

Assessing the Evidence

Gosport Commuting & Employment Study Updated Final Report

Report for Gosport Borough Council

In Association With GVA Grimley

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1 Introduction

1.1 Background

- 1.1.1 Gosport is a small mainly urban Borough situated in south Hampshire. It is bounded by Portsmouth Harbour to the east, the Solent to the south and the Borough of Fareham to the north. It has limited transport connections because of its' peninsula geography and the absence of a direct road link across the harbour to Portsmouth, or a local rail station.
- 1.1.2 There are only two road access corridors. The A32 runs northward on the eastern side of the peninsula and connects, via Fareham town centre, with the A27 and the M27 Junction 11. On the west side of the Borough the B3385 also runs northwards and merges with the A32 south of Fareham town centre. The B3334 runs west, via Stubbington, to the A27 at Titchfield which leads to M27 Junction 9.
- 1.1.3 The Gosport ferry carries pedestrians, cycles and small motorcycles between Gosport town centre and the Portsmouth Harbour rail and bus interchange. There is a further rail station to the west of Fareham town centre for which there is no direct bus service.
- 1.1.4 Information available through the 2001 Census, supported by annual business surveys, suggests that the number of jobs available within Gosport is not sufficient to support the resident population, leading to significant out-commuting; the Census records 18,500 journey to work trips per day leaving Gosport, with approximately 7500 inbound journeys, a net out-commute of c11,000 commuting trips per day by all modes.
- 1.1.5 A number of initiatives have been explored to resolve access difficulties and redress the transport infrastructure deficiency on the peninsula, the most recent being the abandoned South Hampshire Rapid Transit Scheme, dropped in 2006 after a failed Government funding bid. Alternatives are now being considered by Hampshire County Council.
- 1.1.6 To assist with these considerations, Gosport Borough Council commissioned MVA Consultancy, with GVA Grimley, to undertake an evidence based study that sought to identify linkages between local employment, work trips and congestion. The required outcomes of the study are to:
- improve the understanding of the linkages between employment opportunities, out-commuting and levels of congestion;
 - provide evidence for the Borough's Local Development Framework; and
 - offer guidance on how to maximise development opportunities at key employment sites within the Borough.
- 1.1.7 Specifically, the study has sought to:
- provide a robust, statistically reliable, independent evidence base for the Council that assesses the severity and effect of out-commuting on the local economy and quality of life of local residents; and
 - identify actions to reduce congestion and the need to travel by car, particularly those that will result in the creation of appropriate employment opportunities in the Borough and remove actual or perceived barriers to working closer to home.

1 Introduction

1.1.8 This document comprises the Final Report of this study. Our methodology is briefly described below, with study results, conclusions and recommendations presented in following chapters.

1.2 Methodology Overview

1.2.1 Our approach to this study has been to gather independent evidence, based on statistical reliability, to draw informed conclusions on the link between employment, commuting and congestion. A detailed methodology was presented and agreed with GBC at the commissioning stage of this study, so the following offers an overview of the approach taken.

1.2.2 Four tasks have been completed:

- Project Inception;
- Primary Data Collection;
- Data Interpretation & Analysis; and
- Presentation of Findings.

1.2.3 A comprehensive inception meeting took place on 9 May 2007 with GBC officers. Minutes are attached at Appendix A. Detailed aspects of the survey methodology and specification were clarified and agreed, and formed the basis for the remainder of the project. There have been no noteworthy variations in methodology from that agreed at the inception meeting.

1.2.4 A significant element of the project involved primary data collection to capture information from three groups:

- Gosport residents who work outside the Borough (out-commuters);
- Gosport residents who work within Gosport (internal commuters); and
- residents from outside Gosport who work within Gosport (in-commuters).

1.2.5 Information from the first two groups was collected using a home-based survey of resident workers. Information from in-commuters was collected using an employer based survey.

1.2.6 Two further aspects were required by the brief. The potential for expanding local sector-based employment matched to local skills and environment was explored by analysing economic data, supported by discussions with local business and commercial agents. A comparable 'measure of congestion' was also a required outcome; this has been derived using journey time surveys.

Resident Worker Surveys

1.2.7 The main source of information was captured through household surveys of resident workers. This gathered data from out-commuters and internal commuters. 17,000 questionnaires were circulated to randomly selected households within Gosport Borough, evenly distributed across 17 wards. An overall response rate of between 15 & 20% was the target, with an average response of 200 respondents per ward. At this sample size, we can be 95% confident that the true answer is +/- 6.9% (that is to say, if the number of out-

1 Introduction

commuters in a Ward is surveyed to be 50% then the true answer, with 95% confidence, lies between 43.1% and 56.9%. The following chapter shows overall and ward response rates.

- 1.2.8 Postal (freepost) and online returns were accepted, and a free prize draw was offered by the Borough Council as an incentive. The survey questionnaire distributed is attached at Appendix B.

Workplace Employee Survey

- 1.2.9 To capture data from in-commuters, 5000 questionnaires were circulated amongst major Gosport employers. Ward level statistical reliability was not a requirement of this part of the survey, and we aimed to achieve a 15-20% response rate.
- 1.2.10 Gosport Borough Council co-ordinated distribution of surveys amongst the 10 largest employers. The questionnaire used was similar to that used for household surveys, also attached at Appendix B.

Journey Time Surveys

- 1.2.11 A series of journey time surveys was undertaken during peak and off-peak periods to assess the extent of congestion. Surveys were undertaken by private car, ferry and bus. The brief refers to the identification of a 'measure of congestion' that can be reliably compared to other areas. There is no single agreed measure, so an indicator of 'time lost to congestion' has been agreed.
- 1.2.12 The measure of congestion has been calculated by comparing average peak and off-peak journey times, resulting in a measure of time lost to congestion, on each route and by mode.

Business Decision Making

- 1.2.13 GVA Grimley has considered the strategic economic factors affecting employment conditions within Gosport. Their conclusions are reported in Chapter 5.

2 Household Survey Results

2.1 Introduction

2.1.1 This Chapter summarises results from the Household Questionnaires. A full set of results can be found at Appendix D showing information at Ward level.

2.2 Resident Worker Surveys

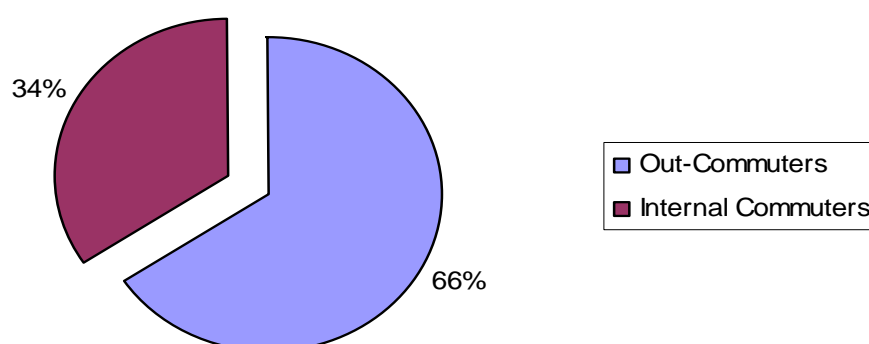
2.2.1 Questionnaires were sent to 17,000 randomly selected households, distributed evenly across the 17 wards in the Borough. 3306 returns were received by post and online by 20th July 2007, representing a response rate of 19.4%. This is at the upper end of the expected 15-20% response range. A small number of additional returns have been received since, but are not included in the analysis; they have been retained for completeness.

2.2.2 On coding the responses, it was found that around 500 responses were from non-working residents and have therefore been excluded from analysis. A 'clean' response rate is therefore **2825 returns**, equivalent to **16.6% response rate**. All analysis has been undertaken on cleaned responses.

2.2.3 Survey responses have been analysed by Out-Commuter and Internal Commuter groups, by ward in both cases. The chart below shows the proportion of responses received from each group.

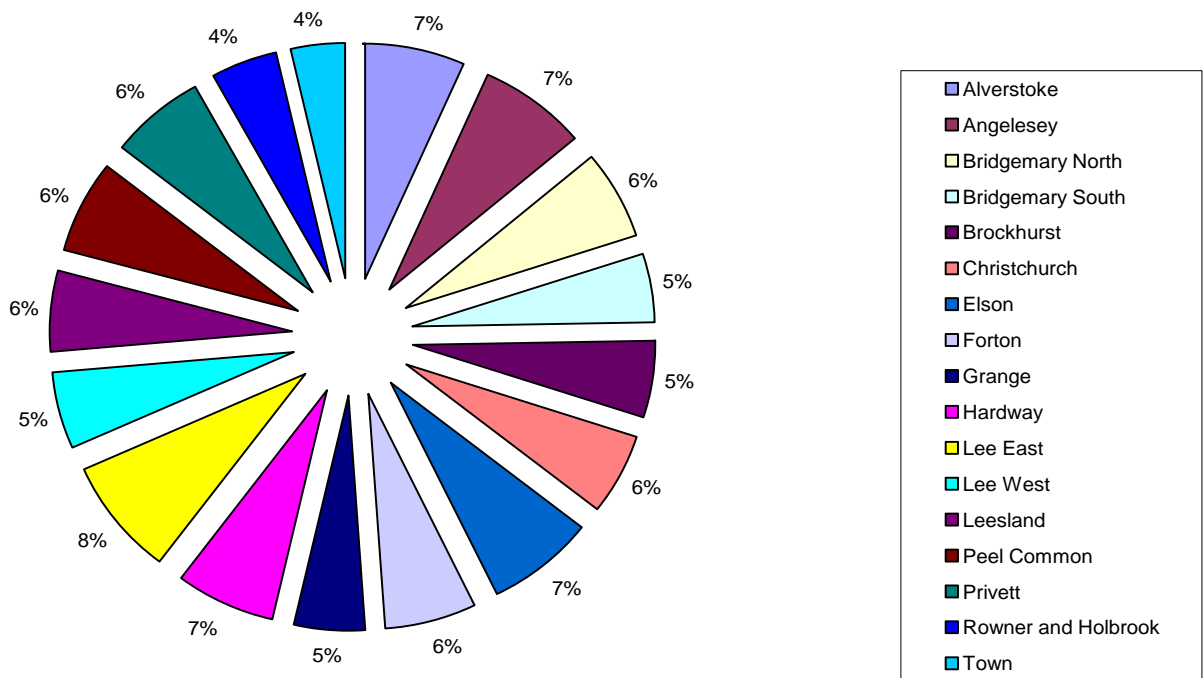
2.2.4 The highest proportions of out-commuters reside in wards close to the Fareham Borough boundary (Bridgemary North, Grange, Lee East and Peel Common). Lower proportions of out-commuters can be found in Wards with easy access to Gosport Ferry (Town, Hardway, Forton).

Figure 2.1 Household Responses by Commuter Group



2.2.5 Responses by ward are shown on Figure 2.2 below. This shows a reasonably consistent response rate across all wards, the lowest being Rowner & Holbrook and Town (4% each of all responses), the highest Lee East (8% of all responses). The results shown are averages across both commuter groups; there is little difference in response between the two groups.

Figure 2.2 Household Responses by Ward



2.2.6 The average response per ward is 165 returns, which means we can be 95% confident that the correct response is +/- 7.6%, i.e. if the sample result is 50%, the true value lies between 42.4% and 57.6%. The male / female response rate is evenly split at 51%/49%.

2.3 Headline Demographics

2.3.1 The following tables show demographic characteristics derived from the questionnaire.

Household Occupancy

Table 2.1 Number of People in Household

Number in Household	Prop'n of Households (across all Wards)	Ward with Highest Prop'n		Ward with Lowest Prop'n	
		Name	%age	Name	%age
One	18%	Christchurch / Forton	25%	Lee East	11%
Two	41%	Lee West	50%	Forton	32%
Three	19%	Grange	26%	C'church	12%
Four	17%	Lee East	22%	Town	8%

Number in Household	Prop'n of Households (across all Wards)	Ward with Highest Prop'n		Ward with Lowest Prop'n	
		Name	%age	Name	%age
Five or more	5%	Privett / Bridgemaury Sth	8%	Town	1%

Table 2.2 Age Profile in Household

Age Group	Prop'n of Hholds	Ward with Highest Prop'n		Ward with Lowest Prop'n	
		Name	%age	Name	%age
17 or less	3%	Grange	5%	Anglesey	1%
18-24	10%	Christchurch	14%	Alverstoke, Lee East / West, Rowner & Holbrook	8%
25-34	14%	Leesland, Rowner & Holbrook	22%	Alverstoke	7%
35-44	22%	Grange	32%	Lee West, Peel Common	13%
45-54	25%	Peel Common	33%	Forton	18%
55-60	14%	Alverstoke	19%	Leesland, Lee East	9%
60+	12%	Lee West	19%	Grange, Lee East	6%

2.3.2 The tables show average responses across both commuter groups, with little variations from the average within each group. From the above, we can conclude that Lee West and Privett Wards are likely to be family areas with relatively large dwellings. Grange also appears to have a large proportion of young families, with the lowest proportion of over 60 year old residents. Town Ward has the lowest household occupancy and, although not featuring in the above table, has an ageing resident profile.

Vehicle Ownership

Table 2.3 Vehicle Ownership by Household

Number of Cars in Household	Prop'n of Hholds	Ward with Highest Prop'n		Ward with Lowest Prop'n	
		Name	%age	Name	%age
None	7%	Town	20%	Lee East / West	2%
One	46%	Christchurch	63%	Lee East	35%
Two	39%	Lee East	53%	Christchurch / Town	24%
Three	8%	Lee West, Rowner & Holbrook	14%	Grange	4%

- 2.3.3 93% of households own at least one car. This is high in comparison with the national average of 75% of households having access to a car (2004). However the national average includes non-working and retired households. The higher than average proportion can partly be explained by the fact that all 'clean' returns were from economically active households, and may therefore be more car - reliant than retired or unemployed households. Again, little variation is shown between out-commuter and internal commuter groups.
- 2.3.4 Consistent with household size and age profile, Christchurch and Lee East households have the greatest access to one and two vehicles. Surprisingly, a relatively large proportion of households in Rowner & Holbrook have access to three vehicles; this ward has a greater than average proportion of households earning lower incomes. No further evidence on the reasons for this is evident from the survey results.
- 2.3.5 Only 12% of households have access to one or more motorcycles, the greatest proportion being Leesland.
- 2.3.6 Bicycle ownership is more widespread, with an average of 77% of households having access to one. 53% of households have access to two or more cycles, fairly evenly spread across wards.

2.4 Employment

- 2.4.1 Overall, 67% of employees have full time occupations (more than 30 hours per week). This rises to 70% in the out-commuting group, dropping to 64% for internal commuters. A greater proportion of this latter group had part-time jobs (24%) than out-commuters (17%). This is probably associated with lower wages and lower disposable income in part time work, resulting in a greater unwillingness to travel for part-time employment. Analysis by ward shows only minor variations from the average figures.

Type of Employment

2.4.2 The breakdown of responses is shown in the following table.

Table 2.4 Type of Employment

	Overall	Internal Commuter	Out Commuter
Employed	86%	85%	88%
HM Forces	5%	3%	6%
Self-Employed	9%	13%	6%
Total	100%	100%	100%

2.4.3 Given the amount of land taken by MoD facilities within Gosport, it is perhaps surprising the relatively low proportion of residents employed by the MoD, particularly Internal Commuters.

Job Role

2.4.4 The table below shows proportions of respondents in each job role following the Office of National Statistics job role definitions.

Table 2.5 Individual Job Role

Job Role	Overall	Internal Commuter	Out Commuter
Manager or Senior Official	18%	16%	19%
Professional	17%	18%	17%
Associate Professional	15%	12%	17%
Administrative	16%	16%	16%
Skilled Trade	13%	10%	14%
Personal & Care Service	5%	7%	3%
Elementary	5%	7%	3%
Machine Operative	3%	3%	3%
Sales & Customer Service	9%	11%	8%
Total	100%	100%	100%

2 Household Survey Results

- 2.4.5 Variations between the two commuter groups are not great, but it is noticeable that a greater proportion of higher skilled and qualified employees are leaving the Borough for employment. The reverse is also true; a higher proportion of internal commuters are to be found in lower skilled categories such as Personal Service and Sales.
- 2.4.6 A clear picture also emerges from analysis at Ward level. Detailed ward level tables can be found at Appendix D. It is notable that Anglesey and Lee East Wards contain a much higher proportion of workers in the top three categories than Town and Grange Wards. By contrast Grange Ward contains the highest proportion of employees in lower skilled categories. This pattern is present across both commuter groups.

Business Sector

- 2.4.7 In terms of business sector, public services, education and health made up the largest proportion of jobs, as shown on the following table.

Table 2.6 Business Sector in which Individual is Employed

Business Sector	Overall	Internal Commuter	Out Commuter
Finance, IT, Business Service	10%	8%	12%
Distribution (retail / hotels etc)	11%	12%	10%
Public services, education, health	39%	44%	35%
Construction	6%	4%	7%
Manufacturing, Engineering	13%	12%	14%
Transport & Communications	5%	3%	6%
Other	16%	17%	15%
Total	100%	100%	100%

- 2.4.8 The business sector classifications are consistent with those used by Office for National Statistics, which does not include an HM Forces category. We believe (but cannot be certain) that the high proportion of 'other' returns are HM Forces personnel.
- 2.4.9 The public sector comprises a significant proportion of employment, particularly for internal commuters. The major public sector employers in the Borough are the two hospitals (Haslar and War Memorial), the Borough Council, St Vincents College and several schools. Some respondents employed by the MoD might have classified themselves as 'public sector' but as stated above, we believe that most of these responses are captured in the 'other response'. The public sector representation is higher than average from well-off wards.
- 2.4.10 Excluding 'other' returns, manufacturing is the second largest sector in which people are employed, after public services. Manufacturing has traditionally underpinned Gosports' economy.

2.4.11 It is also of note that a higher proportion of those employed in the Finance / IT sector are out-commuters, supporting other evidence collected by the Borough Council that this sector is under-represented in the Borough. Grange Ward contains the least number of households with those working in the higher skilled finance, business and IT sector, once again reinforcing that wards' relative underperformance.

Length of Employment

2.4.12 Average length of employment is shown on the following two diagrams, the first showing proportion of respondents serving in each time category, as averages for the whole borough, and the second showing average service length by Ward.

Figure 2.3 Length of Time Worked in Current Job – Gosport Borough

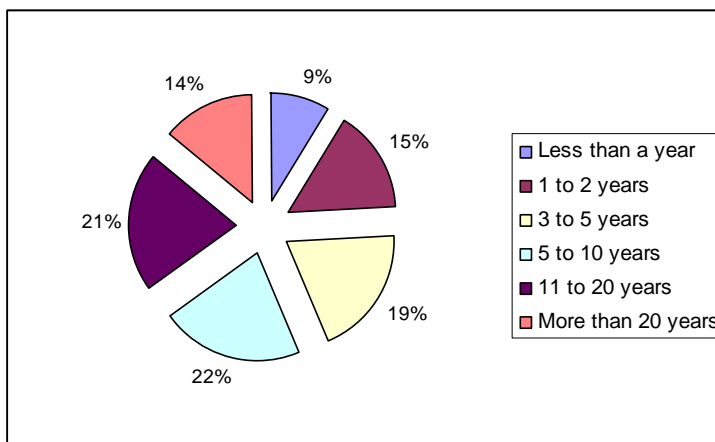
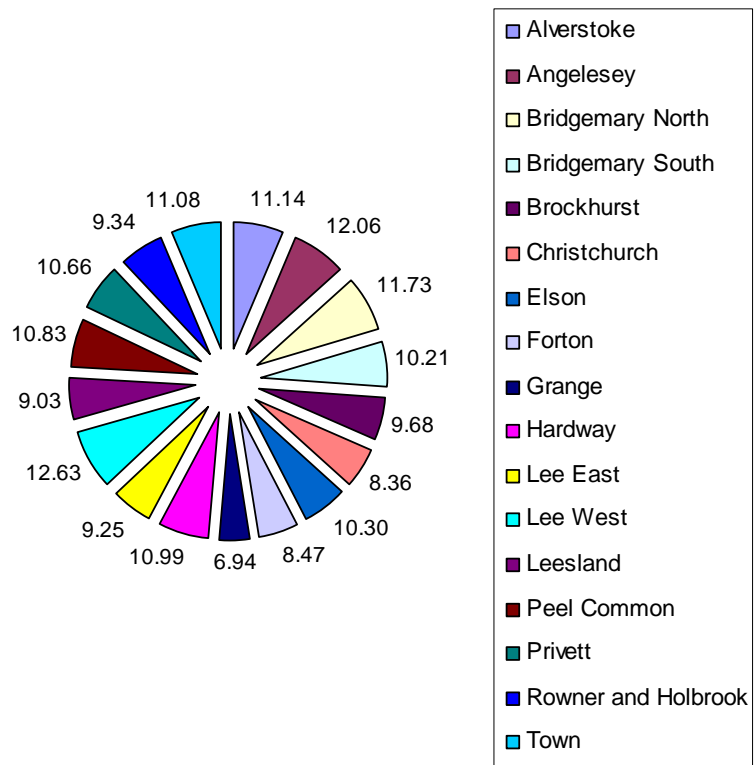


Figure 2.4 Average Time Worked in Current Job – By Ward



2.4.13 The average service length for the borough is 10.2 years. There is little variation of length of service between commuter groups. It can also be seen that length of service in most wards does not deviate significantly from the average. The highest job turnover is in Grange ward, and the lowest in Lee West.

