise the community behind a shared Ambition that they themselves have developed, in order to deliver real and lasting change.

The Ashford Ambition - as set out in the next few pages and throughout the rest of this document - is ambitious indeed. It reflects Ashford's 'go first' 'self-made' attitude, forward-thinking mindset and appetite for growth and innovation. It is founded on what has been achieved in the past: the Borough's impressive growth performance, strategic location and investment decisions; distinct assets and sense of place. It acknowledges the diversity of the Borough - its mix of towns, villages and rural areas - and how this strengthens its position and offer. It seeks to reflect a place that is proud of its history but also keen to look to the future.

The weights and measures assigned to different outcomes has proved one of the most interesting findings from this work. Growth has and will continue to be a feature of Ashford's story - indeed it is central



to improving earnings and living standards. But stakeholders were clear that this should not come at cost to the environment and ecology of the Borough, only bring benefits to select people or places, or risk driving divides within the local community.

Rather, in line with a growing global agenda, **there was a strong consensus that the Borough should be prioritising other outcomes alongside growth, such as ensuring that everyone has the opportunity to thrive in Ashford, strengthening cohesion, improving wellbeing and embracing a more sustainable way of life.**

The Ashford Ambition paints a picture of the Borough in 2030 and beyond that reflects these goals. There is much already underway - from the design principles of Chilmington Green, the Taittinger investment in local vineyards and plans at Newtown Works, to the 'Made in Ashford' and 'Ashford For' initiatives, the Scale Up programme, One You Shop and the Council's success in reducing its own carbon footprint (to name a few). These set the Borough on the right course and there is no lack of ambition or commitment amongst local stakeholders to push forward at pace.

In identifying priority actions for the future we have looked back at past efforts and there is much on which to build. The 15 priority actions identified - which span the 5 strategic themes of economy; work and skills; communities; environment and the visitor economy - emphasise the importance of existing interventions, explore how to enhance them further learning from best practice from elsewhere, and seek to promote greater alignment between local activities and county, regional and national initiatives. Further, many of these priority actions are mutually reinforcing - their collective impact will undoubtedly be greater than the sum of the parts.

How the Borough measures impact and tracks progress towards the Ashford Ambition will be important too.

A key aspect of our approach has been to model and quantify desired outcomes - to establish tangible goals to work towards, allowing Ashford Borough Council and its partners to 'start with the end in mind'.

Some of these targets have been economic in focus, for example increasing the numbers of jobs in the knowledge economy or driving significant improvements in productivity. Some consider other outcomes, such as improving qualifications, reducing the number of children affected by income deprivation or dramatically cutting and wholly offsetting carbon emissions, which are equally important.

In addition, we argue that a new Ambition for inclusive and sustainable growth requires a new framework for **measuring what matters most to local people.**

We establish a robust and wide-ranging framework structured around five strategic themes. In a climate where local resources are limited and funding is stretched, this framework will be vital to ensure that effort and spend is directed towards those things that matter most to local residents and businesses, and will deliver greatest returns in achieving the Ashford Ambition: a prosperous, inclusive and sustainable future for the Borough in 2030 and beyond.



The Ashford Ambition: to be a thriving, productive and inclusive Borough in 2030 and beyond; a vital part of Kent and the South East where local businesses, social enterprises, communities and the public sector provide collective leadership to promote shared prosperity, happiness and wellbeing. The Borough will be renowned as:

- ◇ A caring and supportive place to live, with rich heritage; thriving towns, villages and rural communities; great schools; high-quality housing; a plethora of cultural activities and events; and a strong sense of civic pride
- ◇ A green pioneer where businesses, communities and the public and third sector have come together to become carbon neutral, respect the local environment and ecology, and embrace a more sustainable way of living
- ◇ A connected gateway between the capital and continent; a growing, resilient and diversified economic centre in Kent, with thriving knowledge-based and creative industries and a vibrant rural economy
- ◇ A place where productive, innovative, responsible town and rural business communities offer good quality work to an agile and skilled local workforce who have embraced a culture of lifelong learning
- ◇ A thriving visitor destination with an international reputation as ‘the wine garden of England’ and a high-quality destination for retail; leisure; arts & culture; heritage and nature



Ashford economy expands by 3.4% p/a



22,500 new jobs 2022-2040



Unemployment falls to 2.9% by 2040



HH disposable income up by £16k by 2040

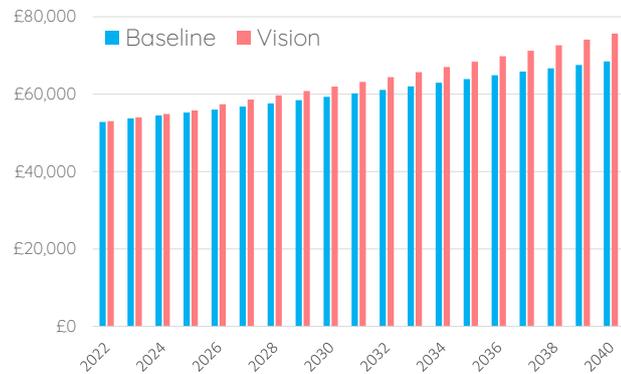


Halve the % of children affected by income deprivation by 2040

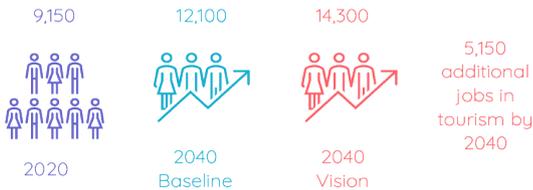
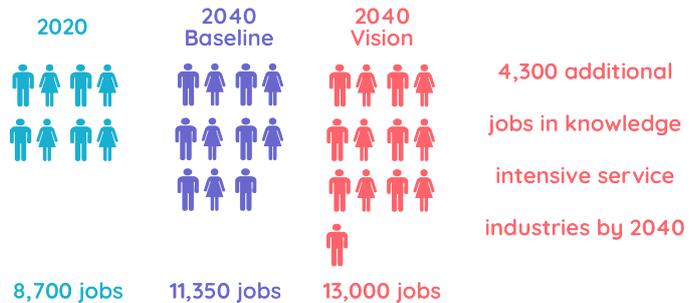


Carbon neutral by 2030

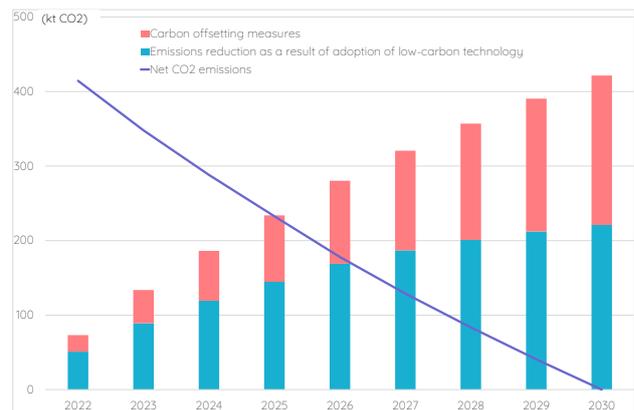
Productivity in Ashford



Jobs in the knowledge economy



Workforce qualifications, Ashford



Carbon emissions, Ashford



Priority actions for realising the Ambition

Measuring what matters

Economy

-  Economic Development Strategy
-  Make the investment case for high growth sectors
-  Digital Infrastructure Programme

- Annual change in Gross Value Added
- Sectoral diversity & specialisation index
- Jobs in knowledge-based services
- Jobs in creative & cultural industries
- Growth in agri-food industries
- Average speed on local A roads
- Broadband speeds & coverage

Work & Skills

-  The Ashford Business support offer
-  All Age Skills Strategy
-  Responsible growth programme

- GVA per FTE Worker / Hour Worked
- Annual change in total employment
- Median Weekly or Annual Earnings
- Business formation, closures & survival rates
- Business stock, by size
- Qualifications profile
- Apprenticeship starts
- Achievement rates in Further Education
- Participation in education and training in work

Communities

-  Develop a prioritised community action plan
-  Ashford's Homes for all initiative
-  Ashford's civil society Programme

- Gross household income per capita
- ILO unemployment rate
- Claimant count rate of unemployment
- Young people that are NEET
- Benefit claimants
- School admissions
- School achievement at KS1,2, 3
- Participation in sports, arts and culture
- Crime rates
- Indices of Multiple Deprivation
- Housing starts & completions
- Housing affordability
- Voter turnout
- Participation in voluntary work
- Wellbeing score

Environment

-  Ashford's carbon neutral strategy
-  Ashford's Environmental Innovation Fund
-  Grants to scale carbon neutral schemes

- CO2 emissions
- Waste recycled
- Energy consumption by type
- IMD Air quality
- IMD Access to transport
- Bus usage

Visitor Economy

-  Update the 2013/14 Tourism Review
-  Refresh the Celebrate & Experience Ashford Programme
-  Ashford town centre commission

- Volume of day visits & overnight stays
- Value of day visits & overnight stays
- Contribution of tourism (GVA)
- Jobs in tourism

1. Introduction

Over the past decade, the Ashford Borough has witnessed considerable economic success and growth. As it embarked on a review of the Corporate Plan and the Local Plan, Ashford Borough Council asked Work Advance to undertake a major futures study. While the context has shifted dramatically; the original intent of the work becomes even more important: to develop a shared 'Ambition' and strategic framework that will deliver a prosperous, inclusive and sustainable future for the Borough, including Ashford, Tenterden and the surrounding villages and rural areas, in 2030 and beyond.

1.1 Background & aims

The study has sought to understand the current and future needs of the community, to enhance existing services, plan for future provision and deploy resources cost-effectively. The research has utilised an evidence-driven approach and extensive engagement with residents and partners in the local community over the past 9 months. This has included workshops with the Corporate Management Team and Cabinet Members; a large-scale visioning event in February 2020 attended by nearly 100 stakeholders from across the Borough; and online consultation, including a survey.

Its objective has been to reflect on the area's recent performance and what this means for the future. The core intention is that by developing a better understanding of the make-up of the Borough - its strengths and weaknesses, opportunities and challenges - Ashford can then better consider and prepare for future drivers of change. Through this process, the research has worked with local stakeholders to co-design the 'Ashford Ambition' which articulates aspirations for the future of Ashford, Tenterden and the surrounding villages and rural areas in 2030 and beyond.

Crucially, the research has sought to take account of current disruptive economic events as well as longer term global megatrends, as we enter particularly uncertain times, and consider how they might best be managed locally.

When the work was commissioned, concerns about economic uncertainty considered the long-term effects of megatrends and macro drivers of change related to the impact of globalisation, rapid

developments in technology, innovations in ways of working, environmental developments and associated political, social and demographic change.

In addition, there are also significant concerns about the impact of the European Union (EU) referendum result. Whilst the UK left the EU on 31st January 2020, there is a considerable risk that the transition period will end in December 2020 with a no-deal position. Given that this has come on the back of an already weak economic position, and persistent slowdown in productivity since the 2008 economic crisis, this has added to economic uncertainties nationally and locally. Since then, of course, the world has shifted even more dramatically in the face of the Covid-19 pandemic.

The rapid spread of the new Coronavirus is creating unprecedented challenges for national and local government across the UK, as well as Governments all around the world. Whilst primary concerns have clearly been around public health measures and treating the sick to contain death rates and ensure public safety, there are also substantial challenges associated with managing the economic fallout. A near shut-down in production alongside plunging consumer spending is having a dramatic impact on businesses, jobs and families. The debate is no longer whether a recession will follow, but rather how long and deep it will be.

While stakeholders consulted have undoubtedly been concerned about the effects of Covid-19, they have also stressed the vital role of long term planning more than ever to shape a strong and coherent response. Hence the Futures study is made even more important by the current context: to ensure the Ashford Borough comes out of this period with a clear view of what



needs to be done to support recovery, and promote a prosperous and more inclusive future.

So minds have already become focussed on what action is needed locally to promote resilience to both the immediate economic shock and longer-term drivers of change. Our approach has therefore been to complete the futures work, while reflecting on the changed context and to use the research to galvanise the community behind the 'Ashford Ambition', which they themselves have developed, in order to deliver real and lasting change.

1.2 Our Approach

The research has sought to develop this detailed and distinctive Ambition and strategic framework for long-term sustainable and inclusive growth in the Ashford Borough.

Our work has been structured around three key phases:

Phase 1 sought to consider the current performance of Ashford across a broad framework of measures. In doing so, the work establishes the baseline position: the area's assets and weaknesses, challenges and opportunities – and those of the distinct towns, villages and rural areas within the Borough;

Phase 2 provided a comprehensive and considered view of the future. This included constructing baseline forecast for the Borough, which were subsequently updated in March 2020 as the short-term outlook

"While minds rightly focus on managing the immediate effects of the Covid-19 pandemic, it will be vital that the Ashford Borough comes out of this period with a strong and coherent response.

"This research aims to galvanise the community behind a shared Ambition in order to deliver real and lasting change"

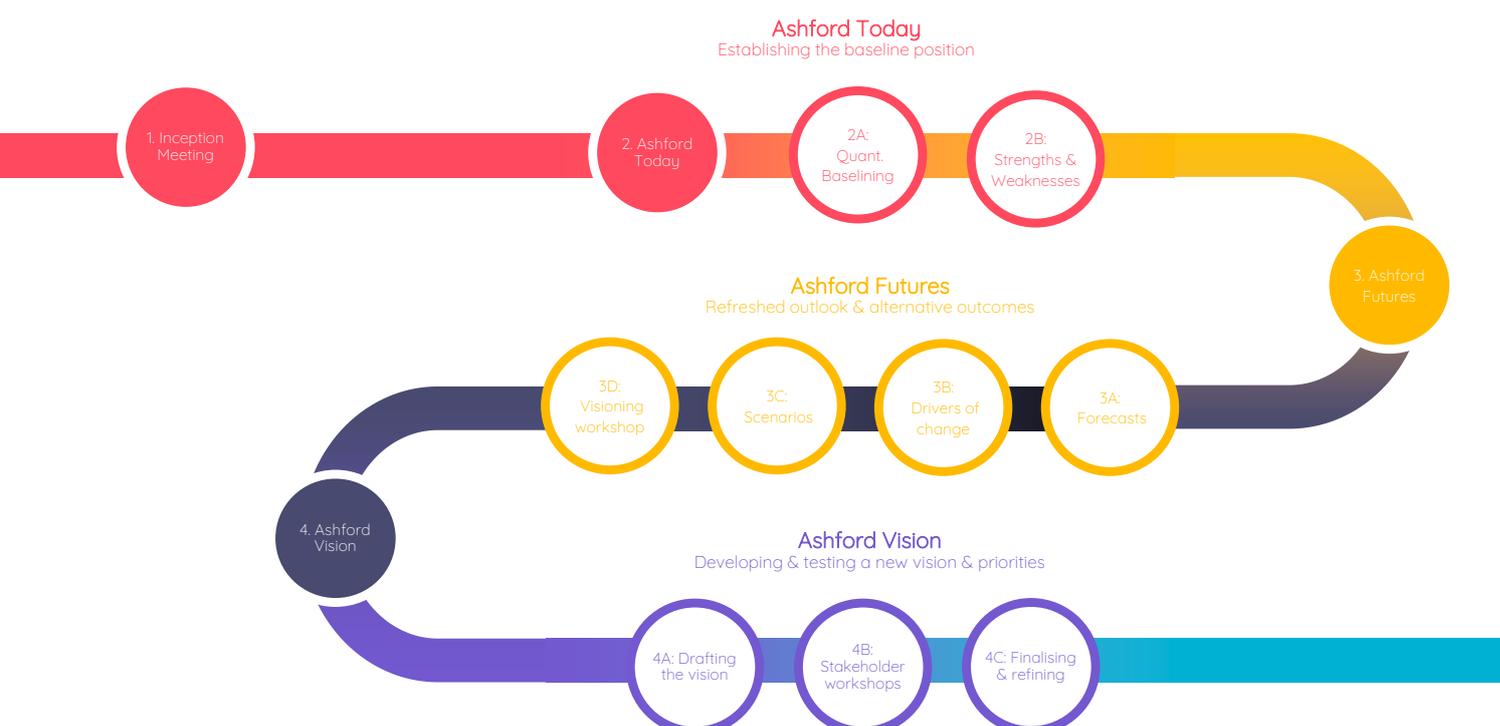
for the global, national and local economy shifted dramatically.

However, the focus for our work has been on the long-term future for the Borough - to 2030 and beyond. As such, the work developed a suite of scenarios that reflected global 'megatrends', external influencers and drivers of change that could drive shift in the future.

These rich and detailed narratives provided a vehicle to promote debate amongst local stakeholders about the implications of these scenarios for different people and places within Ashford, to agree the most desired and preferred outcomes.

Phase 3 then developed the 'Ashford Ambition' and a high-level strategic framework for realising these aspirations. Wherever possible, we have sought to quantify what this future might look like, outlining

Figure 1.1: Our 3-phase work programme



a series of tangible, measurable outcomes informed by the forecasts. This approach seeks to establish a set of aspirational targets for improved performance compared to the baseline - importantly, we look beyond the normal economic measures to capture wider aspects of shared prosperity, wellbeing and sustainability marrying debates around industrial transition, the future of work and inclusive growth.

Engagement has featured at every phase of the research process. Our approach recognises that external consultants cannot develop plans for the future of places in isolation. Instead, we focus on providing robust insight, presenting clear and tangible options, and facilitating an extensive process of engagement that enables local stakeholders and communities to determine the path they want to take and to reach broad consensus on the sort of place they want Ashford to become in the future.

As we approached the end of the research process, the UK implemented lockdown to stem the spread of Covid-19. This forced a change in approach with the final two testing workshops being replaced by online engagement in the form of a webinar and survey. These provided a final opportunity to review and refine the Ashford Ambition; and for stakeholders to share thoughts on where future action is needed in order to deliver these outcomes.

Over the course of the past nine months we have consulted extensively different stakeholders, including residents, businesses, the voluntary sector and wider local stakeholders, to ensure we are capturing and reflecting their views on what is most important - now and in future.

We have also consulted more widely with partners across Kent and the SELEP area, acknowledging that the Ashford Borough will be influenced by developments across the County and region (and London), but also that the Borough will play an important role in realising wider aspirations and objectives articulated in the Kent 5 Year Plan, Kent and Medway Enterprise and Productivity Strategy and SELEP Local Industrial Strategy.

This work identifies a series of priority actions that could help to deliver the prosperous and inclusive future articulated in the Ambition. These are designed to complement the emerging Ashford Recovery Plan, and inform the forthcoming Local Plan, Corporate Plan, Carbon Neutral Strategy, Economic Development Strategy and Town Centre Strategy.

Taken together, while the short-term outlook is challenging, the long-term future for the Ashford Borough is bright indeed.

Figure 1.2: Engagement at every stage of the research process



1.3 This report

The rest of this document outlines the findings from each phase of our work. It should be viewed alongside the Ashford Today report and is structured as follows:

2. **Ashford Today:** assesses current performance, assets and challenges of the Ashford Borough;
3. **Ashford Futures:** considers future drivers of change & alternative outcomes;
4. **The Ashford Ambition:** articulates the shared aspirations for the future of the Borough;
5. **Realising the Ambition:** explores priority actions for the future; and
6. **Measuring what matters:** identifies key indicators to assess progress towards the Ashford Ambition.



2. Ashford Today

Current performance,
assets and challenges



2.1 Introduction

Covering 58,000 hectares of land, Ashford is the largest district in Kent by area and is a major driving force of the county's economy. Alongside the town of Ashford itself, the Borough is home to the historic town of Tenterden, as well as a tapestry of villages and rural areas, including woodland, fields, orchards and vineyards.

Ashford has a population of around 129,000 (ONS 2018), which equates to 8% of the total size of Kent. It has seen a significant rise in its population over the last few decades, benefitting from being designated as a key growth area, and with the completion of High Speed Rail (HS1) in 2009, which has enhanced its connections internationally, as well as nationally, across the UK. Situated 60 miles south-east of central London, and around 13 miles from Folkestone with easier access to Europe, it has started to successfully raise its profile as a transport and retail hub.

