

At a Crossroads: Canterbury Futures Study

Canterbury City Council

October 2006

For and on behalf of Experian	
Approved by:	Tim Sydenham
Position:	Associate Director
Date:	6 th October 2006
Signed:	



At a Crossroads: Canterbury Futures Study

October 2006

Contents

Introduction	1
Background	1
Research to date	1
The structure of this report.....	1
1 Canterbury district: research and evidence	2
1.1 Introduction.....	2
1.2 Canterbury district – past and present.....	2
1.3 Global trends and drivers	6
1.4 Potential outcomes	7
1.4.1 Canterbury Experience	8
1.4.2 Knowledge Economy	9
1.4.3 Green Economy	11
1.4.4 Heritage and Thought	12
1.4.5 Open to Commuters.....	13
2 The Canterbury Futures Workshop: an overview	15
2.1 Introduction.....	15
2.2 Potential outcomes: desirability and achievability.....	15
2.2.1 The weighting and scoring exercise	16
2.2.2 The results	19
2.3 Potential outcomes: implications	21
2.3.1 The identification of spatial implications	21
2.3.2 The identification of social implications	22
2.3.3 Collective issues	23
3 Towards a vision for Canterbury district	24
3.1 Introduction.....	24
3.2 Desired outcomes.....	24
3.3 Challenges and implications.....	26
3.4 Indicators.....	28
3.5 Next steps	29

Annex A: Contextual Overview

Annex B: Trends and Drivers Workshop

Annex C: Scenarios Modelled

Annex D: Spatial Implications

Annex E: Background Information for the Canterbury Futures Workshop

Introduction

BACKGROUND

Experian Business Strategies, the Future Foundation and GVA Grimley were commissioned in April 2006 by Canterbury City Council to undertake a futures study for the district.

The aim of the study is to identify possible outcomes for the future of Canterbury over the next 20 years, by assessing global, national and local trends and influences. A preferred vision will be arrived at by the Council through consultation with district stakeholders, and will be used to help shape policy. In particular, it will be used to inform the district's Local Development Framework Core Strategy, the Sustainable Community Strategy and the Corporate Plan.

RESEARCH TO DATE

Our research to date has included:

- a review of background literature, research and strategic documentation on Canterbury district, East Kent and the South East of England;
- consultations with stakeholders covering Canterbury's past and present, issues relating to each of the six community themes and wider issues such as the Thames Gateway and Ashford growth;
- workshops and seminars with Council officers, members and district partners;
- analysis of the past and current Canterbury district context, using data and information on factors including the district's population/households, economy/business, education/health/wellbeing, community/deprivation, culture/heritage, transport and environment;
- assessment of global influences including the rising economic power of the East, tourism growth, climate change, economic/employment/education trends, counter-urbanisation/second homes, transport infrastructure/planning issues, ageing society, the experience economy, cultural capital, activism/localism and technology revolution/teleworking;
- the production of 20-year forecasts for the district's people and jobs;
- assessment of the implications of possible outcomes on housing, employment space (office, industry, retail), leisure facilities, schools and hospitals/surgeries;
- wider consultation with over 100 stakeholders at a Canterbury Futures Workshop held on 11th September 2006 to engage the district's wider stakeholder community in the process of identifying desirable outcomes for the future.

THE STRUCTURE OF THIS REPORT

Section 1 provides an overview of our research to date.

Section 2 provides a summary of the Canterbury Futures Workshop.

Section 3 provides an overview of challenges, implications and next steps.

For more information, contact:

Tim Sydenham
Associate Director – Economic Policy
Experian Business Strategies
0207 355 8262
tim.sydenham@uk.experian.com

1 Canterbury district: research and evidence

1.1 INTRODUCTION

This section summarises the findings of our research to date, leading up to the Canterbury Futures Workshop which is summarised separately in the next section. Much of this research is detailed more fully in the study's interim outputs, available as separate annexes. These interim outputs comprise:

- a contextual overview, providing an overview of our assessment of Canterbury's past and current situation;
- an overview of our future-proofing and scenario creation process and workshops;
- our economic and demographic modelling of the five potential outcomes;
- our initial assessment of the spatial implications of the five potential outcomes;
- our Canterbury Futures Workshop background information document, providing an overview of the five potential outcomes.

1.2 CANTERBURY DISTRICT – PAST AND PRESENT

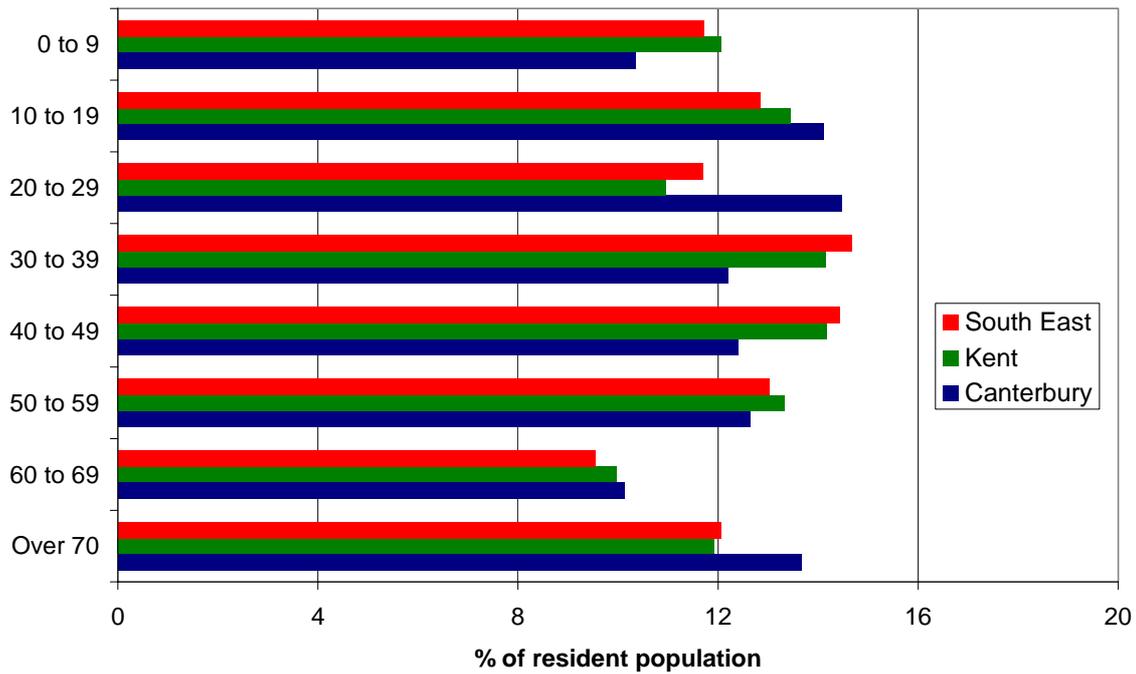
Canterbury today is in a unique position in the South East, an historic city that punches significantly above its weight in terms of its global recognition. Indeed the 'Canterbury' brand is one of its greatest assets. But far from its only asset. Canterbury 'the brand' is mainly associated with Canterbury 'the City', but in fact the district boasts under-utilised assets of great potential in its coastal towns Herne Bay and Whitstable, and its rural villages and hinterlands.

Canterbury has been and is being designated particular roles within the East Kent sub-region, the county and the region:

- The Kent and Medway Structure Plan (deposit) 2003 set out a broad framework for development in Kent, with investment and development concentrated in the North and the East of the county. Canterbury district was placed in a sub-area named the East Kent Triangle along with Dover and Thanet.
- The draft South East Plan places Canterbury district in the East Kent and Ashford sub-region, with Ashford identified for greatest housing and employment growth, although Dover is also significant. Canterbury district's identified economic function is to develop links between university research and business and continue as a commercial and cultural centre.

The district's population is characterised by large numbers of often transitory university-age residents. Compared to the average for Kent and South East England, the district is under-represented by people in their 30s, 40s and 50s. However, the district has a higher proportion of people aged 60 and above.