Household Income

2.4.14 The final headline statistic is household income, as follows. The question was related to household rather than individual income; the questionnaire did not confirm how many working residents lived in the household, just those of working age.

Table 2.7 Gosport Resident Household Income

Income Band	Overall	Internal Commuter	Out Commuter
£5,000 or under	2%	4%	1%
£5,001 - £10,000	5%	8%	3%
£10,001 - £15,000	8%	12%	6%
£15,001 - £20,000	10%	10%	10%

Income Band	Overall	Internal Commuter	Out Commuter
£20,001 - £25,000	11%	11%	12%
£25,001 - £30,000	13%	12%	14%
£30,001 - £40,000	19%	19%	19%
£40,001 - £50,000	13%	11%	14%
£50,000 - £60,000	8%	6%	10%
Over £60,000	10%	7%	12%
Total	100%	100%	100%

2.4.15 It can clearly be seen that a greater proportion of out-commuters enjoy higher average household income than internal commuters.

2.4.16 Analysis at ward level reveals the polarisation between well-off and deprived wards, with Alverstoke and Anglesey wards having significantly higher household incomes than Grange and Town wards. It is of note that the number of households in the £60,000+ category in Alverstoke and Anglesey wards is 24%, almost two and half times the borough average of 10% of households in this category.

2.4.17 At the other end of the scale, Grange ward appears to have over representation of households with particularly low incomes. For the internal commuter group, 15% of households have an income of £5000 or less. This reduces to 5% in the out-commuter group, but is significantly higher than the Gosport average of 2%. The number of households in Grange ward without access to a car is 13%, almost double the borough average of 7%.

2.5 Travel to Work

2.5.1 Travel to work mode share is shown in the following table, both **main mode** (by distance) and **all modes** (mode used for part of the journey – totals exceed 100%).

Table 2.8 Travel to Work Mode Share

Mode	Overall		Internal Commuter		Out Commuter	
	All Modes	Main Mode	All Modes	Main Mode	All Modes	Main Mode
Car Driver	74%	66%	64%	55%	78%	72%
Car Passenger	7%	2%	7%	3%	8%	2%
Walk	15%	7%	27%	15%	9%	3%

	Overall		Internal Commuter		Out Commuter	
Cycle	22%	13%	33%	20%	17%	11%
Bus / Coach	6%	3%	6%	3%	6%	3%
Motorbike / Scooter	4%	2%	3%	2%	5%	3%
Train via Portsmouth	2%	1%	1%	0%	3%	1%
Train via Fareham	1%	0%	1%	0%	1%	1%
Gosport Ferry	12%	1%	3%	0%	17%	2%
IoW Ferry /Fastcat	0%	0%	0%	0%	0%	0%
IoW Hovercraft	0%	0%	0%	0%	0%	0%
Taxi	1%	0%	1%	0%	1%	0%
Other	3%	2%	2%	2%	3%	3%
Total		100%		100%		100%

- 2.5.2 The above table confirms the widely held view that levels of cycling in Gosport are high, and also brings out walking as an important mode. This is particularly true for internal commuters, where travel to work distances are low making these modes more practical.
- 2.5.3 It can also be seen that bus use is relatively low. The questionnaire did not seek views on public transport, but analysis for other work in the Gosport area reveals a complex and indirect bus network, a lack of priority measures, and a perception that fares are expensive, relative to the cost of motoring, all of which contribute to low usage. Analysis of bus journey times reported in Chapter 4 reveals lengthy journeys that are likely to be unattractive to potential users.
- 2.5.4 79% of respondents do not car share on a regular basis; 21% of respondents stated they car shared. Journeys to Portsmouth or Winchester had the highest proportion of car sharers, at 23%. Our experience based on developing employer travel plans suggests that this is a high percentage, but may include other 'share' journeys not included in the 'professional' view of car sharing, such as lifts to the station. However individuals have defined it, this gives an encouraging base from which to promote car sharing to the remaining 80%.

Gosport Ferry

2.5.5 The Gosport Ferry plays an important role in travel to work, particularly in gaining access to jobs in Portsmouth, but is under-represented as main mode by distance. The following chart shows ward distribution of ferry users from responses to the 'all modes' question.

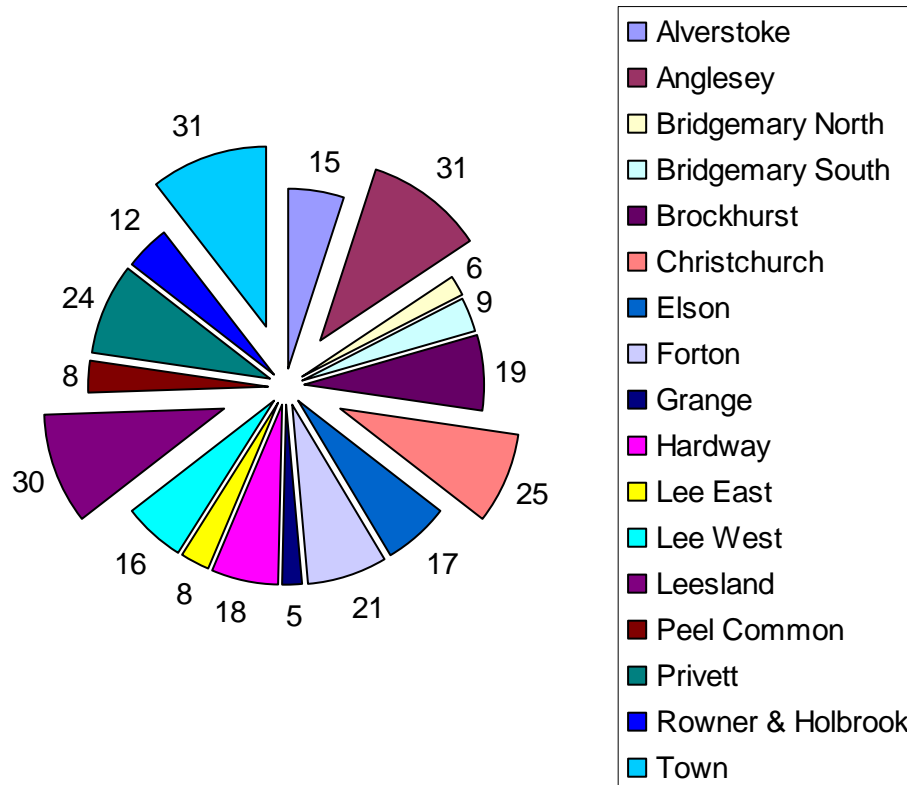
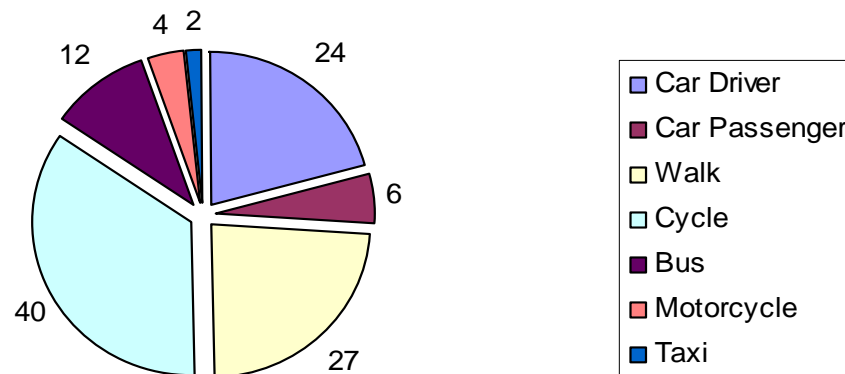


Figure 2.5 Gosport Ferry Users by Ward

2.5.6 There appears to be a direct correlation between distance from the ferry and its use. The four wards closest to the Ferry, Leesland, Christchurch, Town and Anglesey (exaggerated in the pie chart), have much higher proportions of out-commuters using the Ferry to access employment than wards further from the Ferry. This relationship can be extended to car mode share. Wards furthest from the ferry such as Lee East, Grange and Peel Common have low ferry usage. Lee East and Peel Common also have highest car mode shares at 81% and 77%. These wards are more reliant on car use as they have fewer alternatives available.

2.5.7 Of those that used the Gosport Ferry (322 respondents), information was sought on the access mode used, as shown on the chart below.

Figure 2.6 Gosport Ferry Access Mode



2.5.8 Cyclists make up 40% of ferry users, with walking also having a large mode share. Considering the co-location of the bus station and ferry terminal, bus use is relatively low, but this probably echoes the generally low bus use on the peninsula for travel to work. As might be expected, wards closest to the ferry have higher walking and cycling proportions, with 89% of ferry users in Town ward walking. Elson has the highest proportion of cyclists using the ferry at 59%, with several other wards showing percentages of around 50%.

2.5.9 Information was sought from non-ferry users on their reasons for not using the ferry, as shown in the following table. The question was directed at those working in Portsmouth (367 respondents). Respondents were able to select more than one response (totals exceed 100%)

Table 2.9 Reasons for Not Using Gosport Ferry

Reason	Proportion of Portsmouth Workers
Need car as part of my work	41%
I have a parking space at work	19%
Difficult to get to Gosport ferry terminal	8%
More convenient to travel by car	49%
Cost of the journey	25%
Other	21%

2.5.10 Almost half of respondents stated that it was more convenient to travel to their job in Portsmouth by car, rather than use the ferry. The location of jobs in Portsmouth is probably an important factor in this response, and 29% of respondents cited this as their main factor.

Although a large number of jobs are located in the city centre and the Dockyard, both easily accessible from the ferry, a reasonable proportion are located beyond easy ferry access, such as IBM at North Harbour, QA Hospital at Cosham and industrial estates at Hilsea. Other reasons made up 21% of responses to this question, broken down as follows:

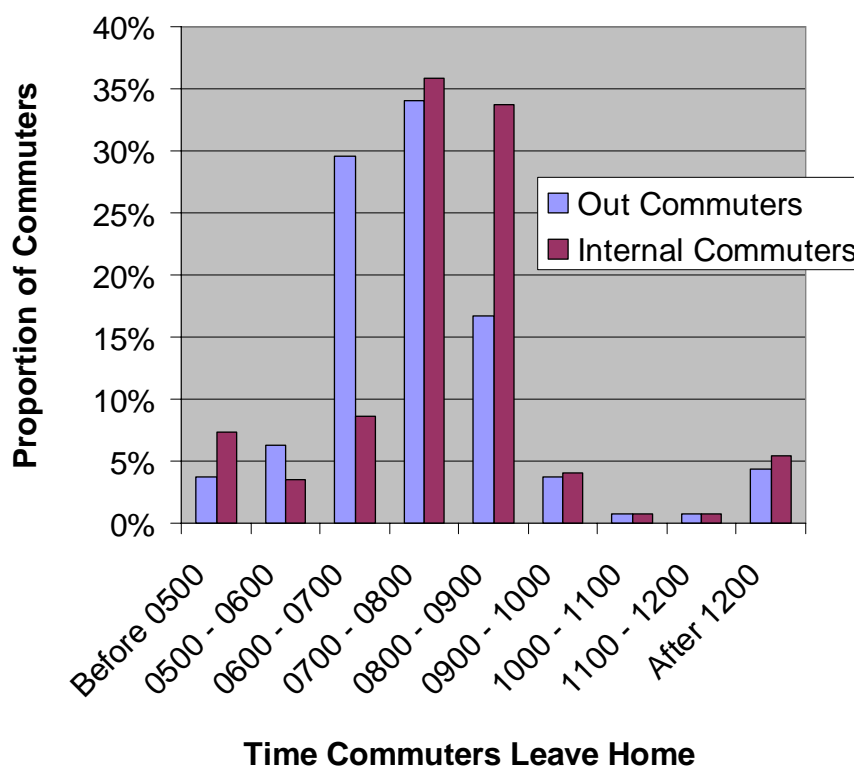
Table 2.10 Other Reasons for Not Using Gosport Ferry

Total Responses	77
Other	10%
Work nights/shifts	21%
Car parking costs/parking problems	12%
Need to carry equipment/drop children off	26%
Work too far away from ferry terminal	9%
Journey time	22%

2.6 Travelling Time

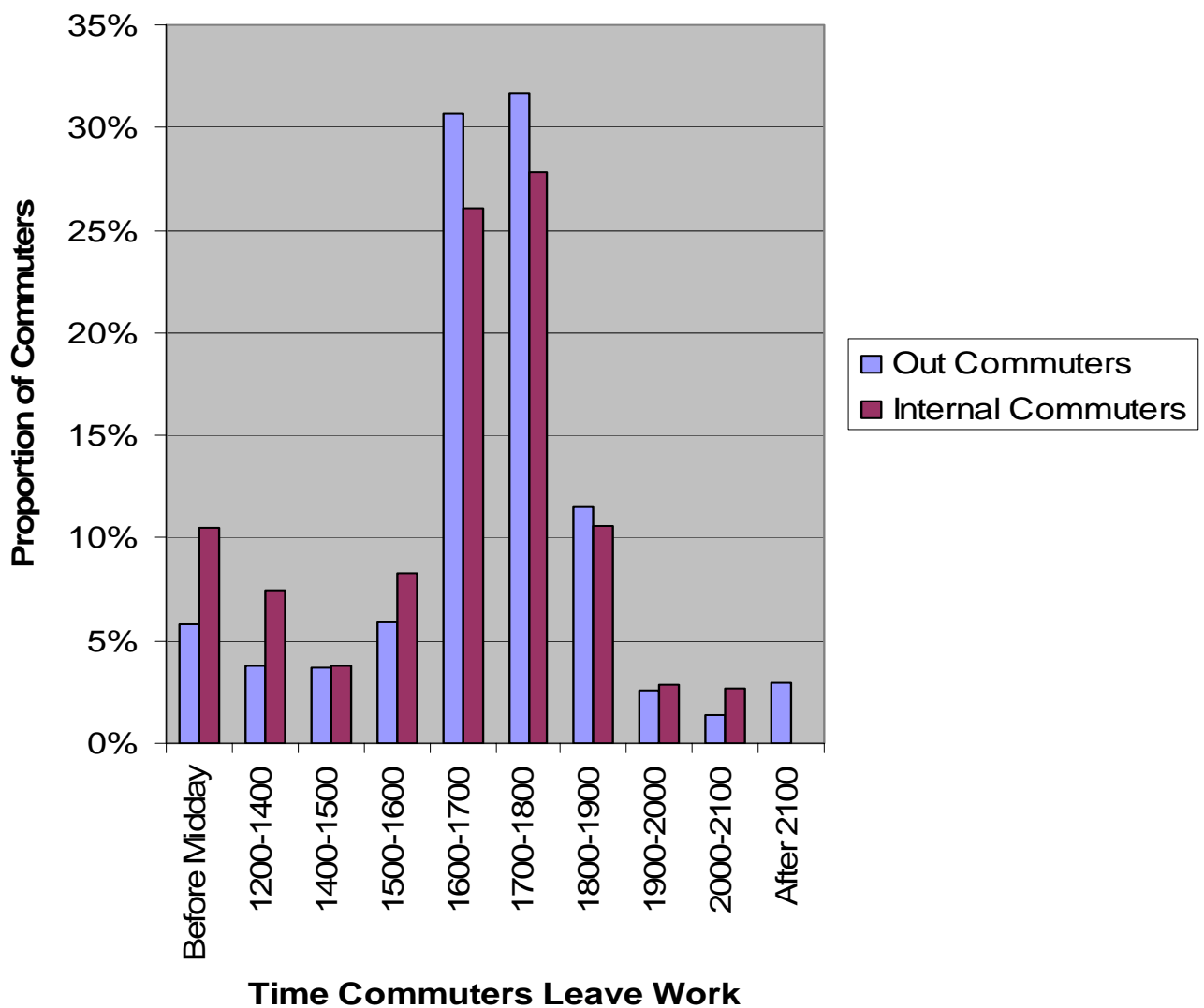
2.6.1 Respondents were asked to state the time they usually left home for work, and vice versa, as shown in the following graphs.

Figure 2.7 Time Commuters Leave Home



- 2.6.2 Commuting starts early in Gosport compared to the peak period in most towns of between 8 and 9am. A significant proportion of Out-Commuters leave home between 6 and 7am, markedly earlier than the Internal commuters. The latter group makes up most of the traffic movement between 8am and 9am. Commuting dissipates quickly after 9am. This pattern is confirmed by traffic surveys undertaken on A32 and Newgate Lane for another Gosport project, which show extensive AM peak spreading from early morning, similar to the above profile.
- 2.6.3 Analysis at Ward level reveals a similar pattern between out and internal commuters. A detailed ward breakdown is included with the results at Appendix D.

Figure 2.8 Time Commuters Leave Work



- 2.6.4 The evening peak period shows a strong homebound movement between 4pm and 6pm amongst both commuting groups, consistent with commuting patterns in most towns.

2 Household Survey Results

Commuting tails off quickly after 6pm. A higher proportion of Internal commuters leave work during the afternoon; this may be associated with the higher proportion of part-time workers amongst this group.

- 2.6.5 Traffic surveys indicate peak spreading from around 3pm along A32 and Newgate Lane. The data above implies that commuting traffic only makes up a small proportion of this, suggesting that afternoon school run traffic makes up a larger proportion of the recorded mid-afternoon peak.
- 2.6.6 For the majority of commuters (88%), their journey patterns do not involve taking or collecting children from school / nursery. Of those for whom this was a factor, the majority dropped off and collected their children, with 91% of respondents rating this factor as very or quite important in their choice of mode.

2.7 Journey Time

- 2.7.1 The survey included a question regarding journey times to and from work, and the importance of travel time to work, and sought to establish a maximum journey time threshold.
- 2.7.2 It is well known that an individuals' perception of journey time is often longer than actual lapsed time, and the following data should be seen in that context. Measured Journey Times are recorded in Chapter 4.
- 2.7.3 Mean journey time from all wards from the questionnaire response is as follows:

Table 2.11 Estimated Journey Times from Household Surveys

Minutes	Internal Commuter	Out Commuter
Journey to Work	17.9 min	45.6 min
Journey from Work	18.3 min	49.3 min

- 2.7.4 The difference in estimated journey is perhaps not surprising given the generic employment locations of each group. The difference also helps to explain the earlier start that out-commuters make to reach work on time.
- 2.7.5 Unsurprisingly, 90% of respondents considered commuting journey time as very important (51%) or quite important (39%).
- 2.7.6 In terms of maximum journey times people were willing to travel, on average 50% of respondents sought journey times of less than an hour, but this applied to a greater proportion of internal commuters. A further 34% were willing to travel up to one and a half hours.

2.8 Commuting Routes

2.8.1 Comparison of outputs by origin ward and destination shows that work location is the main determinant in choosing a commuting route for out-commuters. The following table shows routes chosen by local authority destination.

Table 2.12 Commuting Routes by Local Authority Destination

Route	Average	Gosport	Chichester	Eastleigh	Fareham	Havant	Portsmouth	Southampton	Winchester	Route Varies	Other
A32	39%	44%	40%	29%	22%	49%	60%	10%	18%	39%	30%
Newgate Lane	20%	2%	40%	4%	29%	46%	27%	10%	3%	26%	13%
Stubbington	23%	3%	10%	64%	43%	0%	4%	71%	76%	26%	50%
Other	18%	52%	10%	4%	6%	5%	10%	10%	3%	9%	7%

2.8.2 As might be expected, the route through Stubbington is primarily used for destinations to the west. Newgate Lane shares traffic heading east and west destinations, with A32 taking most of the traffic to eastern destinations. Internal commuters (those staying within Gosport) make significantly more use of A32 to access jobs than the other named routes, primarily due to the number of MOD facilities and industrial estates located along it. The A32 would appear to perform a dual function; strategic access to the peninsula and local route.