Its location, too, close to Areas of Outstanding Natural Beauty (AONB) in the Kent Downs to the north-east, and High Weald to the west, has also enhanced its tourist industry.

Further with a significant rural community and a rise in local wine production, there is likewise a growing focus on wine tourism. We have explored these developments more fully to understand their implications for future growth.

This section of the report examines Ashford's transformation over the recent past to its current position, and lays the groundwork to help identify further opportunities for economic growth and social progress over the longer term.

Its objective has been to reflect on the area's recent performance and what this means for the future. The core intention is that by developing a better understanding of the underlying characteristics of the area - the make-up of the population and economy, the different places that comprise the Borough, its physical infrastructure and skills base - we can identify its distinct strengths and weaknesses, and the opportunities and challenges faced by existing and new communities in the Borough.

Figure 2.1: Map of the Ashford Borough



This then provides the basis for considering and responding to drivers of future growth. We have identified the following key themes as being relevant to Ashford's future success (Figure 2.2) and as such have examined the evidence in light of these.

This chapter should be read alongside the accompanying Ashford Today report, which provides a comprehensive review of each of these core themes, drawing together official ONS data, wider intelligence and Experian proprietary data to paint a rich picture of the Borough in 2020.

Figure 2.2: Ashford Today: Key themes



Source: Experian PLC, 2020



2.2 Recent economic performance

In the last decade or so, Ashford has experienced considerable economic success. The area saw Gross Value Added (GVA) expand by a rapid 4.3% per annum between 1997 and 2007, which exceeded the pace of growth seen in Kent (2.9% per annum) and the South East (3.2% per annum). The area showed more resilience during the recession with output shrinking by 0.7% per annum over 2008-09, at a time when the national experience was far more downbeat at a 2.2% per annum contraction. Ashford has continued to outperform in the post-recession period, posting growth of just under 3% per annum over 2009-17, compared to the far more muted pace of growth recorded for Kent and the UK average. Given the strong pace of output growth, it is unsurprising that job creation has also remained strong.

Ashford saw full-time equivalent (FTE) employment rise by 3.1% per annum in the pre-recession decade: far stronger than the growth of less than 1% per annum seen at the regional and national levels (Figure 2.3). The Borough was, however, more exposed to the impact of the recession in terms of job losses but it had managed to regain its momentum even though the per annum rate of increase in employment in the most recent decade has been slightly weaker than it was in the ten years preceding the recession.

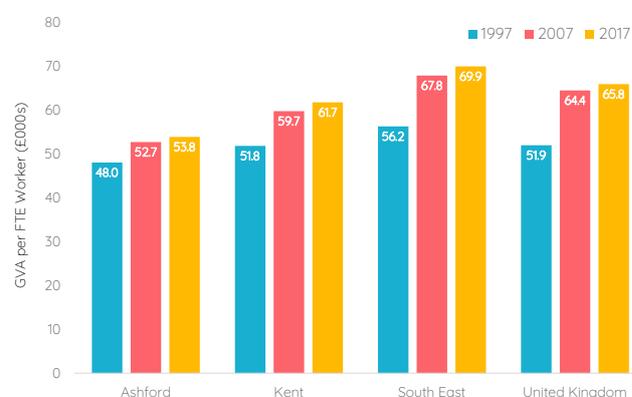
Broadly speaking, the unemployment rate had been falling in Ashford in line with comparable benchmarks. However, unlike the Kent, South East and UK rates, it still remains elevated compared to the more favourable rates seen in the early 2000s. Ashford's unemployment rate stood at 4.0% in 2018, compared to 2.3% seen in 2000. Even though the headline output and employment growth indicators are encouraging, and show Ashford's resilience as an economy, it still, however, demonstrates weakness on key productivity measures.

Output per FTE worker in Ashford, while seeing a gradual rise in the last 20 years, remains a laggard compared to regional and national benchmarks. More notably, the pace of this rise in the last two decades has underperformed productivity growth in Kent and the South East, suggesting that the productivity gap between Ashford and its benchmarks has widened.

Looking at demographic trends, Ashford saw total population rise from about 98,000 in 1998 to 129,300 according to the latest 2018 mid-year estimates. Ashford currently constitutes just over 8% of Kent's total population and, with a 1.5% per annum growth in working-age population over 1997-2007, it was one of the fastest growing districts in the country.

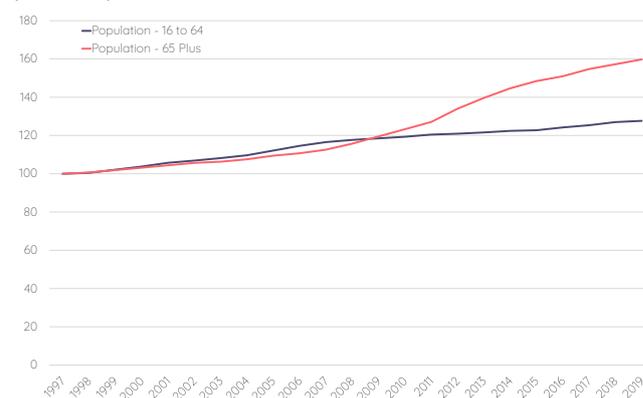
The last decade has seen these fast rates of growth ease somewhat, in contrast to accelerating demographic trends seen across Kent, South East and the UK, narrowing the gap between them. Even so, working age population growth of 1.3% per annum over 2007-18 means that Ashford remains strongly positioned in terms of demographic patterns to drive robust growth in jobs, spending and output in the future.

Figure 2.4 Productivity trends in Ashford vs wider benchmarks



Source: ONS 2020

Figure 2.5 Trend in Ashford's working age and 65+ population (1997=100)



Source: ONS, 2020

Figure 2.3 Full-time equivalent employment growth Ashford, Kent and the South East

% per annum	Ashford	Kent	South East	UK
1997-2007	3.1	1.2	0.9	0.7
2008-09	-2.3	-2	-1.3	-1.2
2009-2017	2.7	1.5	1.5	1.4

Source: ONS, 2020

Dynamism

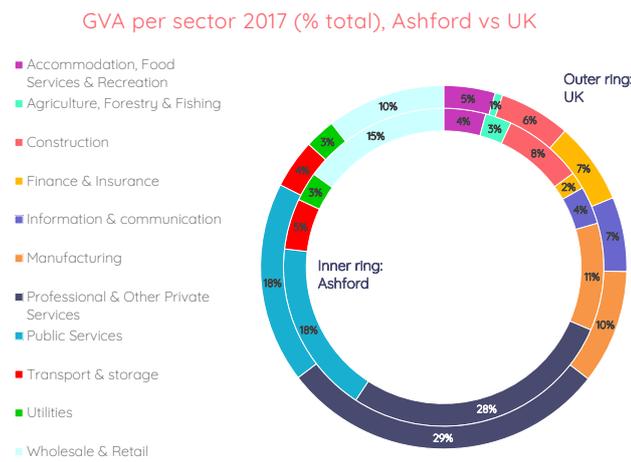
Looking at Ashford’s economic base, the Borough has significantly smaller shares of high productivity sectors such as Finance and Insurance (1.7%) and Information and Communication (3.8%) compared to UK shares of 7.2% and 6.6%. Shares in areas such as financial services have also shrunk since 1997.

In addition, the region is over-represented in sectors such as Wholesale and Retail (15%) compared to UK shares of 10.5%, which typically demonstrate lower rates of productivity. With three large shopping centres and a strategy to encourage the regeneration of its town centre in line with the Portas Pilot scheme, Ashford has been successful in boosting its profile as a thriving retail centre. More recently it has successfully attracted big name luxury brands to Ashford Designer Outlet, after a £90m expansion, which is hoped to generate more retail and hospitality jobs in the area in the coming years, despite changes in shopping habits, with the growth in on-line retail. Ashford’s retail sector enjoyed a nearly 6% rise in town centre footfall in 2018.

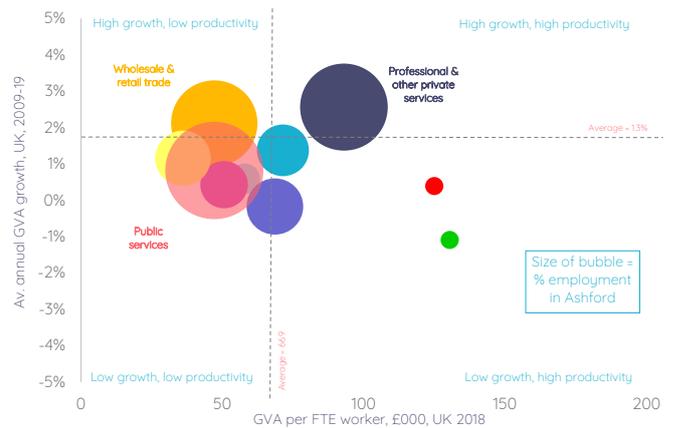
Ashford, in line with South East and Kent trends, has a high proportion of workers in the public sector. It is estimated that in 2018 there were 13,500 full-time equivalent (FTE) workers in public services in the Borough, up from 9,800 a decade earlier. The majority are employed in the health sub-sector with over 2,500 people working in its main hospital, William Harvey hospital, one of the three main hospitals in the East Kent Hospitals University NHS Foundation Trust. Whilst the share of the agri-food sector has declined (around 3%), a growth in wineries is increasing wine tourism in the region.

Not only does Ashford have a sector profile that is slightly biased towards inherently less productive sectors, it also more generally has lower levels of productivity across all sectors including those that typically see higher rates of productivity elsewhere. So, logistics, consumer services, manufacturing, professional services and public services all see weaker productivity in Ashford than at the national level, despite local investment to drive these sectors forward.

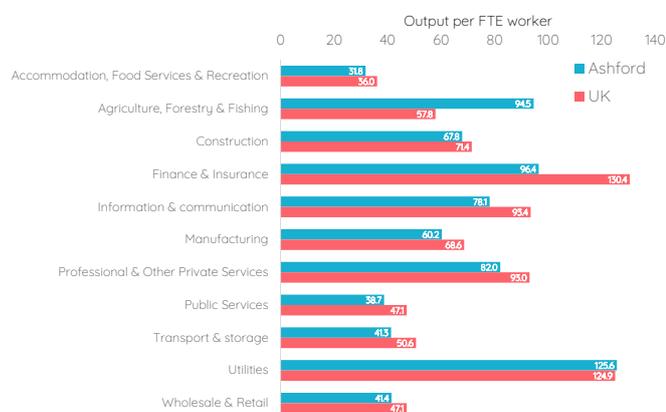
Figure 2.6: Sectoral specialisation in Ashford



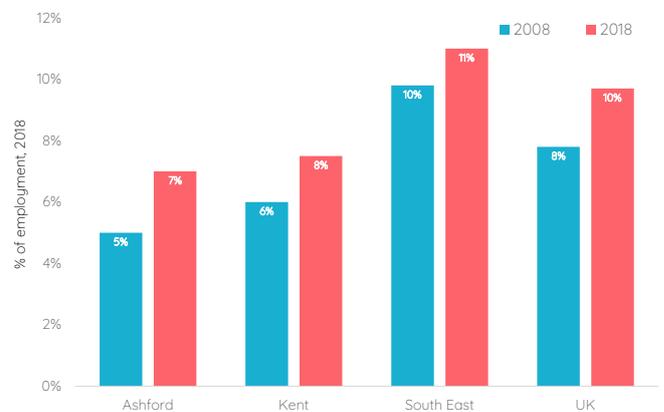
Productivity & performance of Ashford's major sectors



Sector productivity (GVA per FTE worker) in 2017



Professionals employed in Science, Research, Engineering & Technology



Source: Experian PLC, 2020



High-growth industries and enterprises can be defined on a range of indicators. Typically, the more dynamic industries tend to be those that are export-oriented, produce more output per worker and generate direct and indirect employment in the local area. Ashford has a relative disadvantage in export orientation. For instance, transport equipment, which includes both aerospace and automotive that rank in the top 10 most export-oriented sectors of the UK, are heavily under-represented in the area with a total manufacturing share of just 3.5% compared to the UK average of nearly 15%. Machinery and equipment is similarly under-represented with pharmaceuticals barely recording a presence in the area. The one export-oriented manufacturing industry that does have a strong presence in Ashford is Chemicals (Coty Rimmel and Givaudan being two notable firms) which captures over 23% of its manufacturing output. Overall though, Ashford has a relatively weak presence of industries positioned to access international markets.

The challenges of businesses in the Ashford economy also relate to size. In line with Kent, South East and UK trends, Ashford has the greatest proportion of SMEs with 92% of the area's enterprises employing less than 10 people. Further, fewer than 5% of businesses have 100+ employees. 90% of Ashford businesses survive their first year, while 5-year survival rates are significantly less at 43%, which is similar to the regional and national averages.

Working patterns in Ashford are in line with those seen across the UK as well as Kent and the South East. So, with over 45,000 people in full-time employment, (76%), this is close to the UK average (but higher than for Kent - 71%). But more flexible working is still quite contained with only 14,200 part-time employees in Ashford in 2018, 13% self-employed (7,600), and only 7% of employees (65% of self-employed people) in Ashford defined as predominantly working from home.

Ashford's occupational structure broadly mirrors the patterns seen across the South East and Kent, with some differences.

First, skills at each end of the spectrum - both highly skilled and elementary skills - are marginally under-represented in the area compared to selected benchmarks. In general, higher skilled occupations (managers, directors and senior officials, professional occupations and associate professional and technical occupations) constitute a smaller share (38%) of employment than the South East (51%) and Kent (44%) averages.

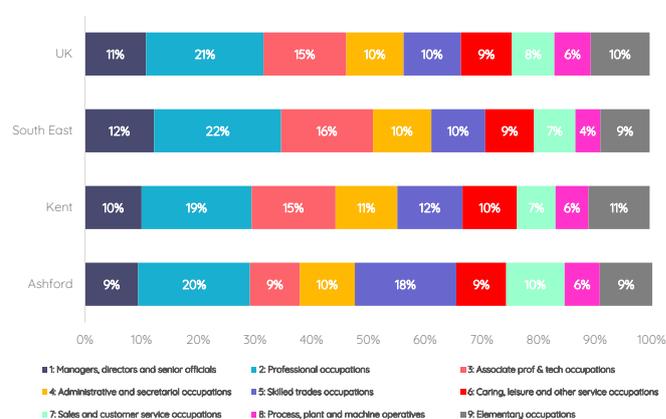
Instead, Ashford shows a higher proportion of skilled trades and customer service occupations, the latter of which is unsurprising given Ashford's relative strength in retail. Together these underpin 28% of employment compared to 18% and 17% for Kent and South East

respectively.

A breakdown of qualifications by employment provides some insight into Ashford's relatively unfavourable productivity and skills profile established in previous sections. Ashford has a notably lower proportion of highly qualified workers. Only 11.8% have NVQ4+ compared with 14.9% in the South East and 13.0% in Kent.

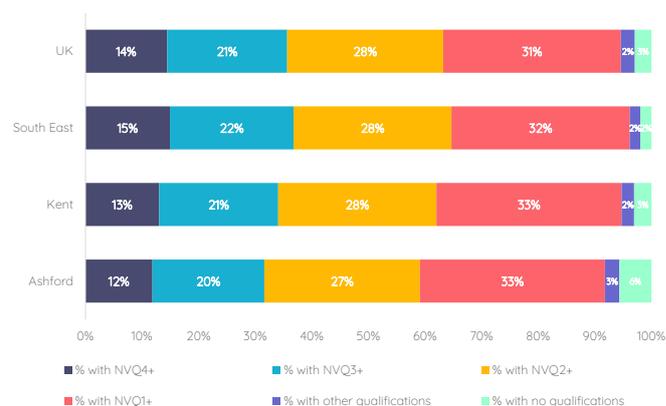
Furthermore, 5.7% of workers have no NVQ qualifications compared to 1.8% in the South East and 3.1% in Kent.

Figure 2.7 Occupational profile of the workforce, 2018



Source: Annual Population Survey 2019

Figure 2.8 Qualifications profile of the workforce, 2018



Source: Annual Population Survey 2019

Infrastructure

Ashford’s strategic connectivity is a key asset, which undoubtedly will play an increasing role moving forward, supporting economic growth. Since the implementation of HS1 in 2009, journey times from Ashford to central London have more than halved to just 37 minutes. With Ashford International station being highly accessible by the Eurostar rail link, it is a gateway to Europe, with journey times to Paris and Brussels 2 hours and 90 minutes respectively. This has brought a whole range of benefits to the region, from more tourists visiting the town, to significant business regeneration.

Data from the Office of Rail and Road shows that the usage of Ashford International station jumped by 25%, between 2010/11 and 2017/18, to just under 4 million passengers. Further, Network Rail has forecast a rise in passenger numbers of around 40% by 2040, and we therefore expect the people using Ashford International Station to be part of this growth story, bringing with it more economic benefits and jobs to Ashford.

In addition, the town has excellent road connections to the wider motorway network via the M20 and stands well placed to take advantage of these rail and road connections to establish itself as a desirable place to live and do business.

Easy transport connections, improved journey times, relatively lower housing costs along with a good lifestyle make Ashford an excellent place to commute to and from. However, Ashford has avoided turning into a predominantly commuter town and, according to a London Commuter Hotspot Rankings 2019, Ashford was placed bottom of the rankings compared with other towns in Kent. Season ticket price and resident life satisfaction were the two areas where Ashford fell short compared to neighbouring areas as an attractive place to live and commute from.

Furthermore, the area does experience some congestion on its roads currently. Most of Ashford’s residents commute to work (eg close to 60% of households - 2001 Census and 70% in the Council’s Resident Survey 2020. Car use is higher at 79% for shopping visits). The proportion who walk to work has also stayed stable at about 10% in the last 20 years. Although the recent residents survey puts this at 16% in 2020, with 19 % saying they would prefer to walk. Further, many of the A roads in Ashford experience low average speeds.

Figure 2.9: Average speeds on A roads in Ashford

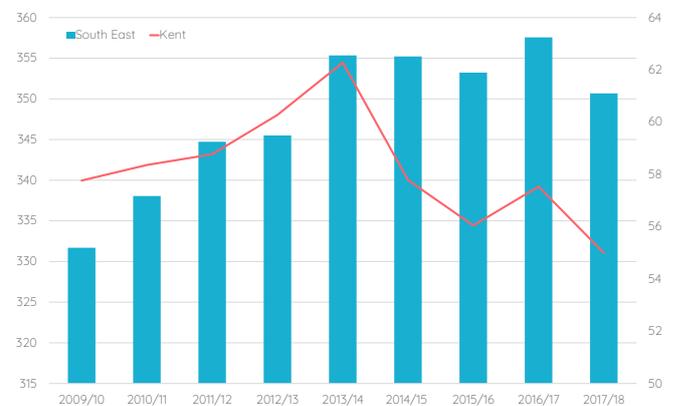
mph	Road	2017	2018
Kent	A28	26.5	26.9
Kent	A2070	25.2	26.4
Oxfordshire	A41	39.7	38.7

Source: Census 2011

“Further initiatives to boost public transport usage and reduce traffic congestion are needed”

The M20 is a busy international route used heavily by goods and holiday traffic. Operation Stack, a procedure occasionally used by Kent Police to park large vehicles on the M20 when services across the Channel are disrupted, can add to the issue. Work is, therefore, in progress on improvements including the new £104m junction on the M20. The opening of this new Junction 10a will unlock job-creating developments, improve journeys, encourage usage of better-flowing public transport and open the door to further inward economic investment for communities along the Channel Corridor.