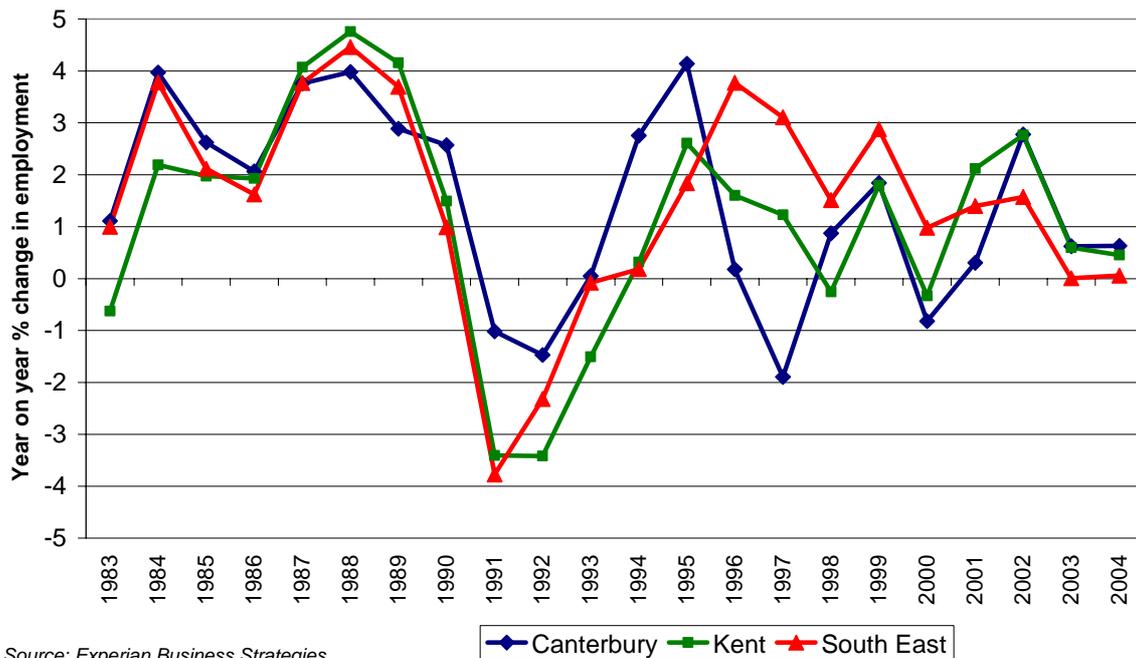
Figure 1.1: The age range of the district's population



Source: Office for National Statistics

Over the past 25 years, employment in the district has been less volatile than in Kent and the South East of England on average. In the 1980s and early 1990s, the district's employment growth was less badly affected by the recession, but over the past decade, it has grown at a much slower rate than the rest of the UK. In general, the district tends to perform not too bad in difficult economic times but not too good in strong economic times.

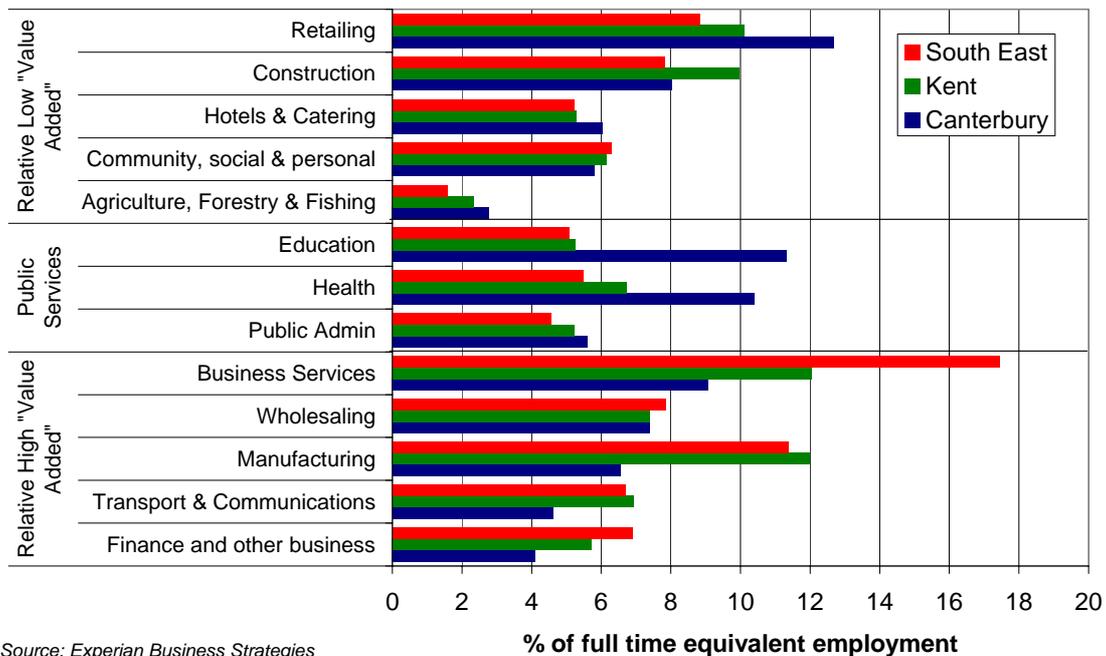
Figure 2.2: Change in employment, 1983-2004



Source: Experian Business Strategies

An important factor in the district’s employment patterns is the structure of its economy. Employment in public services is comparatively high in the district, and these jobs tend to be better protected in times of recession. However, the high-value sectors such as financial and business services which have driven employment growth in the South East over the past decade are under-represented in the district. A large proportion of the district’s jobs are in retail and tourism, generally low-income jobs, but reflecting the importance of these sectors to the district’s economy.

Figure 1.3: Sectoral breakdown of employment in the district



Source: Experian Business Strategies

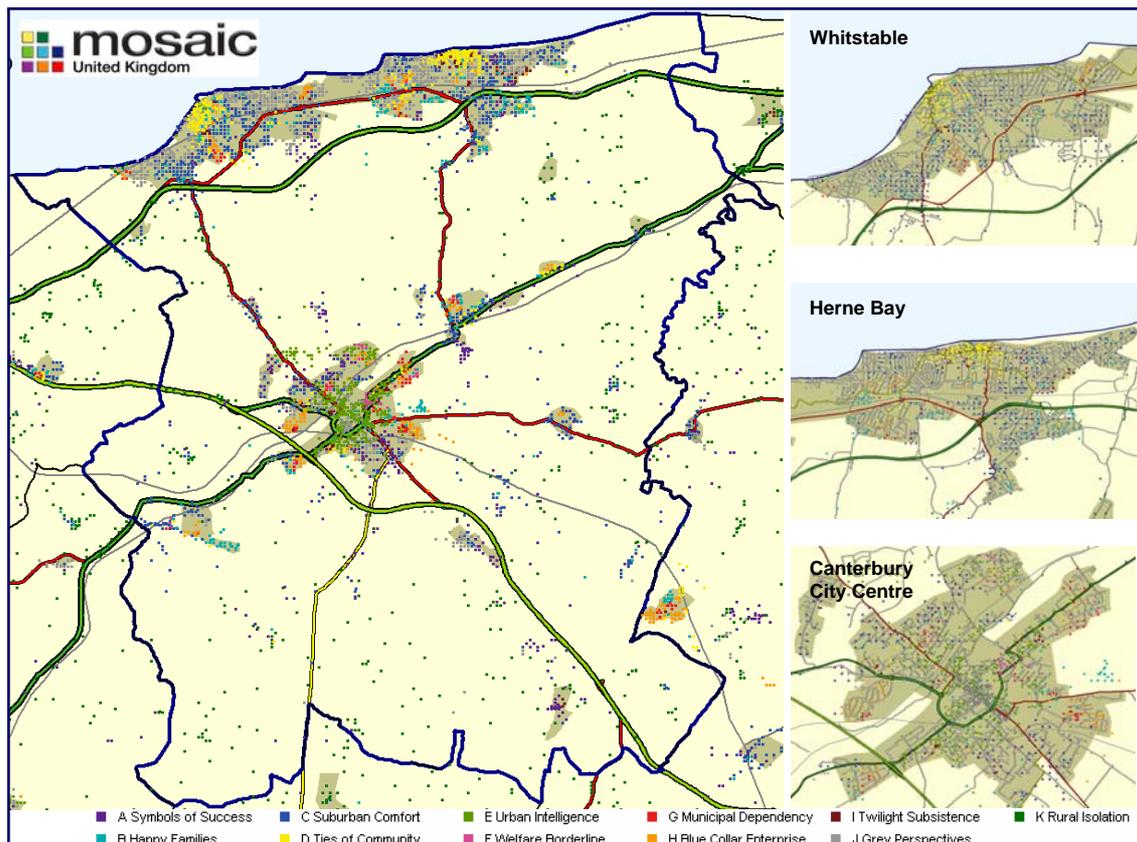
There is little deprivation in the district compared to the national picture, although the district has relatively high deprivation in a South East of England context. Statistics suggest that deprivation is due to barriers to housing and services, and to a lesser extent to low education and income levels. However, they also indicate that the district has low crime and its residents have good health and enjoy a healthy living environment.

Our analysis of the household composition of the district identifies significant numbers of the following groups:

- Older families living in suburbia (“Suburban Comfort”). Within this group, Canterbury district has high numbers of small business proprietors living in low density estates in smaller communities.
- Independent older people with relatively active lifestyles (“Grey Perspectives”).
- Educated, young, single people living in areas of transient populations (“Urban Intelligence”). Within this group, Canterbury district has high numbers of well-educated singles and childless couples and short-term student renters.
- Low income families living in estate-based social housing (“Municipal Dependency”).

The spatial distribution of these household groups is identified in the map below.