2.8.3 There is a wide selection of routes categorised as ‘other’ predominantly local roads and routes into town centre used by Gosport resident / workers (i.e. Privett Road, Anns Hill Road etc). There is some evidence of rat-running through Stokes Bay and Lee on Solent for longer journeys, but this is by no means widespread.

2.9 Parking

2.9.1 As with route data, parking information is best analysed by destination borough, rather than origin ward.

Table 2.13 Parking Locations by Local Authority Destination

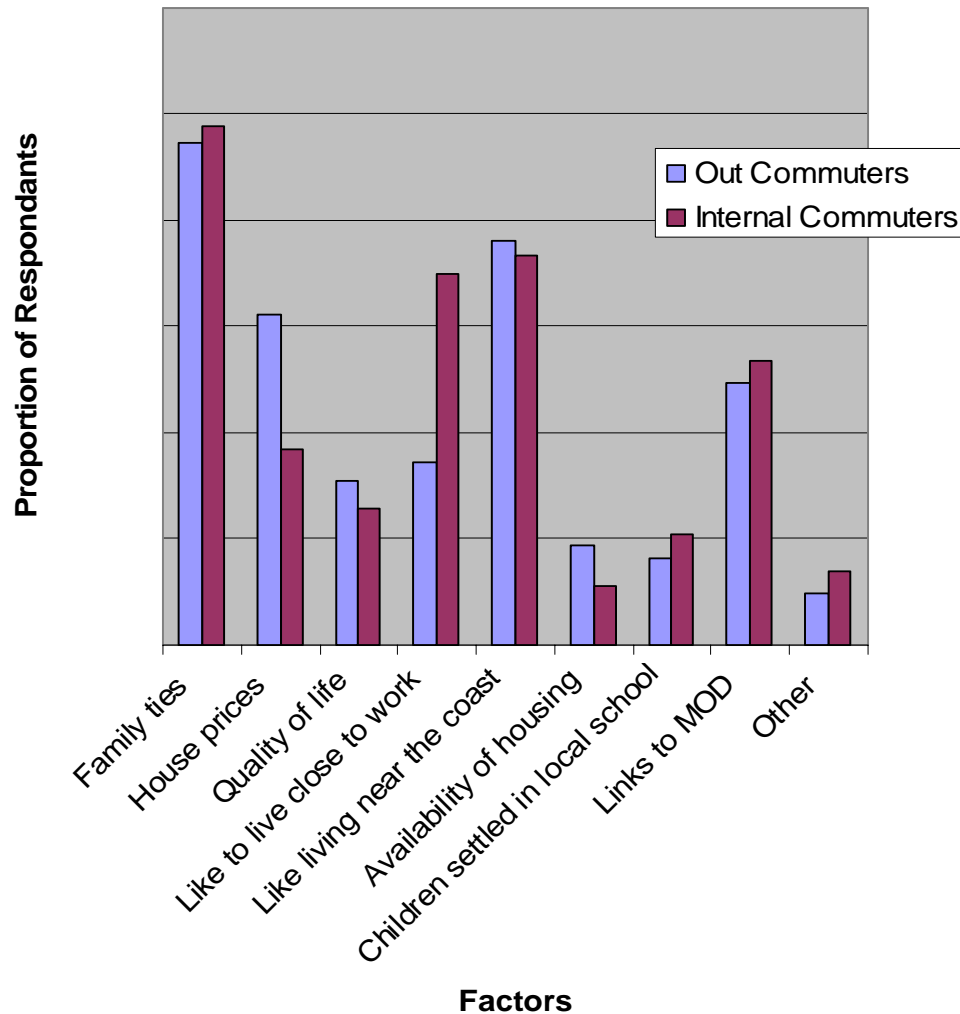
Route	Average	Gosport	Chichester	Eastleigh	Fareham	Havant	Portsmouth	Southampton	Winchester	Destination Varies	Other
Public Car Park	10%	9%	20%	4%	10%	5%	12%	14%	5%	10%	6%
Station Car Park	1%	0%	0%	0%	0%	0%	0%	5%	3%	1%	3%
On Street	9%	11%	0%	0%	5%	3%	9%	10%	5%	8%	4%
Employer Parking	75%	75%	70%	89%	82%	92%	72%	71%	85%	77%	85%
Don't Park	2%	4%	0%	4%	4%	0%	3%	0%	3%	1%	1%
Dropped Off	3%	2%	10%	4%	0%	0%	3%	0%	0%	3%	1%

- 2.9.2 The influence of private non-residential (PNR) parking provided for employees on mode choice is very apparent from this data. The ability to limit the amount of new PNR through the development process is one of the main ways in which car mode share can be reduced.
- 2.9.3 Of those who paid for parking (those in public or station car parks, and some on-street parking), average costs are reasonably consistent, probably as a result of co-ordinated parking policy across southern Hampshire
- 2.9.4 The average daily parking charge across all local authority destinations is **£3.06**. The number of responses to this question was low, so reliable disaggregation by LA destination has not been possible.
- 2.9.5 Less than one-third of all respondents had a car park season ticket. Of those who paid for parking, three-quarter paid for it themselves, with employers paying in 22% of cases, on average.

2.10 Factors Affecting Home & Work Location

2.10.1 Respondents were asked to identify the factors that influenced their choice to live in Gosport, as shown on the chart below (respondents were asked to select up to 3 factors; the chart shows the relative frequency of response for each factor).

Figure 2.9 Factors Affecting Decision to Live in Gosport



2.10.2 Family ties features as the strongest factor, cited by almost half respondents. Living in a coastal location is also a strong factor, with house prices cited by just over one quarter of respondents. MOD links was a factor for 25% of respondents.

2.10.3 It is also worth noting that house prices were a significant factor for out commuters, whilst the desire to live and work in the same town was more significant for internal commuters.

2.10.4 These parameters are difficult to influence and control at a local authority level. These are personal choices that planning or other policy can do little to alter. However, the results do offer insight to the psyche of residents, showing a family orientated community that places a high value on the location of Gosport (near the coast) and, for MOD personnel, their proximity to jobs. Quality of life was not rated highly by either group, as an individual

2 Household Survey Results

factor, although other features, such as living near the coast or family connections contribute to overall quality of life..

- 2.10.5 The survey also asked respondents to rank a range of factors that would influence them getting a job in Gosport. Average rankings are shown on the table below, with lower scores showing a higher ranking.

Table 2.14 Factors that Would Encourage Out Commuters to Work in Gosport

Factor	Response Frequency By Factor					%age Responses Ranked #1	Overall Ranking	
	Rank	1st	2nd	3rd	4th			5th
More Jobs for People with my Qualifications		282	179	179	75	21	20%	2
More Jobs for People with my level of experience		179	365	182	61	33	13%	3
More jobs that pay the salary I want		542	229	200	31	15	38%	1
Nothing, I don't want to work where I live		125	15	7	9	17	9%	4
Improved public transport links		110	89	82	103	86	8%	5
Improved work / life balance		113	142	150	153	71	8%	5
Access to leisure / social facilities		4	16	32	50	77	0%	8
Access to child care near work		7	18	17	15	16	0%	8
Other		50	12	1	6	3	4%	7

- 2.10.6 A desire for more Gosport jobs to reflect salary expectations, qualifications and experience levels clearly emerge as the three most important job locational factors for out commuters.
- 2.10.7 'Nothing – I don't want to work where I live' was recorded as the 4th highest ranking responses, although well-off wards rated this higher. A significantly higher proportion of public sector workers prioritise this factor.
- 2.10.8 Taking this statistic at face value, it shows an inclination to travel longer distances for employment particularly for better paid jobs or for public sector workers. However, analysis by ward shows that those coming from wards with a higher proportion of lower paid professions are more amenable to taking jobs locally. Disposable income available for travel costs may be a factor in this response.

Table 2.15 Factors Affecting Choices to Work in Gosport – Internal
Commu Table 2.16 Factors Affecting Choices to Work in Gosport – Internal ers

Factor	Response Frequency By Factor					%age Responses Ranked #1	Overall Ranking	
	Rank	1st	2nd	3rd	4th			5th
More Jobs for People with my Qualifications		23	20	13	9	11	16%	2
More Jobs for People with my level of experience		8	22	15	9	0	6%	5
More jobs that pay the salary I want		51	15	16	5	4	35%	1
Nothing, I don't want to work where I live		7	0	1	2	1	5%	7
Improved public transport links		23	21	14	4	4	16%	2
Improved work / life balance		21	21	12	11	7	15%	4
Access to leisure / social facilities		0	7	6	10	11	0%	9
Access to child care near work		2	0	3	5	6	1%	8
Other		9	1	2	1	2	6%	5

2.10.9 For Internal Commuters, the desire for higher grade jobs in terms of salary and qualifications again features strongly. There is less of a desire amongst this group for jobs relating to levels of experience.

2.10.10 Many internal commuters are seeking improved public transport links.

2.10.11 Direct comparison between this table and the Out Commuter table should be done with care as sample sizes and response rates are not consistent. The Out Commuter sample size is much larger.

2.11 Summary

2.11.1 Although there are many similarities between out commuters and internal commuter groups in terms of household profile and demographics, the way in which their lives are organised appears to vary considerably. The out-commuting group commence their commute over an hour earlier than internal commuters, reflecting not only the additional commuting distance involved, but also time necessary to reach their destination. This evidence is confirmed when considering measured journey time surveys in Chapter 4.

2 Household Survey Results

- 2.11.2 The benefits to out-commuters appear to be higher household income than internal commuters, and a higher proportion in skilled / professional jobs. The comparatively low house prices in Gosport are an attractive aspect for out-commuters.
- 2.11.3 At ward level, the data presents a picture of polarisation across the borough, with some clearly well-off wards (Alverstoke, Anglesey, Lee East & West), against some very deprived areas (Grange, Rowner & Holbrook, Town).
- 2.11.4 Analysis indicates that income, job location and proximity to the Gosport Ferry are all important factors in car mode share. It is of some concern as to the limited extent to which local authority policy can directly influence the number of jobs with better salaries, skills or experience levels. Facilitating economic growth is one of the main priorities of the Borough Council, but market conditions, locally and on wider scale, need to be in a position to exploit those opportunities.
- 2.11.5 Encouragingly, workers within Gosport, or who work in Portsmouth close to the Gosport ferry have more sustainable travel patterns. Bus mode share is consistently low across all groups but the precise reasons for this pattern have not emerged from this dataset. As explored later, journey time compared with car journeys is one of the factors, but our experience suggests that there are usually several other aspects involved when considering bus use such as destinations served, frequency, pricing and quality of service.

3 Employee Results

3.1 Introduction

3.1.1 This Chapter summarises results from the Employee Questionnaire that captured data from in-commuters – those working in Gosport and living elsewhere. A full set of results can be found at Appendix E.

3.2 Employee Survey

3.2.1 Questionnaires were sent to 4000 employees at the largest Gosport employers. The Borough Council co-ordinated survey distribution, and responses were sent directly to MVA Consultancy for analysis. A total of 615 responses were received prior to the original deadline. An additional 53 responses were added to this analysis, having been received after the survey deadline, but considered to be valid responses. This equates to a 16.7% response rate. A high volume of responses were received from the following organisations:

Ashford Colour Press	CPG Logistics
DCAE - HMS Sultan	DARA Fleetlands
Flagship Training – HMS Sultan	Fortek Computers
Gosport Borough Council	MOD / Royal Navy (no Base given)
STS Defence	Tyco Healthcare

3.2.2 Small numbers of responses were also received from a large number of other organisations, included at Appendix E. The responses indicate that knowledge of the survey spread well beyond the 10 largest organisations targeted by the Council, and online completions accounted for 15% of the overall response.

3.2.3 It has since become apparent that some surveys were not distributed within organisations until after the survey deadline passed. Additional responses have been sent to the Borough Council for separate analysis.

3.2.4 The results below are based on the 668 original responses (although response rates to individual questions vary slightly). At this response rate, we can be 95% confident that the correct response is +/- 4%. The male / female response is 55%/45%.

3.2.5 The primary audience for the survey was the in-commuter group, but no restrictions were placed on Gosport residents / workers also completing the questionnaire. Respondents residing in each location authority are as follows:

- Gosport – 45%;
- Fareham – 24%;
- Havant – 4%;
- Portsmouth – 9%;

3 Employee Results

- Isle of Wight – 1%;
- Southampton (including Eastleigh) – 3%;
- Winchester – 2%;
- Rest of Hampshire – 2%;
- Chichester - <1%;
- Rest of Sussex – 1%;
- Rest of South East – <1%; and
- Rest of UK - <1%.

3.2.6 It can be seen that almost half of the 668 respondents are Gosport residents (300 responses), and therefore not strictly in-commuters. Their responses, however, are still valid, and are helpful in presenting a fuller picture of employment conditions with Gosport, and have therefore been included in the analysis of employee data shown at Appendix E. For the purposes of this report, only the analysis of in-commuter data is presented, amounting to 368 responses, equivalent to a 9.2% response rate.

3.2.7 To aid comparison, we have included the figures from the household survey, although care should be taken given the difference sample sizes of these two datasets (2825 household response, against 368 in-commuter response).

3.2.8 Where appropriate we have split in-commuter data by origin Local Authority, but care should be taken in interpreting some of these results due to small sample sizes at this level of details.

3.3 Headline Demographics

3.3.1 The following tables show demographic characteristics derived from questionnaire responses.

Table 3.1 Number of People in Household

Number in Household	%age Household	%age In-Commuters
One	18%	18%
Two	41%	59%
Three	19%	13%
Four	17%	10%

3.3.2 There is very little difference between the household sample and that of in-commuters only, although in-commuters are slightly less likely to have dependants.

3.3.3 The chart below gives the age profile of in commuter respondents.

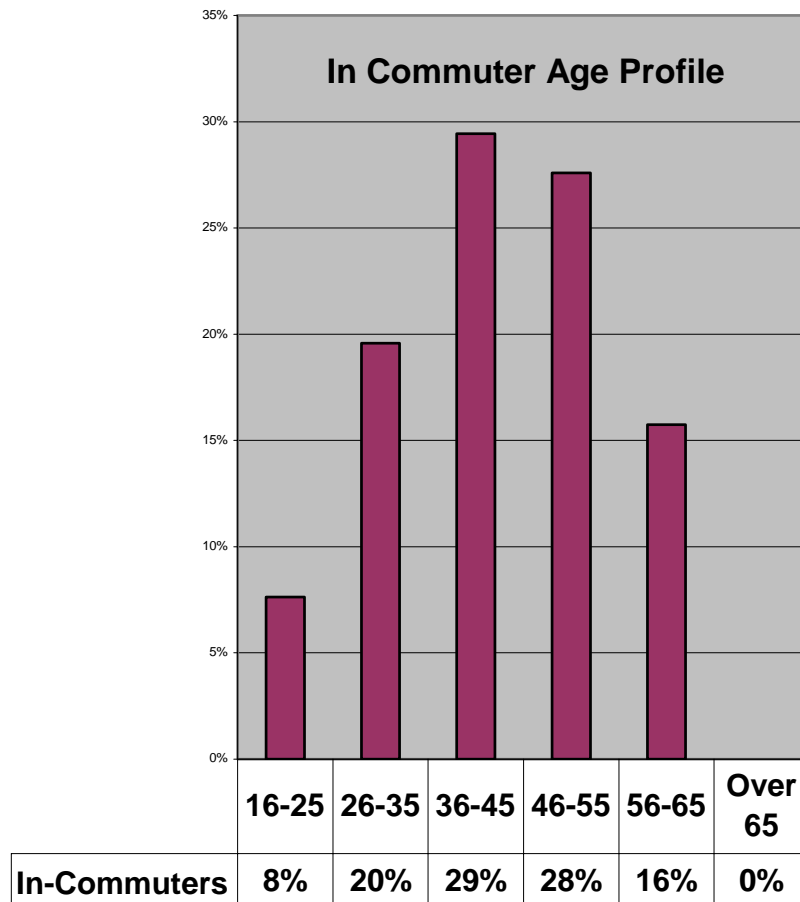


Figure 3.1 Age of In Commuter Respondents

Table 3.2 Vehicles Ownership by Household

Number Available	%age Household	%age In-Commuters
None	7%	2%
One	46%	27%
Two	39%	58%
Three or More	8%	14%

3.3.4 Similar to returns from Gosport households, car ownership overall is high, probably as a result of only getting returns from economically active households.

3.3.5 The proportion of households with access to two or more cars is higher amongst in commuter households at 72%, compared with 47% for Gosport households.

3 Employee Results

- 3.3.6 Only 12% of those surveyed from in-commuter households have access to one or more motorcycles. Bicycle ownership amongst this group is similar to Gosport households, with 28% not having access.

3.4 Employment

- 3.4.1 94% (295) of in-commuter respondents work full time, compared with the Gosport resident average of 67% (1897).

Job Role

- 3.4.2 The following table shows proportions of respondents in each job role as defined by ONS.

Table 3.3 Job Role

Job Role	%age Household (2713 replies)	%age In-Commuters (338 replies)
Manager or Senior Official	18%	29%
Professional	17%	21%
Associate Professional	15%	22%
Administrative	16%	16%
Skilled Trade	13%	8%
Personal & Care Service	5%	1%
Elementary	5%	0%
Machine Operative	3%	1%
Sales & Customer Service	9%	1%

- 3.4.3 Comparing the above table with Gosport household data, it can be noted that a higher proportion of management and professional staff (the top 3 categories) are in-commuters (72%) than residents (50%). As stated above, caution should be taken with direct comparison between household and employee data due to different sample sizes.
- 3.4.4 At the bottom end of the table, a similar comparison shows that the proportion of Gosport residents making up the bottom three categories (from the household survey) is 17%, whilst in-commuters make up only 2% of that group.
- 3.4.5 Both of these comparisons suggest the lower skill workforce resident in Gosport, and a reliance on external workers to fill senior / professional posts. There is, however, anecdotal evidence suggesting many employers only advertise junior / elementary jobs locally, whilst promoting senior jobs to a wider audience. Although this is common practice in many organisations, the (unintended) consequences of that policy can clearly be seen. It would

3 Employee Results

appear that, with 50% of working residents in management / professional posts, there is a good local supply of appropriately skilled workforce, without the need for over-reliance on external staff.

Business Sector

- 3.4.6 As with Gosport residents, the public sector comprises the largest employment group, shown on the table below.

Table 3.4 Business Sector

Business Sector	%age Household (2751 replies)	%age In-Commuters (344 replies)
Finance, IT, Business Service	10%	18%
Distribution (retail / hotels etc)	11%	2%
Public services, education, health	39%	30%
Construction	6%	3%
Manufacturing, Engineering	13%	30%
Transport & Communications	5%	1%
Other	16%	16%

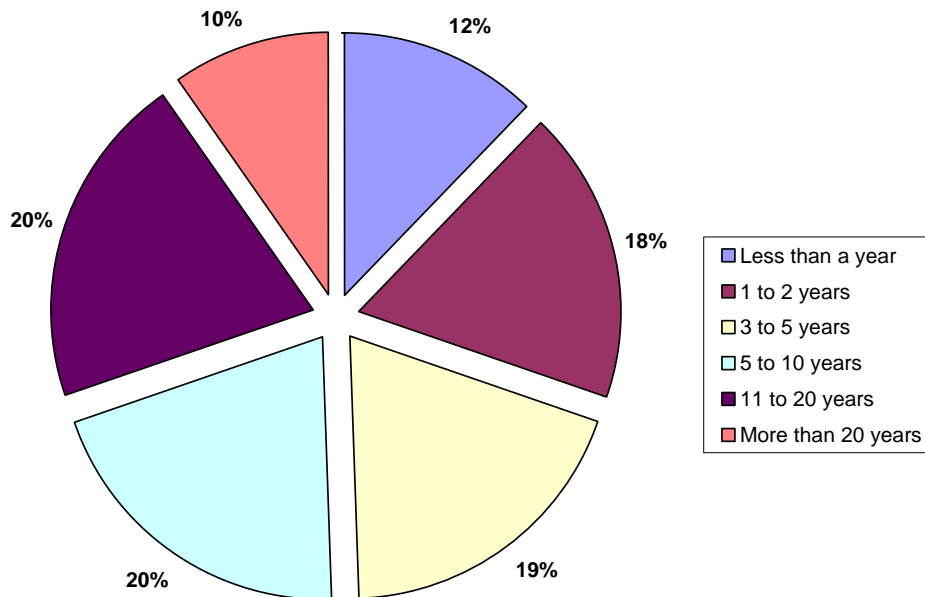
- 3.4.7 Similar to the household survey returns, we believe the 'other' sector includes HM Forces personnel.
- 3.4.8 Consistent with the 'job role' discussion above, the number of in-commuters taking up higher skilled and better paid positions is disproportionate compared to the proportion of residents working in similar sectors. For example, only 2% of in-commuters are employed in the (typically low paid) distribution / retail sector, compared with 11% of residents in the household survey. By contrast, 18% of in-commuters are employed in finance / IT, compared with 10% of residents, some of whom work outside Gosport.
- 3.4.9 The anomaly is the manufacturing and engineering sector. This segment is one of the mainstays of the Gosport economy, but appears to rely on a higher percentage of in-commuters (30%) than local residents (13%) to function. The reasons for this are not clear from the survey, but may be connected with particular skills required for some specialist engineering processes, possibly not available from Gosport residents. It may be of value to explore this area further.