Figure 2.10: Bus usage in Kent versus South East



Source: ONS, Department for Transport

More widely, Kent has seen an overall decline in the number of bus journeys between 2009 and 2018. This follows a period when the wider South East region enjoyed a general upward trend in journeys on local bus services, and has occurred despite local initiatives such as the Fastrack Bus Rapid Transit scheme. Whilst there is no distinct information for Ashford, it implies a similar trend in the local area. Recent steps to enhance bus services in the Borough suggests that there is appetite for public transport locally. For example, Stagecoach’s implementation of the Little and Often mini buses scheme, which debuted 30 Mercedes Sprinter vehicles on major routes in February 2017, had to enhance the seating capacity of its buses, after one year due to its popularity. With high proportions of the population living in rural communities across the Borough (eg nearly two fifths), such services undoubtedly play an increasingly important role for people travelling to work, and to support travelling tourists. That said, with Covid-19 forcing moves to remote, homeworking and use of on line and digital applications, this also places an onus on developing the digital infrastructure in the area.



Access to fast broadband infrastructure is critical in driving growth and opportunities in the digital age. Although little hard evidence exists on broadband usage and quality, softer research suggests that Ashford benefits from a good quality of broadband connections, in particular in the more urban areas. BT's Ashford exchange is 'infinity enabled' providing high-speed access of over 200mb with private sector providers supplying even faster broadband speeds, although there is variability in the quality and speed of services over the borough. According to Which? Ashford ranks 176th amongst 390 local authorities in a ranking of the fastest to slowest local authorities by broadband download speed. In terms of superfast fibre coverage, 90% of Ashford is covered by Openreach (coverage percentages include both residential and business premises and is based around postcode level data), with 6% of the borough, primarily in the rural areas, faced with poor quality speeds of less than 15mbps.

Sustainability

Ashford has been tracking population growth and density to monitor the potential effects on environmental degradation through increased waste production, urbanisation, land degradation and transport development. Ashford exhibits a comparatively low total population density and a rural population density in line with England as a whole, despite having seen rapid growth in its residents in the last 20 years. Since 2001, Kent has shown the highest absolute rise in population density for the area. Ashford saw a lower change than Kent and the South East, but a notably higher change than the UK overall.

We have reviewed CO2 emissions per capita at the local, county and national level and over time. Ashford sits notably lower than the rest on this measure and has seen a downward trend, in line with the UK and England. This suggests that it has been successful in adopting sustainable initiatives to reduce emissions. But so too have other local authorities within Kent which are closing the gap with Ashford. Overall, the Borough emits 820,337 tonnes of carbon emissions per year. Positively Ashford has seen notable reductions in emissions from industrial and commercial activity and domestic use over time. An assessment of variations in CO2 emissions between industries (BEIS 2017) suggests that a disproportionately high share of Ashford's emissions derive from transport compared with the UK average, with a notably lower share for

“Compared with other local authority areas in England and Wales, Ashford ranks highly for performance in addressing climate change”

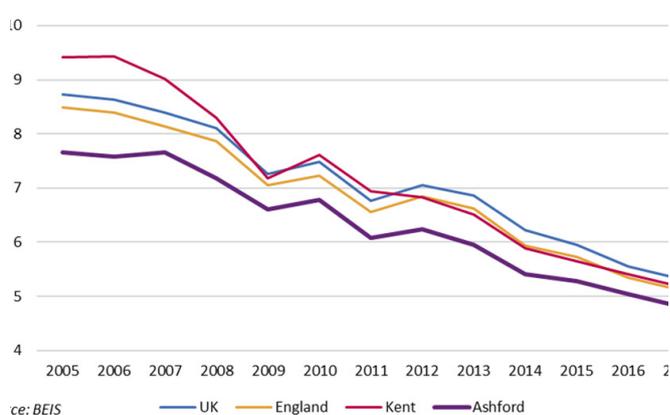
the industrial and commercial sectors. Given Ashford's proximity to the M20, emissions from cargo traffic at the port of Dover are likely to be a significant factor in the share of transport emissions. This suggests that Ashford will require a growing commitment to achieve its ambition to be carbon neutral by 2030.

According to a report published in September 2019 by Friends of the Earth, Ashford ranks joint 14th in a local authority league table based on performance in a number of areas, addressing environmental issues: household energy efficiency, eco-heating, renewable energy, proportion using public transport, cycling or walking, electric vehicle chargers, lift-sharing, tree cover and reuse, recycling and composting of household waste. Ashford scores particularly well in the provision of charging points for electric vehicles, with the highest number of charging locations of all local areas in Kent and a notably higher rate relative to the number of licensed electric vehicles.

The Borough also has a large number of green spaces and playparks that are undergoing significant investment. Ashford Borough Council has been successful in boosting recycling rates with Ashford. Statistics for 2017/18 from Defra show that Ashford retains its spot at the top of the table for household waste recycled and composted. It's recycling rate has increased to 56% indicating that over half of all waste collected is either being recycled or composted. The Council has also taken action to improve the Borough's air quality with a new Air Quality Strategy, and air pollutant concentrations locally are below the national limit. This strategy includes the establishment of a Green Taxi Scheme encouraging use of electric and hybrid vehicles within the local taxi and private hire fleet. In addition, the Cycling and Walking Strategy 2019 - 2029 aims to improve the cycling and walking network and to encourage safer cycling and walking tourism.

The most notable changes in energy consumption over time in Ashford have been in the growing use

Figure 2.11 CO2 per capita emissions (t)



Source: BEIS 2017

of bioenergy but also slightly increased gas use as a share of overall energy (measured in Gigawatt hours, GWh). Ashford also exhibits a much higher share of gas use compared with the UK average. The broad downward trend in the use of all fuel types from 2007 to 2014 and the relative rise in bioenergy fuels is a promising sign for environmental impact mitigation in Ashford. There has, however, been a more recent dip in the adoption of bioenergy, and notable bounce back in traditional fuel use since 2014, suggesting that this needs to be an area of ongoing and renewed focus.

Community

Ashford has a population of around 129,000 (ONS 2018), and has seen a considerable growth in its population over the last few decades. The overwhelming majority of Ashford's inhabitants are white, at 93.7%, while the total black minority ethnic (BME) population constitutes 6.3% of inhabitants (10% for the south east). While most of Ashford's employment is concentrated in urban centres, a significant proportion of its population is rural which raises quite particular issues for its requirements and hence in turn services (eg 37% - the comparable figure for England is 4.8%). Of the ten wards with the highest populations, two (Weald East and Tenterden North) are classified as rural. Of these, Weald East is the most highly populated ward within Ashford with 3,759 inhabitants. Levels of educational attainment in rural areas are weaker than the Borough average, with over 20% of the rural population over the age of 16 holding no formal qualification.

Rankings from the latest Index of Multiple Deprivation give a rounded perspective on Ashford's position on a number of social and community issues relative to other local authorities such as income, employment, education, health, crime as well as overall living conditions. We see that Ashford ranked 158th out of 317 local authorities on its average score (the deprivation indicator is produced by the ONS every five years, at a Lower-Layer Super Output Area (LSOA) or neighbourhood level). Around 1.3% of the neighbourhoods in Ashford were in the most deprived 10% of neighbourhoods, nationally. Areas of more concern include:

- Barriers to housing and services, appear to be the area in which Ashford performs the worst, ranking 30th, with a fifth of its LSOAs in the most deprived 10%. This suggests higher barriers to accessing housing in the Ashford Borough.
- Ashford also has a higher rank (102) on crime, with 12% of its neighbourhoods in the 10% most deprived.
- Education is another area in which Ashford is lagging, ranking 116th in education, skills and training. Nearly a tenth of its neighbourhoods are in the most

“While Ashford is ranked 158th out of 317 local authorities on the national Indices of Multiple Deprivation (IMD) , barriers to housing and services; crime and education, skills and training give greater cause for concern”

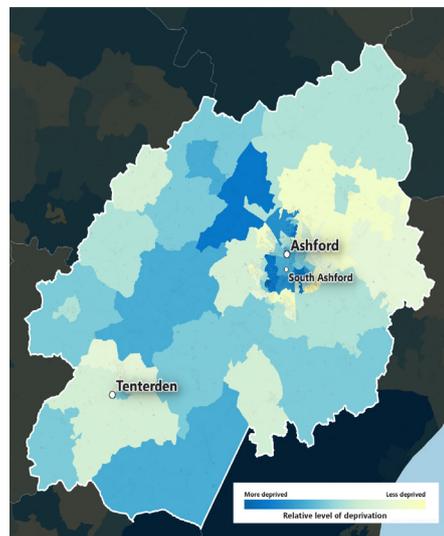
deprived 10%.

In contrast, Ashford scores better on:

- living environment, ranking at 214th, with only 2.6% of neighbourhoods in the most deprived 10%.
- employment, ranking 170th, with none of its neighbourhoods in the most deprived 10%.
- less than 1,000 residents claimed income support in Ashford in 2018, of which 680 were lone parents.
- for income, Ashford ranks 146th out of 317, with 4% of neighbourhoods being in the most deprived 10%.
- for health ranking 209th with none of its LSOAs in the most deprived 10%. That said data suggests that primary care and GP services are falling behind. In Ashford, there were 2,100 patients per GP, with the Borough in the 9th worst percentile in the country. Only 8.4% of overall households in the Borough are fuel-poor households which is below the average for Kent (9.5%) and the South East (8.7%). Furthermore, since 2010, the proportion of fuel-poor households has declined. Life expectancy in Ashford also compares well to the regional and national level. Men in Ashford can expect to live two years more at 81 and women one year more at 84 than the national average.

Given the dominance of the rural economy in the Borough, Ashford's growth strategy needs to pay particular attention to understanding and supporting its distinct rural activities. Retail and SMEs underpin the bulk of jobs in rural Ashford and the share of

Figure 2.12: % of LSOAs in each national deprivation decile



Source: Indices of Multiple Deprivation 2019, MHCLG



the agri-food sector has declined (around 3%). Nonetheless agriculture still remains important to rural communities and is an increasing source of tourism revenue, given the attraction of the AONB. Ashford Market is the largest cattle auction market in the South East with around 35,000 cattle being sold every year. Further, the Rare Breeds Centre in Woodchurch, is a 100-acre farm open to visitors working for the conservation of rare breeds of farm animal. In addition, Ashford's growing offer as a wine tourism destination is beginning to benefit its rural economy. Given the prevalence of working in rural areas, there is a need to invest in high-speed broadband connections as well as to provide better public transport services. At the moment, fibre is available in only limited rural communities with the vast majority of rural Ashford unable to access high-speed internet services. Similarly, public transport provision is limited to infrequent bus services across many parts of rural Ashford, which risks adverse impacts on its residents' ability to access urban amenities. For communities who work and benefit from these rural activities, it is essential that strategies and activities to diversify the rural economy are intensified in future to compensate for the falling share of agri-food in output.

Visitor Economy

Ashford is developing its local offer to support a growth in tourism and strengthen its visitor economy. Situated 60 miles south-east of central London, and around 13 miles from Folkestone with easier access to Europe, it has started to successfully raise its profile as a transport and retail hub. Its location, too, close to AONB in the Kent Downs to the north-east, and High Weald to the west, also means it is ideally located for both domestic and overseas tourists wishing to explore Kent. Further, with a significant rural community, and a rise in local wine production, there is likewise a growing focus on wine tourism.

The Borough is increasingly taking steps to exploit the fact that it lies at the heart of a range of diverse sites of beauty and interest, ranging from historic houses and gardens, steam railways, windmills to animal attractions and a number of National Trust properties. For instance, the conservation area of Tenterden is

a prime example of a thriving tourist town. Around 90,000 people a year visit the Kent and East Sussex Railway, while the town also attracts food and drink lovers, with local vineyard Chapel Down gaining increasingly strong brand recognition.

Also close to Ashford, beyond the Kent Downs AONB, lies the medieval cathedral town of Canterbury and the seaside towns of Whitstable and Margate; the latter of which contains the Turner Contemporary Gallery. Further down the south coast, all within thirty miles of Ashford, tourists can enjoy the former fishing and mining town of Deal, as well as the port towns of Dover and Folkstone, and Romney Marsh, a sparsely populated area of marshland. Leeds Castle, one of the heritage sites in England to approach the 500,000-mark for visitors in 2018, is less than 15 miles away from Ashford. With its transport links, therefore, Ashford is ideally placed to position itself to be the entry point for visitors to the scenic county of Kent and numerous attractions within it and is taking action to market such attractions as important and grow the visitor economy. This is illustrated with its trails, through which Ashford is establishing itself as an exciting destination for wine tourism. Aside from Chapel Down, the Borough contains a further three wineries (Biddenden Vineyard, Gusbourne and Domaine Evremond). These are now recognised as part of the "Wine Garden of England" initiative, which links seven of Kent's top wine producers to create a world-class wine trail and visitor experience across the county. Investments by the French Champagne company Taittinger in 2015, with commitments until at least 2023, further strengthen this position. This has added numerous tourist-facing jobs, but also supports local job creation in the farming and agricultural sectors. Curious Brewery, a contemporary state of the art brewery, is another example, as part of Chapel Down and in close proximity to Ashford International station, which is now being promoted as a new attraction.

Information from Destination Research, produced by Visit Kent in 2018, shows that such activities are having an effect. Indeed, from 2015 to 2017 Ashford saw notable improvements in the overall volume and value of visits undertaken annually. Their work revealed that 39% of trips are for holidays, 34% to visit friends or relatives, and 22% for business which is slightly higher than for Kent and the South East. Expenditure by visitors to Ashford is helping to generate numerous jobs in the rural and metropolitan economies of the Borough. Retail, accommodation, hospitality and transport sectors in particular have been feeling the benefit of rising tourist expenditure, with a 5% increase in the number of jobs supported by tourism since 2015. But, the strongest growth has centred around day trips to Ashford rather than longer overnight visits, with day trips rising by 5.6%, and spend per trip increasing by

Figure 2.13: Ashford's Visitor Economy: Volume and Value of trips by type

Ashford	2015	2017
Day trips		
Volume	3,924,000	4,028,000
Value (£m)	£133.9m	£141.4m
Overnight Trips		
Number Of Trips	392,000	391,000
Number Of Nights	1,228,000	1,257,000
Value (£m)	£71.8m	£72.2m

Source: Destination Research 2018

2.9%. That said, whilst the number of overnight trips contracted slightly in line with the broader experience in the county, the number of nights spent in Ashford per trip rose by 2.4%. It seems this was driven by a 10% increase in the length of stay by overseas visitors.

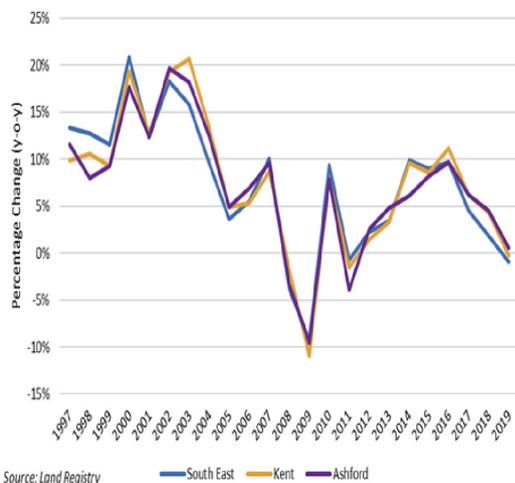
It is likely that longer term visitors may have been affected by the wider availability of services in the area. Indeed, Visit Kent and Locate in Kent have highlighted the need for more suitable accommodation locally, to enhance the quality of the region’s tourist offer. For instance their research shows: there are no five-star hotels in the county, just 30 properties have more than 100 bedrooms and only 14% of hotel beds are located in rural areas. Better connectivity to these sites, through public transport and supporting broadband services too, could improve spend per trip and length of stay, and generally increase Ashford’s appeal to overseas visitors.

Housing

Housing, commercial and infrastructure developments over the last decade have all increased the attractiveness of Ashford and Kent as locations to live. So, whilst, house prices fell in 2008/2009 as the recession hit, post-2011, growth returned and has since been encouraged by a range of supportive policy measures including Help to Buy schemes. House prices growth (for all property types) in Ashford has broadly mirrored Kent and the wider South East. That said, despite the completion of HS1, this has not driven the increases in property prices in Ashford relative to other parts of Kent that might have been expected.

Although average house prices have been cheaper in the Borough than the regional average, affordability has been squeezed for Ashford residents. This is due to a weaker earnings profile. Rightmove data indicates Ashford house prices averaged £270,248 in 2018. However, Ashford has an elevated house price

Figure 2.14: Annual changes in house prices over time



Source: Land Registry

to earnings ratio of 9.4 (median house price/median pay), which is broadly in line with the South East average of 9.9. This affordability issue is also reflected in the Index of Multiple Deprivation outlined earlier, and means that a fifth of its neighbourhoods are placed in the most deprived 10% of neighbourhoods nationally. With the average price of a property over nine times the average salary, it is unsurprising that residents have turned to the private rental market.

According to the Ashford Strategic Housing Market Assessment (2014) conducted by the local Council, the private rented sector in Ashford has seen properties rise by 120% over the last decade. More recent data suggests rental values are still competitive, with monthly mean and median private rents in Ashford, between 1 April 2018 and 31 March 2019, lower than the Kent and South East averages.

Over the last decade, growth in housing starts and completions in Ashford have generally outpaced Kent. According to Ashford Borough Council’s Authority Monitoring report (2018), there were 1,277 residential dwellings that were granted planning permission in 2017/18. This build up in new housing schemes coincides with the implementation of HS1, which has been notable for developers and buyers wishing to have easier transport links to London.

For example, in 2013, work started on the first phase of a 170-hectare housing development at Finberry in Ashford. The fourth phase known as The Village Centre was ready for residents to move in from Spring 2018. When eventually completed, the development will deliver 1,180 new homes to the area.

However, despite several housing projects that are currently in the pipeline, Ashford housing starts have seen a general downward trend since 2016. If the housing demand and supply gap exacerbates in Ashford, it will exert upward pressure on real estate values and rents which will detract from Ashford’s offer as an affordable destination to live. Simultaneously, the house price to earnings ratio will rise even further, deepening the affordability issue for local residents.

“Despite relatively lower house prices, affordability in Ashford is squeezed given the elevated house price to earnings ratio. The delivery of planned in housing developments could alleviate the pressures on housing access and affordability”

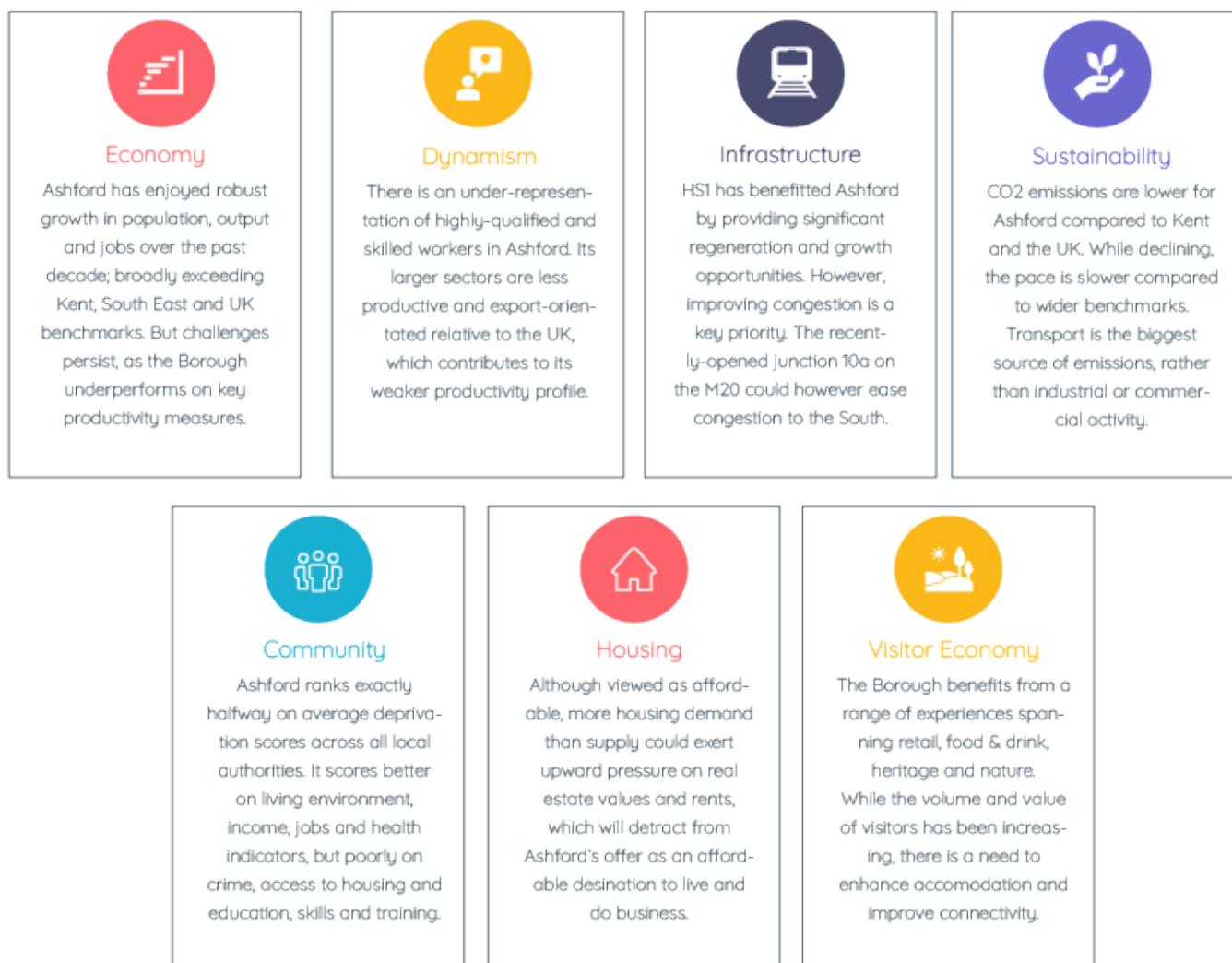


2.3 Summary: strengths and weaknesses

Given the Ashford Today analysis, we can summarise the strengths, opportunities and good progress made in key areas across the Borough. But, there are also some structural weaknesses that remain, and threats that need to be managed to ensure future progress can continue to be made. We have summarised this below to help shape our assessment of future priorities.