Figure 1.4: Spatial distribution of household groups



There are a number of key considerations facing the district, including the:

- strength of the Canterbury *City* brand;
- debate over the (possibly very different) future roles of Whitstable and Herne Bay, and indeed the district's rural areas;
- differing demands of development and conservation;
- declining availability of brownfield land;
- relatively low-value, low-skilled, low-income industrial structure, focused on retail, tourism, personal services and the public sector;
- changing demographic structure of the district, particularly the potential benefits and costs of its ageing population and the churn of university students;
- 2009 1-hour rail link to London which would bring the Capital closer to the district and vice versa;
- perceived traffic congestion, particularly on the ring-road, and poor access (particularly by public transport) to large airports;
- designated role in South East of England policy of the district as the higher education centre of the East Kent Triangle;
- positive and negative effects of growth in Ashford and the Thames Gateway.

To some extent, Canterbury district might be said to be at a crossroads. External influences are likely to push the district in certain directions over the coming years. However, with a number of important district strategies soon to be drafted, there is now a window of opportunity for the district to decide its own future. A vision for Canterbury should help the district take itself in its own preferred direction.

1.3 GLOBAL TRENDS AND DRIVERS

We assessed external influences through a future-proofing process and a series of workshops, internally and externally. Key to this assessment of global and national drivers was determining their relevance and applicability to Canterbury district – i.e., using a robust process capable of making links between the global and the local. To do this, we drew on *nVision*, our proprietary database of social, demographic, economic and technological trends which draws on over 120 sources of data. We generated a long-list of 60 trends and drivers with the objective of tailoring these to a short-list using future-proofing.

Central to this future-proofing process was an internal workshop in which we:

- reviewed the long-list of drivers, factors, and trends that could impact on the future of Canterbury district;
- assessed the likely significance of these national and global trends on the basis of the current composition and trajectory of the area in terms of effects and certainty;
- selected a short-list of key drivers that we believe will have the greatest impact on the area in the coming decade as the basis for scenario creation.

We short-listed the following twelve trends and drivers of relevance to the district:

- The rising economic power of the East
- Global tourism growth
- Climate change (including water and attitudes towards it)
- Economy and employment trends and related consumer spending
- Educated Britain (and new patterns of youth)
- Counter-urbanisation/second homes/housing pressures
- Transport infrastructure/planning issues
- Longevity and ageing society (including the baby boomer explosion)
- Leisure society/experience economy (including shopping as leisure)
- Building cultural capital (including the increasing interest in heritage)
- Collective individualism/new activism/localism
- Technology revolution/network society/tele-working growth

An external workshop was then held with Canterbury City Council, its local strategic partnership and other key stakeholders to develop potential outcomes for the district, and to test these outcomes against the short-listed trends and drivers.

A number of issues arose from the workshop:

- there are a variety of views about the possible trajectory for Canterbury district's future;
- everyone agreed that the variability and the spread of the district would make it difficult to arrive at a single vision for the district that could encompass and express the potential of its many parts and features, especially the coastal towns;
- everyone identified transport/infrastructure as a critical and negative factor – whatever the vision;
- climate change was also commonly judged as a significant risk factor with unknown outcomes, and that it was vital that this was included in the outcome evaluation process;
- mixed views were expressed about the desirability or otherwise of actively encouraging population growth in the district beyond current forecasts.

The workshop generated a set of initial potential outcomes which we thereafter developed in greater detail.

1.4 POTENTIAL OUTCOMES

In order to be able to model and assess the possible implications of any potential outcomes, we first established a baseline view of the district over the next 20 years. We used Kent County Council's population projections to inform 20-year forecasts for the district's people and jobs. This helped us to paint a picture of what the district might look like in 2026 if current trends continue, i.e. if no action is taken by the district to alter its current trajectory.

In broad summary, the forecasts suggest the following:

- The district's population structure will change significantly over the next 20 years, as the proportion of older people increases. This may increase pressure on health services but is also likely to provide a retired "baby-boomer" demographic with more time than previous generations to spend on leisure activities important for the district's economy.
- However, the district's working-age population (16-59/64 year-olds) is forecast to decline. This means that growth in employment will slow, since there will be fewer residents in the district to work. Therefore, the growth in jobs is also likely to slow, or there will need to be an increase in commuters into the district in order to fill job vacancies. The structure of the district's economy is likely to remain relatively low-value.
- But outside the district, there are likely to be significant changes including strong growth in high-value sectors such as business services, particularly in Ashford and the Thames Gateway. It is unlikely that Canterbury will be able to escape being affected by these external influences.

5 "potential outcomes" for the district were developed, alternative to the future implied by Canterbury's current trajectory. As described earlier, the process for identifying these outcomes involved:

- using our research into the district's past and present to identify its distinctive assets and current trajectory;
- consultation with stakeholders on the district and the desirability or otherwise of potential future paths;
- a series of workshops to assess the significance of global influences and shortlist a number of key factors likely to impact on the district's future;
- a collaborative weighting and scoring exercise to join-up local assets and global trends and to identify potential and distinct outcomes.

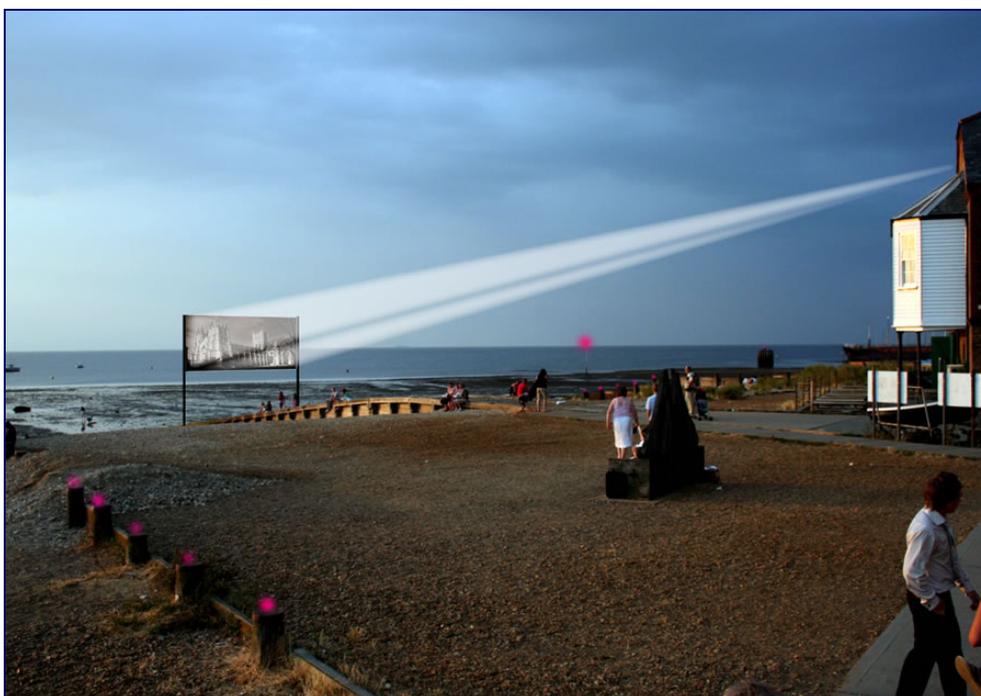
The potential outcomes needed to adhere to a set of principles, ensuring that:

- each expresses a fundamentally different set of qualities and characteristics that can motivate and inspire a future vision and therefore inform strategy for the district;
- they reflect ambitions expressed by district stakeholders or alternatively are outcomes that could occur as a result of planned developments such as the 2009 high-speed rail-link;
- these 'alternatives' can fit into a range of frameworks that provide some means of evaluating the relative achievability of the outcomes and policy options that each represent.

Each of the potential outcomes has its own challenges, but each is plausible. They are not mutually exclusive, indeed the achievement of some outcomes is likely to be dependent at least in part on the achievement of others. Nor does one outcome need to apply to the entire district, indeed some outcomes are more likely to be achievable in some parts of the district than others. Below we provide broad outlines of the 5 potential outcomes and what they might mean for the district. The outcomes are:

- **Canterbury Experience**
- **Knowledge Economy**
- **Green Economy**
- **Heritage and Thought**
- **Open to Commuters**

1.4.1 Canterbury Experience



Overview

- *Canterbury Experience* is about the district as “the place to visit”. Its focus is to build on the district’s tourism and leisure strengths, and particularly its role as a primary retail centre for much of East Kent.
- Exploiting recent and planned investments in its cultural offer, the objective would be to create a reputation for the district as a location for a wide range of high quality consumer and leisure activities. This would include high quality retail and eateries, enhanced leisure options and attractive premises for businesses.
- By doing this, the district would aim to increase prosperity by attracting more visitors, and by increasing the time and amount that each visitor spends.

Challenge

- The key challenge would be to increase the average level of expenditure by visitors. This would require an improvement in the underlying quality of the district’s offer, effective marketing and brand management.
- Also essential to the achievement of this outcome is the district’s ability to differentiate itself from competing retail centres, particularly Ashford. The challenge would be to establish the district as a higher quality destination, with a strong retail, leisure and cultural offer, an attractive environment, child-friendly facilities, good parking and transport access.