Length of Employment

- 3.4.10 Average length of employment in current job is shown on the following chart. The average service length for in-commuters is 7.7 years, considerably shorter than the Gosport average of 10.2 years.

3.4.11 Detailed breakdown of this analysis is included in the main results at Appendix E, showing analysis by gender, business sector, age and job role for all employee respondents and in-commuters. Some variations exist across the data set, with jobs in skilled trade and process sectors tending to have lower turnover rates than other sectors, with a much higher proportion of employees working more than 10 years in the same job. Comparison with the household survey suggests a higher turnover amongst in-commuters with only 26% having been with the same employer for more than 10 years, compared to 35% of residents (see Figure 2.3)

Figure 3.2 Length of Employment



Household Income

Household income for in-commuting households is shown on the table below. As for the household survey, the question was related to household rather than individual income and the questionnaire did not confirm how many working residents lived in the household, just those of working age.

Table 3.5 Household Income

Income Band	%age Household	%age In-Commuters
£5,000 or under	2%	1%
£5,001 - £10,000	5%	3%

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Income Band	%age Household	%age In-Commuters
£10,001 - £15,000	8%	1%
£15,001 - £20,000	10%	7%
£20,001 - £25,000	11%	9%
£25,001 - £30,000	13%	9%
£30,001 - £40,000	19%	19%
£40,001 - £50,000	13%	20%
£50,000 - £60,000	8%	14%
Over £60,000	10%	17%

3.4.12 The results are similar to Gosport residents data in the middle income bands, but in-commuters show a higher percentage of households with incomes over £40,000 (51% compared with 31% of Gosport households), and significantly fewer households on less than £15,000 (5% compared with 15% of Gosport households).

3.5 Travel to Work

3.5.1 Travel to work mode share is shown in the following table, as main mode (by distance) and all modes (which total more than 100%).

Table 3.6 Travel to Work Mode Share

Mode	All Modes Used %* (Household)	Main Mode %	
		Household	In-Commuters
Car Driver	74%	66%	81%
Car Passenger	7%	2%	2%
Walk	15%	7%	1%
Cycle	22%	13%	2%
Bus / Coach	6%	3%	3%
Motorbike / Scooter	4%	2%	3%
Train via Portsmouth	2%	1%	1%
Train via Fareham	1%	0%	1%
Gosport Ferry	12%	1%	1%
IoW Ferry /Fastcat	0%	0%	6%

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IoW Hovercraft	0%	0%	0%
Taxi	1%	0%	0%
Other	3%	2%	0%

*Respondents using this mode for part of the journey

- 3.5.2 These results show a higher reliance on car for in-commuters than Gosport residents. The proportion of cyclists and those walking to work is much lower for in-commuters than for the resident population, confirming the presence of a strong cycling culture in Gosport. Bus use is identical at 3%. 84% of in-commuters stated that they never car share.
- 3.5.3 Use of the Gosport ferry is very low at only 1% (12% for residents), but is probably explained by the relative lack of jobs in close proximity to the Gosport ferry terminal – most of Gosports' large employers are some distance from the ferry.
- 3.5.4 This is supported by respondents' reasons given for not using the ferry (58 comments); 58% stated it was more convenient to travel by car, and 21% stated it was difficult to get to Gosport ferry terminal. It should also be remembered that in-commuters are travelling against the heavy outbound flow of traffic, and therefore have a relatively uncongested car journey. Buses operating between Gosport and Fareham town centres have no priority measures in either direction, and are therefore subject to delays on the outbound route, which in turn affects reliability on the less congested in-bound route. The cost of the journey by ferry was cited by 30% (this probably relates to the cost of the whole journey rather than just the ferry element).
- 3.5.5 A small proportion of in-commuters reside in IoW (6 respondents). Although this is not a statistically reliable sample size, it is of note that two respondents commute by car either as driver or passenger to work in Gosport, suggesting a lengthy journey time (car ferry, car journey via Portsmouth, M27 and A32). The remainder use Fastcat and Gosport ferries.

3.6 Travelling Time

- 3.6.1 In commuters were asked to state the time they usually left home for work, and vice versa, as shown in the following graphs.

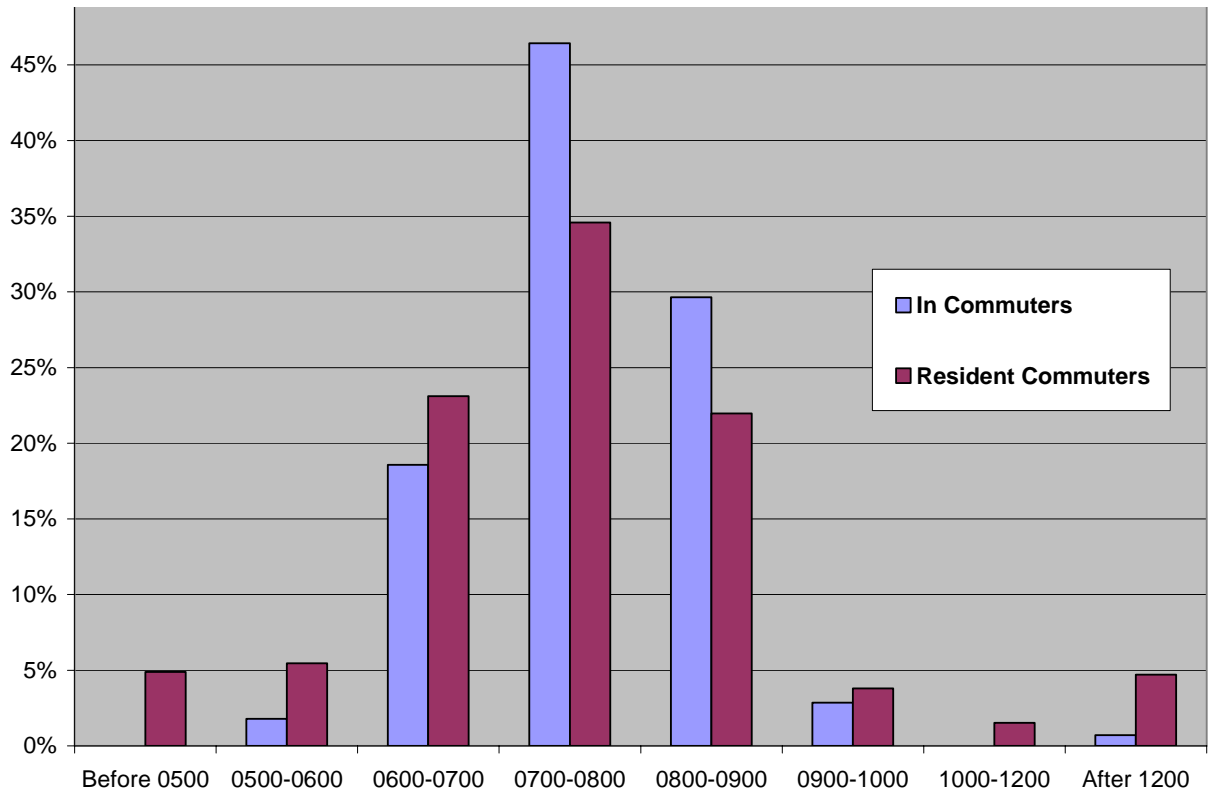


Figure 3.3 Time In-Commuters Leave Home

- 3.6.2 The early peak, and peak spreading shown in out commuting patterns is repeated amongst in-commuters. However, the 6am peak in this profile is lower than for out-commuters, with a greater proportion of in-commuters leaving after 7am.
- 3.6.3 As with resident commuters, the in-commuter profile shows a strong homebound peak between 4pm and 6pm, with commuting tailing off sharply after 6pm, although less so for in-commuters.
- 3.6.4 The overall commuting patterns appears to be that Gosport resident workers leave for work early, and also head home relatively early, whilst in-commuters also have a relatively early morning commute, but tend to leave work slightly later.

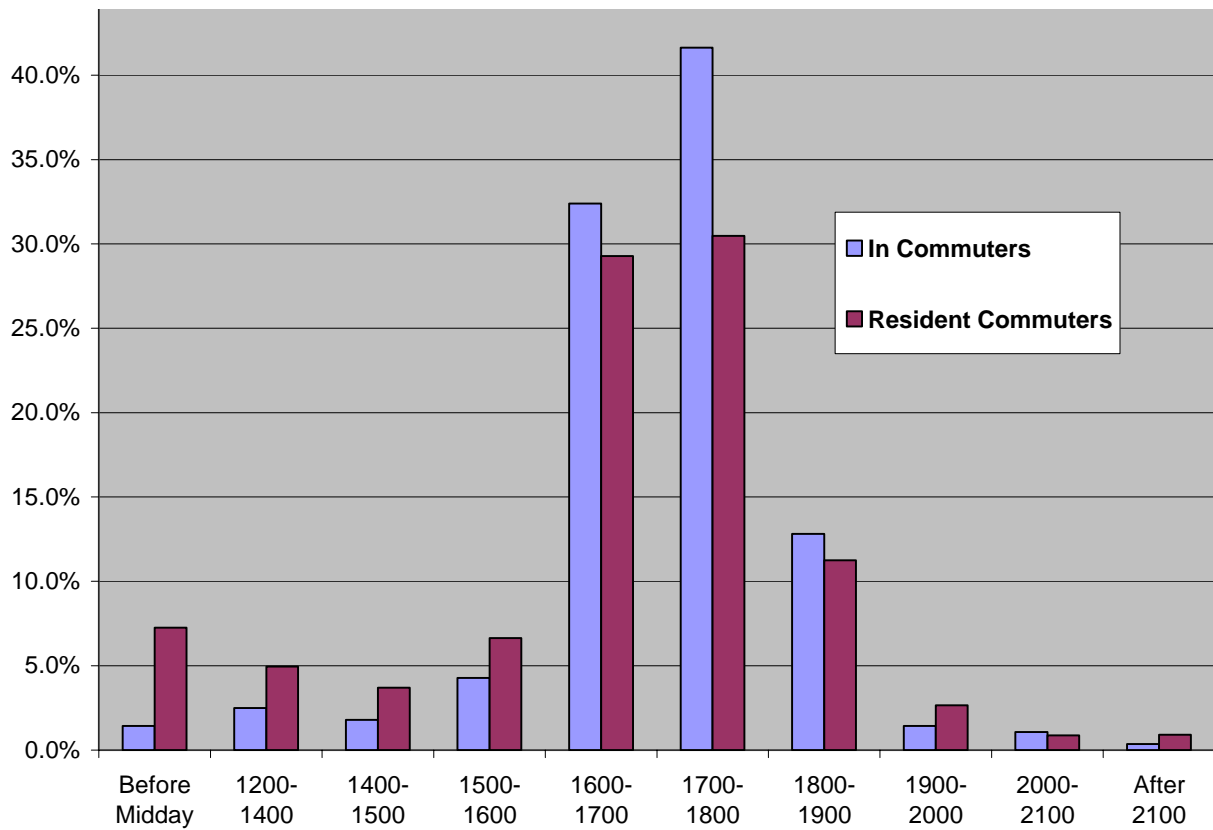
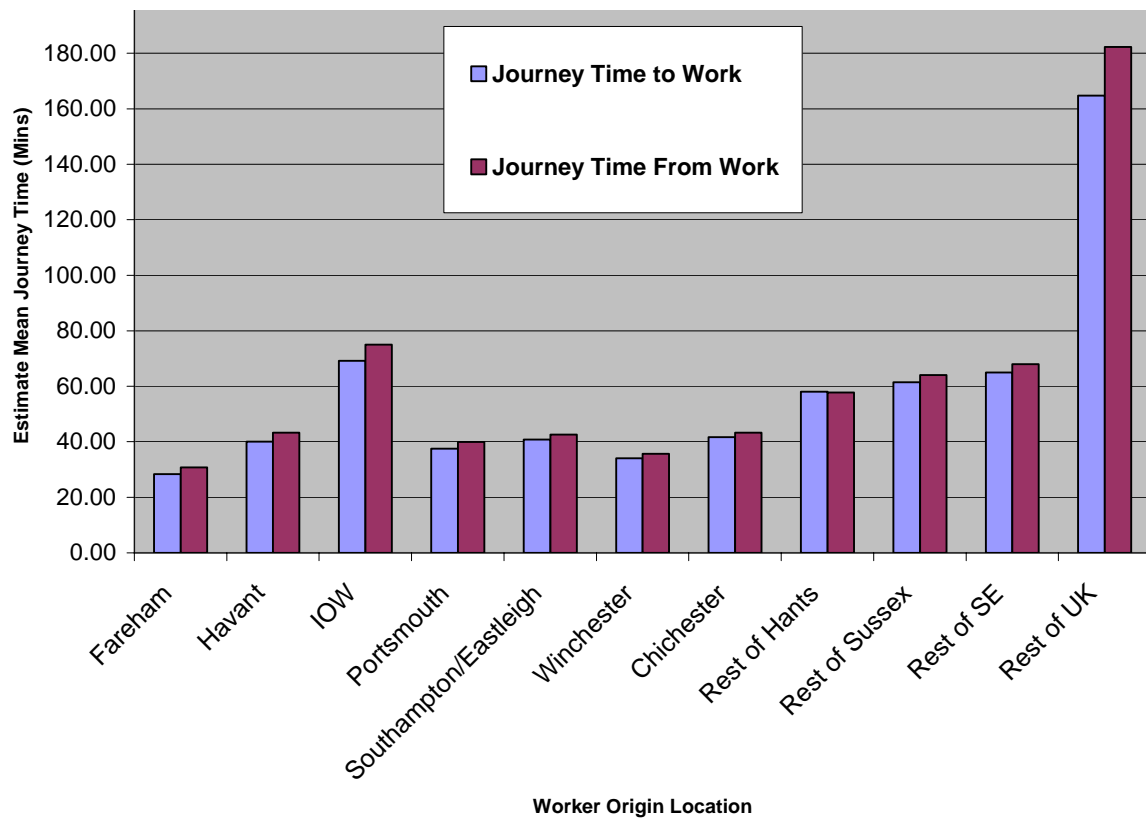


Figure 3.4 Time Commuters Leave Work

3.6.5 For 90% of in-commuters, dropping off or collecting children did not form part of their commuting pattern. For those for whom this featured, 76% felt it was very important (71%) or quite important (5%) to their mode choice.

3.6.6 The chart below indicates responses to questions regarding estimated journey times to and from work.

Figure 3.5 Estimated Journey Times



3.6.7 As mentioned previously, individuals often perceive longer journeys than actual elapsed time, and this data should be seen in that context. Measured Journey Times are recorded in Chapter 4.

3.6.8 Mean journey times were recorded as follows for in commuters:

- Journey To Work – 43.3 mins; and
- Journey from Work –46 mins.

3.6.9 It can be seen that estimated journey times to most major settlements in southern Hampshire are reasonably consistent at around 40 minutes. As with responses from the household survey, the homebound journey is perceived to be longer than the journey to work.

3.6.10 86% of respondents felt that commuting journey time was very important or quite important.

3.7 Commuting Routes

3.7.1 In-commuters were asked which routes they usually used to access employment, as shown in the following table.

Table 3.7 In-Commuter Routes Used

Route	%age In-Commuters
A32	64%
Newgate Lane	12%
Stubbington	20%
Other	4%

3.7.2 The A32 takes almost two-thirds of in-commuting traffic, probably as a result of the number of employment locations directly accessible from it, and that it is a quicker route to Gosport town centre than Newgate Lane in relatively uncongested conditions.

3.8 Parking

3.8.1 Respondents were asked to record their parking location and pricing information as shown below.

Table 3.8 Parking Locations for In-Commuters

Location	%age Resident Commuters	%age In-Commuters
Public Car Park	10%	13%
On Street	9%	7%
Employer Parking	75%	76%
Don't Park (Dropped Off)	2%	1%
Other	3%	3%

3.8.2 Again, the influence of PNR parking is evident in influencing mode choice, particularly for Gosport resident employees. However, compared with resident workers parking in other local authority areas, a higher proportion of in-commuters use public car parks.

3.8.3 The table shows responses only from those who stated they pay to park. Those with free parking are excluded. The mean daily cost of parking is £1.66. Three-quarters of respondents paid for parking themselves, with 76% of in-commuters having a car park season ticket, a much higher percentage than out-commuters.

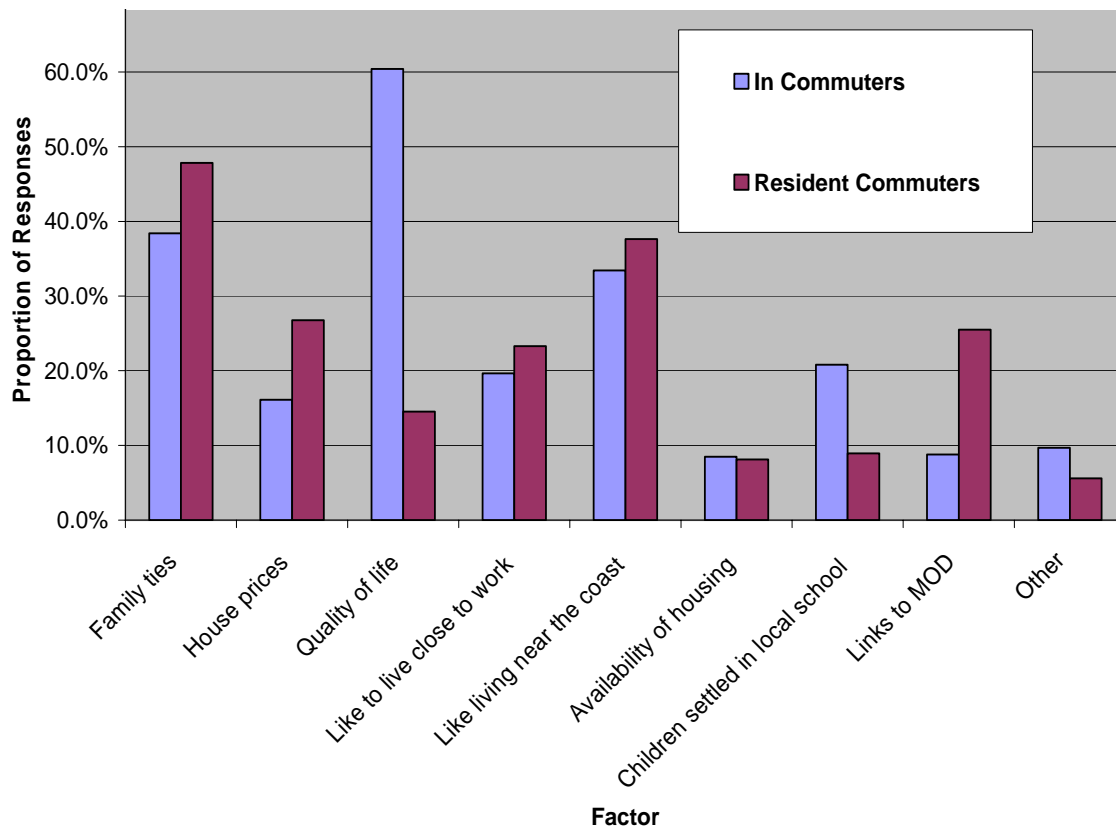
Table 3.9 Daily Parking Charges

Price (£) / day	%age In-Commuters
Less than £1	3%
£1 – 1.99	77%
£2 – 2.99	8%
£3 – 4.99	8%
£5 or more	2%

3.9 Factors Affecting Home & Work Location

3.9.1 Respondents were asked to identify the factors that influenced their choice of home location, as shown on the chart below, for in-commuters only

Figure 3.6 Factors Affecting Home Location Choice



3 Employee Results

3.9.2 As with Gosport resident commuters, family ties feature strongly in home location choice. But Quality of Life is the most important factor given by in-commuters at 63%. This was cited as only important for only 26% of Gosport resident workers, indicating that Gosport residents perceive they have a lower quality of life than residents elsewhere, despite rating other 'quality' factors such as living near the coast as higher.