These, alongside the opportunities and threats from the future, will be important in shaping the future Ambition for Ashford and what core actions will enable it to be achieved.

Figure 2.15: Summary strengths and weaknesses of the Ashford Borough



3. Ashford Futures

Future drivers of change
& alternative outcomes





3.1 Introduction

The research has also explored the future outlook for the Borough to support the development of the long-term Ambition for the Ashford Borough. This has built on the earlier assessment of recent trends and economic performance in Ashford Today, Experian's Macroeconomic models and KCC population projections, in order to establish a baseline forecast for the future.

While these 'central' forecasts set an important view of a potential 'policy-off' scenario, a key goal has been to enable consideration of what a "desired" future for the area might look like. Most crucially, the research has also sought to take account of current disruptive global megatrends, as we are entering particularly uncertain times, and to consider how any opportunities might be optimised, and risks and threats mitigated, to achieve success. By considering potential disruptors, and the alternative paths these present, a number of different scenarios have been developed for the future of the Ashford Borough.

The aim was not only to consider the implications of these different scenarios for desired outcomes, but also different people and places within Ashford. This has been achieved through consultation, and a series of "testing" workshops with stakeholders locally.

The Covid-19 pandemic has unsurprisingly impacted the outlook for the global, national and local economy for the next 2-3 years. While the effects are considerable and widespread, businesses and households will suffer in different ways and the economic impact is unlikely to be felt equally across all parts of the country. The characteristics of a local area – from the make-up of the local economy and dynamism in the business base, to the health and wealth of local people and the strength of local partnerships – will determine the scale of impact and the speed of recovery.

At the same time, longer term drivers of change march on; and in some cases are likely to accelerate as a consequence of the ways in which Covid-19 has impacted our daily lives.

This chapter therefore seeks to reflect the substantive impact that Covid-19 has and will continue to have on the Ashford Borough, but without losing sight of the overarching aim of this research: to develop an aspirational yet achievable long-term Ambition for the Borough in 2030 and beyond.

3.2 Future outlook for the Borough

We have developed a baseline forecast view for Ashford Borough, using the March 2020 vintage of Experian's Regional Forecasting Service, which produces economic forecasts for the UK, its 12 regions and 380+ local authorities. The baseline forecasts for Ashford are consistent with demographic projections underpinning housing assumptions in the council's Local Plan and can be used as a reliable basis for scenario analysis to assess and test the viability of alternative assumptions of the future. Whilst again the forecasts have not been able to take full account of the effects of Brexit or, indeed, Covid-19, as these have still not fully run their course, it has been possible to draw likely assumptions about the future, taking account too of wider trusted players such as the Bank of England and the Office for Budget Responsibility. This has enabled the forecasts for the region to be revised. The framework for the local analysis has been informed by macro level assumptions, which we have therefore outlined briefly below.

Due to the unprecedented nature of the pandemic, the timing and speed of the recovery is uncertain and there are a range of alternative recovery paths the macro economy could follow. We expect the most likely of these to be a delayed-V shaped recovery which is what we use as our base case. This is similar to assumptions taken in other forecasts such as by Government and the Bank of England. On a quarter-on-quarter measure, this would consist of a sharp contraction of 25% in the second quarter of 2020, with much of the lost output growth in the first half of the year recovered by the first quarter of 2021. Underpinning this is the assumption that the easing of restrictions is phased, with the Covid-19 outbreak being contained more slowly. A meaningful bounce-back in activity is expected to be postponed until the latter half of 2020. We forecast a 17% decline in output in 2020, with growth at roughly that rate the following year. Assuming most jobs remain safeguarded supported by policy measures such as the Coronavirus Job Retention Scheme, companies should be able to rapidly restore output, with the economy seeing a recovery in 2021. Whilst we do not expect the trend growth rate to return until early next-year, output in value terms is unlikely to return to pre-Covid levels until 2022. As such our longer terms forecasts have been run from 2022 and the forecast period extended to 2040. The full implications of this for Ashford are set out below.

Looking at the local forecasts, our assessment suggests that prospects for Ashford Borough are likely to remain favourable over the forecast horizon up to 2040 when compared with Kent, the South East and UK as a whole on key headline metrics. The growth premium Ashford has held over comparable

benchmarks in the past is expected to be maintained going forward. Short-term growth prospects are likely to be relatively subdued, with a weak macroeconomic backdrop the notable constraint. This is a feature across the country, as growth is squeezed amid lingering uncertainty over the outcome of the next phase of the Brexit negotiations as well as the short but deep impact of coronavirus. At the time of writing, there remains much uncertainty over the final trade deal and what balance is eventually struck on the trade-off between an agreement which minimises trade friction and the right to diverge from EU rules. The baseline projections assume the outcome is a trade deal that allows continued access to EU markets.

In addition to the macroeconomic backdrop, local area future growth dynamics are determined by a number of factors, notably its industrial structure, skills mix, demographic outlook, infrastructure, etc. In the short term, the macro economic landscape, alongside the industrial mix are the dominating factors in driving growth. Despite the challenges of Brexit and a fairly constrained UK outlook, output (GVA) growth trends in Ashford are expected to remain ahead of the pack and lead the economic growth rankings in Kent.

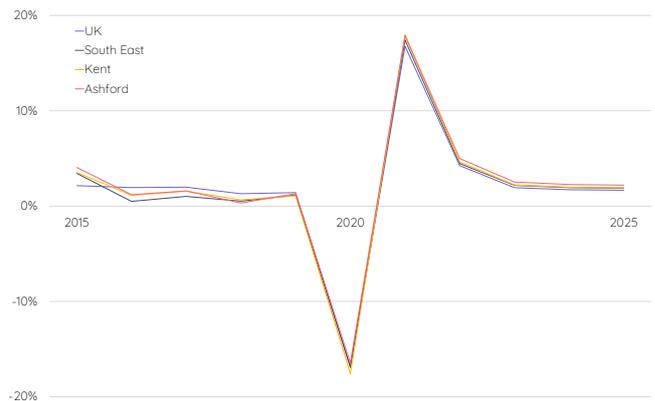
The sectoral breakdown shows that some of the largest sectors in Ashford will continue to drive trends and post robust growth. Indeed, Professional Services, Health and Wholesale will be among the faster growth sectors in the borough.

Meanwhile, some of the smaller sectors in the local area, such as Telecoms, Information and Communication and Media Activities will also post strong growth and help Ashford achieve healthy growth momentum. It is expected that short term employment growth in the Borough will remain positive despite the lingering uncertainty and tight labour market conditions.

Around a quarter of Ashford’s labour force works in public services, with this share expected to rise to close to 27% by the end of 2040. The share of professionals is also projected to rise, with over a fifth of Ashford’s workers expected to be employed in this sector. Another key sector expected to see growth is Information and Communication, with the proportion of those employed in this sector set to rise slightly to 2.4% by 2040. On the flipside, the share of those employed in Manufacturing as well as Wholesale & Retail will fall slightly (down to 7% and 18%, respectively), indicating a gradual shift towards higher-skilled sectors by the end of the forecast horizon.

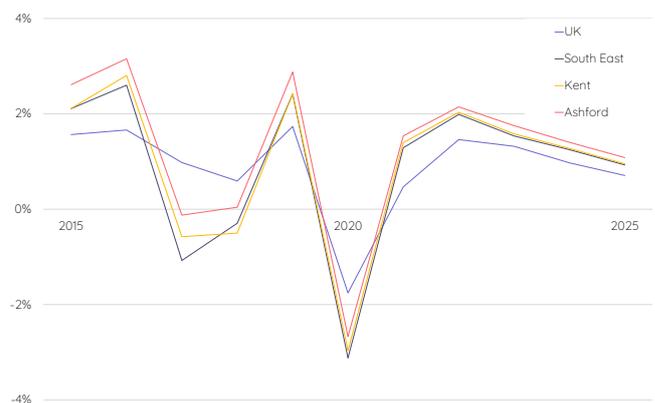
As we look further over the forecast horizon and consider longer term growth credentials, other determinants of growth, such as infrastructure and population dynamics, play a key role. Infrastructure developments in Ashford have played a vital role in shaping past growth and will remain supportive over the longer term, helping it remain competitive in terms

Figure 3.1 Average annual change in GVA, short-term



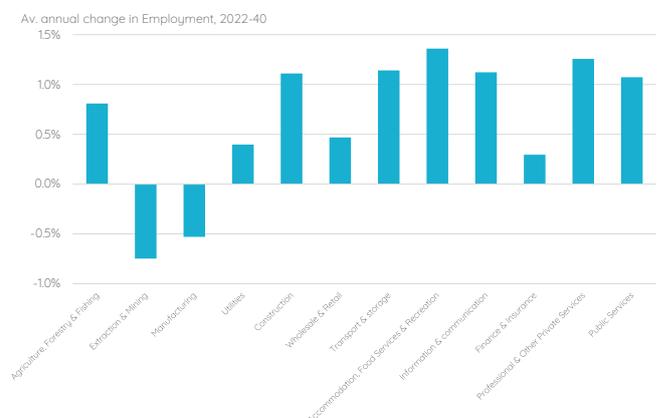
Source: Experian PLC, 2020 based on ONS data

Figure 3.2 Average annual change in Employment, short-term



Source: Experian PLC, 2020 based on ONS data

Figure 3.3 Employment growth by sector in Ashford, 2022-40



Source: Experian PLC, 2020 based on ONS data



of location and accessibility. Demographics in the past have been ultra-supportive, having benefitted from previously being designated a government growth area. Looking ahead, population growth in the borough is expected to remain on a favourable upward track. The expected boost in the borough's population from approximately 129,280 in 2018 to 164,650 in 2040 will fuel growth potential in the area. Within this, the working-age population is expected to rise by 14,400 by 2040 whereas the number of 65+ will increase by 16,700.

Between 2022 and 2040 we expect GVA growth in Ashford will average 2.3% per annum under the baseline forecast, which means the local area will lead the county growth league table, surpass the Kent and South East average of around 2% and well exceed the national average of 1.9%.

Looking at labour force trends we expect workforce jobs growth in the Borough to average 1% p.a. between 2022 and 2040. With that growth expectation Ashford will comfortably sit ahead of the South East average of 0.8% p.a. and remain ahead of the UK average of 0.6% p.a. Supportive factors such as dynamic population growth alongside a healthy impetus from sectors such as Professional Services, Real Estate, Accommodation & Food Services, Health and Residential Care & Social Work will spur job creation in the local area.

Ashford's economic activity rate is set to decline slightly, at least amongst the working-age population, and much of this can be explained through more people staying on in full-education. Historically Ashford has tended to have an above-average activity rate. It will not significantly differ from the national average, in the coming decade. The activity rate among those

“While short-term growth prospects are subdued as a consequence of Covid-19 and Brexit, over the longer-term Ashford is expected to lead the county growth league table, posting robust expansion in GVA between 2022 and 2040”

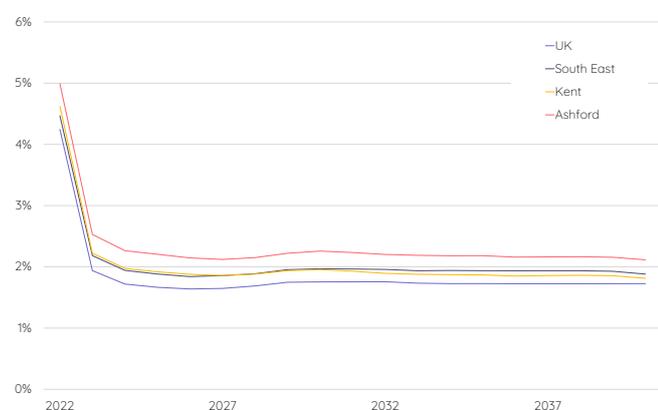
65-plus, however, will rise to 29%, up from close to a tenth. This is indicative of a greater dependency ratio, the rising pension age, and signals that more people will be working past retirement.

The employment and GVA outlook for Ashford implies productivity growth will improve from the current weak trend and narrow the productivity gap that Ashford has with the comparable geographic benchmarks. Productivity set to grow at 1.4% per annum.

We expect that skilled sectors such as the pharmaceutical and chemical industry as well as professional services will see significantly better performance in their productivity per worker, emblematic of a shift of the economy towards higher-skilled occupations.

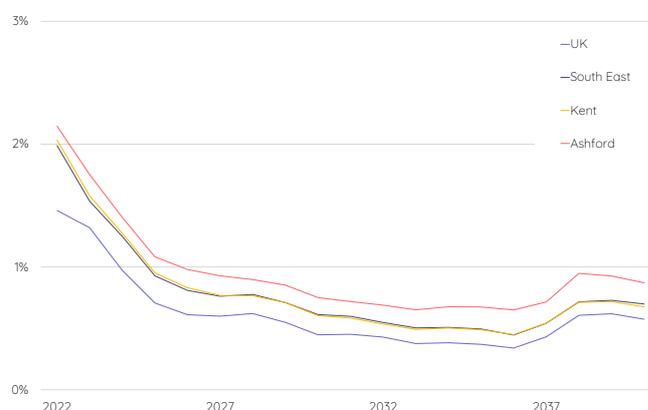
So taken together, despite a need to respond to short-term challenges associated with Covid-19 and Brexit, the longer-term economic outlook for Ashford is positive indeed. However, this very much represents a 'central' scenario and there remains significant short-term uncertainty, as well as longer-term external influencers that could alter the trajectory in a range of ways.

Figure 3.4 Long-term outlook, GVA



Source: Experian PLC, 2020 based on ONS data

Figure 3.5 Long-term outlook, Total Employment



Source: Experian PLC, 2020 based on ONS data

3.3 Global megatrends & drivers of change

Any examination of the future must include an assessment of the “megatrends” and significant drivers of change, giving rise to huge transformations across the global economy.

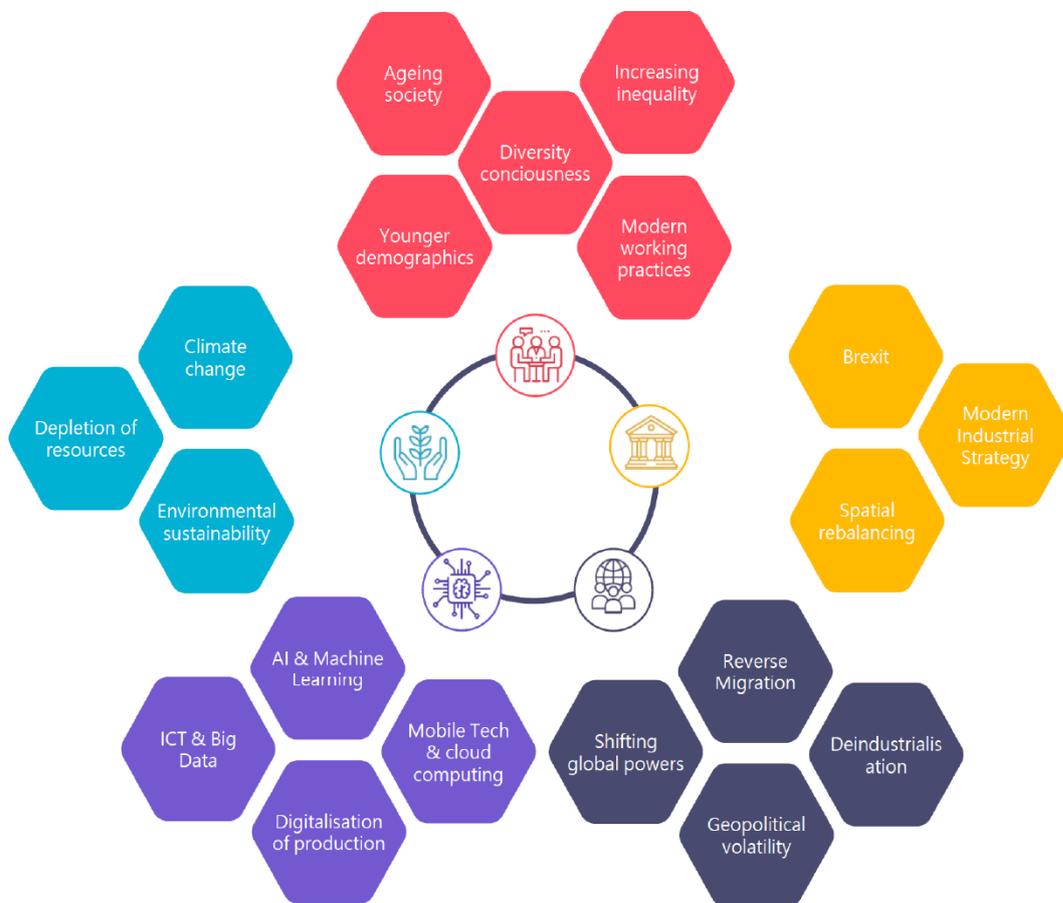
Whilst future studies have been of interest for a while, especially to policy makers, the rapid developments in technology, innovations in ways of working and growing polarisation in the opportunities open to different socio-economic groups, are driving an explosion in futures research more widely. This includes major foresighting programmes in the UK (UKCES 2014 and 2016; Government Office for Science 2017 and Nesta 2013, 2017) and internationally (eg Organisation for Economic Co-operation and Development - OECD 2017 and 2019; World Economic Forum - WEF - 2016 and International Labour Organization (ILO) 2017). The challenge, however, is how to progress futures research in a way that really enhances the understanding of, and preparations for, future impacts. In particular, a key value add must be working with stakeholders to facilitate the proactive

management of likely opportunities and threats, and the better anticipation and mitigation of risks presented by the megatrends and drivers of change.

We drew five common themes from the body of futures research and unpacked the core themes to debate the implications for Ashford Borough:

1. **Social and demographic change** - which also incorporates consumer trends and preferences
2. **Politics and government** - including legislation, regulation and public policy in a range of areas (economic, social, energy, foreign policy etc)
3. **Economics and globalisation** - covering economic shifts here in the UK, across Europe and globally
4. **Technological change** - which clearly is of growing interest as we enter the fourth industrial revolution
5. **Environmental concerns** - including threats to climate change raised by growing demands on natural resources and unsustainable practices.