Implication

- In employment terms, there would be little change to the current economic structure as jobs created would mainly be in services. However, these jobs would be more productive because consumers would be paying higher prices for quality goods and services.

- An essential factor in the achievement of this service-oriented outcome is training for local people on the “front-line”, i.e. those who occupy service-jobs, to help establish a culture and reputation for customer service excellence.
- Easy access to the district’s offer would also be essential, and the 2009 1-hour rail link to London would be important if visitors from the Capital are to be attracted to the district.
- Increased visitors to the district may push up house prices if they decide to stay or purchase second homes, creating affordability issues.

Effect

- *Canterbury Experience* would impact most on the City, though Whitstable and (slightly less so) Herne Bay would be important in enhancing the district’s coastal activities within its overall offer.
- This scenario could co-exist with the *Heritage and Thought* outcome, and would be enhanced by the increased population (and therefore consumer base) resulting from the *Open to Commuters* outcome.

1.4.2 Knowledge Economy



Overview

- *Knowledge Economy* is about the district as “the place to work”. Its focus is to encourage the development of new enterprises, producing high value-added output, based on the specialist knowledge of their owners and employees.
- Exploiting its educational strengths and its cultural and heritage assets, the objective would be to develop, attract and retain knowledge-intensive people and businesses.

These would be in a range of sectors, initially linked to the strengths of its higher education institutions, in areas such as the creative and cultural industries (e.g. digital design and animation), specialist legal, financial and accountancy advice, biotechnology, geographical and life sciences.

Challenge

- Although this outcome would build on some of the district's existing strengths and assets, it would still require a range of highly effective targeted policies geared towards encouraging people to locate certain types of businesses in the district, as opposed to elsewhere in the South East of England.
- A key challenge would be establishing a pool of highly skilled labour, both by creating enough opportunities and jobs to encourage bright students to stay, and by shifting perceptions of the district as an exciting place in which to live.
- Essential to the achievement of this would be offering beneficial terms, good locations and enhanced transport connections to fledgling businesses, in addition to providing enough attractive, affordable housing for young knowledge professionals. Achievement of the outcome is also partially dependent on the creation of a vibrant cultural and experience economy, and an attractive backcloth, in which these professionals will wish to live.

Implication

- This outcome implies very strong employment growth in what are collectively termed business services, along with associated gains in productivity.
- Transport would be vital to this outcome, as any centre of the knowledge economy has to be accessible and open to business visitors and buyers, including international links. This is double-edged as the district may struggle to create a separate and specialist identity in relatively close proximity to London and other centres. So offering good job prospects, a vibrant backcloth and the chance for a better work-life balance would be key to retaining talent.
- The higher education institutes would also be essential to the achievement of this outcome, both as providers of skilled people (both the children of residents and students who have come to the district in order to study) and collaborators in the knowledge economy. This implies building further on initiatives such as the Business Innovation Centre and the Enterprise Hub.
- Considerable investment in new, high-quality office accommodation would be required, as would investment in new housing (if the level of commuting into the district is not to be significantly increased). There would need to be close collaboration between the public sector, higher education and business.

Effect

- The employment associated with *Knowledge Economy* is likely to be concentrated in the City, although promotion of the coastal towns for active leisure will be key to attracting and retaining skilled people and businesses.
- Knowledge economy sectors tend to thrive in places with a vibrant cultural offer, so this outcome may be enhanced by *Canterbury Experience*.

1.4.3 Green Economy



Overview

- *Green Economy* is about the district as “the place to live”. Its focus is very different to other outcomes, requiring a fundamental re-evaluation of objectives and the emergence of a shared agreement that the attractions of a green economy could outweigh some shortfall in material living standards.
- Building on its high-quality environment, the objective would be to establish a higher than normal degree of local self-sufficiency, strong connections between the City and rural surroundings, and measures to rediscover the distinct characters of the coastal towns.
- This outcome would be based on developing specific offers such as eco-tourism, or a ‘weekending’ environment with farmers’ markets and charming eateries, a range of community based activities and rural and semi-rural outdoor activities such as guided bird watching, cycling and sailing.

Challenge

- The key challenge would be achieving consensus in the district on taking a very different path from other parts of the South East of England, a path which ensures environmental sustainability but is likely to limit economic growth and material living standards.
- Further challenges would include the need to introduce regulation and guidance on restricting certain types of development, supporting local traders, establishing pedestrian areas and eco-friendly building standards.

Implication

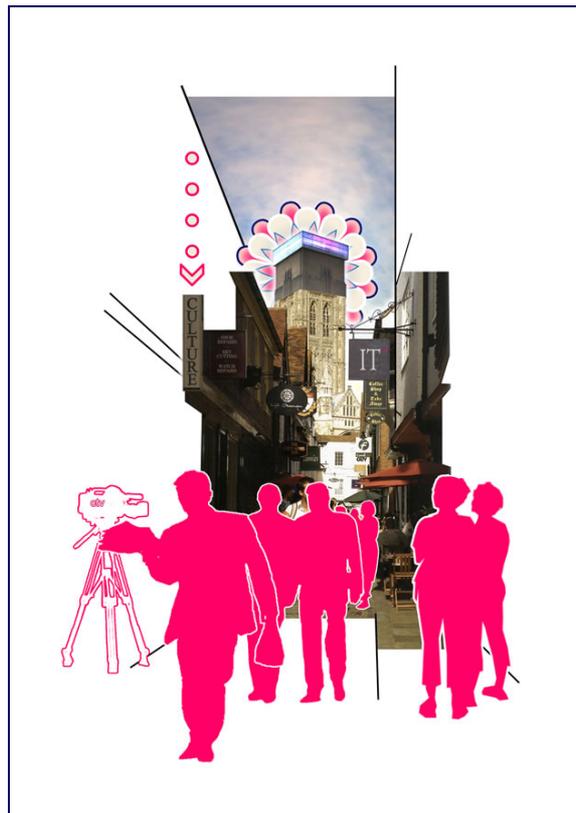
- This outcome implies increased employment in retail, hospitality, service activities and agriculture, but a drop in productivity. Employment patterns might change with more part-time employment, and job opportunities for both sexes and all ages.
- This outcome may increase visitors and new residents to all parts of the district, attracted to a slower pace of life. This may increase demand for housing (including second homes), thereby pushing up house prices. Since people living and working locally are likely to be on low incomes, there would need to be increased provision of affordable housing to ensure local people are not priced out of the market.

- The scarcity of high-value job opportunities may persuade highly-skilled residents to leave the district and make it difficult to retain university graduates. Alternatively, they may choose to commute elsewhere for work, an option made more feasible by the 2009 1-hour rail link to London.
- Therefore, achieving the outcome would require a significant, ongoing campaign to communicate the principles associated with it, along with targeted investment in public/sustainable transport and the environment.

Effect

- *Green Economy* would impact on the district as a whole, particularly the coastal towns.

1.4.4 Heritage and Thought



Overview

- *Heritage and Thought* is about the district as “the place to gather and think”. Its focus is on establishing the district as a site for thought leadership and big ideas of both a religious and non-religious nature.
- Building on the unique significance of the Cathedral as a place of pilgrimage, fellowship and international study, the objective would be to establish a niche as a conference centre for policymakers, non-governmental organisations and academics (in the same way that many cities such as Harrogate have sought to target the business conference market). Additionally, people with environmental interests may be encouraged to gather in the coastal towns. This would help to shape both the tourist trade and the local business offer.
- Similarly, the same “Canterbury” branding would be applied to web-based methods of bringing people together, and the district would seek to build a reputation in the world of information technology and encourage a range of content-providers, broadcasting organisations and opinion formers to locate in or be associated with the district.

- This outcome is in tune with many existing trends and policies, such as the decision to invest in the Marlow Theatre project, but takes them much further.

Challenge

- Establishing the district (rather than, for example, Oxford or Geneva) as a national and international centre for dialogue would require sustained, committed and effective marketing and brand management.
- Good transport access would be essential, as would investment in the district's cultural and heritage sites, and appropriate hotels and conference facilities.

Implication

- This outcome implies much stronger growth in hospitality employment, alongside employment growth in transport and communications, business services and publishing/broadcasting.
- Key to achieving this outcome is considerable investment in the built environment, in particular increased high quality office accommodation, conference facilities and top-end hotels. Developers will need to be persuaded that such investment is viable.
- Significant improvements in transport infrastructure would be critical to this outcome, particularly into and out of the City, although links to London (e.g. the 2009 1-hour rail link), the rest of the UK and internationally would also need to be enhanced.
- To realistically achieve this outcome, district stakeholders would need to collaborate closely around a shared marketing and branding plan.

Effect

- *Heritage and Thought* would initially need to be pinned on the reputation not of the district as a whole, but on the global reputation of the City and its Cathedral. However, the outcome could be widened and enhanced by marketing the coastal towns as sites for environmental dialogue.
- This outcome could be enhanced by the retail, leisure and tourism focus of *Canterbury Experience*, and also by elements of *Knowledge Economy* and (in the coastal towns) by elements of *Green Economy*.