Table 3.10 Factors That Would Encourage In-Commuters to Live in Gosport

Factor	Response Frequency by Factor					%age Responses Ranked No. 1	Overall Ranking
	1st	2nd	3rd	4th	5th		
Improved Public Transport Links	30	36	23	21	11	12%	3
Access to Leisure / Social Facilities	5	15	27	18	15	2%	7
Affordability of Housing	20	30	22	13	15	8%	5
Improved Work / Life Balance	30	28	16	17	17	12%	3
Improved Road Links	85	42	20	12	8	35%	1
Availability of Childcare	0	3	1	0	4	0%	9
To be closer to the Family	4	5	7	1	8	2%	7
Don't want to work where I Live	51	5	8	5	7	21%	2
Other	20	3	0	0	5	8%	5

3.9.3 Improved transport links (road and public transport) were given a high priority by in-commuters, even though many of them will be travelling against the dominant flow of traffic. The second highest factor for in commuters is a reluctance to live and work in the same town. This may also relate to quality of life perceptions identified in the previous question.

3.10 Summary

3.10.1 The data presented in this Chapter suggests that In-Commuters take a higher proportion of higher skilled and higher paid jobs than Gosport resident employees.

3.10.2 In-Commuters are more car-reliant than Gosport resident employees, and that is reflected in the desire to see more road improvements. Bus use is similar in both survey groups, so higher car use points to lower mode shares of walking and cycling.

3 Employee Results

- 3.10.3 There is a clear difference in perceptions of quality of life between Gosport residents and In-Commuters, with almost two thirds of the latter group citing that factor as one of the main reasons they chose their home location. This compares with around one quarter of Gosport residents.
- 3.10.4 There is a strong desire to separate work and home location, with many respondents not wishing to work and live in the same town. This desire was not reflected in the household commuter group. The implications of this are discussed further in Chapter 5.

4 Journey Time Survey Results

4.1 Introduction

- 4.1.1 The main objective of Journey Time Surveys has been to calculate a comparable 'measure of congestion'. In this case, it has been agreed that this measure is defined as 'time lost to congestion'. Peak and Off-Peak journey time surveys have been completed by car, bus and ferry on several routes, so a comparable assessment can be made by time of travel, mode and route.

Methodology

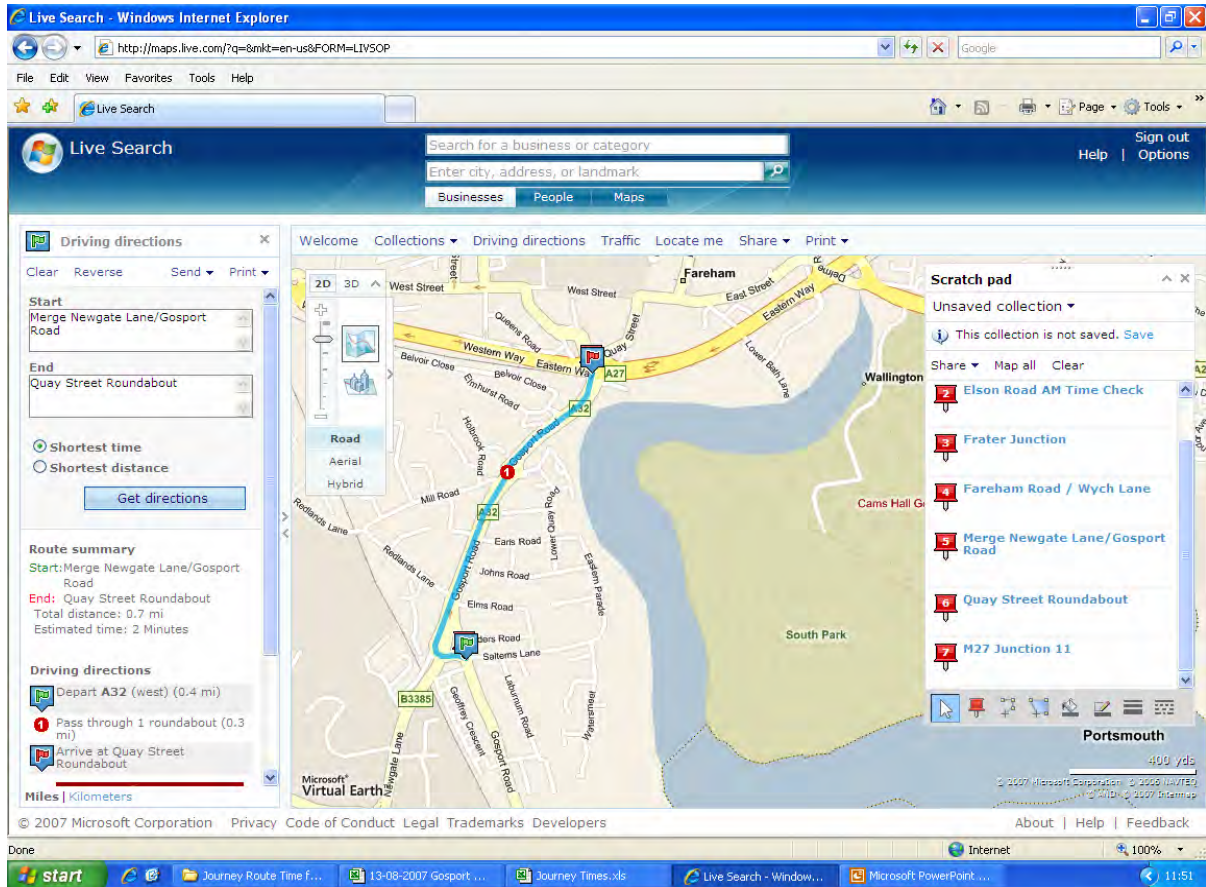
- 4.1.2 Journey time measurements were recorded either in-vehicle or on-bus for each journey, by routes segment. Journeys followed peak tidal movements, outbound from Gosport and Portsmouth in AM peak, and the reverse in PM peak.
- 4.1.3 Surveys were carried out over a three week period from 25th June 2007. A survey schedule is attached at Appendix F. Each route was surveyed over a number of days (i.e. data for Route 1 was collected over 3 days), and data for common sections of route was not necessarily collected simultaneously (i.e. common sections of Routes 1 & 2 were collected on different days for specified time periods). This adds robustness to the survey by ensuring that each route is measured separately to reduce the chance of one-off incidents affecting overall results, but direct comparison between journey times on common sections of route is not possible. Taking the results as a whole, they show a range of journey times for peak and off-peak periods for the main commuter routes.
- 4.1.4 Surveys were started at approximately half hourly intervals between 7am and 9am, and between 4pm and 6pm. These correlated with the peak traffic periods as measured through recent traffic surveys.
- 4.1.5 Hampshire County Council has provided additional funding to enable extra surveys to be completed, adding robustness to the survey programme. Journey time surveys took place according to the following schedule. The agreed specification map is attached at the end of this Chapter.

Table 4.1 Journey Time Survey Schedule

Route (Reverse for PM Peak)		Car		Bus
		Peak	Off-Peak	Peak
1,4	Gosport Town Centre to M27 Jn 11 – via A32	*	*	*
2	Gosport Town Centre to M27 Jn 11 – via Newgate Lane	*	*	
3	Gosport Town Centre to M27 Jn 9 – via Stubbington	*		
5	Fort Brockhurst to Portsmouth City Centre – via Ferry			*
6,7	Portsmouth City Centre to Fareham Town Centre	*		*

4.1.6 Off-peak peak surveys were completed for car journeys using Route 1 (A32). Off-peak journey times on other routes were estimated using web-based journey planning and mapping tool 'Live Earth' published by Microsoft as a comparison. Selected extracts from screen shots are shown below.

Figure 4.1 Web-based Journey Time Estimation Screen Shot



4.2 Car Journey Time Surveys

Route 1 Gosport town centre to M27 Junction 11 by car via A32

4.2.1 Route 1 is the most direct route between Gosport town centre and the M27. The route was split into segments in order that detailed route analysis could be undertaken.

Table 4.2 Route 1 Description

Segment	Distance (miles)
(Start) Mumby Rd / South Street – Brockhurst Roundabout	2.3
Brockhurst Roundabout – Frater Junction	0.7
Frater Junction – Wych Lane	1.1

Wych Lane – Salterns Lane / Newgate Lane Flyover	0.6
Salterns Lane / Newgate Lane Flyover – Quay Street Roundabout	0.7
Quay Street Roundabout – M27 Junction 11	1.12
TOTAL	6.6

Outbound Journey - Route 1

4.2.2 The table below shows cumulative journey times for each time period measured for the outbound journey. Two survey runs were completed (on separate days) for 0700 and 0800 periods; the results shown are averages. One survey run was completed on all other time periods.

Table 4.3 Route 1 Cumulative Journey Times - Outbound

Survey Start Time	Total Journey Time (Mins:Secs)	Total Journey Time (Secs)
0700	22.43	1363
0730	28.55	1735
0800	25.11	1511
0830	24.40	1480
0900	24.41	1481
1000	20.44	1244
1400	21.11	1271

4.2.3 The longest survey commenced at 0730, indicating the greatest congestion during this period. This correlates with traffic survey data completed separately to this study showing peak traffic movements during this period. Household survey responses reported in Chapter 2 that show most residents leave for work between 0700 and 0800.

4.2.4 Off-peak surveys are also shown, and there are significant time differences between peak and off-peak journeys of up to 8 minutes, a 28% drop in travel time.

4.2.5 The journey time for each segment are shown on the charts below. Elapsed time for each segment is shown in seconds.

Figure 4.2 Route 1 – Outbound AM Peak Journey Time by Segment

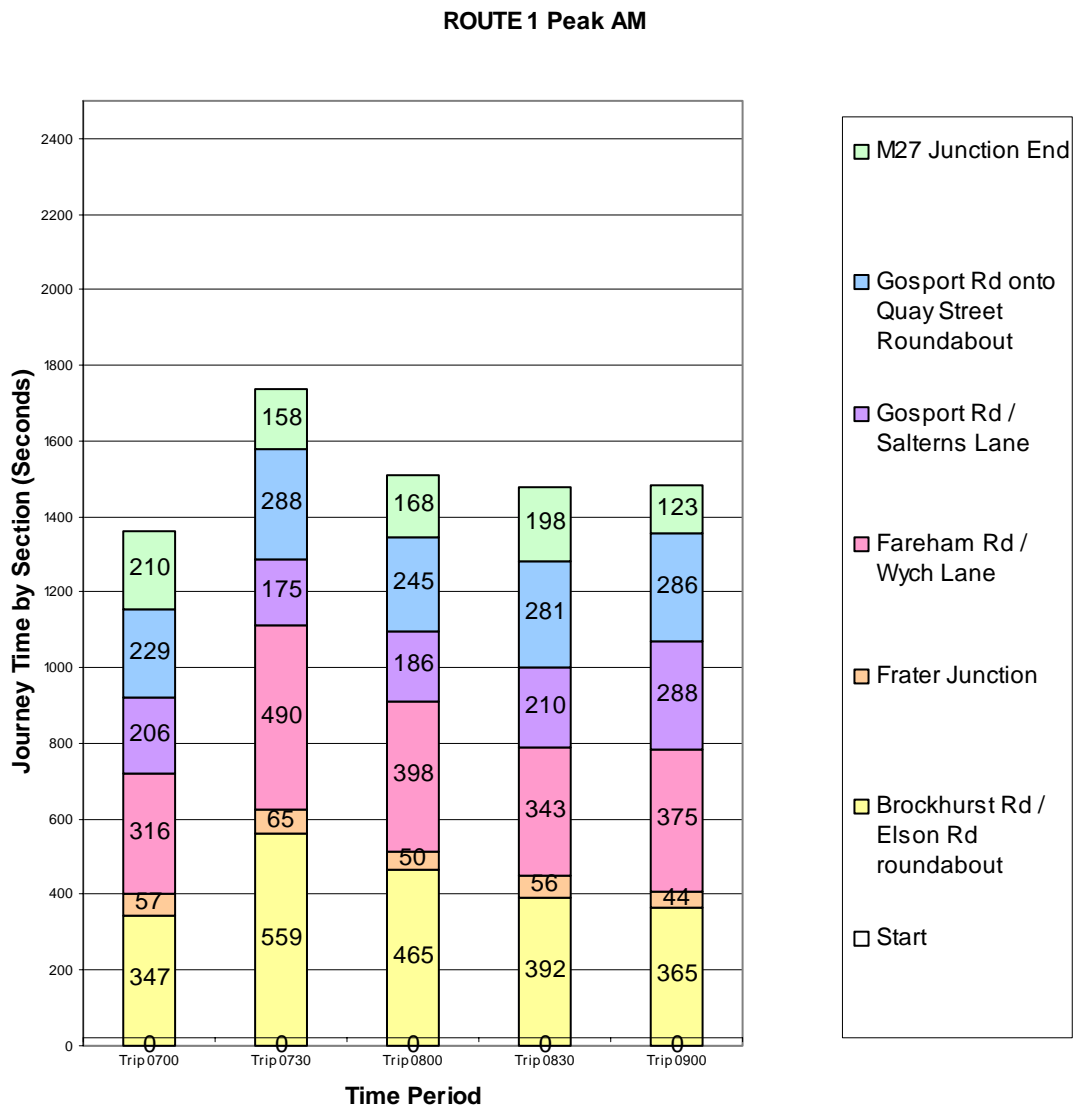


Table 4.4 Average Speed by Journey Segment Route 1 Outbound AM Peak

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		0700	0730	0800	0830	0900	
Start – Brockhurst Rd	2.30	24	15	18	21	23	30
Brockhurst Rd- Frater Jn	0.70	22	19	26	23	29	40
Frater Junction - Fareham Rd	1.10	17	11	13	15	14	40
Fareham Rd - Newgate	0.60	11	12	12	10	8	40

4 Journey Time Survey Results

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		0700	0730	0800	0830	0900	
La Flyover							
Newgate La Flyover - Quay Street Roundabout	0.70	11	9	10	9	9	30
Quay Street Roundabout - M27 Junction 11 End	1.20	21	27	26	22	35	40 - 70

- 4.2.6 It can be seen that average speeds per segment vary significantly throughout the journey, but all are well below the speed limit. The free-flowing section is between Gosport Ferry (start) and Brockhurst, but beyond that point, average speeds drop significantly, across all time periods. The section beyond Quay Street Roundabout is also faster leading to the motorway junction, but considering that approximately half of this segment is derestricted (70 mph), average speeds remain relatively low.
- 4.2.7 The surveys suggest that Quay Street roundabout is a constraint, with queues for that junction starting around Brockhurst.
- 4.2.8 We compare these results against those measured for off-peak journey times below.

Figure 4.3 Route 1 – Outbound Off-Peak Journey Time by Segment

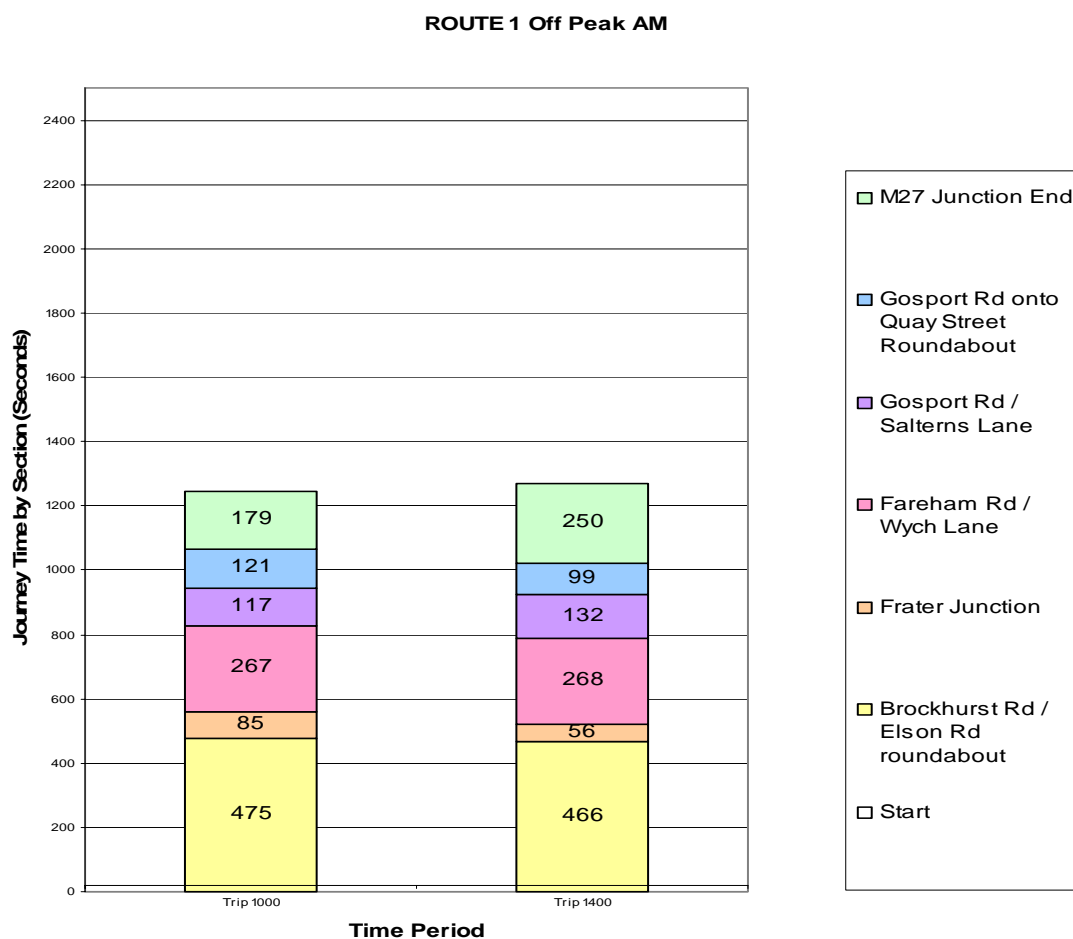


Table 4.6 Average Speed by Journey Segment Route 1 Off Peak Outbound

Segment	Distance (Miles)	Average Speed (mph) per Segment		Speed Limit
		1000	1400	
Start – Brockhurst Rd	2.30	17	18	30
Brockhurst Rd- Frater Junction	0.7	15	23	40
Frater Junction - Fareham Rd	1.10	20	20	40
Fareham Rd – Newgate La Flyover	0.60	19	16	40
Newgate La Flyover - Quay Street Roundabout	0.70	21	26	30
Quay Street Roundabout - M27 Junction 11 End	1.20	24	17	40 - 70

4.2.9 Comparison between peak and off-peak journey speeds per segment reveals that off-peak speeds are around twice that of peak period speeds. However, average speeds remain well below the speed limit, particularly between Brockhurst and Newgate Lane flyover.

4 Journey Time Survey Results

- 4.2.10 Off-peak journey times were measured along Route 1 using surveys. For all other routes, off-peak journey times were estimated using the web-based tool described above. To validate estimated times, the table below shows estimated times for Route 1 using the web tool.

Table 4.7 Outbound Calculated Off Peak Journey Times – Route 1

	Start	Elson Rd	Frater Junction	Wych Lane	Newgate La Flyover	Quay St Rab	M27 Jn 11	Total Time
Duration (mins:secs)	0	6:00	2:00	3:00	1:00	2:00	3:00	17:00

- 4.2.11 Comparison with measured journey times reveals that those calculated underestimate actual durations by approximately 5 minutes, or around 30%.