Figure 3.6: Global megatrends and future drivers of change



Source: Work Advance, 2020



Social & demographic change

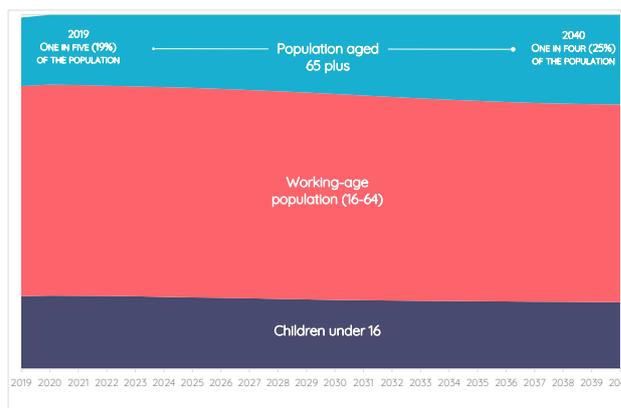
We are seeing growing diversity within our communities which will affect the future of work. The increase in labour market participation amongst women and those with disabilities are expected to continue. Alongside this, we are seeing greater movement of workers between countries which will change the ethnic make-up of the workforce.

The population is ageing and people are likely to participate in the labour market for longer. By 2030, the population aged 65 and over is expected to increase by 42% whereas the percentage of those aged 14-64 is forecast to grow by 3% (UKCES 2014). The ageing of the population is also evident in Ashford, where the percentage of the population aged 65 and over is expected to increase from 19% to 25% by 2040.

This trend will have a major impact on the composition of the labour market, with a need for older workers to learn new skills and to pass on knowledge as they move into retirement (PwC 2018a). That said we expect to also see five generations of the population working together in the labour market.

These social trends will substantially affect consumer trends and choices. For instance, consumption patterns and expenditure vary hugely with age, being low early in life, increasing drastically around middle age and then dropping significantly in older age (Yang 2006). In 2017, the 65- to-74-year-old households spent nearly a fifth (18%) of total spending on recreation and culture, making this the top expenditure category for this age group (Living Cost Survey 2017). At the same time, millennials' increasing purchasing power is shaping a new demand for goods and services. Millennials are tech-savvy, enthusiastic consumers of entertainment and gather information through the

Figure 3.7: Forecast demographic change in Ashford



Source: Experian PLC 2020

internet. New models of online and mobile, on-demand consumption are emerging and purchase/ownership is no longer a need (Hwang & Griffiths 2017).

Over the longer-term there has been growing awareness amongst consumers of the provenance of the goods and services they purchase (responsible consumerism), with concerns around their associated carbon footprint and environmental impact; food safety; labour standards; and a company's record on ethical sourcing (WEF 2016). This has led to a shift towards brands that align with personal values and environmental and ethical concerns and 'buying local' (Mintel, 2019; Ipsos, 2020). This, potentially coupled with increased recognition of the importance of self-sufficiency in the wake of Covid-19, could drive increased demand for locally-grown produce and opens up opportunities for growth in local, ethical and sustainable produced goods more widely.

At the same time, there is increased diversity consciousness and growing dissatisfaction with the levels of income inequality evident in the UK and in other developed nations across the world. Some are calling in to question the current capitalist model; instead favouring a new model centred around sustainable and inclusive growth, stakeholder capitalism and responsible business.

While this global movement was evident prior to the current Covid-19 crisis, some argue that the pandemic and the unprecedented scale of Government intervention to stem to spread of the virus and shore up national economies could provide an opportunity for countries and their citizens to open up a wider debate about capitalism, the role of Government and business, putting people at the heart of policy-making and shaping a more caring society (Mazzucato 2020; Wilkinson & Pickett 2020).



Technological change

Technology is a huge disruptive force. The number and type of jobs available has been dramatically modified by technological breakthroughs, driving major improvements in productivity and efficiency.

These include automation, robotics, cloud computing, digital communications and Artificial Intelligence (AI). Technological change will continue to have a great impact on consumption patterns, commercial models and ways of working. More intelligent digital technologies connected through networks are extending their uses, operating factory production lines, transport and logistics centres, retail outlets, and driving ever more efficient construction processes.

The automation of routine tasks will place a focus on human creativity and social interaction, enriching job roles and strengthening purpose; as well as freeing-up time for innovation. Since Frey and Osborne (2013) suggested that up to 47% of jobs in the US were at high risk of automation, there has been considerable debate across the world concerning the impact of technology on the future of jobs and skills. More recent studies focusing upon the impact of automation on jobs in OECD countries (Nedelkoska and Quintini 2018) and in the UK (ONS 2019) suggest the impact will be more moderate, with between 14% (according to the OECD) and 7% (in the case of the ONS work) of jobs in the UK at high risk of automation.

However, some occupations and places are more at risk than others. Given the sectoral mix of the Ashford economy, with its particular reliance on the retail sector, the Borough could be disproportionately impacted by these trends - ranked 56th out of 319 LAs in England and fourth in the South East, with 3,875 jobs at high risk of automation. Further, a shift towards e-commerce continues to provide sizeable challenge



to the future of British high streets.

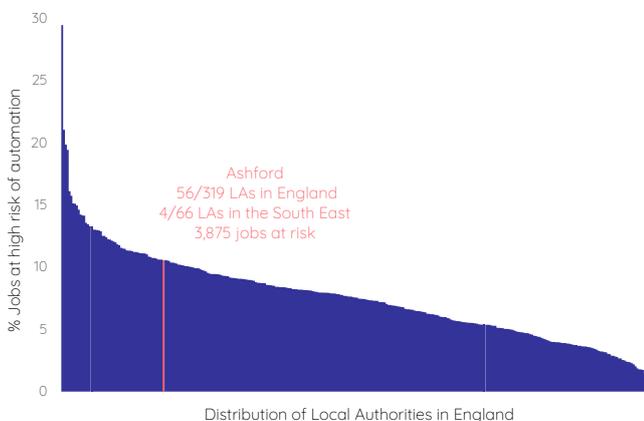
Technology has the potential to support smarter and more agile ways of working; enhancing and flattening management structures; shaping bespoke teams to tackle specific business challenges; while also supporting greater discretion, better employee engagement and better skills utilisation. Further, social media, networks and employee forums offer the potential to strengthen communities of workers.

Big data analytics is enabling intelligent operations, marketing and designing workplaces around the needs of their workers. For some time now we have been seeing how technology is supporting remote working: providing new, agile, employment opportunities that offer a better work-life balance; rethinking what people do, how, when and where they do it, flexing start and finish times around busy lives. The events of the past few weeks and months have forced dramatic changes in the way we all work, and could very well mean we reach a ‘tipping point’ when remote working becomes far more pervasive – not simply because we have proved it can work, but also because of the impact the reduction in travel to work has had on carbon emissions.

There has been growing debate in recent years about the role of workplaces in the context of new modern ways of working. While there lacks robust evidence on the long-term impact of Covid-19 on the scale and pace of this shift, some major businesses have signalled they are reviewing the purpose and value of office space in major cities. While there is always a tendency to overstate the scale and impact of market shocks, these trends could further enhance Ashford’s appeal as a destination for business investment and workers looking for locations a close commute-away from the Capital.

We will also see a whole host of new modes of learning, including the increased use of immersive technology to support experiential learning around the workplace and digital and remote learning.

Figure 3.8: Percentage of jobs at high risk of automation, 2017



Source: ONS 2019



Politics and government

As the demands of growing populations around the globe rise, their needs become more diverse, yet we do not see the economic growth rates of the past, there is a risk of rising political instability.

Public finances come under increasing pressures, as Governments wrestle with how to build a more prosperous, productive and fair UK economy that tackles persistent and growing inequality and supports spatial rebalancing - something clearly evident in the new Conservative Government's 'levelling up' agenda.

Government policy, country by country, clearly has a significant impact on the environment within which businesses operate and trade and fiscal policy (e.g. tariffs, taxation and incentives) plays a crucial influential role in attracting or deterring investment and easing access to international markets. But, with increasingly dramatic and disruptive global events such as the global financial crisis in 2008, and now with the global Covid-19 pandemic, the traditional forms of economic management appear increasingly less effective to respond to future global economic and social dynamics and to enhance social prosperity and progression for all.

Pressures on finances put pressures on diverse demands of Governments and their public programmes. The widespread occurrence of political, economic and social uncertainty in several countries will undoubtedly have a far-reaching and deep, detrimental effect on domestic growth and employment and inward investment.

Even prior to the current Coronavirus crisis, recent ONS data showed that growth in the UK had slowed to 0.2% in the three months to December 2018 (down 0.6% on previous quarter), moving away from traditional trends. This followed warnings of slow growth due to ongoing Brexit negotiations and the impact of a weakened global economy. Now with the advance of the current pandemic there is even more uncertainty ahead. The UK Government, alongside other national Governments, must work together in a global collaborative effort to find lasting solutions.

The Conservative party's manifesto commitment to 'full devolution' and a Devolution white paper expected later in 2020 could also afford greater opportunity for local innovation and place-based leadership.

"A revival of the devolution agenda under the new Conservative Government could offer greater opportunity for local innovation and place-based leadership"

Economics and globalisation

As populations grow, trade barriers breakdown and open up economic co-operation, there is an increasing pace of international trade and growing global competition.

The opening of international markets brings with it significant challenges as well as opportunities for export-oriented and globally facing businesses.

Developing countries (such as China and India), which are pushing forward ambitious strategies for growth, supported by heavy investments in industry, technology and education, are able to play an increasing role in higher value markets, now too, which a generation ago would have been considered the exclusive preserve of the mature advanced economies. As such by 2030 the BRIC's (Brazil, Russia, India, China) combined economic power will surpass that of major advanced nations and we are seeing a shift in economic powers around the globe.

In the future, we are also expected to see rapid growth amongst other emerging economies such as Indonesia, Mexico, Turkey, Saudi Arabia, Nigeria, Egypt, Pakistan, Iran, the Philippines and Vietnam (WEF 2017). These trends will increase the complexity of the global economy and financial systems (UKCES 2014) and will drive an ongoing shift in global power.

As such, this will support further integration of global labour markets (Bakhshi et al. 2017). Mature and developed economies in the west, such as the UK, will see a slowdown in growth as new economies account for a growing share of global demand, alongside wider shifts in economic power globally. In turn, shifting power will be strengthened, by the international movement of labour, seeking new employment opportunities from the economic benefits of growth.

With shifts in economic demand will come shifts in the political response. We are seeing increasing moves in developed countries towards nationalism, rather than country collaborations, to protect common cultures and traditions. This challenges supranational bodies such as the European Union. Greater geopolitical volatility will create more uncertainty within business ecosystems and risks detrimental effects on growth.

At the same time, the Covid-19 crises has highlighted the vulnerability of products (particularly electronics and automobiles) dependent on complex, global supply chains. This, coupled with ongoing trade restrictions applied as a consequence of increased tensions between major trading nations, is expected to drive a diversification and potentially localisation of supply chains. Given its strategic location, strong infrastructure and established strengths in transport and logistics, the Ashford Borough could stand to benefit from these trends.



The discussions at the futures workshop enabled stakeholders to consider the desirability and achievability of the alternative scenarios, to compare and contrast different activities and consider trade-offs between the outcomes they gave rise to.

For instance, the “**High-Speed**” scenario demonstrated steps to drive high rates of ongoing future growth in the area at any cost. Participants debated the advantages and disadvantages of this approach. Within this scenario, high speed growth did not create quality employment opportunities for all, and stimulated a strong growth in low paid and low skilled work, thus maintaining polarisation in the labour market. This also suggested persistent low levels of productivity, raising issues about low pay and precarious employment. As such, it raised concern that it would drive further inequality and divisions across the community.

The exercise then enabled the scenario to be compared and contrasted with a more inclusive perspective represented by the “**Caring Ashford**” scenario. In particular this emphasised the role of the Council as a key anchor institution that through its resources and tools could deliver a multi-institutional Civil Society Programme, not only based around public procurement and other levers, but inspiring wider groups in the voluntary, community and social enterprise sector, alongside businesses, to work together to build a more cohesive community. Crucially, this sought to encourage businesses to embrace a new commitment to responsible leadership, offering ‘good work’.

The high speed growth scenario was also then seen to be incompatible with a more environmentally

conscious perspective represented within the “**Green Pioneer**” scenario. This aimed to consider the detrimental effects of climate change, and what actions needed to be taken in future to ensure more sustainable and environmentally friendly living and working. There was a greater preference, therefore, for the more targeted approach to growth, outlined within the “**Targeted Growth**” scenario which stakeholders felt enabled a more socially responsible and sustainable focus.

Key aspects of “**Experience Ashford**” were also widely valued and supported in discussions. There are clearly areas of natural beauty and heritage in the Borough of which stakeholders were very proud. People talked about active steps to enhance visitor attractions, which secured employment, as well as bringing income into the local area. But there were also concerns about creating too many low skilled and low paid jobs.

Interestingly, but perhaps unsurprisingly, there was an overwhelming support for pursuit of a future path for the Borough that aimed to secure prosperity in a more caring, socially responsible and inclusive way, that also respected the environment and looked to adopt practices and support ways of living that were more sustainable.

This discussion therefore provided a strong basis from which to begin to draft ‘the Ashford Ambition’; bringing together the desired outcomes from different scenarios to construct a clear, compelling and coherent narrative outlining the aspirations for the Ashford Borough in 2030 and beyond.

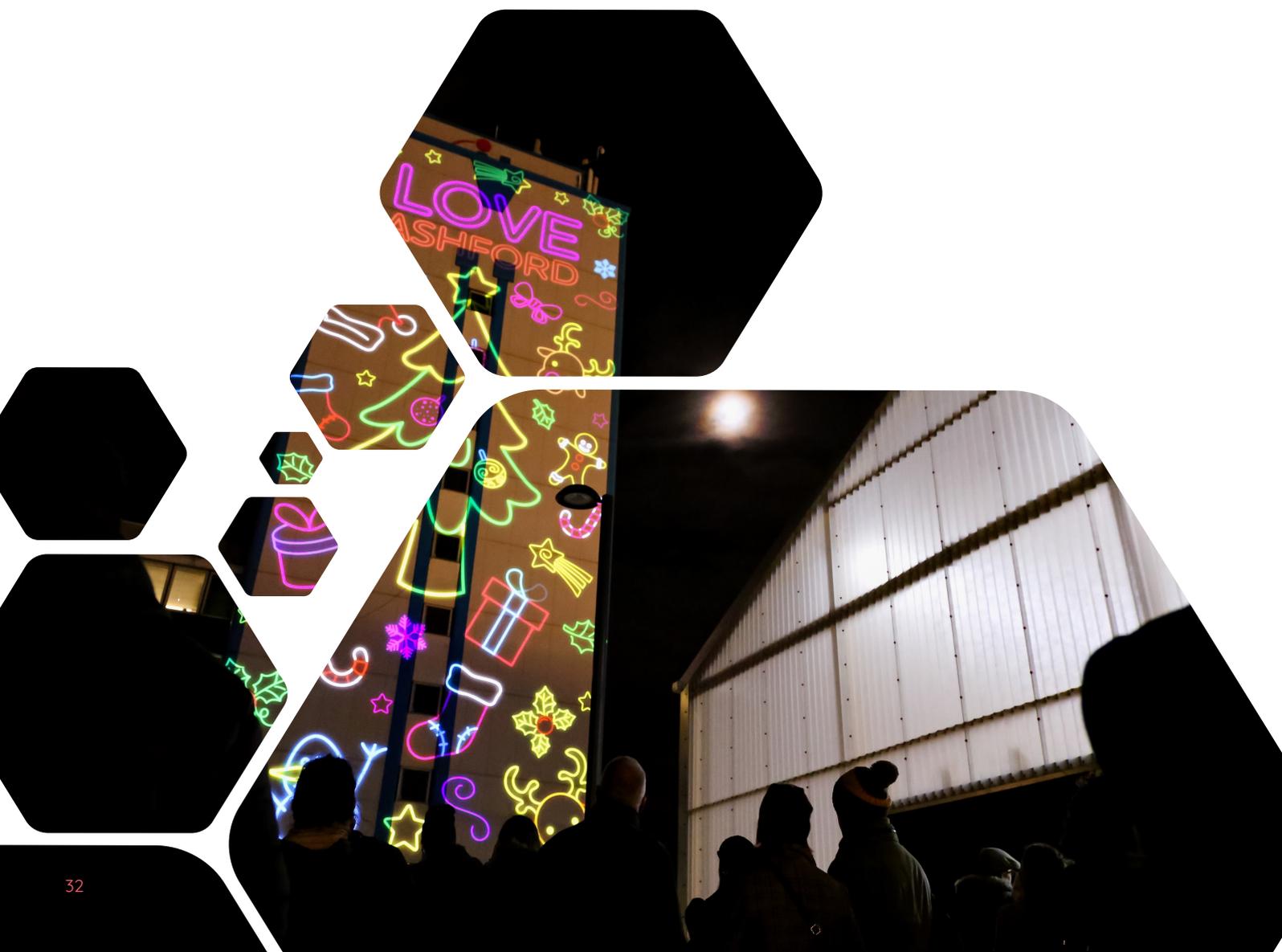
Figure 3.11 Scoring alternative scenarios for the future

SCORING CRITERIA	GREEN PIONEER	HIGH SPEED ASHFORD	TARGETED GROWTH	CARING ASHFORD	EXPERIENCE ASHFORD
DESIRABILITY					
Economic prosperity	33	41	46	31	36
Access to jobs and opportunities	35	38	42	35	36
Education, training & progression	38	31	44	39	37
Access to housing	26	29	33	42	24
Community and culture	38	25	36	47	43
Health and social wellbeing	44	25	36	50	36
Public services: quality and access	32	28	33	48	29
Sustainable environment	50	25	33	39	37
TOTAL DESIRABILITY	295	241	302	330	276
ACHIEVABILITY					
Fit with existing trends & developments	30	31	29	24	31
Fit with existing policy and priorities	26	28	32	21	29
Fit with what Ashford residents want	29	20	29	35	32
TOTAL ACHIEVABILITY	85	79	90	80	92

Source: Work Advance 2020

4. The Ashford Ambition

Aspirations for the future of the Borough





4.1 Introduction

Having considered external drivers of change and alternative scenarios for the future of the Borough, this chapter shares the findings from the final stage of the research process - developing and testing the 'Ashford Ambition'.

It summarises the method deployed and subsequently articulates the Ambition itself; outlining the different dimensions or "outcomes" captured within this, and sets out what the desired outlook or over-arching goal might look like.

4.2 Developing & testing the Ashford Ambition

In light of the changed backdrop for the research, we have needed to adapt the final stages of the study around developing, testing and refining the vision and shared priorities for Ashford.

Having completed the futures phase, we developed the draft Ambition for the Borough in preparation for testing with local stakeholders. This consisted of an overarching goal or statement that captures high-level aspirations:

"A caring and supporting place; where local businesses, social enterprises, communities and the public sector come together to promote shared prosperity, happiness and wellbeing"

This statement was then underpinned by five sub-themes that reflected more detailed and distinct outcomes. The intention was that these are then further unpacked answering the question 'what would this look like in practice?' Wherever possible we have sought to use quantitative measures, deploying econometric modelling and "aspirational benchmarks" to specify a series of tangible, measurable outcomes - some to 2030 and others to 2040, reflecting differences in the starting point of the Borough, as well as the changed context that Covid-19 presents.

The aim is in principle to construct uplifted projections compared to what we might expect under the baseline scenario, so that this inspires ambition in local actions and improvements in performance. Having clear and measurable 'end-points' enables the local authority and its partners to consider how best to achieve these outcomes, what actions could deliver real change, and how best to prioritise investment.

Given the developments with the Coronavirus, the process of testing and refining the draft Ashford Ambition evolved as lockdown measures were implemented. Whilst we were able to run one of the planned three 'testing' workshops in March at the Rare Breeds Centre, we have had to shift the remaining workshops and planned engagement activity to digitally enabled and online engagement mechanisms. In particular we have deployed:

- A webinar - hosted at the beginning of April, we presented the emerging Ashford Ambition and invited comments and questions from participants.
- Online survey testing - we launched an online survey to test and refine the Ambition; and explore strategic priorities and actions.