1.4.5 Open to Commuters



Overview

- *Open to Commuters* is about the district as “the place to move to”. Its focus is on establishing the district as a prime location for London’s expanding commuter belt, facilitated by the 2009 1-hour rail link to the Capital.
- Not so much an end in itself, this outcome could be highly beneficial to the achievement of certain other outcomes. Building on the district’s quality of life offer and its safe and secure communities, the objective would be to provide homes for affluent, professional families whose primary income initially derives from urban centres such as London.
- Although the primary earner may commute to the Capital, returning for evenings and weekends, the families themselves would reside in the district, considerably increasing local consumer spending on retail, personal services and leisure activities. These families would contribute to the affluence of the district, raise spending power and provide a latent local skilled workforce should higher-value jobs ever be attracted.

Challenge

- This outcome is most challenging to the views and sentiments of existing residents. Therefore, achieving consensus on the potential benefits of this outcome would be the key challenge.
- The scale of development and investment required to accommodate this outcome would require a step-change from past trends.
- Sustained efforts would be required to help integrate incoming households into the existing community.

Implication

- This outcome would result in a much larger increase in population than in employment. Initial increases in employment would largely mean jobs for the (mainly female) partners of commuters, especially in service sector jobs. There would also be considerable additional employment generated by the increased spending power in the district, in retail, leisure and personal services. Primary earners may take advantage of flexible and tele-working to work from home on certain days of the week.
- Average income in the district would rise sharply as may house prices, though the latter could be prevented depending on the scale of land-release. There would be significant temporary construction employment for houses, roads, retail and leisure space, and new public service facilities such as schools and surgeries. Significant amounts of additional land would need to be made available for this development.
- The increase in population would put pressure on existing schools, surgeries and other public services, but would also create new jobs for teachers, nurses and other public service workers.

Effect

- *Open to Commuters* would effect the entire district, but particularly the western-edge of the City as commuters are likely to want to be based near the rail station. This outcome would establish the district as the urban centre of East Kent, and enhance the achievability and impact of other outcomes. The effects of this outcome may be felt in any case, given the fact of London’s expanding commuter belt and the 2009 1-hour rail link.

2 The Canterbury Futures Workshop: an overview

2.1 INTRODUCTION

Having collaborated with core stakeholders in the Canterbury district to identify 5 potential outcomes, the next step involved communicating the outcomes to a wider audience. Central to this wider consultation was a Canterbury Futures Workshop with over 100 stakeholders held on 11th September 2006 to engage the district's wider stakeholder community in the process of identifying desirable outcomes for the future.

The main objectives of the workshop were to:

- engage the wider stakeholder community in the future process and communicate the 5 potential outcomes identified to date;
- highlight the challenges for decision-making in the district in reconciling different outcomes and achieving economic and employment growth;
- evaluate the outcomes' desirability, achievability and ability to deliver key district objectives, and identify the most appropriate balance;
- assess the likely impacts of the outcomes on the district, with particular focus on specific groups of the population;
- help locate these outcomes in spatial terms within the district; and
- review the policy and planning implications of the potential outcomes.

This section summarises the outcomes and broad messages arising from the workshop.

2.2 POTENTIAL OUTCOMES: DESIRABILITY AND ACHIEVABILITY

The workshop participants were split into eleven groups of 7-10 people each. Collectively, they were presented with the five potential outcomes for Canterbury district:

- Canterbury Experience
- Knowledge Economy
- Green Economy
- Heritage and Thought
- Open to Commuters

Groups were tasked with the following:

1. Score how well each of the potential outcomes impacted in terms of four key themes:

- Economic health and job prospects
- Environmental and sustainability criteria
- Social and community cohesion
- Degree of fit with current trends

2. Rate the relative preferences for each of the potential outcomes by allocating a maximum of 100 points between them.

2.2.1 The weighting and scoring exercise

Each of the groups were asked to score consider each of the potential outcomes and agree how well they contributed to supporting the economy, environment, community and existing trends in the area. Groups were asked to give scores from 0 to 5 where 0 is negative contribution or fit, 5 is a highly positive contribution or fit and 3 is neutral.

Below, we present each of the scenarios and present the scores awarded by the groups.

Canterbury Experience

Results for Canterbury Experience				
Group	Economic health and job prospects	Environmental and sustainability criteria	Social and community cohesion	Degree of fit with current trends
1	3	3	2	5
2	2	3	4	5
3	1	3	1	5
4	4	3	2.5	5
5	5	3	2	3
6	3	2	2	4
7	2	2.5	2	4
8	3	2	4	4
9	3	4	2	3
10	4	3	4	5
11	4	4	1	5
Average	3.1	3.0	2.4	4.4

The key results for the Canterbury Experience outcome were:

- There was wide divergence about what this means for economic prospects with results ranging from 1 to 5. This suggests ambiguity about what this means for the economy, for example it may provide more jobs although these may be low paid and part time.
- The groups were mostly in agreement that this mildly supports environmental criteria with scores from 2 to 4. It may have implications on the transport network and the provision of affordable housing.
- There were mixed views in terms of social cohesion with scores ranging from 1 to 4. There may be more jobs for local people but they would be providing services for more affluent visitors.
- It was agreed that this is closely in line with current trends with scores from 3 to 5.

Knowledge Economy

Results for Knowledge Economy				
Group	Economic health and job prospects	Environmental & sustainability criteria	Social and community cohesion	Degree of fit with current trends
1	5	2	3	2
2	4	2	2.5	3
3	5	3	3	1
4	5	4	3.5	2
5	5	3	4	2
6	5	2	3	3
7	4	3	3	4
8	4	4	4	2
9	5	3	4	1
10	4	2	2	1
11	5	2	3	2
Average	4.6	2.7	3.2	2.1

The key results for the Knowledge Economy outcome were:

- There was agreement that this is positive for economic prospects with results from 4 to 5. It was suggested that this outcome, while desirable, may be difficult to implement.
- The groups were mostly in agreement that this does little to support environmental criteria with scores from 2 to 4. For example, it was suggested there could be a possible impact on the environment if significant development were involved.
- There were mixed views in terms of social cohesion with scores ranging from 2 to 4. It was suggested that benefits may be limited to the city rather than coastal towns and countryside.
- It was mostly agreed that this is not closely in line with current trends with most scores from 1 to 2 although one group scored this up to 4. Some of the assets already exist and others are being developed but they are starting from a lower base than many other places in the UK.

Green Economy

Results for Green Economy

Group	Economic health and job prospects	Environmental & sustainability criteria	Social and community cohesion	Degree of fit with current trends
1	1	5	2	3
2	1	5	4	1
3	3	4	4	2
4	4	5	5	2
5	2	5	3	3
6	2	5	4	1
7	2	5	2	3
8	4	5	4	0
9	1	5	3	4
10	0	5	2	3
11	2	5	5	3
Average	2.0	4.9	3.5	2.3

The key results for the Green Economy outcome were:

- There was general agreement that this does not add much to the area's economic prospects other than potential for eco-tourism and some employment sectors.
- The groups were in agreement that this supports environmental criteria with most scoring 5.
- There were mixed views in terms of social cohesion with scores ranging from 2 to 5. For example, it could become more inclusive, or alternatively be seen as a 'middle class' preoccupation which does not meet the needs of all local people.
- There was little consensus on whether this is in line with current trends with scores from 0 to 4.

Heritage and Thought

Results for Heritage and Thought				
Group	Economic health and job prospects	Environmental & sustainability criteria	Social and community cohesion	Degree of fit with current trends
1	4	2	2	2
2	3	2	3	4
3	2	3	1	3
4	4	3	3	4
5	4	4	2	2
6	3	3	3	3
7	1	1	0	1
8	3	2	3	1
9	2	4	2	5
10	5	3	4	5
11	3	4	1	1
Average	3.1	2.8	2.2	2.8

The key results for the Heritage and Thought outcome were:

- There was little agreement on how this helps economic prospects with scores from 1 to 4. However, it was felt to be building on some existing strengths.
- Similarly, it was unclear whether this supports environmental criteria with scores ranging from 2 to 4.
- There were mixed views in terms of social cohesion with scores ranging from 0 to 4. It was suggested that apart from the city of Canterbury there was no particular benefit for the district as a whole.
- There was little agreement that this is in line with current trends with scores from 1 to 5. There was concern that the idea of ‘thought leadership’ in this scenario was difficult to achieve.

Open to commuters

Results for Open to Commuters				
Group	Economic health and job prospects	Environmental & sustainability criteria	Social and community cohesion	Degree of fit with current trends
1	4	2	2	1
2	4	1	1	2.5
3	2	1	1	3
4	3	1	1	2
5	5	1	1	1
6	3	1	1	4
7	2.5	1	0	3
8	4	2	3	4
9	3	1	3	3
10	3	1	1	1
11	3	2	2	2
Average	3.3	1.3	1.5	2.4

The key results for the Open to Commuters outcome were that:

- It was recognised as generally positive for economic prospects with results from 2.5 to 4.
- The groups were mostly in agreement that this does not support environmental criteria with scores of 1 or 2. For example, this may require significant housing development.
- There were low views in terms of social cohesion with scores ranging from 0 to 3. It was suggested that it could create a ‘two-tier’ community although others said an influx of people might revitalise the area.