Inbound Journey - Route 1 Gosport town centre to M27 Junction 11 by car via A32

- 4.2.12 The table below shows cumulative journey times for each time period measured for the inbound journey on Route 1. For survey periods 1630 and 1730, two survey runs were completed and the results shown are averages. One survey was completed for all other time periods.

Table 4.8 Route 1 Cumulative Journey Times - Inbound

Survey Start Time	Cumulative Journey Time (Mins:Secs)	Cumulative Journey Time (Secs)
1100	20:29	1229
1500	23:40	1420
1600	25:11	1511
1630	29:00	1740
1700	29:00	1740
1730	26:13	1573
1800	35:39	2139

- 4.2.13 The longest survey, and therefore greatest level of congestion, was experienced on the 1800 survey. Off peak survey results reveal a significant difference of more than 15 minutes between peak and off-peak travel, double the peak / off-peak difference for outbound journeys. This confirms postal survey results which show that commuters perceive the evening peak journey lasting longer than the morning outbound journey.

4.2.14 Journey times for each segment are shown at Figure 4.4 and Figure 4.5 with elapsed time for each segment shown in seconds.

Figure 4.4 PM Peak Journey Time by Segment

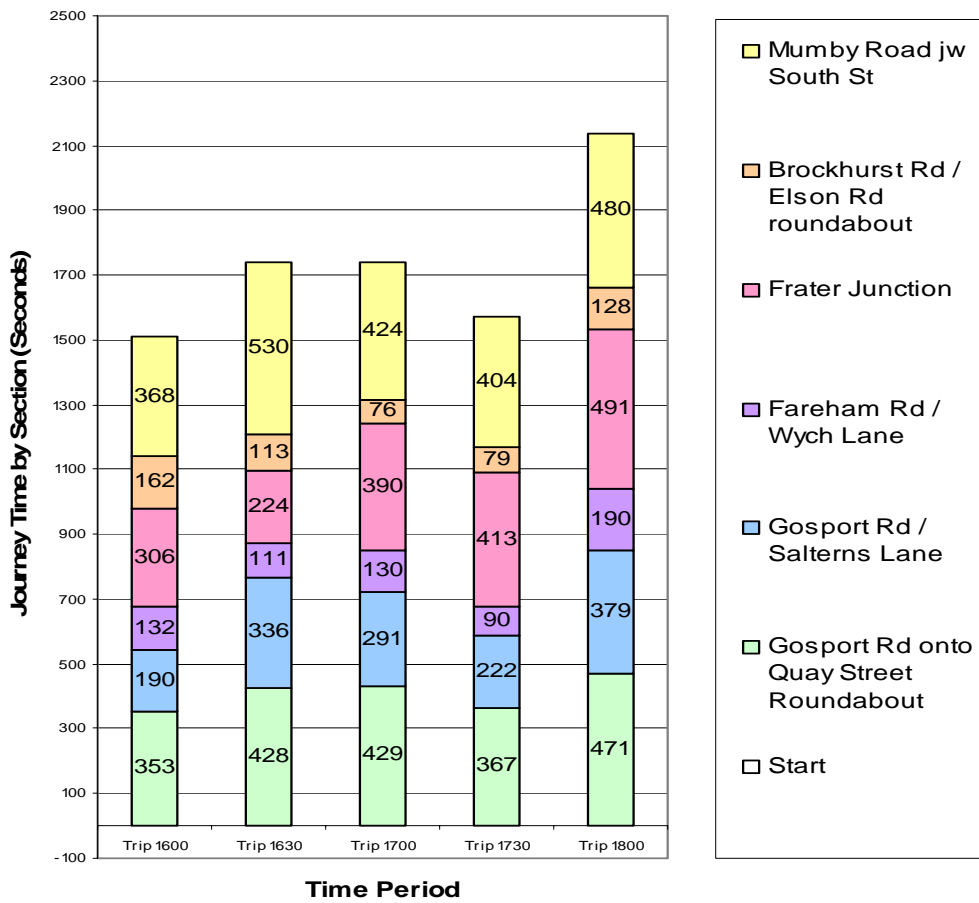


Table 4.9 Average Speed by Journey Segment Route 1 PM Peak

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		1600	1630	1700	1730	1800	
Start – Quay Street	1.10	11	9	9	11	8	70-40

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		1600	1630	1700	1730	1800	
Roundabout							
Quay Street Roundabout – Newgate La Flyover	0.70	13	8	9	11	7	30
Newgate La Flyover - Fareham Rd	0.60	16	20	17	24	11	40
Fareham Rd - Frater Junction	1.10	13	18	10	10	8	40
Frater Junction - Brockhurst Rd	0.70	16	22	33	32	20	40
Brockhurst Rd - Mumby Rd	2.40	23	16	20	21	18	30

- 4.2.15 It can be seen that the approach to Quay Street roundabout from M27 is longer during the peak period than the off-peak, and steadily increases as the peak period advances. The difference in this segment between the 1600 survey and 1800 is almost 2 minutes.
- 4.2.16 The next segment between Quay Street roundabout and the Newgate Lane / A32 diverge shows even greater differences between peak and off-peak journey time; almost 5 minutes between the 1000 and 1800 surveys. It can also be seen that delay steadily increases through the peak period, doubling from just over 3 minutes to over 6 minutes.
- 4.2.17 There is also evidence of peak period congestion on the approach to Frater Junction, although this is not as exaggerated as the two segments identified above. Other segments show extended peak period journey times, but the differences are relatively small.
- 4.2.18 Average speeds per segment are well below the speed limit, repeating the pattern shown in the AM Peak. Approach speeds to Quay Street roundabout are particularly slow, as are those towards Newgate Lane flyover. Beyond that point, traffic appears to be moving at a steadier, albeit slow, pace.
- 4.2.19 These results are compared with measures off-peak surveys as described below.

Figure 4.5 Inbound Off Peak Journey Time by Segment

4 Journey Time Survey Results

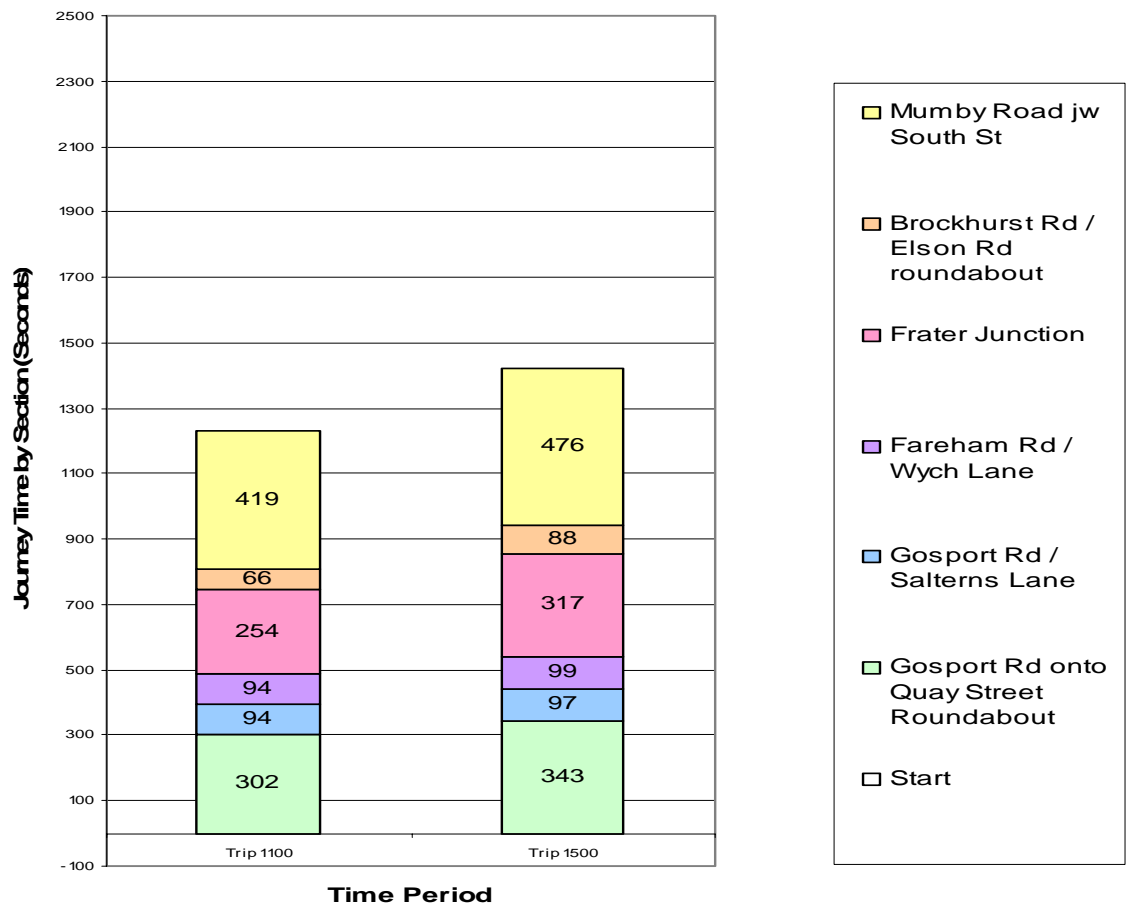


Table 4.10 Average Speed by Journey Segment Route 1 Off Peak Inbound

Segment	Distance (Miles)	Average Speed per segment		Speed Limit
		1100	1500	
Start – Quay Street Roundabout	1.10	13.1	11.5	70-40
Quay Street Roundabout – Newgate La Flyover	0.70	26.8	26.0	30
Newgate La Flyover - Fareham Rd	0.60	23.0	21.8	40
Fareham Rd - Frater Junction	1.10	15.6	12.5	40
Frater Junction - Brockhurst Rd	0.70	38.2	28.6	40
Brockhurst Rd - Mumby Rd	2.40	20.6	18.2	30

4 Journey Time Survey Results

- 4.2.20 Although journey times are reduced and average speeds are higher than during peak periods, Quay Street roundabout appears to act as a constraint. Average speeds are also well below the 40mph speed limit between Newgate Lane and Brockhurst.
- 4.2.21 Off-peak journey times were also calculated using 'Live Earth' as shown on the table below for comparison purposes.

Table 4.11 Calculated Off Peak Journey Time Inbound

	Start	Quay St Rab	Newgate La Flyover	Wych Lane	Frater Junction	Elson Rd	Mumby Road	Total Time
Duration (mins:secs)	0	3:00	1:00	1:00	3:00	2:00	6:00	16:00

- 4.2.22 The calculated durations overall underestimate the measured journey times by around 6 minutes, or approximately 27%.

Route 2 Gosport Town centre to M27 Junction 11 by car via Newgate Lane

- 4.2.23 Route 2 is the alternative, but lengthier route between Gosport and M27. It follows Route 1 between Mumby Road and Brockhurst, at which point the route diverges through Rowner, and Peel Common along Newgate Lane, before rejoining Route 1 at Newgate Lane flyover. It is just under 1 mile longer than Route 1.
- 4.2.24 Evidence from the household survey response suggests that it carries traffic destined for east and west bound employment destinations in approximately equal measure. The A32 carries predominantly traffic heading for destinations to the east. Route 2 was split into eight segments as follows:

Table 4.12 Route 2 Description

Segment	Distance (Miles)
Mumby Road / South Street – Brockhurst Roundabout	2.3
Brockhurst Roundabout – Rowner Lane Roundabout	0.9
Rowner Lane Roundabout – Peel Common Roundabout	0.8
Peel Common Roundabout – Collingwood Roundabout	1.2
Collingwood Roundabout – Longfield Avenue Roundabout	0.2
Longfield Avenue Roundabout – Newgate Lane Flyover	0.4
Newgate Lane Flyover – Quay Street Roundabout	0.5
Quay Street Roundabout – M27 Junction 11	1.2
TOTAL	7.5

Outbound Journey - Route 2 Gosport Town centre to M27 Junction 11 by car via Newgate Lane

- 4.2.25 The table below shows cumulative journey times for each outbound time period; one survey was completed for each period.

Table 4.13 Route 2 Cumulative Journey Times - Outbound

Survey Start Time	Cumulative Journey Time (Min:Sec)	Cumulative Journey Time (Sec)
0700	32.16	1936
0730	27.40	1624
0800	30:25	1825
0830	22:20	1340
0900	25:14	1514
1030	18:59	1139
1200	24:16	1591

4.2.26 The survey commencing at 0700 recorded the longest duration. There is a difference of 13 minutes between this survey and the 1030 off-peak survey. The midday survey duration was comparable to some of the peak period durations, suggesting a small lunch time peak along this route.

4.2.27 Journey times for each segment are shown below, with elapsed time shown in seconds.

Figure 4.6 Route 2 Outbound Peak Journey Time by Segment

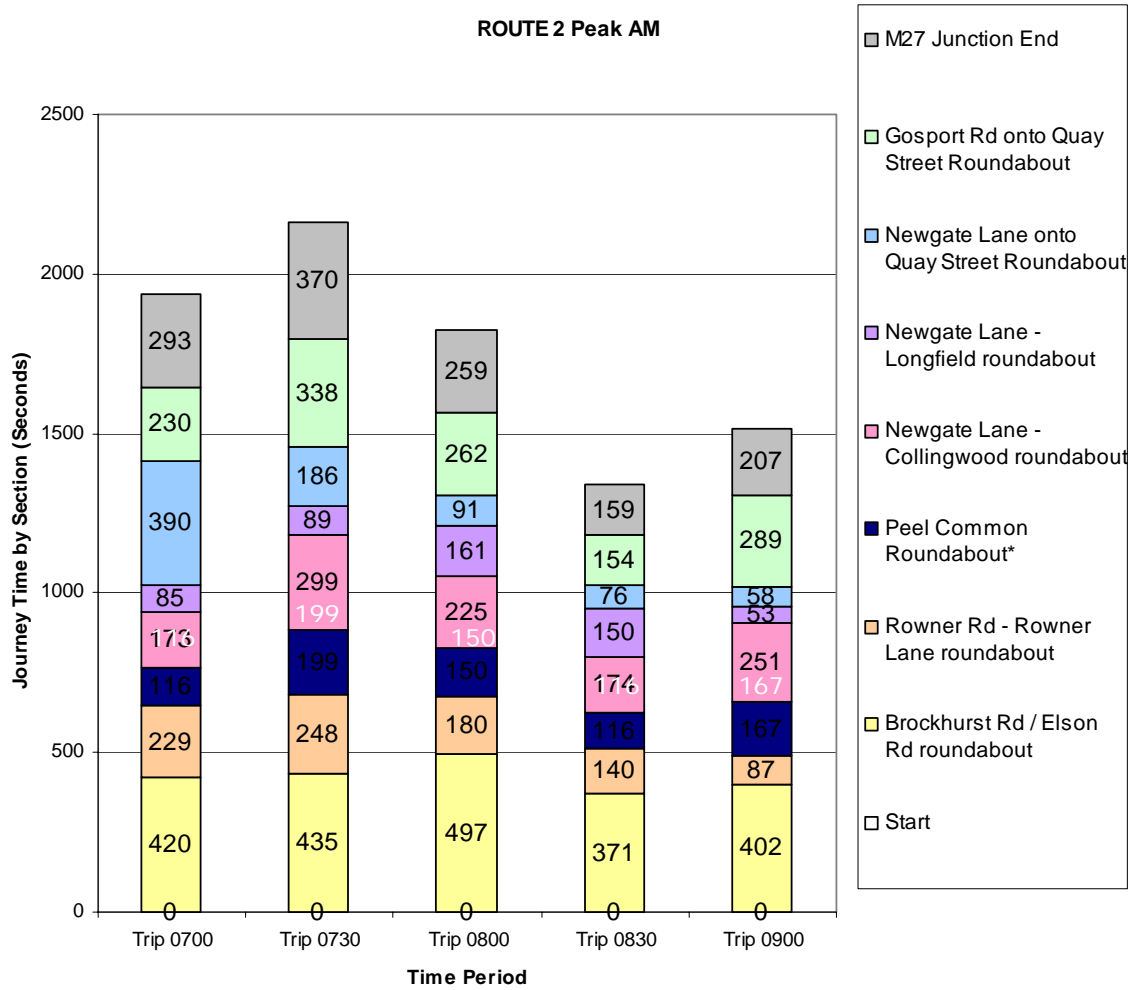


Table 4.14 Average Speed by Journey Segment Route 2 AM Peak

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		0700	0730	0800	0830	0900	
Start – Brockhurst Rd	2.3	20	19	17	22	21	30
Brockhurst Rd- Rowner Rd	0.9	14	13	18	23	37	30
Rowner Rd - Peel Common Roundabout	0.8	25	14	19	25	17	30-40
Peel Common Rab – Collingwood Rab	1.2	25	14	19	25	17	40
Collingwood Rab – Longfield Rab	0.2	8	8	4	5	14	40

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		0700	0730	0800	0830	0900	
Longfield Rab – Newgate La Flyover	0.4	4	8	16	19	25	40
Newgate La Flyover - Quay Street Rab	0.5	8	5	7	12	6	30
Quay Street Rab - M27 Junction End	1.2	15	12	17	27	21	40-70

- 4.2.28 There are major variations in journey time on the approach to Longfield roundabout, ranging from 35 seconds on the 0900 survey, to over 8 minutes (461 seconds) on the 0800 survey. This is more than double the next longest recorded duration at 0830, of 3.5 minutes. Even without this apparent anomaly, the large variations in journey along Newgate Lane suggest that this part of the network is very fragile, and only needs a minor 'incident' to cause major delays. No incidents were reported during the surveys.

Figure 4.7 Route 2 Outbound Off-Peak Journey Time by Segment

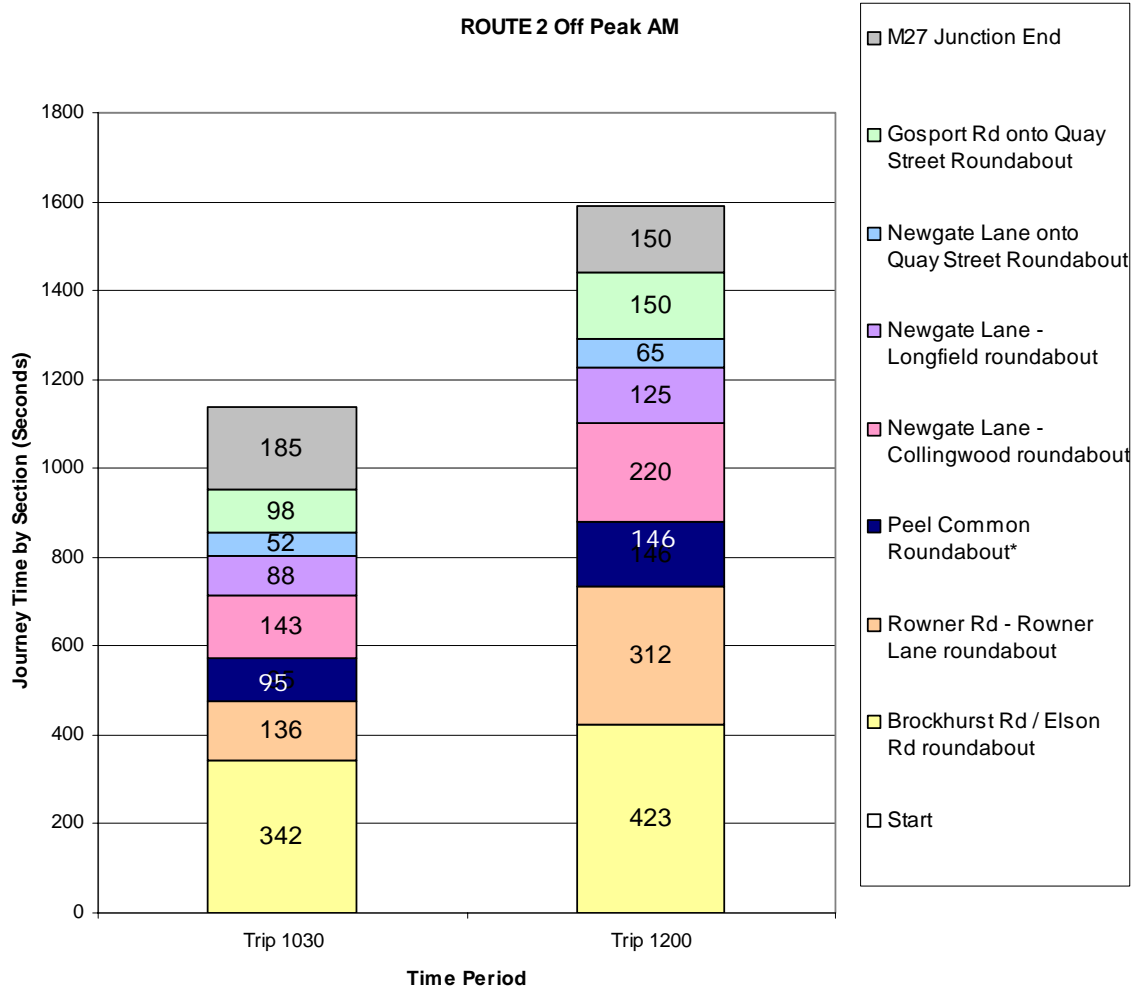


Table 4.15 Average Speed by Journey Segment Route 2 AM Off Peak

Segment	Distance (Miles)	Average Speed per segment		Speed Limit
		1030	1200	
Start – Brockhurst Rd	2.3	24	20	30
Brockhurst Rd- Rowner Rd	0.9	24	10	30
Rowner Rd - Peel Common Roundabout	0.8	30	20	30-40
Peel Common Rab – Collingwood Rab	1.2	30	20	40
Collingwood Rab – Longfield Rab	0.2	8	6	40

Longfield Rab – Newgate La Flyover	0.4	28	22	40
Newgate La Flyover - Quay Street Rab	0.5	18	12	30
Quay Street Rab - M27 Junction End	1.2	23	29	40-70

4.2.29 There are common sections between Routes 1 and 2, between Mumby Road and Brockhurst, and between Newgate Lane Flyover and M27. Surveys were completed on different days for each route. Comparison with Route 1 results shows similar durations on common sections of route, giving an added layer of robustness to the survey results.