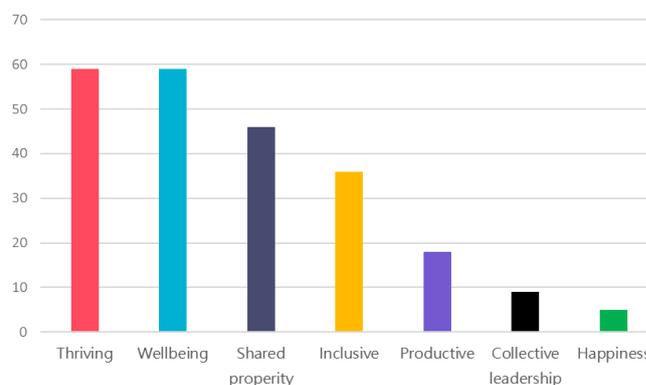
We also made use of the recent Residents Survey 2020 run by Ashford Borough Council to ask questions about local priorities. This included a sample of nearly 2,200 respondents.

Positively, the consultations highlighted strong support for the overall structure and content of the draft Ambition, with most comments suggesting more minor modifications rather than large revisions or changes. This is exemplified through the results from the online survey. Three quarters of the importance ratings for the different sub-themes provided ratings at 7 or above (with a rating of 10 representing the highest importance). The most important outcome was for Ashford being a caring place to live. This was followed by Ashford becoming a productive place to work. The third most highly rated goal was Ashford acting as a green pioneer in driving for carbon neutrality and a more sustainable way of living. These results were supported by those from the Residents Survey 2020. The priorities with the highest importance ratings there were 'Caring', 'Sustainable' and 'Employment'.

The online survey asked respondents about the words that best reflected Ashford's aspirations. The most popular were: thriving (59%), wellbeing (59%) and shared prosperity (46%).

The survey also asked respondents to rate achievability. Overall, the different aspects of the Ambition secured high ratings with the majority of stakeholders suggesting they were achievable. The most challenging were perceived to be those relating to the environment, but even then just under half of respondents gave ratings of 7 or above for achievability.

Figure 4.1 Testing the aspirations for the future of the Ashford Borough



Source: Work Advance 2020

4.3 The Ashford Ambition

Following the testing phase, we have been able to refine and finalise the **Ambition** for Ashford in 2030 and beyond (below) and articulate a series of desired outcomes that capture key aspirations within this (in the pages that follow).

The Ambition includes strong performance of Ashford's economy, which over the next ten years outperforms the County, growing at a rate of 3.4% per annum, adding more than 22,500 new jobs to the local economy by 2040;

But the engagement process emphasised that this growth must be inclusive and targeted. Thus a significant share of these new jobs would be filled by local residents. This includes those who were or are now out of work, hence helping to reduce the rate of unemployment in the Ashford borough following Covid-19, which would fall to 2.9% by 2040.

The Ambition sees Ashford strategically target improvement in productivity across the Borough,

prioritising investment in activities that attract high-value sectors, enhance productivity within local businesses, develop the talent pipeline and upskill the local workforce;

Productivity increases by 2.0% per annum between 2022 and 2040, compared to the past decade where productivity growth has been minimal.

This increased productivity in turn improves living standards, with household disposable income increasing by 1.7 % per annum between 2022 and 2040, putting an average £16,000 back in the pockets of local residents by 2040 and helping to tackle in-work poverty and deprivation.

The Ambition sees the Borough realise its commitment to become carbon neutral by 2030.

We further explore the different aspects of the Ambition.

"The Ashford Ambition: to be a thriving, productive and inclusive Borough in 2030 and beyond; a vital part of Kent and the South East where local businesses, social enterprises, communities and the public sector provide collective leadership to promote shared prosperity, happiness and wellbeing. The Borough will be renowned as:

- ◇ A caring and supportive place to live, with rich heritage; thriving towns, villages and rural communities; great schools; high-quality housing; a plethora of cultural activities and events; and a strong sense of civic pride
- ◇ A green pioneer, where businesses, communities and the public and third sector have come together to become carbon neutral, respect the local environment and ecology, and embrace a more sustainable way of living
- ◇ A connected gateway between the capital and continent; a growing, resilient and diversified economic centre in Kent, with thriving knowledge-based and creative industries and a vibrant rural economy
- ◇ A place where productive, innovative, responsible town and rural business communities offer good quality work to an agile and skilled local workforce who have embraced a culture of lifelong learning
- ◇ A thriving visitor destination, with an international reputation as 'the wine garden of England' and a high-quality destination for retail; leisure; arts & culture; heritage and nature





"A caring and supportive place to live, with rich heritage; thriving towns, villages and rural communities; great schools; high-quality housing; a plethora of cultural activities and events; and a strong sense of civic pride"

Ashford becomes known as a place that supports people at all stages of their life, from ensuring school readiness at age 5; to joining and progressing in the world of work; starting and growing businesses and social enterprises; supporting adults through difficult times in their life; and integrated care for the elderly.

Building on the success of the Carnival of the Baubles and Snow Dogs, the Borough develops a comprehensive programme of local events that promote culture, music and sports activities to engage people of all ages and that celebrate its distinct characteristics and reconnect with its history, heritage and natural environment to build a stronger local identity which local residents feel a proud part of.

Thriving villages and rural communities promote inclusion, tackle rural isolation and enhance health, wellbeing and community cohesion, Ashford town centre is revitalised and alongside Tenterden becomes a place where people from across the Borough come to meet and socialise; with high-end leisure facilities, arts and cultural spaces that draw footfall to the towns.

Achievement in schools improves significantly alongside a greater focus on culture in education; and local libraries and shared spaces support adult skills development, becoming places where local residents can go to improve their literacy, numeracy and digital skills to ensure that no one is left behind.

A strong sense of place fosters greater community cohesion; where young and old, existing and new residents come together to support one another underpinned by a strong ethos of 'giving back' fostering a culture of volunteering and civic participation.

Figure 4.2 Promoting inclusive growth in the Ashford Borough



Source: Experian PLC, 2020

The high quality living environment in the towns, villages and rural areas attracts high-skilled young and experienced professionals and their families to relocate to the Borough; supporting the sustainability of local retail and hospitality businesses.

"A connected gateway between the capital and continent; a growing, resilient and diversified economic centre in Kent, with thriving knowledge-based and creative industries and a vibrant rural economy"

Ashford continues to act as a hyper-connected hub for rail and road, as well as offering enhanced broadband connectivity, successfully attracting businesses drawn to the Borough by its strategic location, comparatively more affordable commercial rents, and strong business networks who act as ambassadors for the local area.

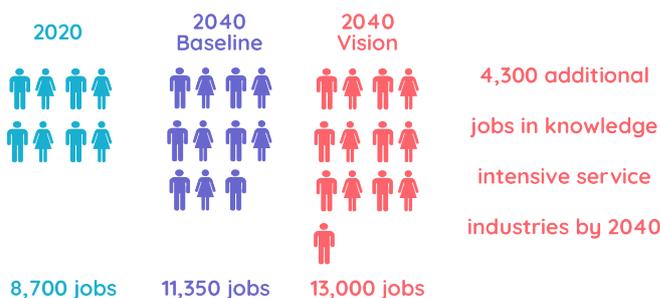
The local economy will witness growth in existing core sectors such as wholesale and logistics and construction, but alongside growth in high-value businesses operating in knowledge-intensive service industries. Between 2022 and 2040, the number of jobs in the knowledge economy grows by 1.9 % per annum, supporting diversification and resilience.

Ashford exploits its connectivity to London's thriving creative cluster in Kings Cross and investment in Newtown Works to establish a growing creative and digital sector, attracting inward investment and supporting start-ups of local creative businesses.

The Borough also benefits from stronger links with wider growth opportunities across the Kent / South East area, including the Thames Estuary Production Corridor and Medical Corridor, maximising opportunities at the William Harvey Hospital and linking to the new Kent and Medway Medical School.

The rural economy continues to thrive, centred around local food and wine production, the livestock market at Orbital Park and agri-tourism businesses.

Figure 4.3 Jobs in the knowledge economy, baseline vs vision



Source: Experian PLC, 2020

"A place where productive, innovative, responsible town and rural business communities offer good quality work to an agile and skilled local workforce who have embraced a culture of lifelong learning"

Businesses embrace a new commitment to responsible leadership, where strong communities of town and rural businesses recognise their role as stewards of the local economy, offering 'good work', working with local third-sector organisations, maximising the positive social benefits they can deliver for local communities; while minimising their environmental impact. Strong employment services support businesses in this endeavour;

A strong network of schools, Ashford college and wider skills providers come together to develop the skills needed by existing and new high value knowledge-based and creative businesses, with stronger links with local employers and an enhanced technical education offer including Apprenticeships. This improves the skills of the local workforce, with the proportion qualified to degree-level or above increasing by nearly 20 percentage points by 2040;

This is bolstered by a new digital education offer to support remote learning, upskilling and workforce development; supporting a culture of lifelong learning that enhances the agility and resilience of the local workforce to future changes in the labour market linked to technology and automation.

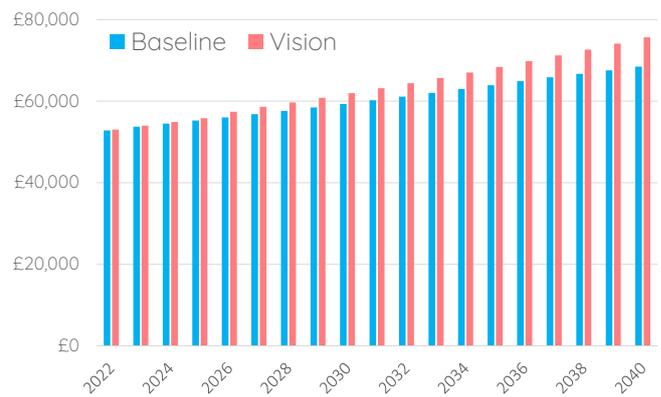
"A thriving visitor destination with an international reputation as 'the wine garden of England' and a high-quality destination for retail; leisure; arts & culture; heritage and nature"

Ashford becomes recognised internationally as a high-quality visitor destination, at the heart of the Wine Garden of England, capitalising on investment by Taittinger in local vineyards alongside a winery / visitor centre which offers national and international repute and appeal.

Under a consistent 'Experience Ashford' branding, tourists are drawn to a range of visitor propositions that promote Ashford as a place to experience: retail; food and wine; heritage; arts and culture; and nature; with a growing agri / eco-tourism sector which supports diversification and sustainability of the rural economy.

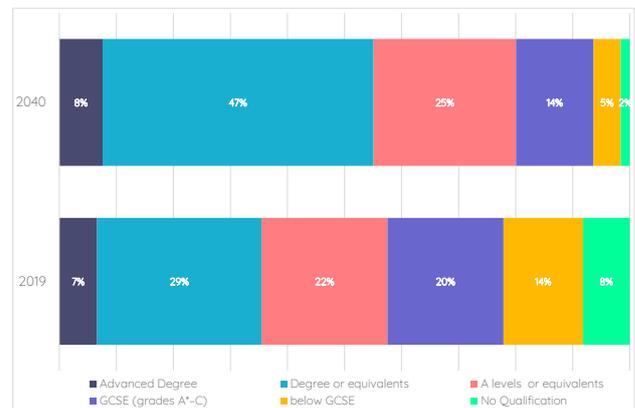
The Ashford Experience is known for quality – in the range of visitor attractions; the hotels, B&Bs and eateries; and for its high-quality customer service environment – and a vital part of a series sub-regional and regional 'trails' that promote a cohesive visitor proposition across Kent county and the wider sub-region.

Figure 4.4 Productivity (GVA per FTE worker), baseline vs vision



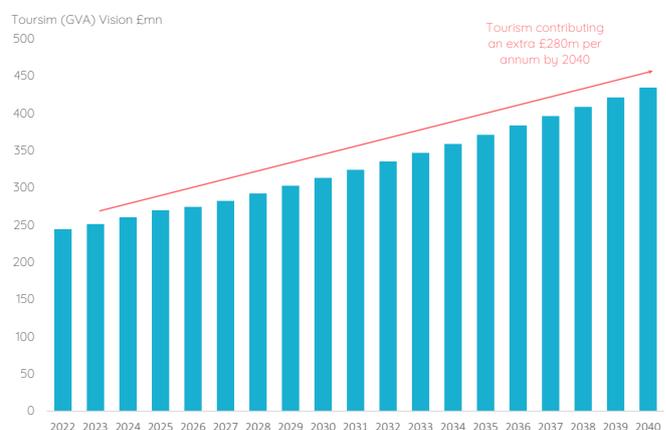
Source: Experian PLC, 2020

Figure 4.5 Qualifications of the workforce, vision



Source: Experian PLC, 2020

Figure 4.6 Contribution of tourism to the local economy (GVA)



Source: Experian PLC, 2020



As a consequence, the Borough sees notable growth in both the overall volume and value of visitors, including both day trips and overnight stays. By 2040, the tourism sector is contributing an additional £280m to the local economy each year, supporting an additional 5,150 jobs.

"A green pioneer where businesses, communities and the public and third sector have come together to become carbon neutral, respect the local environment and ecology, and embrace a more sustainable way of living"

Ashford aggressively pursues the ambition to achieve carbon neutrality by 2030, and enhance biodiversity by implementing a range of Initiatives and policy changes which incentivise energy efficiency, offset carbon dioxide emissions, protect green spaces and promote a shift towards sustainability amongst local residents and businesses.

Ashford embarks on large-scale replacement of existing fossil-fuel based Internal Combustion Engine (ICE) vehicles with Ultra-Low Emissions Vehicle (ULEV); and extends public transport and cycle routes to support a dramatic modal shift in local transport usage.

Local planning and building regulations act to balance the needs for biodiversity and preserving green, open spaces, alongside developments to encourage the construction of carbon neutral and energy efficient commercial buildings and housing, including decarbonising heating and cooling systems; with grants for new equipment and building adaptations to support environmental improvements, and land use that protects wildlife and tree cover and create ecological conservation areas.

Figure 4.7 Jobs in the tourism sector



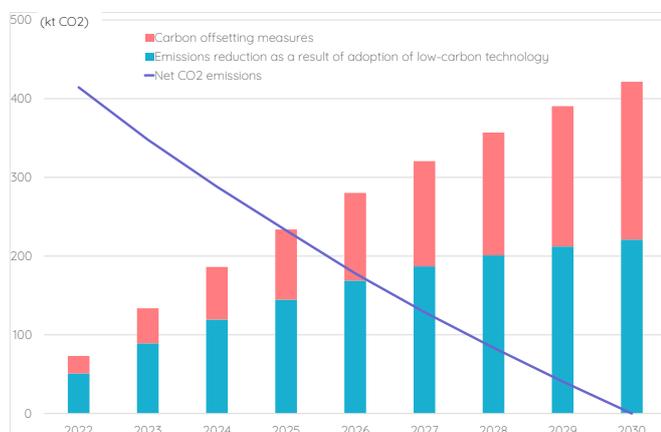
Source: Experian PLC, 2020

This is supported further through investment in local renewable generation including small-scale solar PV combined with carbon capture and storage and investment in greenhouse gas removals technology and reforestation to offset remaining carbon emissions.

Ashford establishes itself as a leader in sustainable food production, working with farmers to encourage farming practices that are more environmentally friendly, reducing herbicide and pesticide use, the likelihood of flooding, and preserving natural resources.

Local communities have greater respect for the environment, pursuing a more sustainable self-sufficient way of living and working to operate more sustainably, acting to diminish demands on water and natural resources, accelerate recycling and reduce waste; and recognising the health benefits of walking and cycling.

Figure 4.8 Carbon emissions off-set, baseline vs vision



Source: Experian PLC, 2020



5. Realising the Ambition

Priority Actions for the future





5.1 Introduction

Having articulated the Ashford Ambition, this chapter considers what future actions are key to enable the Borough to achieve these aspirations.

These actions build on the consultations, webinar and survey, which sought to explore with local stakeholders their perspectives on the most effective actions that could be taken in the area.

As might be expected, many stakeholders raised concerns about the economic impact of Covid-19 and outlined the importance of actions that protected the pre-existing strengths and assets in the local economy. This emphasised the vital role that foundational sectors, such as retail, hospitality, leisure and recreation, and food and drink production were already playing and the need to support them during recovery. There was clear recognition of the importance of creating the right type of employment, in the right place; to attract people to live and work in the Borough and, crucially, to promote shared prosperity.

Relatedly, there was a call for responsible business and greater recognition of the value of essential and key workers. This included demands for better working practices that provided good, well-paid work and terms and conditions that created careers of first choice. Aspects of responsible practices developed through the lockdown period involving retaining staff through job retention schemes and developing comprehensive health and safety plans that considered staff welfare, whilst remote working, as well as their safe return to work were given as examples that could be built upon.

Another area of common concern related to the need to protect essential services and to ensure that they reached the needs of different parts of the community, especially those made most vulnerable such as younger and older age groups, and those with pre-existing health conditions for example. Unsurprisingly, a key focus was placed on the vital role of health and social care to effectively support the sick and manage the public health measures to protect public safety. But there was an emphasis on wider social concerns too, such as housing and general public wellbeing and the vital role of broader community and voluntary services in meeting these broader community needs. People cited examples of existing initiatives such as One You that had the potential to be further developed to create a wider range of community outreach activities through networks and hubs.

Stakeholders felt that Covid-19 effectively demonstrated the potential of providing services remotely using digitally-enabled tools to reach more distant parts of the community, and that once social distancing measures were relaxed these could be

complemented with community-based meeting points and facilities providing on-line access as well as face to face services.

In the context of broad economic uncertainty, stakeholders also raised the important role of education and employment services, in addition, to business support. It was recognised that it was now more important than ever that individuals and businesses alike could access a range of support and advice to ensure they could take the best course of action moving forward, whether that was: accessing job retention schemes; pursuing upskilling, training, and re-skilling activities; securing advice about the best future employment or business opportunities; and accessing finance to support future development activities.

There was a lot of support for driving further action towards a more sustainable economy, capturing aspects of reducing carbon emissions as well as protecting the natural environment. Covid was felt to have provided a trigger to substantial changes in behaviour and encouraged more sustainable and healthy living, which people were keen to preserve over the long term

In setting out key actions and agreeing priorities for investment, stakeholders also emphasised the importance of “geography”, and moving beyond the usual priority areas such as the Ashford and Tenterden town centres. That means ensuring a sufficiently balanced approach which is appropriately targeted, and reaches out to the different needs of all parts of the community across the Borough, including rural areas.

These discussions, along with our experience of undertaking work of this nature elsewhere, have provided the basis to articulate a series of actions that could support the Borough in achieving the aspirations it has set out for the future.

The Ambition itself covers a comprehensive and diverse set of priorities which aim to ensure a more prosperous, inclusive and sustainable future for the Borough; and as such we identify a broad range of potential actions, structured around five strategic themes:

- Economy
- Work and skills
- Communities
- Environment
- Visitor economy

We do not aim to be overly prescriptive. Rather, these high-level actions are designed to support Ashford Borough Council as it develops the new Corporate Plan (2020-2025), the Economic Development

Strategy, and the Local Plan to 2030.

We have looked back at previous practical interventions and actions implemented in the area to gain a sense of what success has already been achieved and what further needs to be done, looking forward.

In developing actions we have reflected on the policy levers the Council has in its policy toolkit and the partners it needs to work with as a two-tier local authority, from Kent County Council and its intermediaries, to local residents and businesses.

These actions should not be viewed in isolation, but rather should inform an integrated strategic framework comprised of local strategies and policies, connecting with wider programmes at the county and regional level.