- There was disagreement over whether this is in line with current trends with scores from 1 to 4. For example, some suggested that this outcome is already happening to some extent and likely be reinforced by the 1-hour rail-link to London; others that this goes against current trends in terms of the way the City is developing.

The average scores across all eleven groups are presented below:

Summary of Average Scores				
	Economic health and job prospects	Environmental and sustainability criteria	Social and community cohesion	Degree of fit with current trends
Canterbury Experience	3.1	3.0	2.4	4.4
Knowledge Economy	4.6	2.7	3.2	2.1
Green Economy	2.0	4.9	3.5	2.3
Heritage and Thought	3.1	2.8	2.2	2.8
Open to Commuters	3.3	1.3	1.5	2.4

The average scores show that no single outcome is either strongest or weakest across each of the four themes:

- Economic health and job prospects are believed to be strongest in the Knowledge Economy outcome, weakest in the Green Economy and largely uncertain in the other three.
- Environmental and sustainability criteria are believed to be strongest in the Green Economy but weakest in a future that is Open to Commuters. Environmental criteria appear largely uncertain in the other three outcomes.
- Social and community cohesion is not believed to be strong in any of the outcomes. It is believed to be weakest in Open to Commuters.
- The degree of fit with current trends is believed to be strongest in the Canterbury Experience outcome. Across the remaining four scenarios, the degree of fit is largely uncertain.

The eleven stakeholder groups were also asked to comment if they thought there were positive correlations or potential conflicts between each of the outcomes. The main observations from these discussions were:

- The Canterbury Experience mostly correlates with the Knowledge Economy, Heritage and Thought, and the Green Economy. However, some groups said this may conflict with the Knowledge Economy.
- The Knowledge Economy most correlates with the Canterbury Experience and Heritage and Thought. Some suggested it also correlates with being Open to Commuters and others identified potential conflict with the Green Economy.
- The Green Economy was identified by many groups in that it needed to be “built in” to other scenarios rather than assuming a natural correlation. Some groups suggested it may conflict with being Open to Commuters.
- Heritage and Thought was mostly believed to correlate with Knowledge Economy and Canterbury Experience.
- Openness to Commuters potentially conflicts with the Green Economy.

2.2.2 The results

Each of the groups had a total of 100 points to allocate between the scenarios. This was designed to show their relative preferences about which of the scenarios they believed were the most desirable futures for the Canterbury district.

The outcomes that were most preferred were given a high share of the 100 points and those least preferred given a low share of the points. The groups were encouraged to demonstrate clear preferences to distinguish between the scenarios.

The full set of results is shown below:

Total results of relative preferences for the scenarios

	Canterbury Experience	Knowledge Economy	Green Economy	Heritage and Thought	Open to Commuters
Group 1	20	45	5	20	10
Group 2	25	30	20	15	10
Group 3	10	40	30	15	5
Group 4	23	23	26	23	5
Group 5	25	40	20	10	5
Group 6	30	40	10	20	0
Group 7	30	50	20	0	0
Group 8	15	30	30	5	20
Group 9	20	24	20	21	15
Group 10	40	0	10	50	0
Group 11	20	27	33	10	10
Total	258	349	224	189	80
Average	24	32	20	17	7

The full results show that on average across the groups there were clear preferences as to which scenarios were judged to be the most or least desirable for the future of Canterbury.

1. Knowledge Economy

The Knowledge Economy came out on top scoring an average of 32 points. This was the first choice of seven out of the eleven groups and joint first of one other.

The first place ranking of the Knowledge Economy was not entirely comprehensive. Although most groups scored it highly, including a high score of 50 points, other groups were more questioning, in particular one which scored it with 0 points.

2. Canterbury Experience

The Canterbury Experience came second with an average score of 24 points. This was not the first choice of any of the groups but was the second preference for five groups and joint second preference for two more.

The highest score awarded to the Canterbury Experience was 40 points and the lowest was ten points. This shows some differences in opinion across the groups about how preferable this is.

3. Green Economy

The Green Economy came third with an average score of 20 points. This was the first choice of two groups and joint first choice of one other. One group chose this as the least preferred outcome.

The highest score awarded to the Green Economy was 33 points and the lowest was 5 points. This again shows some differences in opinion across the groups.

4. Heritage and Thought

The Heritage and Thought outcome came fourth with an average score of 17 points. This was the first choice of one group and was the second preference for one more.

The highest score awarded to Heritage and Thought was 50 points and the lowest was 0 points. This shows some differences in opinion across the groups.

5. Open to Commuters

The Open to Commuters outcome came fifth with an average score of only 7 points and so is the least preferred. This was not the first or second choice of any of the groups.

The highest score awarded to Open to Commuters was 20 points and the lowest was 0 points.

2.3 POTENTIAL OUTCOMES: IMPLICATIONS

The second stage of the workshop concentrated on two core themes: future geography and future people. Some groups concentrated on geography; others on people. The aim was to consider the top three outcomes identified in the first stage of the workshop (Knowledge Economy, Canterbury Experience and Green Economy) and to identify their likely implications in relation to:

- the spatial distribution – the implications for Canterbury’s geography;
- different groups within the population – the implications for Canterbury’s people.

2.3.1 The identification of spatial implications

Groups considered which of the outcomes was most realistic for different areas within Canterbury district:

- The city of Canterbury itself was broadly identified as the place most likely to feel the impact of a knowledge economy outcome. This builds upon the city’s higher education institutions, transport connections and as the base for most of the area’s existing employment activities.
- Whitstable and the rural areas in the district were identified as the places most likely to be impacted by the Green Economy, based upon the existing environmental strengths in these areas.
- The groups could not envisage Herne Bay as a location for Knowledge Economy. However, there was thought to be potential for the area to be an important part of the Canterbury Experience.

The groups went on to consider and discuss some of the main spatial implications of each of the different scenarios. Discussions focused on:

- Housing and employment sites

The current housing supply is likely to need to be increased and improved, as more people are attracted to live in the area. This may mean a need for affordable high-density apartments. However, others argued that the City should not be expanded. There would also be a need for some development to create flexible buildings for commercial use.

- Transport use and transport infrastructure

Transport infrastructure is likely to need to be modernised with environmental issues considered. This might include initiatives such as a “green travel policy” for developers and employers and ensuring “sustainable transport links” to other growth areas outside the district.

This could also help tackle problems of road congestion by encouraging the use of public transport. Transport must be considered in the wider East Kent perspective, for example with potential for road improvements on the A2 and A28.

- People

The groups suggested that Canterbury had a good workforce supply of trained and skilled people. However, the challenge is to encourage skilled people, for example Canterbury’s large student population, to remain in the area after graduation and become part of the resident population.

The groups looking at geography also considered the potential spatial impact of “Wild Cards”. Wild cards refer to events that are low in probability but potentially high in impact. The main wild cards considered by the workshop groups were environmental concerns over flooding, water shortages, and geo-political risks of global terrorism.

Wild Card	Issues for Canterbury
Flooding	There is a risk of flooding in coastal areas of the district such as Herne Bay and Whitstable but there was some debate on whether it will have an impact on planned development sites.
Water shortages	Drought is quite likely and has already been seen in area. This would see a change in crops in rural areas and possibly stop the river Stour from flowing, having a negative impact on the Canterbury Experience. The problem could be helped by integrating the water network and better use of reservoirs.
Global terrorism	The likelihood is unknown but generally thought to be a high threat. There would be a clear impact on tourism with the impression that foreign visits will decline and domestic visits increase. This would also have an effect on the Canterbury Experience.

2.3.2 The identification of social implications

The other groups considered particular segments of Canterbury’s population and discussed what their lives in Canterbury may be like under each of the three outcomes. The groups of population considered at the workshop included young people, young families and older people.

The groups went on to consider and discuss some of the main policy implications for people under of each of the three outcomes identified.

Knowledge Economy

Some of the main implications identified in relation to the Knowledge Economy were:

- For older workers it may be necessary to offer additional skills and training while they are still at work so they can continue to work and be part of the knowledge economy.
- Young families drawn to the area will need extra schools for their children in addition to extra housing.

- Young people in the area will require a wider range of education options such as modern apprenticeships. Not all new jobs require a higher education background and jobs in sectors such as construction and culture may need more transferable skills.
- Some groups may be negatively affected and potentially marginalised by increases in house prices reducing affordability. These groups may need extra assistance.
- Disadvantaged groups will need support services to be in place or could face risk of exclusion from the knowledge economy.