4.2.30 Comparison of the peak and off-peak charts shows the influence of Quay Street roundabout on peak period delay and, again, the variability of journey times along Newgate Lane. The latter might be explained by the impact of the large retail outlets at Collingwood Retail Park generating reasonable levels of traffic through the day.

Inbound Journey - Route 2 Gosport Town centre to M27 Junction 11 by car via Newgate Lane

4.2.31 Cumulative journey times for the inbound Route 2 are shown on the table below.

Table 4.16 Route 2 Cumulative Journey Times - Inbound

Survey Start Time	Cumulative Journey Time (Min:Sec)	Cumulative Journey Time (Sec)
1300	21:21	1562
1430	20:28	1413
1600	30:28	1828
1630	33:26	2261
1700	36:10	2107
1730	45:44	3082
1800	29:37	1777

4.2.32 The longest peak period journeys are more than twice the duration of off-peak journeys. The journey time profile shows a distinct peak between 1700 & 1730, followed by a sharp drop-off.

4.2.33 Segmented journey times are shown on the charts below.

Figure 4.8 Route 2 Peak Inbound Journey Times by Segment

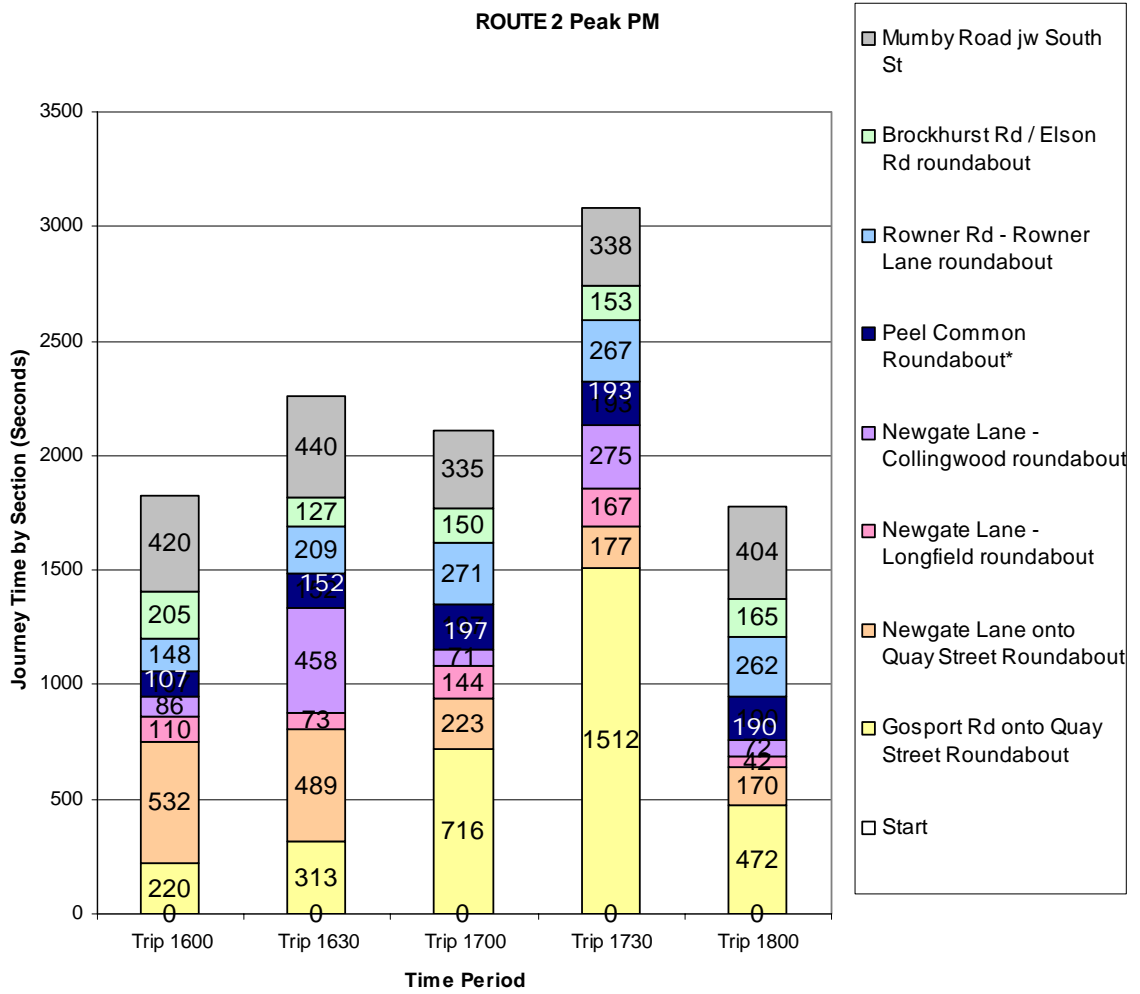


Table 4.17 Average Speed by Journey Segment Route 2 PM Peak

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		1600	1630	1700	1730	1800	
Start – Quay St Roundabout	1.2	20	14	6	3	9	70-40
Quay Street Rab – Newgate La Flyover	0.5	3	4	8	10	11	30
Newgate La Flyover – Longfield Rab	0.4	13	20	10	9	34	40
Longfield Rab – Collingwood Rab	0.3	13	2	15	4	15	40
Collingwood Rab - Peel Common Rab	1.1	37	26	20	20	21	40
Peel Common Roundabout - Rowner Rd	0.80	19	14	11	11	11	40-30
Rowner Rd - Brockhurst Rd	1.0	18	28	24	24	22	30
Brockhurst Rd - Mumby Rd	2.40	21	20	26	26	21	30

- 4.2.34 Once again, delays on the approach to Quay Street roundabout feature strongly. The 1730 survey shows a 25 minute delay reaching Quay Street roundabout, with the remainder of the route similar in duration to other survey periods.

Figure 4.9 Off Peak Inbound Journey Times by Segment

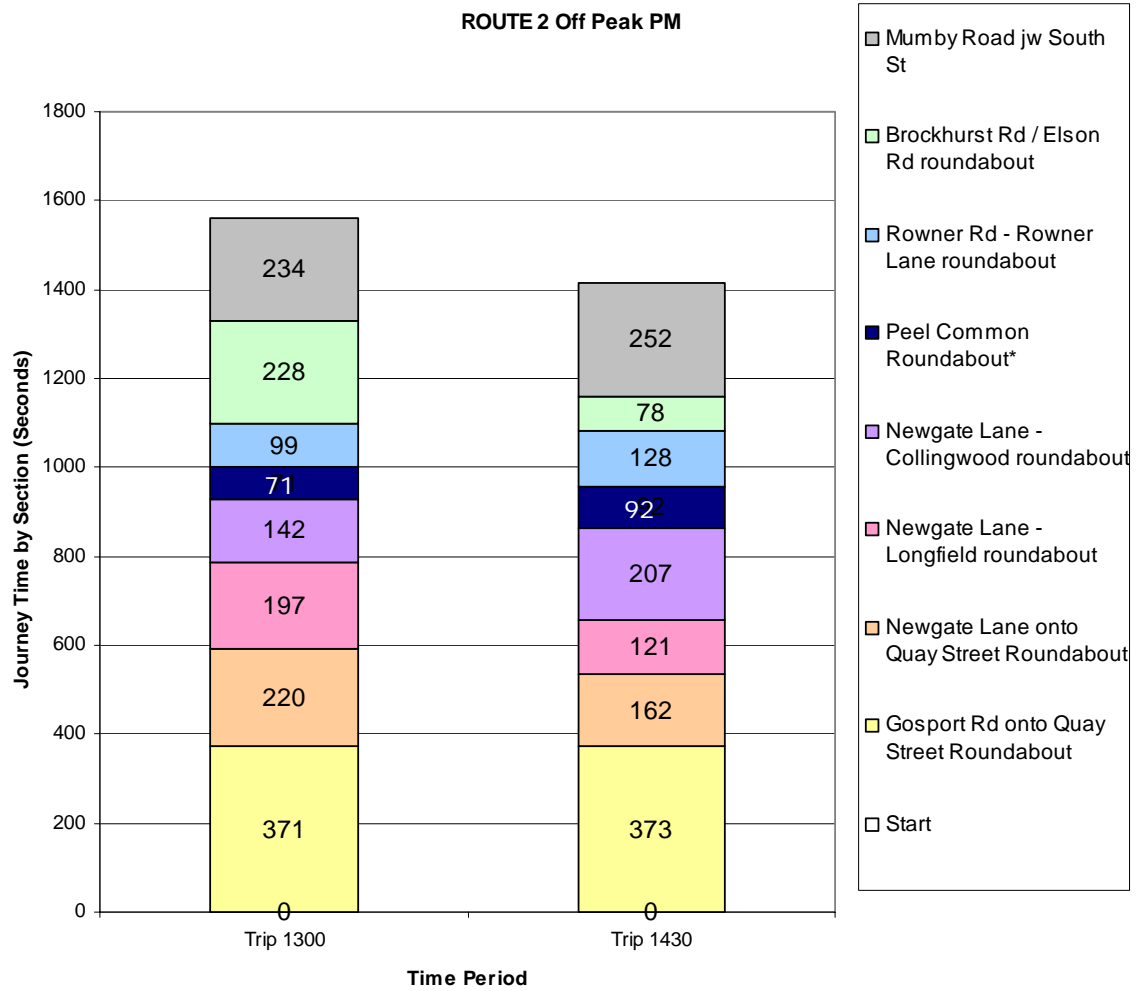


Table 4.18 Average Speed by Journey Segment Route 2 PM Off Peak

Segment	Distance (Miles)	Average Speed per segment		Speed Limit
		1300	1430	
Start – Quay St Roundabout	1.2	12	12	70-40
Quay Street Rab – Newgate La Flyover	0.5	8	11	30
Newgate La Flyover – Longfield Rab	0.4	7	12	40
Longfield Rab – Collingwood Rab	0.3	8	5	40
Collingwood Rab - Peel Common Rab	1.1			40

Segment	Distance (Miles)	Average Speed per segment		Speed Limit
		1300	1430	
Peel Common Roundabout - Rowner Rd	0.8	29	23	40-30
Rowner Rd - Brockhurst Rd	1.0	16		30
Brockhurst Rd - Mumby Rd	2.4			30

- 4.2.35 As with outbound surveys, off-peak delays can be observed along Newgate Lane, on the approach to Longfield and Collingwood roundabouts.

Route 3 Gosport town centre to M27 Junction 9 by car

- 4.2.36 Results from the household survey reveal that this route is predominantly used by commuters travelling to destinations west of Gosport. The route has been segmented as follows:

Table 4.19 Route 3 Description

Segment	Distance (miles)
Mumby Road / South Street – Brockhurst Roundabout	2.3
Brockhurst Roundabout – Rowner Lane Roundabout	0.9
Rowner Lane Roundabout – Peel Common Roundabout	0.8
Peel Common Roundabout – Stubbington Roundabout	1.2
Stubbington Roundabout – Peak Lane Roundabout	0.2
Peak Lane Roundabout – Titchfield Gyratory	2.1
Titchfield Gyratory – Segensworth Roundabout	2.2
Segensworth Roundabout – M27 Junction 9	0.4
TOTAL	10.1

Outbound Journey - Route 3 Gosport town centre to M27 Junction 9 by car

- 4.2.37 The Route 3 journey times for each survey period are shown in the table below. One survey was completed for each period.

Table 4.20 Route 3 Cumulative Journey Times Outbound

Survey Start Time	Cumulative Journey Time (Mins:Sec)	Cumulative Journey Time (Sec)
0700	21:20	1280
0730	25:32	1532
0800	33:19	1999
0830	28:26	1706
0900	21:57	1317

- 4.2.38 The 0800 peak on this route is slightly later than that shown for Routes 1 and 2. No off-peak measurements were taken on this route, so a web-based off peak journey measure has been used, as described later.
- 4.2.39 Segmented outbound journey times are shown for each outbound period on the chart below.

Figure 4.10 Route 3 Outbound Journey Times by Segment

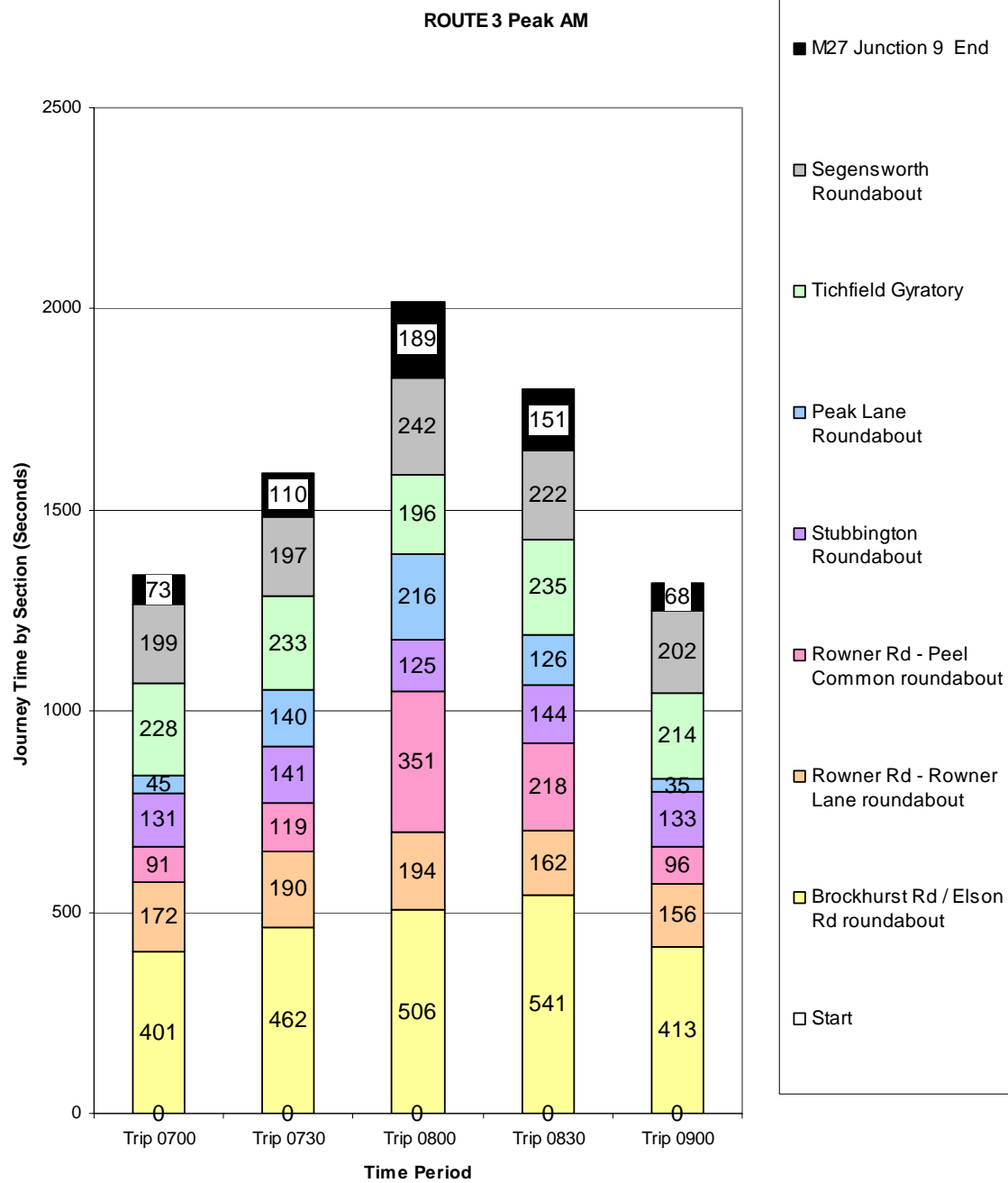


Table 4.21 Average Speed by Journey Segment Route 3 AM Peak Outbound

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		0700	0730	0800	0830	0900	
Start – Brockhurst Rd	2.30	21	18	16	15	20	30
Brockhurst Rd- Rowner Rd	1.00	21	19	19	22	23	30
Rowner Rd - Peel Common Roundabout	0.90	36	27	9	15	34	30 – 40
Peel Common Roundabout - Stubbington Roundabout	1.10	30	28	32	28	30	40 - 30
Stubbington Roundabout - Peak Lane Roundabout	0.20	16	5	3	6	21	30
Peak Lane Roundabout - Tichfield Gyratory	2.10	33	32	39	32	35	40
Tichfield Gyratory - Segensworth Roundabout	2.10	38	38	31	34	37	40
Segensworth Roundabout - M27 Junction End	0.40	20	13	8	10	21	40-70

- 4.2.40 Unlike Route 2, the approach to Peel Common Roundabout appears to be a segment where lengthy delays are experienced. It is one of the main reasons for the 0800 survey to be of longer duration than other surveys, but delays in this segment vary noticeably across time periods.
- 4.2.41 The same is true of the short stretch between Stubbington and Peak Lane Roundabouts; durations vary between 35 seconds and 3.5 minutes. Site observations and anecdotal evidence undertaken for other work in the Gosport area reveal the impact that high demand for the two pelican crossings has on traffic flow.
- 4.2.42 Journey time measurements for off-peak journeys were calculated using 'Live Earth' as described in the table below.

Table 4.22 Calculated Journey Times Route 3 Outbound

	Start	Elson Road	Rowner La Rab	Peel Common	Stubbington Rab	Peak Lane Rab	Titchfield Gyr	Segensworth Rab	M27 Jn 9	Total
Duration (Mins:secs)	0:0	6:00	2:00	2:00	2:00	1:00	4:00	3:00	1:00	21:00

- 4.2.43 Comparison between calculated and measured journey times on Route 1 revealed that calculated routes underestimate journey times by around 30%, making the real journey time closer to **27 minutes**.
- 4.2.44 Measured peak journey times range from 21 to 35 minutes, suggesting that an off-peak range between 21 and 27 minutes is valid. It also suggests that the constraint points at Peel Common roundabout and Stubbington are the main causes of peak period congestion for the outbound route.

Inbound Journey - Route 3 Gosport town centre to M27 Junction 9 by car

- 4.2.45 The cumulative journey times for Route 3 inbound are shown on the table below.

Table 4.23 Route 3 Cumulative Journey Times Inbound

Survey Start Time	Cumulative Journey Time (Mins:Sec)	Cumulative Journey Time (Sec)
1600	26:29	1589
1630	28:28	1708
1700	36:23	2183
1730	32:30	1869
1800	29:16	1756

- 4.2.46 The results show a similar profile to the morning peak profile through the surveyed period, with the longest survey commencing at 1700. No off-peak surveys were conducted.
- 4.2.47 Journey times by segment are recorded in the chart below.