Economy

With the opening of HS1, the Borough has seen dramatic improvements in journey times and enhanced connections to the capital and international markets. This, when combined with relatively lower housing costs and a good lifestyle with access to AONB, has undoubtedly enhanced the collective opportunities of the Borough as an excellent place to be located. Over the last few years the Council has advanced a number of measures to exploit this potential.

Ashford's economic strategy has established several local economic development initiatives targeted at encouraging regeneration and business growth in the area to exploit the convenience of transport links and lower commercial property costs compared to central London.

One such example "Ashford for" has made an important contribution, promoting the area and incentivising inward investment. 'Ashford for' includes an inward investment campaign run by the Council, which has helped to finance a range of recent development projects in the area through a blend of private and public finance.

Another initiative, "Made in Ashford" has worked to incentivise innovation and enhance the development of, and investment in, social enterprises and businesses in the local area. More specifically, Made in Ashford is a collaborative community interest company, comprised of local designers, makers and crafts people. Starting as a pilot project as part of the Portas initiative, and selling its own products in a town centre store, it has already had to find bigger premises and is currently set on a growth trajectory.

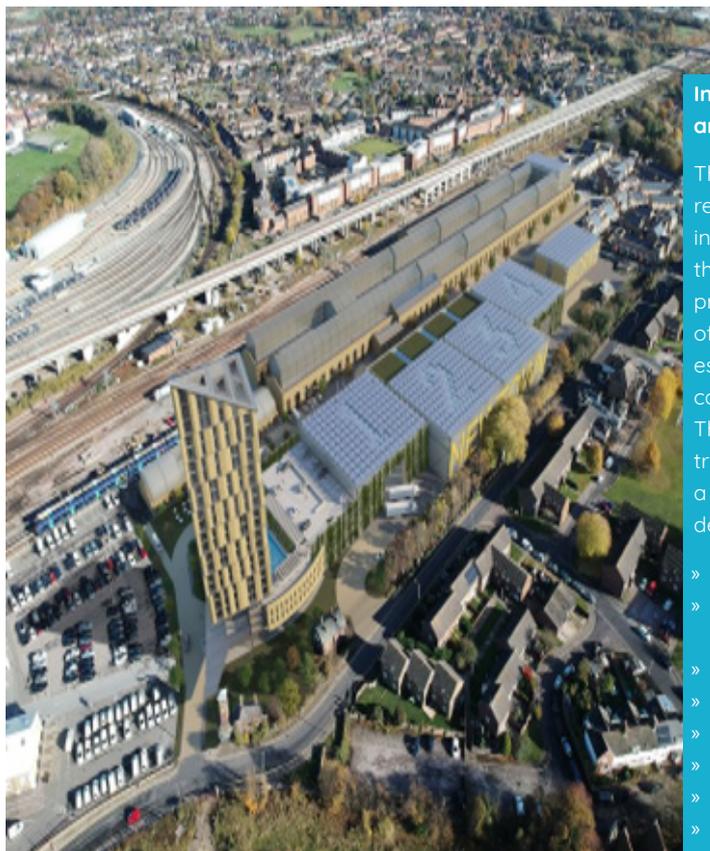
Ashford Borough Council has embarked on and now completed a significant range of new developments in the area – the Big 8 projects. This has successfully attracted more inward investment. New commercial and investment companies have included U+, GRE Assets, McArthurGlen and Stanhope. Given this recent success there is room for the Borough to learn from and extend on this experience as it moves to update its strategies and Local Plan.

But the shape of future investments and developments are also important to long term economic resilience and creating a climate for sustainable and socially responsible, as well as economic, growth. A key concern for the economic strategy must also be seeking to encourage economic diversification to support the right kind of industrial restructuring to attract new sectors, as well as strengthening existing ones and in turn creating more long term, quality employment in the area.

The Curious Brewery is one example of this, with the company having selected Ashford as its central hub for domestic and international distribution, and expanding links the business already has within vineyards in the rural economy of the Borough. Investments in and around the town centre are also seeking to enhance the retail offer and integrate leisure and high-end services.

The long term prize for the Borough would, however, be to attract more high value, high skilled businesses. This is of key concern to stimulating a more balanced, productive and knowledge-based economy.

One such example on which the Borough could build is at the Newtown Works site.



Investment in Newtown Works to establish a growing creative and digital sector

This project aims to put Ashford at the forefront of the digital revolution, by offering state-of-the-art film and TV production space in the heart of Kent. It presents an ideal location for key players in the online streaming, film and TV industries. Although Kent has a presence in the industry with Maidstone Studios, the combination of a forward-thinking developer, a specialist player in film real estate and a site like Newtown Works means that Ashford and Kent can maximise the proximity to London to curate a new industry. The opportunity, in terms of profile and job creation makes this a true game changer for the Borough, especially as it repurposes a long redundant site. Newtown Works is a proposed mixed-use development, consisting of:

- » 80,000 sq. ft. of TV and film studios
- » 27,000 sq. ft. Media Village, which will include commercial space for SMEs and freelancers
- » A conference and events centre
- » A 120-bedroom hotel
- » A multi-storey car park
- » 62 service apartments
- » On-site restaurant
- » 90,000 sq. ft. of converted accommodation in the former engine shed, including B1 workspace, retail space, a gym and D1 accommodation.

Future Actions

Whilst HS1 has clearly benefitted Ashford by already stimulating significant regeneration and inward investment, it has not ignited the levels of growth perhaps envisaged.

Transport congestion is still an issue in the area and while on the one hand Ashford has avoided becoming a 'commuter town', on the other it could potentially go further in attracting residents, particularly high skill, high wage professionals to the area.

Further, whilst the Borough is considering ways to attract more knowledge-based industry to the local economy, such as in the creative industries, the dominant sector mix is currently still biased to less productive, less skilled and less export-oriented sectors.

Future of work challenges, affecting the dynamics of retail, future consumer behaviour and online growth, raise growing concerns for parts of the retail, leisure and service based economy. Already this is affecting footfall and business vacancy rates in the town centre.

These developments were evident even before we consider the impact of Brexit and the current Covid pandemic, which raises a whole host of significant challenges ahead. For instance, many of service-based sectors, such as in retail and hospitality, have

been the hardest hit by the public health measures from Covid-19 such as lockdown and social distancing, and longer term changes in customer behaviour don't suggest a quick recovery.

Alongside the interventions outlined as part of the Economic Recovery Plan, we outline potential actions (overleaf) which could help stimulate a positive way forward, during and beyond this period of economic turbulence. A particular focus is placed on a series of distinct actions for the Borough.

Clearly, these actions are cross cutting and will need to combine with others articulated elsewhere in this chapter. Further, given the wider context, an increasing importance is also placed on partnerships across the region, and nationally to pool expertise and resources in such difficult circumstances.



Economic Development Strategy

Ashford Borough Council's renewal of its Economic Development Strategy will clearly play a central role, outlining where the Council will both work collaboratively with KCC and its partners (such as SELEP), but also act distinctly to add unique value in the Borough. This will be vital to secure a strategic systemic view of future demands and where to target resources effectively to support business productivity improvements and enhance skills development and use amongst the local community.

Sitting alongside the Economic Recovery Plan, the new EDS can serve to address medium-term priorities in a post-Brexit and post-Covid world, connecting with wider strategy documents for the area such as the 2050 Kent and Medway Enterprise and Productivity Strategy and SELEP Local Industrial Strategy, as well as national strategies such as the Industrial Strategy and forthcoming Devolution White paper. In developing the new EDS, there will be further scope in turn to update the District Deal to establish how such partnerships can achieve long term ambitions.



Digital Infrastructure Programme

A key theme emerging from the consultations, was the vital role of digital infrastructure in supporting businesses and modern ways of working. In recognition of this, Ashford Borough Council might consider reviewing its digital infrastructure and set out a costed programme with key partners that seeks to improve connectivity where necessary in areas with no or slow broadband, such as remote and rural locations.

This would ensure the Borough is well-placed to meet the growing needs of businesses in the area and residents, responding to the demands for digitally-enabled services too, such as lifelong learning and growth in home working.



Make the investment case for high growth sectors

A critical priority for Ashford identified through the research and engagement process is the need to build the most compelling case for high growth sectors, and to identify and work with industry partners to enhance the proposition to businesses operating in these parts of the economy.

In the context of having a dedicated economic development strategy for the Borough and with that a clear strategic articulation of local economic needs, Ashford will be well-placed to work with KCC and wider partners to develop a collective lobbying position for devolution to maximise funding from the UK Shared Prosperity Fund to support local priorities.

Ashford could also work with Inward Investment Services to ensure the right employers are attracted into the area to drive more high value activities and growth in the local economy.





Work and skills

A core part of Ashford's economic strategy over the last decade or so has considered ways to raise business productivity, regenerate the local economy, and support the development of new employment opportunities across the Borough, as well as safeguarding existing employment sites. This has been a conscious response to developments around the future of work and local economic restructuring, driven by megatrends such as changes in technology, consumer habits and ways of working. As the local population and economy has grown over this period, despite the economic downturn in 2008, a number of initiatives have been identified as being important drivers to local economic success and social prosperity. This has included key infrastructure projects (the Big 8) as well as targeted economic development initiatives.

The success of the economy has demanded investment in the transport network to enhance accessibility, and facilitate the "travel to work". The improvement of key road infrastructure such as junctions 9 and 10 on the M20 and the introduction of better international and domestic services rail service through HS1 since 2009, have transformed Ashford's connectivity.

As a major site for employment, plans to transform Ashford's Town Centre and the surrounding area have been vital. With changes in consumer habits, and moves to on-line shopping, the shape of the retail sector locally and use of real estate has changed dramatically, with some well known brands retrenching (such as Marks and Spencer and Debenhams). This has required a proactive strategy to encourage economic redevelopment, and re-purposing of the site. This has included investment in a new Commercial Quarter (Connect 38), with a large scale, contemporary office space, within close proximity to the new international station, and HS1, as well as a new college campus. It also incorporates a new town centre cinema and leisure complex at Elwick Place. This has already attracted new businesses to the area with, in addition to the cinema: the Ashford International Model Railway Exhibition Centre; a 58-bedroom Travelodge; a range of food and drink specialists including Macknade, and the UK's first Dansaki Afro-Caribbean restaurant; and a Snap Fitness gym and fitness club.

The town centre site has been complemented by further developments within the vicinity including Victoria Way, Victoria Point and the Designer Outlet Village.

These have sought to strengthen the services offer in the area, with enhanced leisure, food and drink and retail facilities. For instance, the Designer Outlet Village has successfully been redeveloped and expanded following a £90m investment by

McArthurGlen. This has created 500 jobs, with 50 new stores and restaurants, that complement the retail offer already in Ashford's town centre. Construction at Victoria Point, involves a 120 bed hotel, 216 apartments and three retail units. This follows the opening of a new Aldi superstore in autumn 2018. Furthermore, the development at Victoria Way includes a newly-opened craft brewery and visitor centre (Curious Brewery), building links to the developing vineyards locally.

To enhance the business offer further, it has been important to consider the nature and availability of workspace. As such, additional commercial accommodation is also being provided at Eureka Park close to J9 of the M20. The intention of this project is to meet growing demand in the area for high-quality office space. But, this aims to enhance and widen its appeal through a location that is in a more landscaped setting and closer to strong transport links such as the M20 Kent corridor.

At the same time, the Council has worked with local partners across the county to provide local businesses with a range of tailored business support. Much of this is free, to enhance management practices and performance through 1 to 1 coaching, networking and sharing good practice. There is currently provision, offered from Kent County Council, backed by European funding, and delivered with partners such as Locate in Kent; the Chamber of Commerce which has branches in Ashford (Kent Invicta) and Tenterden; Kent and Medway Growth Hub; and Ashford Borough Council itself running the Scale up Initiative with Kent Invicta. The services are broad, encouraging practical improvements in skills, international trade and leadership and management. With persistent productivity problems, and polarisation in jobs in the labour market, there is a need to drive more responsible business leadership, and improvements in working practices that create "good work" across the career pipeline, and in turn more sustainable businesses. Employment services must support such developments.

The Council has been working with KCC to enhance its network of schools and education and skills providers. In particular, in a future world calling for more lifelong learning, this has required a focus on its post secondary provision to tackle low levels of qualifications amongst the working age population. Another of the Big 8 Projects has involved investment in its local FE college, Ashford College. This investment has aimed to enhance the range of industry-led programmes including apprenticeships, work placements and experience opportunities and to introduce more modern forms of learning that respond to employers needs.

Future Actions

Whilst past actions have clearly been important in supporting economic development, it is also recognised that there is still more to do given the prevailing economic concerns locally. Deep-rooted performance weaknesses in the area risk being exaggerated further in a post Covid-19 climate, and future opportunities need to be more fully exploited. For instance, the low level of productivity and dominance of low skilled, low export-oriented businesses historically, and a community with a significant proportion of people who are low qualified, has limited the extent of responsible leadership and high performance working, which can create greater employment prospects through people and good work.

A number of core actions have been identified that could help to set out a direction of travel moving forward. This is not intended to be exhaustive but to initiate the next phase of work, in preparation for updates to the new corporate strategy and local plan. It seeks to build on opportunities for partnership working, exploring ways in which existing partnership agreements, such as the District Deal, could be enhanced, as well as allowing room for distinct innovations for the Borough.



All Age Skills Strategy

Given concerns around the skills of the local population and workforce, Ashford Borough Council should consider developing its own All Age Skills Strategy that articulates specific local education and training priorities from schools through to adult skills training.

Whilst this would be cross-cutting, including improving the skills of young people and adults, a key priority would be to support the skills demands of the existing workforce and unemployed across the Borough. This is an area of significant demand, especially in a post-Covid world, where more people may be required to upskill, reskill and retrain to secure work in future.

A particular focus would also be to champion lifelong learning for all ages and abilities, including for hard to reach groups through industry-led and owned solutions such as apprenticeships. Work-based programmes aligned with employment services would help to tackle lower skill levels locally and enable people to retain work. In developing such a strategy, ABC could consider co-creating programmes and skills innovations with industry players to develop solutions that meet future employment requirements that can be tested and trialled in the area.



The Ashford Business support offer

In light of dramatic changes in the operating environment for businesses, it is an important moment for the Council to undertake a local business review to better understand the needs and aspirations of the business community and to develop a strategic Ashford Business Offer that builds strong and lasting business networks and partnerships through local sectors and supply chains.

This would clearly need to continue to be delivered collaboratively around shared business services with Kent County Council, the local Chambers of Commerce, Locate in Kent, and the Kent and Medway Growth Hub but also support distinct aspects for Ashford, building on the success of existing initiatives such as the Scale Up programme. A local Industry Forum for the Borough could help to steer the review and the development of the local medium term offer, ensuring that local business services are co-designed by local businesses and confront the challenges they



Responsible growth programme

The review of the local business support offer could also support the development of new high growth business programme for the Borough. Such a programme could be industry-led and supported by co-creation and co-investment where industry leaders in the different sectors could help to tailor support packages around distinct needs and local services such as skills, employment and business services.

This could include a focus on key foundational sectors to support upskilling, reskilling and productivity improvement. As a key anchor institution, the Council has scope to explore how it can effectively deploy multi-institutional anchor programmes to support more responsible growth. This could fully exploit all tools in the local authority policy toolkit including procurement and financial incentive schemes. The terms of this could be agreed and set down within a new Good Work Charter for the Ashford Borough.



Communities

With ongoing population growth in the area, and increasing diversity within the population, including a greater ageing community, Ashford has had to ensure it adapts its policies and supporting infrastructure and services appropriately to meet this growing demand. A key goal has been to support ongoing community cohesion and well-being. Key to the most recent Corporate Plan has been the delivery of the “Big 8 Projects”, as well as co-ordinating the effective delivery of a range of services. These have covered economic development, housing, strategic planning, the environment, property and asset management, highways, transport, culture, town centre management, and health and wellbeing. Several recent initiatives are deemed to have already been offering benefits.

A number of modern housing developments aim to combine high-quality properties, in scenic settings, with healthy living and easy access to first-rate recreational and leisure activities, as well as new local services. One such example is Chilmington Green. This has been modelled on garden city principles, with over half of the site comprising open spaces including Discovery Park, with sports pitches, play spaces, picnic areas, wildflower meadows and woodland walks. It will also enhance local services with four new primary schools, one secondary school, retail and commercial space. Whilst this is a long term development running up to 2030, with around 5,750 homes expected to be built over this time, the first phase of development is complete. Another development is Conningbrook Park, which has the ability to house around 2,100 residents in an estimated 750 properties. This too will exist alongside a family country park and a watersports activity centre.

Several projects support regeneration through a range of mixed use developments. These seek to not only deliver quality homes but a wider range of cultural and performance space, food and drink outlets and workspace, to complement the market town’s history and heritage. The Vicarage Lane and Victoria Park projects are recent examples.

The revitalised town centre masterplan, and surrounding area, is also an integral part of the reinvigorated community strategy, with developments such as Elwick Place, Vicarage Road, Victoria Way and the Designer Outlet village, not only providing high quality retail, restaurants and leisure facilities but creating attractive places to meet and socialise, thus also contributing to a stronger sense of community. Developments to the town centre environment, to encourage more footfall and social gathering, have then also been conducive to supporting national community initiatives such as “One You”. This is run

by Public Health England. Ashford Borough Council, working with Kent County Council, Public Health and Kent Community Health Foundation Trust (KCHFT), and has sought to extend access and reach to a range of health and well-being services. It is the first One You shop that has opened within the UK and therefore presents an important trailblazer for delivering other potential services.

A core intention has also been to help provide more high quality accommodation in the area, and particularly to enhance the availability of affordable housing to support vulnerable people and to reduce homelessness thus confronting the index of multiple deprivation scores. A range of positive schemes have also been cited, including the re-opening of the Danemore sheltered housing scheme in Tenterden. This provides more affordable homes for rent for older people, together with four chalet-bungalows to be sold on the open market. Two projects have also been run to help the homeless in the area providing temporary accommodation whilst they get back on their feet.

Ashford Borough Council has also been working with partners to enhance its education and skills offer locally. Whilst it has nearly fifty ‘good’ and ‘outstanding’ primary and secondary schools, including two independent schools and two Grammar schools, it has also significantly invested in its local FE college, Ashford College. The new campus opened in 2017 and aims to offer a brand-new, state-of-the-art campus in the town centre, and broader range of undergraduate courses and apprenticeships in the area, full-time or part-time, working closely with industry. These include options in the arts, manufacturing, construction, technology and parts of the service sector such as catering, and health and beauty which are important sectors locally. More modern teaching facilities include a multi-media learning resource centre, live music production, photography and fine arts studios, teaching kitchens and a hair and beauty salon.

The Borough has also developed a comprehensive annual programme of local events, held around sites of heritage, history and natural beauty to mark and celebrate cultural activities, holidays, festivals, and religious occasions throughout the year. These have been important to strengthen the Borough’s sense of local identity and to unite residents across the community. Not only is this building the popularity and reputation around long running and established events, such as the annual Create Music Festival, which last year was in its 24th year, and the Tenterden Folk Festival, but it is also providing a platform to continually innovate and develop new events and activities. For instance, last year Ashford’s Town Centre hosted the first Great British Bark Off in partnership with Loveashford and Emergency Exit Arts. Other successful events have included the Carnival of the

Baubles and Snow Dogs. As activities build around events, it extends the opportunities to access local street food and refreshments, and provide a range of entertainment, interactive theatre and children's rides.

Future Actions

Such developments are clearly starting to provide some important benefits to the local area. But given some of the local social challenges, there is more to do.

From the earlier analysis we see a mixed performance for Ashford as a caring and supportive place to live. For instance, the Borough ranks exactly halfway on average deprivation scores across all local authorities. It scores better on living environment, income, jobs and health indicators but less well on crime, access to housing and education, skills and training. In addition, given the dominance of the rural economy in the Borough, Ashford's future action plan needs to pay particular attention to understanding and supporting its distinct rural activities.



Develop a prioritised community action plan

Ashford Borough Council's update to the Local Plan will play a vital role in ensuring services are targeted to residents where they are needed most and support ongoing community cohesion and well-being in relation to economic development, housing, strategic planning, the environment, property and asset management, highways, transport, culture, town centre management and health and wellbeing.