Green Economy

Some of the implications identified in relation to the Green Economy were:

- Older people need to be included as part of the green economy through encouraging leisure pursuits and promoting benefits of a healthier quality of life.
- Disadvantaged groups may be excluded if “green economy” means that activities are more expensive or inconvenient. They need to be included in this.
- Ensuring a green economy requires investment in green energy and in green infrastructure such as cycle paths and opening access to the countryside.

The Canterbury Experience

Some of the implications identified in relation to the Canterbury Experience were:

- This outcome may generate more part-time or flexible service sector jobs. This may create work opportunities for older workers, young people and young families (for example for women with dependent children). A framework needs to be in place to ensure people can access these opportunities.
- The Canterbury Experience needs to include coastal towns and not just the city if it is not to exclude many of the area’s most disadvantaged residents.

2.3.3 Collective issues

Many of the implications discussed cut across the different outcomes and could be equally applied to either. These implications included:

- Social enterprises to be encouraged as it helps put money back into the community.
- Accessibility to be improved for those who are less mobile.
- Ensuring that migration into the area does not displace local people from jobs.
- Ensuring support services such as health, education and affordable housing is in place.
- Ensuring businesses are engaged in the process.
- Making better use of technology to reduce rural isolation.

3 Towards a vision for Canterbury district

3.1 INTRODUCTION

This section describes the current status of the Canterbury Futures process, following the Workshop on 11th September 2006.

It articulates more fully the principles that are emerging as a platform for the vision. We identify the key challenges that the district would face in attempting to achieve such a vision, and the implications of this for district policy.

We also make recommendations on the next steps required to take the Canterbury Futures process forward.

3.2 DESIRED OUTCOMES

Local authority districts across England are in the process of formulating spatial and community strategies. In Canterbury district, the Futures Study has demonstrated a willingness to agree a vision for the district that can underpin its policy-making – a vision that is consistent, distinctive and meaningful. Simply undertaking this process has helped the district to properly consider its trajectory and the world around it:

- this is the first time that there has been a genuine attempt to think seriously about the great global challenges of globalisation and climate change and ensure that local choices reflect those challenges;
- this very top down view of global challenges has been integrated into a national/regional perspective that takes seriously two big drivers of change – expected population shift to Kent (Ashford, Thames Gateway, other districts) after years of the county being the Cinderella of the South East; and the new high-speed rail-link;
- there has been integration of global, national and regional challenges into serious examination of essentially local issues to do with key and distinctive assets such as education and heritage and locations with specific needs within the district; and
- the process has been inclusive and representative of the different stakeholders in the district, helping to ensure that the vision for Canterbury district's future captures the interest of the people who live there.

These factors are essential, if the district is at a crossroads as it seems to be. The Canterbury Futures Study is about beginning a long process of changing hearts and minds and building a community that is open to change and opportunity, where that has been driven by:

- a clearer realisation that 'doing nothing is not an option'; and
- a process of choosing and guiding the nature of change, to ensure that it is what the local community wants and not simply what fate and external influences impose.

Not surprisingly, given the formulation of the outcomes through an iterative process including the district analysis, trend evaluation and expression of ambitions by the Core Strategy Team and other interviewees, no one potential outcome swept the board and garnered a majority of points in the workshop. In essence all of the potential outcomes formulated had some basis in ambitions and ideas of at least some of the Council executive team. Only the 'Open to Commuters' option which was developed somewhat as a provocation to challenge the district to really consider both the implications of the high speed rail link in 2009 and the need for a more

expansive housing development and open planning policy failed to score any significant points. This in itself reflects the continuing difficulty that the district has in accepting the necessity of significant population expansion in order to achieve other objectives. In our view this remains as a key tension – and will need to be resolved if progress is to be made in moving towards the main outcomes selected. (Whilst some accommodation was made for the provision of a further 8-9,000 homes over the period, it is arguable that even more than this will be required and it seems that there is little appetite for any real expansion of population even though realisation of the future visions requires this to a certain degree.)

In the workshop, we decided to focus on the top three highest scoring outcomes in the first exercise in order to give direction and shape to the afternoon activities. Thus ‘Heritage and Thought’ which came 4th was effectively discarded whilst only scoring a little lower than ‘Green Economy’. However, there are elements of this option that can be seen to have considerable overlap with the ‘Canterbury Experience’ and therefore the most attractive components of that vision can be included in the overall vision for Canterbury’s future.

The process has therefore created a broad view of a desirable set of interlinking and complementary future outcomes for the Canterbury City and wider district in the future. This combines the qualities and opportunities described by three potential outcomes. In essence these are complementary to each other, and can be seen to provide an excellent basis for articulating a clear and compelling future vision.

The ‘lead’ elements must come from the Knowledge Economy – clearly the most attractive, but also the most challenging of the options presented. Thus the focus is on creating the conditions in which new knowledge based and creative industry enterprises will **want** to establish themselves in the district and will be genuinely helped to do so. This will create a real ‘hub’ that will ensure a significant proportion of graduating students, artists and designers will find employment and stay. This will not happen without the building of appropriately priced homes to make this an attractive lifestyle option.

This necessary expansion of a younger, educated and more affluent demographic in the district will then create the conditions in which the ‘secondary’ component of the vision can be more readily achieved. The Canterbury Experience must be developed to fulfil their need for a wider range of attractive leisure and experience economy activities – the link between healthy economic conditions, more diverse populations and thriving retail and leisure centres has been made by Professor Richard Florida in his influential book ‘*Rise of the Creative Class*’ based on an analysis of US cities. Investment in the development of a more explicitly attractive and satisfying experience economy will also pay dividends in attracting more affluent shoppers from the wider Kent area, encouraging tourists to stay longer and part with more money. To realise its full potential in terms of activities, locations and maximising use of resources the Canterbury Experience must be conceived as a ‘whole of district’ opportunity to expand the range and scope of the attractions on offer.

This then ties neatly into the third element of the future vision provided by the ‘Green Economy’ which describes an essential set of underlying qualities and values that need to be incorporated into the development plans for the district in order to ensure that future development and changing lifestyles are sustainable and make the most of the potential assets of the district whilst minimising negative environmental impacts. Given the current concerns about climate change and the growing demand for more ethical and environmentally friendly goods and services, there are many elements of the Green Economy that are forward looking and attractive, in terms of creating better links between city and countryside such as greener transport options and opportunities to consume and enjoy local produce and resources. Additionally a greener vision can add value to the Canterbury Experience option by providing environmentally friendly experience and leisure opportunities whether that is walking on the

East Kent pathways, sipping organic wine in local vineyards or cycling to the coastal towns on designated paths.

A genuine commitment to sustainability can also contribute to the achievement of the Knowledge Economy vision, as the educated young professionals will be attracted by homes and workplaces with a low carbon footprint and take advantage of healthier and environmental travel options between the two. Thus consideration must be given to the nature and quality of the building programme from this perspective and be genuinely leading edge from an environmental perspective. This raises a longstanding thorny problem for the district – whatever the future holds it is certain that the major transport infrastructure is currently a major barrier to future developments and that the major underlying routes in and out by train and car must be made to work more smoothly to get people in and out of the City *alongside* any investment in greener options for local travel and leisure activities.

In effect, the district has signalled that there should be greater and more sustained efforts to create a higher-value local economy with higher-paid jobs by improving the district's retail and leisure offer and building from a low-base more business service activities. Green and sustainable principles should underpin this development to ensure the protection of the district's environment which is in fact one of the strengths that the district has to draw on in its attempts to attract higher-value jobs and higher-spending visitors.

Much of the vision for the district is about “creating the right conditions”:

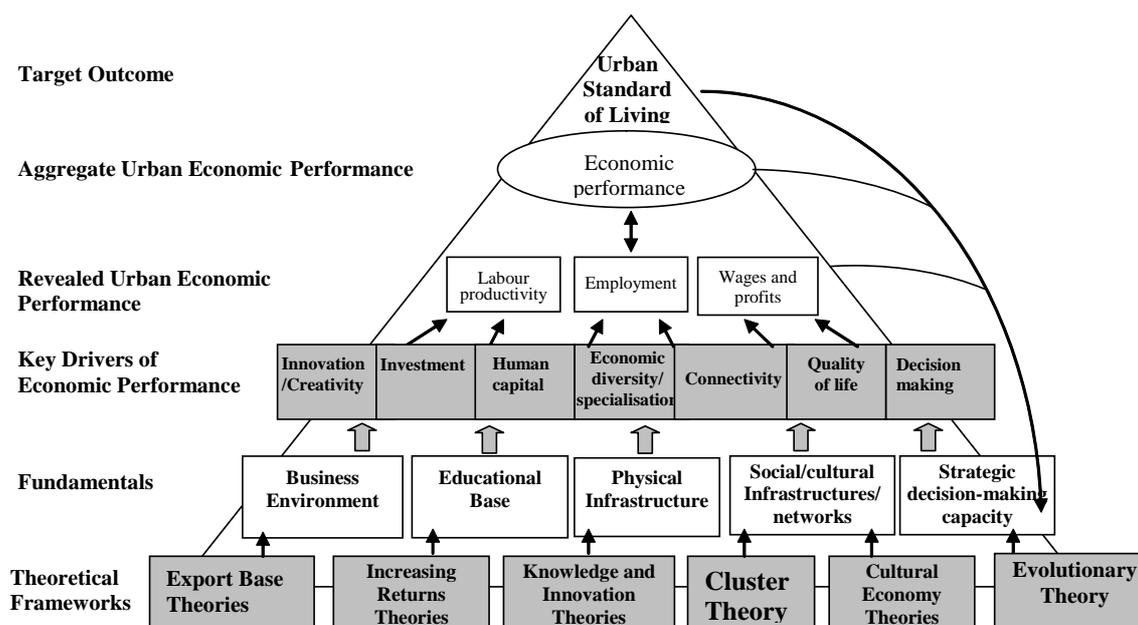
- conditions for business – to start them up, attract and retain them;
- conditions for visitors – to encourage them to visit, to stay and to spend;
- conditions for residents – to improve their local area whilst retaining its heritage.

To achieve this, the district faces a number of challenges.

3.3 CHALLENGES AND IMPLICATIONS

Creating a higher-value economy with higher-paid jobs is an aspiration shared by many local authority districts in England. It should be noted that there is a general trend towards this higher-value end of the economy, evident particularly in some parts of the South East, but to date this has largely by-passed the district of Canterbury and other parts of Kent. However, the district does have many of the assets and characteristics that are generally considered necessary to build a higher-value, knowledge-based economy. But significant challenges remain.

Establishing the district as a place for businesses at the higher end of the value chain to grow will be tough. Currently, there is a relative dearth of such businesses, so the district is starting from a very low base. There is no simple method of improving the business environment and creating a critical mass of high-value activity where now there is little or none. Commentators disagree on the relative importance of different factors. However, one framework for assessing the relative competitiveness of an area is that used by the authors of the recently published *State of the Cities Report* (DCLG, 2006) and used by us in conjunction with these authors in our own recent report for the South East of England Regional Development Agency, *South East Diamonds for Investment and Growth: the evidence* (Experian, 2006).



This framework highlights seven key drivers of economic performance in an urban context. Each driver alone, when viewed in isolation, will not serve to enhance the competitiveness of the district. What is important is that efforts are made to boost all of the drivers:

- Innovation/creativity
- Investment
- Human capital
- Economic diversity and specialisation
- Connectivity
- Quality of life
- Decision making

These drivers serve to illustrate both Canterbury district’s challenges and assets. We highlight the key ones for the district below:

- One of the greatest challenges facing the district is around its connectivity – both internally and externally. Internally, the congestion currently experienced, particularly around the City’s ring-road and slip-roads, is already a concern for many stakeholders in the district. Until there is improvement, this is likely to be a barrier to business, commuters and visitors. Externally, good connectivity is required between the district and both London and major international airports. The new high-speed rail-link will improve access to the capital, and is therefore a beneficial development. But the district’s links to airports are relatively poor, and innovative ways to improve these links will be important if the district is to enhance its attractiveness as a location for business and tourists.
- Human capital is a real strength for the district, but only latently. The current lack of suitable opportunities in the district means that many higher-skilled residents tend to out-commute or are employed in the public sector, and graduate retention is low. The challenge is to generate many more of these higher-value, higher-salaried opportunities in the future. The quality of life offered by the district will play a huge role in this, but will not in itself be enough to retain skilled workers, as current trends serve to demonstrate. Measures are required to encourage businesses to locate and grow in the district. But measures also need to be taken, building on embryonic initiatives such as the Business

Innovation Centre and the Enterprise Hub, to encourage entrepreneurship and enterprise in graduates and others.

- Linked to the above is the district's current industrial structure. Many successful economies survive and thrive by being both diverse and specialised – specialised enough in some sectors to be able to exploit them to their full potential, but diverse enough across a range of sectors to be resilient in the face of economic difficulties. Currently, the district's industrial structure is very skewed towards retail and tourism. A vision which is built on sustained and increased efforts to develop more knowledge-intensive businesses will help to improve the district's industrial structure. Investment in suitable business infrastructure, including commercial premises, will need to be made.
- The district's quality of life is an obvious strength. Its heritage, environment and mix of the City, the coast and rural areas are likely to continue to make it a destination of choice for many students and residents. Therefore, it is important that this quality of life is sustained over the next twenty years. However, this will mean taking into account the needs of future households – the children of current residents, graduates wishing to stay and other incomers. Ensuring that the future supply of housing is both affordable and built in accordance with sustainability principles will be important. Those parts of the district in need of regeneration, such as Herne Bay, will need investment and renewal. Raising the bar in the retail, leisure, entertainment and tourism offer of the district is also important if more visitors are going to be attracted and encouraged to spend more – the coastal towns and rural areas should play a key part in this.

It is important to note that the district's ability to position itself as a knowledge economy depends on its success at getting people to think it is, i.e., perceptions need to drive reality as well as vice versa. Drawing on the strong and distinctive reputation of Canterbury district to enhance place-marketing will be an important part in achieving this. It will be important to promote the idea of "Canterbury" as a place of intellectual discourse, founded on the university, the cathedral and a local interest in green principles, and manifesting itself through globally prominent summit meetings and through the use of a "Canterbury" brand on the internet for web-based seminars and dialogues. Canterbury Experience should build in heritage and cultural aspects but special measures will be needed to encourage the higher value, leading edge 'destinations' that will really deliver the distinctive experiences. All of the above, taken together, will help to differentiate the district's offer from other places.

Achieving these desired outcomes will be challenging. Developing a knowledge economy requires a change of policy and will require serious investment and partnering with the education establishments to incubate new businesses and create good conditions. There will be implications for travel. The way of the future is not commuting versus localism – it is combining the two. The district will be developing local knowledge economy businesses employing local people, who will mostly stay local and/or communicate digitally, but they will sometimes travel to London and abroad using the excellent transport links and hence will be globally competitive. This means improving transport within the district but also outside, working with external stakeholders.

Achieving this vision of a highly competitive, higher-value economy needs to be done in the greenest possible way.

3.4 INDICATORS

As the district progresses the Canterbury Futures process towards an ultimate vision which underpins its core local strategies – corporate, spatial and community – it will need to begin considering how to monitor its progress towards achieving the vision itself. The type of indicators to be used to monitor progress will flow from the specifics of the final vision, but we recommend a number below. Clearly, these would indicate the district's progress towards a vision of a higher-value, knowledge-driven economy. But they would need to be in addition to

standard indicators used, e.g., to measure sustainability and the district's general ecological footprint.

Knowledge Economy

Indicators of progress towards the Knowledge Economy element of the vision should include:

- Growth in average earnings
- Change in industrial structure, by output and employment
- Business start-ups and survival, by VAT registrations/de-registrations
- Percentage of employees in:
 - Knowledge Intensive Business Services (KIBS)
 - Creative Industries
 - R&D
- University commercialisation
- Patents
- Travel time to:
 - London
 - Major international airport/s
- Net change in the availability of B1 land and office accommodation
- Occupancy rates of office accommodation
- Growth in availability of affordable housing

Canterbury Experience

Indicators of progress towards the Canterbury Experience element of the vision should include:

- Visitor numbers:
 - Overnight stays
 - Visits to key attractions
 - Retail footfall
- Net change in numbers of hotels, by star-ranking
- Number of tourist attractions developed
- Visits to key local internet sites
- Mentions in national/international press

Green Economy

Indicators of progress towards the Green Economy element of the vision should include:

- Quality of life, by annual survey of residents
- % of development on green/brownfield
- % new development (residential, commercial, industrial) built to eco-standards
- % products/services sourced locally
- Transport usage (exact indicators depend on policies implemented by the Council)
- Standard indicators around deprivation, emissions, recycling, etc.

3.5 NEXT STEPS

To date, the Canterbury Futures process has created a broad view of a desirable set of interlinking and complementary outcomes. This combines the qualities and opportunities described by three potential outcomes which are, in essence, complementary to each other, and provide an excellent basis for articulating a clear and compelling future vision. The next steps for the Council and its stakeholders include:

- Consultations within the district to flesh out the potential outcomes, focusing on:
 - the appropriate balance between the three outcomes within the final vision;
 - the details of the vision itself.
- This includes a planned workshop in November for the Council to articulate the vision in a concise and compelling way, and to spell out the implications and immediate actions and requirements needed to start moving towards it.
- This also includes ongoing consultation through the Canterbury Futures website.
- Further research into the implications of the final vision.
- Translation of the vision into policymaking in the district, particularly planning and transport.
 - Active consultation with key stakeholders needed to deliver the vision, including universities, businesses and external stakeholders/funding bodies.
- Further appraisal of the potential outcomes, including Sustainability Appraisal and Strategic Environmental Assessment.
- Ongoing assessment and testing of the evolution of policy in the district, to determine whether they are distinctive and different to what is being said and done elsewhere.