Alongside this, there is scope to develop a clear community and social action plan which ensures that neighbourhoods are mixed and balanced, and provide high quality places to live and work. With ongoing population growth and increasing diversity, including a greater ageing community, there will be a need to adapt policies and supporting infrastructure and services to meet this changing demand.

In particular the evidence suggests there is scope to strengthen Ashford's performance in areas such as crime and safety, housing, and the degree of more responsible business driving good work and skills. Further, the Council could explore the scope to create 'community hubs' where cross-cutting services are co-located in accessible locations, driving innovation in delivery through volunteer networks and digitally enabled services.



Ashford's Homes for all initiative

As Ashford Borough Council updates its local plan, this is a clear opportunity to review housing provision and develop an initiative which seeks to enhance the affordable housing offer. A core intention of Ashford's Housing Strategy has been to provide sufficient high quality accommodation in the area to meet the demands of its growing local population, and particularly to enhance the availability of affordable housing to support vulnerable people. Whilst current commitments have been based on forecasts of infrastructure provision, level of services available, area suitability, and environmental concerns it will be important to keep these under review, especially given the current changes in the external climate. This should build on the experience of 'what works' from previous schemes in this area.



Ashford's civil society Programme

Given the current context, the Council could take this opportunity to develop a Civil Society Programme to build a more connected community at this time of social crisis and strengthen the identity of 'place'.

This would draw attention to the vibrant and diverse Voluntary, Community and Social Enterprise Sector that operates locally and promote a programme of voluntary services aligned to the Local Action Plan. It could make full use of libraries and local community facilities to create the right environment for strong, cohesive and resilient communities to thrive and help each other, driven by a strong sense of social responsibility.



Environment

Ashford Borough Council has taken an assertive approach to the environment, setting out a range of measures to reduce carbon emissions and protect the environment. More recently to reinvigorate its efforts, the Council has chosen to lead the way by example, and reduce its carbon footprint. The core purpose of this has been to encourage businesses and residents locally to follow their lead and contribute to the Borough's carbon neutrality. By reducing its carbon emissions, the Council intends to achieve cost-savings, productivity increases, and efficiency improvements. The Council estimates that by changing its role in planning, housing, and transport, for instance, as well as the purchasing of goods and services, it could indirectly influence up to 41% of the Borough's emissions (ABC 2020). Whilst this is clearly early days, steps are being taken to change ways of working and put in place the cultural ethos to support this environmental change programme.

More widely, various additional measures have already been taken to reduce the Borough's and Council's emissions, to protect biodiversity and the natural environment, and to build sustainability across all sectors.

By investing in renewable energy, the Council aims to decarbonise the local grid and switch to green energy providers. At the end of 2017, there were 2,070 installation sites producing renewable electricity, 99.7% of these were photovoltaic specific. In 2019, 2,044 domestic Photovoltaics have been installed in Ashford with a total of 2,155 domestic and non-domestic photovoltaic. Ashford also has two domestic and two non-domestic wind installations. But renewable energy projects are costly and connection to the grid, grid capacity issues, and resident opposition are factors that need to be considered.

Ashford's approach to ensuring an effective and sustainable transport network is a key objective of its Environmental Plan. Whilst the Council recognises that private cars are, and will remain in the short term, the preferred method of transport, the Borough's approach also needs to keep abreast of future developments such as growing environmental concerns, and keep alternative modes of transport under-review. Clearly, interventions to encourage more public transport, especially where that uses Ultra-Low Emission Vehicles (ULEVs), and to promote a healthy lifestyle through cycling and walking will be more beneficial in future. The Council has therefore been investing in active travel infrastructure, by enhancing its cycling and walking routes, and ULEVs to reduce carbon emissions where it can exercise some form of control as a two-tier local authority.

This acknowledges that transportation accounts for the second largest carbon footprint in the area. Over the last decade Ashford had taken action to reduce the dominance of cars and vehicles in its town centre, introduced shared space and by 2019 288 ULEVs had been registered.

The Borough has already focused significant attention on recycling in the area, given the awareness that a significant source of carbon emission is created from solid waste disposal. From 2010/11 until 2017/18 Ashford has found that 42.6% more household waste is being sent for reuse, recycling or composting. Ashford's residual household waste has also fallen over this time from 699kg to 327.2kg per household. This progress in recycling has been recognised and valued across the community. But reducing high levels of waste production remains a priority, and would also help to deal with increasing incidences of illegal fly tipping.

The Council has already taken action to collaborate with partners to protect and enhance biodiversity across the Borough, to maintain the quality of its rural landscape in the Garden of England. Indeed its Big 8 Projects included developments on repurposed brownfield sites, two new strategic parks at Ashford and the promotion of sporting and recreational hubs in accessible locations. New building projects have been rewarded for their green environmental principles such as Chilmington Green. Not only are these new developments aiming to preserve green spaces and woodland, but to create landscaped parklands with sustainable drainage systems that aim to align modern drainage systems with natural water processes thus supporting local biodiversity.

Ashford Borough Council has already been working to promote and encourage a green low-carbon economy, attracting low carbon businesses to Ashford and innovators in sustainable development. Consequently, between 2005 and 2017 there has been a 38% decrease in carbon emissions within Ashford's industrial and commercial sector. The Council has also offered around £452,025 in grants to support local businesses to adopt energy efficiency measures, innovate, improve their heating and lighting, and for the purchase of ULEVs.

Future Actions

The Council has set out very ambitious goals for 2030 and is progressing a series of environmental and green interventions.

Yet, while CO₂ emissions per capita are lower for Ashford compared with Kent and the UK and are on a declining trend, the pace is slower compared to benchmarks. This calls for stronger action moving forward. Whilst transport is the biggest source of emissions rather than industrial or commercial

activity, with growing congestion and a reliance on car ownership locally, there are clearly benefits to taking a more holistic and wide-reaching approach in future.

We identify a number of potential actions that could enhance the Borough's approach, as it seeks to demonstrate leadership on this vital agenda.



Ashford's carbon neutral strategy

Ashford Borough Council is developing a dedicated carbon neutral strategy for the Borough to demonstrate where it can lead by example within the County to meet its ambitious carbon neutral targets, and where the Council will need to act collaboratively with KCC, and its partners through Kent's Environment Strategy in areas such as waste management.

The strategy needs to set out a clear action plan with specified goals over the short, medium and long term. Actions should be proportionate to resources and take stock of: the nature of environmental priorities; current practices to manage the environment locally; and the knowledge and engagement of the current community.

Actions will also need to be multi-dimensional adopting measures not only to reduce the Borough's carbon emissions but also to protect biodiversity and the natural environment.



Ashford's Environmental Innovation Fund

Ashford could also develop a dedicated Environmental Innovation Fund to incentivise innovation locally amongst the community to advance the sharing of good "green" practices.

There is a huge economic as well as environmental opportunity in advancing a green low-carbon economy. As Ashford Borough Council seeks to take a lead and is working with innovators in sustainable development, this provides the basis to develop a virtuous cycle of environmental best practice and innovation in the area.

This would need to encourage further research and development in this field to inspire, share and promote more good carbon neutral and environmentally friendly practices, which then attracts more innovators to the area and extends reach and impact.



Grants to scale carbon neutral schemes

The Council could also develop a proposal, with regional partners, in the context of Government backing clean growth as one of four grand challenges in the Industrial Strategy, to leverage additional national grant funding for the region and its 12 district and borough councils.

This could be deployed to accelerate the take up and use of low carbon technologies, systems and services locally. The Borough has significant ambitions to advance the take up of renewable energy in homes and businesses across the area and improve energy efficiency, especially in existing buildings. This would build on current programmes and learning.

The lack of national levers means the Council can only use softer, small scale interventions that nudge and influence residents, businesses and developers to modify their behaviours and practices. Grant funding could enable existing interventions that have been tested, and work, to be extended to accelerate their reach and impact.



Visitor Economy

Ashford guides its approach to tourism through its tourism and heritage strategies, and key services have been provided through Ashford's Tourism Service, working in partnership with local bodies such as Visit Kent, Tourism South East, and the Ashford & Tenterden Tourism Association - a membership body that exists to raise the profile of tourism in the Ashford Borough. The strategies recognise the value of tourism and the visitor economy to broader economic growth in the area and the Council has sought to pursue activities to optimise its contribution. The tourism review in 2013/14 revealed that the Ashford Borough performed well in terms of visitor numbers, spend and tourism related employment. A number of actions have been important to Ashford's current approach, building on its connectivity, growing international status, and reputation as a desirable place to visit as well as live.

Local development projects, especially in the town centre, have strengthened visitor facilities. Ashford's 'Big 8' Projects by strengthening the local area were also felt to have contributed to a successful visitor economy too, by enhancing cultural activities, and the service economy which has developed the food and drink, hotels and retail offer, and the evening economy. For example a range of developments around the town centre, and surrounding area have greatly enhanced "the visitor offer" including: the International Station; a new town centre cinema with a hotel, retail and restaurant outlets; a complementary commercial development in the Commercial Quarter; the opening of the Curious Brewery and hotels in close proximity; expansion of the Designer Outlet; and the creation of the Jasmin Vardimon International Dance Academy.

The creation of an Ashford Heritage Strategy (AHS) in 2017 to draw attention to and sustainably develop Ashford's existing and distinctive heritage was also vital. This was created to understand and recognise the nature and wealth of historic assets in the Borough and better look after them, and to develop a positive strategy of conservation - with 42 scheduled monuments, 43 Conservation Areas, 6 Registered Parks and Gardens.

The Council has pursued activities to protect and enhance heritage sites, and sustainably manage and develop them whilst increasing their visibility and enjoyment for visitors to the Borough. As a result, a range of heritage projects have been developed. For example, steps have been taken to ensure the railway heritage of the area is valued through support for a new Ashford International Model Railway Education Centre (AIMREC) which is currently being piloted at Elwick Place and the promotion of the Kent and East

Sussex Railway. This has its main station and a small museum outlining its history in Tenterden and offers a route through the surrounding AONB. In addition, the Council developed a town centre heritage trail in 2016 to recognise the historical assets of the area.

There have been wider developments to promote Ashford's distinct visitor attractions and strengthen the offer, including drawing attention to the areas vineyards (eg Chapel Down Winery, Biddenden Vineyards, Gusbourne Vineyard, Hush Heath Estate and Woodchurch Wines) through a wine trail brochure focusing on Tenterden, known itself as the 'Jewel of the Weald' with a host of specialist shops, pubs and restaurants and the surrounding area. Investment by Taittinger in the area in 2015 to create the first English sparkling wine by 2023, substantially enhances the local offer.

There have also been significant efforts to promote a more integrated digital, online and social media offer through the new 'Experience Ashford & Tenterden' branding proposition. Visitors to the area have welcomed the launch of key websites such as www.visitashfordandtenterden.co.uk and wider tourist brands such as www.loveashford.com. These have provided information about existing and developing attractions in a more co-ordinated and accessible way, being more easily viewed on a range of devices such as phones, tablets and pcs. In addition, the fact that these have been developed in partnership with bodies such as Visit Kent has helped to deploy resources and marketing more effectively.



Future Actions

Ashford's strategic approach to developing the distinctness of its offer to tourists, and its visitor attractions has clearly paid some dividends already to the local area. The tourism review in 2013/14 revealed that the Borough performed well in terms of visitor numbers, spend and this had boosted tourism related employment. Whilst more tourists visit on day trips than staying over, those that do stay tend to stay for longer. Visitors have valued the development of better more integrated information, made more readily available and accessible digitally, on-line and through social media so that trips can be more effectively planned. Past performance has suggested that tourism could be a considerable growth area. That said, in a future climate of significant change and uncertainty, even before the current Brexit transitions and Covid-19 crisis, there is clearly a need to take stock, if not to enhance this position to at least maintain it.

Having reviewed the evidence affecting tourism in the area and consulted with stakeholders, several actions have been outlined to guide the way ahead, which complement actions in other areas, thus working together to provide a sum greater than its parts.



Refresh the Celebrate & Experience Ashford Programme

The Council, having a refreshed perspective of the Borough-wide programme of visitor attractions, independent projects and events, could at the same time create a refreshed programme of activities to actively celebrate and promote what the area has to offer throughout the year, drawing on local projects and talent of all ages.

This could mark cultural activities, holidays, festivals, and religious occasions in innovative ways and could provide opportunities to actively experience, celebrate and promote what the area has to offer. The publicity and events programme could develop throughout the year as it becomes more well-known and more people volunteer to become involved.

This programme would also be important to strengthen the Borough's sense of local identity and sense of place; uniting residents across the community as well as to appeal to visitors.



Update the 2013/14 Tourism Review

Ashford Borough Council last reviewed its approach to tourism in 2013/14. Its heritage strategy was updated in 2017. Given the recent economic turbulence, and changes in visitor behaviour, which will have a significant impact on the local tourism businesses and organisations, it is timely for the Council to update the tourism review.

This will enable the Borough to take stock of the recent economic and social impacts especially from Brexit and the Coronavirus on residents and likely visitors' future intentions and to develop its tourism strategy accordingly. The travel industry in particular has been very hard hit, and even after social distancing measures are relaxed it is unlikely that people will travel to the extent that they have over the last decade or so.

The review will need to establish how the Council can best support and develop the sector and its key partners, moving forward and refresh the visitor offer in such a climate and to maximise the potential for a distinctive local 'experience' - already key - to become even more significant post-Covid.



Ashford town centre commission

Through the master planning process currently underway, Ashford Borough Council has the potential to lead the way, working with partners, to trail blaze the development of a new 21st town centre, which is connected to its surrounding environment, developing a compelling vision and vibrant experience.

In the context that KCC is establishing a Kent High Street Commission to progress action and attract funding to transform the look and feel of Kent's town centres and high streets, this provides an opportunity to take a lead.

The project could incentivise local initiatives and action, building on the current strengths of the area and existing attractions, such as Made in Ashford, Revelations, AIMREC and the aspirations of the Ashford Borough Museum to develop a new museum for the town. It could encourage independent social enterprises, shops and businesses as well as events and cultural activities to improve the variety and offer in Ashford Town Centre, from the arts to home-grown crafts and produce.



6. Measuring what matters

Key indicators to assess progress towards the Ambition



6.1 Introduction

There is a growing global debate about the usefulness of Gross Domestic Product (GDP) and Gross Value Added (GVA) as measures of economic prosperity. Some question whether they adequately capture what is important to real people; while others challenge their failure to consider who benefits from growth.

While growth of the local economy is of course an important vehicle for improved living standards, it is not in itself enough. One of the most substantive findings from this research is the desire amongst local residents for a focus on more inclusive growth, shared prosperity, health, happiness and wellbeing. If these are the outcomes most important to local residents, it is vital to build a framework that assesses progress towards these ends: to start measuring what matters most.

6.2 Developing a framework for measuring what matters

Throughout this document we have sought to draw on a range of wider measures - both when assessing the assets and challenges facing Ashford today, and the aspirations and outcomes local stakeholders want to achieve in the future.

Figure 6.1 below brings together these measures, and others, to establish a framework that will enable Ashford Borough Council and wider stakeholders to measure what matters - structured around the strategic themes vital to achieving the Ashford Ambition.

The criteria used to select measures includes:

- **Local** - indicators need to be available at a local authority district level, to enable us to establish the local picture alongside wider county, regional and national benchmarks
- **Publically available** - we have sought measures drawn from official sources and surveys, administered by ONS, Government departments and arms-length bodies (e.g. the Electoral Commission, Valuation Office Agency). It should be noted that there is scope to enhance these measures through local business and resident surveys; as well as proprietary datasets which have the potential to offer additional insight (e.g. on high growth businesses, export orientation etc)
- **Measured regularly** - while the Ashford Ambition is long-term in focus, regular assessment of progress towards these outcomes will be vital. As such, we have sought wherever possible to identify indicators that

are updated on at least an annual basis

- **robust** - finally, given many of these measures are survey-based we have excluded indicators from surveys where we expect the sample size at an LAD-level to be insufficient to support robust and credible analysis. The picture of data availability does however change regularly, and hence ABC should continue to review the availability of local indicators relevant to the Ambition and wider strategies.

6.3 Deploying this measurement framework

The priority actions identified in Chapter 5 are designed to support progress across this framework of measures. For some of these measures, this research has sought to include targets that the Ashford Borough might work towards, for example improving productivity, increasing average household disposable income or enhancing the skills of the workforce. We would recommend that ABC seeks to agree a set of targets for a selection of these indicators in dialogue with wider partners; ensuring at least one target per strategic theme.

As part of their regular reporting cycle, we also recommend that ABC looks to develop a regularly updated dashboard or 'KPI' framework, against which to track and review progress. This will allow local stakeholders to assess performance and identify areas where greater effort or investment is required in order to deliver desired outcomes.

Finally, in a climate where local resources are limited and funding is stretched, this framework could be used to inform prioritisation and appraise investment decisions, directing effort and spend to those areas that will deliver greatest returns in delivering the long-term Ambition for a prosperous, sustainable and inclusive future for the Ashford Borough in 2030 and beyond.





Figure 6.1 Measurement framework for assessing progress towards the Ashford Ambition

Theme	Indicator	Source	Frequency
Economy	Annual change in Gross Value Added (GVA)	ONS	Annually
	Sectoral diversity & specialisation index (LQ/ HHI)	ONS: Business Register & Employment Survey	Annually
	Jobs in knowledge-based services	ONS: Business Register & Employment Survey	Annually
	Jobs in creative & cultural industries	ONS: Business Register & Employment Survey	Annually
	Growth in agri-food industries	ONS: Business Register & Employment Survey	Annually
	Average speed on local A roads	DfT	Annually
	Broadband speeds & coverage	Think Broadband	Quarterly
Work & skills	GVA per FTE Worker / Hour Worked	ONS - Annual Survey of Hours & Earnings	Annually
	Annual change in total employment	ONS - Annual Population Survey	Annually
	Median Weekly or Annual Earnings (workplace & residence-based)	ONS - Annual Survey of Hours & Earnings	Annually
	Business formation, closures & survival rates	ONS - Business Demography	Annually
	Business stock, by size (turnover & employee bands)	ONS - Inter-departmental Business Register	Annually
	Qualifications profile (NVQ Levels, workplace & residence-based)	ONS - Annual Population Survey	Annually
	Apprenticeship starts	DfE - Individualised Learner Record	Annually
	Achievement rates in Further Education	DfE - Individualised Learner Record	Annually
	Participation in education and training in work	ONS - Annual Population Survey	Annually
Communities	Gross household income per capita	ONS	Annually
	ILO unemployment rate	ONS - Annual Population Survey	Annually
	Claimant count rate of unemployment	DWP	Monthly
	Young people Not in Education, Employment or Training	KCC	Annually
	Benefit claimants	DWP	Monthly
	School admissions (% offered places at preferred schools)	DfE	Annually
	School achievement at KS1,2, 3	DfE	Annually
	Participation in sports, arts and culture	DCMS - Taking Part	Annually
	Crime rates	ONS: Recorded crime data	Annually
	Indices of Multiple Deprivation (various measures)	MHCLG	4-yearly
	Housing starts & completions	MHCLG	Annually
	Housing affordability (prices & rents)	Land registry / VOA & ASHE	Annually
	Voter turnout	Electoral Commission	Annually
	Participation in voluntary work	DCMS - Taking Part	Annually
	Wellbeing score	ONS - Annual Population Survey	Annually
Visitor Economy	Volume of day visits & overnight stays	Visit Kent	Bi-Annually
	Value of day visits & overnight stays	Visit Kent	Bi-Annually
	Contribution of tourism (GVA)	ONS	Annually
	Jobs in tourism	ONS: Annual Population Survey	Annually
Environment	CO2 emissions (gross & net)	BEIS	Annually
	Waste recycled	DEFRA	Annually
	Energy consumption by type	BEIS	Annually
	IMD Air quality	MHCLG	4-yearly
	IMD Access to transport	MHCLG	4-yearly
	Bus usage	DfT	Annually