Figure 4.11 Route 3 Inbound Journey Time by Segment

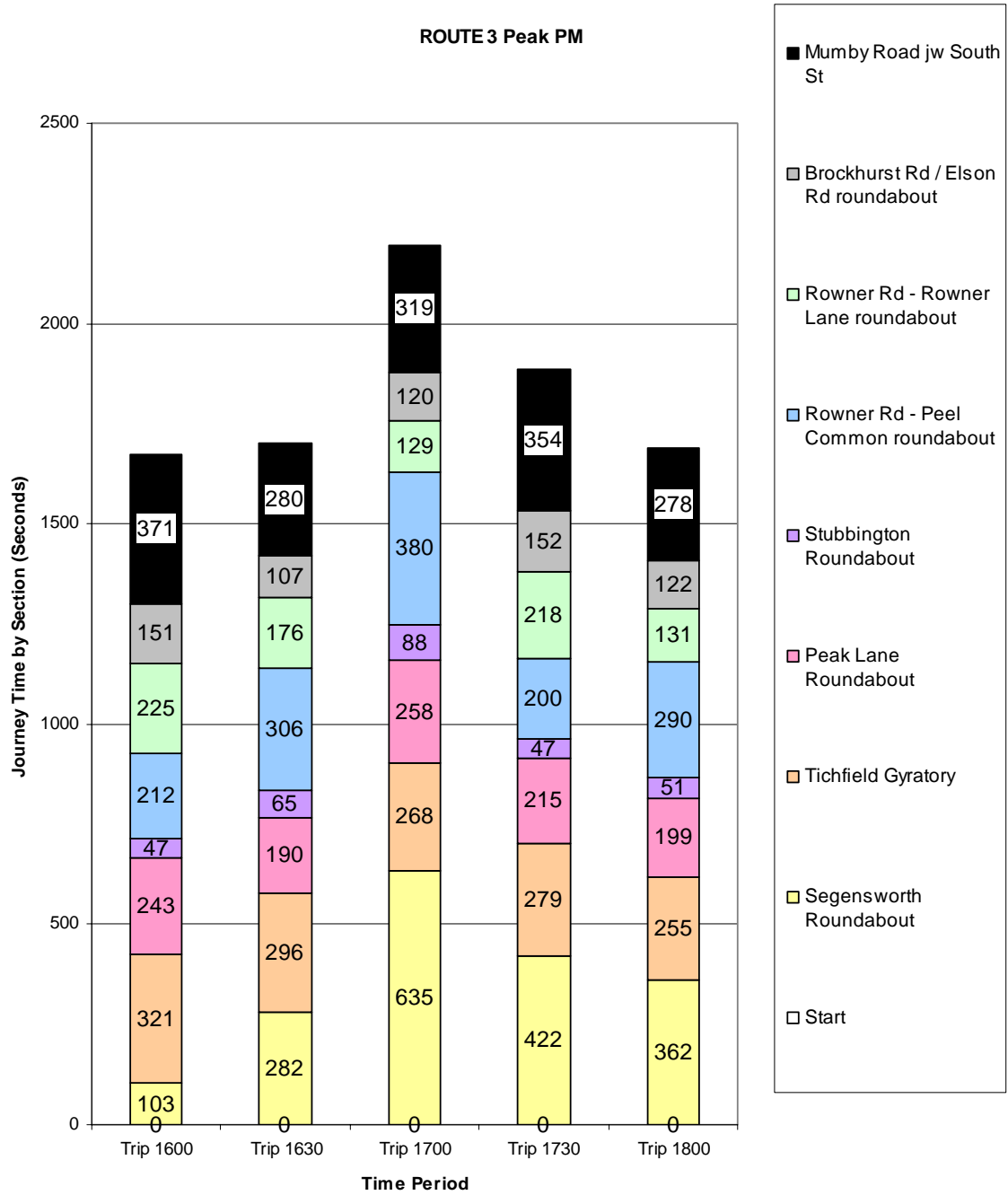


Table 4.24 Average Speed by Journey Segment Route 3 PM Peak Inbound

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		1600	1630	1700	1730	1800	
Start - Segensworth Roundabout	0.40	14	5	2	3	4	70-40
Segensworth Roundabout - Titchfield Gyratory	2.00	22	24	27	26	28	40
Titchfield Gyratory - Peak Lane Roundabout	1.80	27	27	25	25	29	40-30
Peak Lane Roundabout - Stubbington Roundabout	0.20	15	10	8	11	14	30
Stubbington Roundabout - Peel Common Roundabout	1.10	19	12	10	12	12	30-40
Peel Common Roundabout - Rowner Rd	0.90	31	46	34	33	50	40-30
Rowner Rd - Brockhurst Rd	1.00	24		30	31	28	30
Brockhurst Rd - Mumby Rd	2.40	21	25	25	27	24	30

- 4.2.48 The segment causing greatest delay is between the Jn 9 roundabout and Segensworth roundabout. Some delay is also experienced on the approach to Peel Common roundabout, a difference of almost 3 minutes between 1600 and 1700 surveys along this section. The section through Stubbington also shows delay, taking almost twice as long to travel this segment between 1600 and 1700 surveys.
- 4.2.49 Journey time measurements for off-peak journeys were calculated using 'Live Earth' as described in the table below.

Table 4.25 Calculated Journey Times Route 3 Inbound

	Start	Segensworth Rab	Titchfield Gyr	Peak Lane Rab	Stubbington Rab	Peel Common	Rowner La Rab	Elson Road	Mumby Road	Total
Duration (Mins:secs)	0:0	1:00	4:00	3:00	1:00	2:00	2:00	2:00	6:00	21:00

4 Journey Time Survey Results

- 4.2.50 Using the '30% underestimation' rule applied previously, off-peak journeys are likely to range between 21 and 27 minutes. Peak period journeys take up to 15 minutes longer.

Route 6 The Hard to Fareham Town Centre via M27

- 4.2.51 This route was chosen as comparison of time lost to congestion between journeys made from Portsmouth and Gosport to a common point, Fareham town centre. It should be noted that Route 6 journeys were recorded against the tidal flow of traffic, i.e. majority of traffic is entering Portsmouth during AM Peak, but our survey recorded the opposite direction. The route is described in the table below.

Table 4.26 Route 6 Description

Segment	Distance (miles)
The Hard, Portsmouth – Hope St Roundabout	0.94
Hope St Roundabout – Lake Rd / Kingston Rd	0.70
Lake Rd / Kingston Rd – North End Junction	0.80
North End Junction – Portsbridge Roundabout	1.5
Portsbridge Roundabout – Paulsgrove Junction	1.0
Paulsgrove Junction – M27 Jn 11	4.0
M27 Jn 11 – Quay St Roundabout	1.1
Quay St Roundabout – Portland Street Car Park	0.2
TOTAL	10.24

Outbound Journey - Route 6 The Hard to Fareham Town Centre via M27

- 4.2.52 Cumulative AM Peak journey times are shown in the table below.

Table 4.27 Route 6 Cumulative Journey Times Outbound

Survey Start Time	Cumulative Journey Time (Mins:Sec)	Cumulative Journey Time (Sec)
0700	35:26	2126
0730	46:59	2819
0800	27:51	1671
0830	35:56	2156
0900	27:10	1630

4 Journey Time Survey Results

4.2.53 There is a high degree of variation in journey times; almost 20 minutes difference between the 0730 and 0800 surveys. The survey was also subject to conditions on M27, which are affected by a wide range of external factors. No incidents were reported by the survey team.

4.2.54 Peak journey times by segment are reported below.

Figure 4.12 Route 6 Outbound Journey Times by Segment

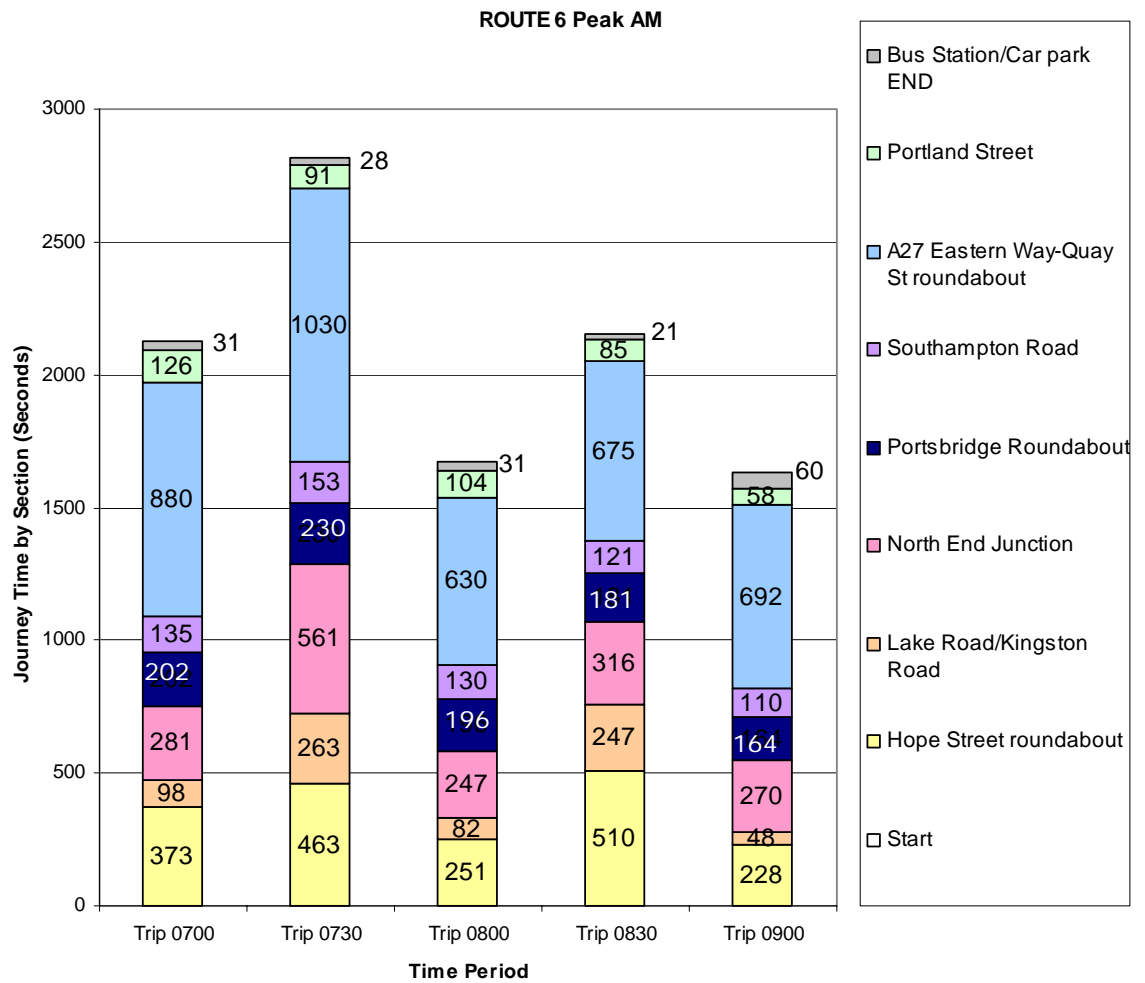


Table 4.28 Average Speed by Journey Segment Route 6 AM Peak

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		0700	0730	0800	0830	0900	
Start – Hope Street Roundabout	0.94	9	7	13	7	15	30
Hope Street Roundabout - Lake Road	0.70	26	10	31	10	53	30
Lake Road - North End Junction	0.80	10	5	12	9	11	30
North End Junction - Portsbridge Roundabout	1.50	27	23	28	30	33	30
Portsbridge Roundabout - Southampton Rd	1.00	27	23	28	30	33	70
Southampton Rd - Quay Street Roundabout	4.00	16	14	23	21	21	70-40
Quay Street Roundabout - Portland Street	1.10	31	44	38	47	68	30
Portland Street - End	0.20	23	26	23	34	12	30

4.2.55 There are many variables affecting journey times along this route, but the segment with the highest degree of variability is between Paulsgrove Roundabout and Quay Street roundabout, including the M27 stretch.

4.2.56 Off peak journey time has been calculated on Live Earth as set out below.

Table 4.29 Estimated Off Peak Journey Time Route 6 Outbound

	Start	Hope Street Rab	Lake Rd / Linoston Rd	North End Jn	Portsbridge Rab	Paulsgrove Jn	M27 Jn 11	Quay Street Rab	Portland Rd	Total
Duration (Mins:secs)	0:0	2:45	2:00	2:00	4:00	2:00	4:00	3:00	0:30	20:15

4.2.57 Adding an underestimation factor of 30% brings the estimated off-peak journey time to approximately 26 minutes.

Inbound Journey - Route 6 The Hard to Fareham Town Centre via M27

4.2.58 The table below shows cumulative journey times for the Route 6 inbound journey. One survey run was completed for each time period.

Table 4.30 Cumulative Journey Time Route 6 Inbound

Survey Start Time	Cumulative Journey Time (Mins:Secs)	Cumulative Journey Time (Secs)
1600	55:17	3317
1630	47:07	2827
1700	52:55	3175
1730	42:40	2560
1800	45:43	2743

4.2.59 It is worth noting that PM peak journeys are markedly longer than AM Peak on this route, the maximum PM duration being 10 minutes longer than the equivalent AM peak survey. Segmented journey times are described in the chart below.

Figure 4.13 Route 7 Inbound Journey Times by Segment

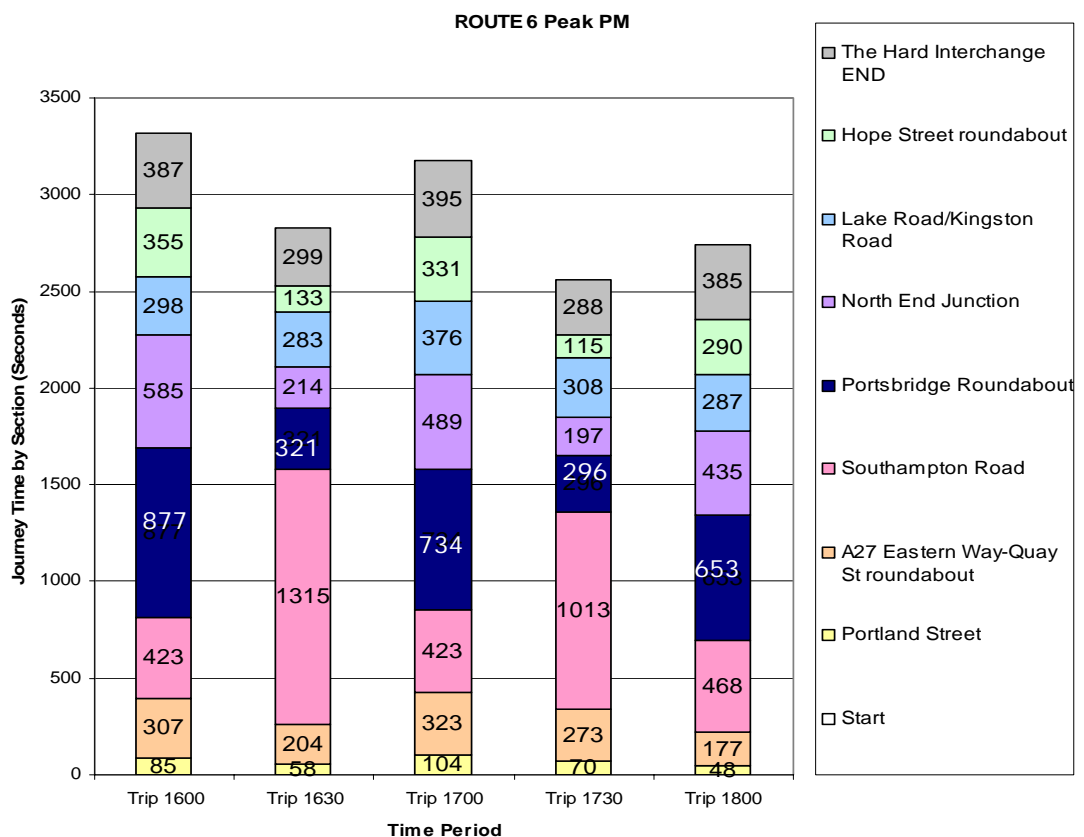


Table 4.31 Average Speed by Journey Segment Route 6 PM Peak

Segment	Distance (Miles)	Average Speed (mph) per segment					Speed Limit
		1600	1630	1700	1730	1800	
Start – Portland Street	0.20	8	12	7	10	15	30
Portland Street - Quay Street Roundabout	1.10	13	19	12	15	22	30
Quay Street Roundabout - Southampton Rd	3.70	31	10	31	13	28	40-70
Southampton Road - Portsbridge Roundabout	1.00	4	11	5	12	6	70
Portsbridge Roundabout - North End Junction	1.50	9	25	11	27	12	30
North End Junction - Lake Road	0.80	10	10	8	9	10	30
Lake Road - Hope Street	0.70	7	19	8	22	9	30
Hope Street - End	0.94	9	11	9	12	9	30

4.2.60 As with AM journeys, the segment including the M27 experiences the highest variations in journey time, but the approach to Portsbridge Roundabout is also highly variable. It is of note that two segments leaving Fareham approaching M27 Junction 11 are reasonably consistent, and similar to AM peak outbound durations measured in Routes 1 and 2, suggesting that this segment is not a constraint on the road network.

4.2.61 Off peak journey times have been estimated using Live Earth, as shown in the table below.

Table 4.32 Estimated Off Peak Journey Times Route 6 Inbound

	Start	Quay Street Rab	M27 Jn 11	Paulsgrove Jn	Portsbridge Rab	North End Jn	Lake Rd / Lingston Rd	Hope Street Rab	The Hard Interchange	Total
Duration (Mins:secs)	0:0	0:30	3:00	4:00	2:00	4:00	2:00	2:00	2.45	20:15

4.2.62 Adding the 30% underestimation, suggests actual journey times range between 20 and 26 minutes, significantly shorter than peak time measurements.

4.3 Bus & Ferry Journey Times

4.3.1 Three public transport based journey time surveys were also completed for comparison purposes, based on similar routes to car journeys. The survey specification requested specific timetabled journeys to be undertaken, to ensure a reasonable spread of survey data through the peak period. In practice, services were found to be unreliable, with bus arrival times and frequencies bearing little resemblance to published timetables. Survey staff therefore used the first bus available for the survey period in question. The survey window was 7am to 9am and 4pm to 6pm. Due to bus unreliability or failure to run, it was not always possible to complete as many surveys within that window as set out in the specification. It was agreed that off-peak comparison was not necessary for public transport journeys.

Route 4 Fort Brockhurst to Fareham Town Centre via A32 by bus

4.3.2 The surveys were undertaken using a combination of bus services 82 & 83, as they have identical routes between the two survey points. A timing point at Hoeford was included. Surveyors also recorded passenger boarding / alighting information at each stop. The tables below give journey time information for outbound and inbound journeys, by segment.

Table 4.33 Cumulative Journey Time Route 4 Outbound – AM Peak

Survey Start Time	Brockhurst - Hoeford	Hoeford – Fareham TC	Total Journey Time (Mins:Secs)
0710	15:40	10:59	26:39
0731	21:34	23:20	44:54
0816	13:54	8:30	21:57
0902	11:46	11:30	22:49
0932	17:56	14:48	32:44

4.3.3 There is high degree of variability in journey times, between 22 minutes and 45 minutes. There is a direct relationship with the car journey time profile for Route 1 outbound; 7.30 surveys have the longest durations.

4.3.4 However, the key feature is that bus journeys take longer than car journeys. Over an equal distance (Brockhurst Roundabout to Fareham Town Centre), car journey durations are between 13.5 and 17 minutes compared with a range of 22 and 45 minutes by bus.

Table 4.34 Cumulative Journey Time Route 4 Inbound – PM Peak

Survey Start Time	Fareham TC - Hoeford	Hoeford - Brockhurst	Total Journey Time (Mins:Secs)
1613	8:19	17:24	25:42
1709	10:19	8:36	18:55
1728	27:14	11:14	38:28

4.3.5 Only three surveys were possible due to buses failing to arrive. Even with limited results, they display a high variability in journey times. Car journeys over the same distance take between 13 and 19 minutes, once again showing the disparity between modes.

Route 5 Brockhurst to Portsmouth City Centre via Ferry

4.3.6 This route used a bus-ferry-bus combination between Fort Brockhurst and Portsmouth City Centre. The surveys help to establish typical journey durations for what is a popular commuting journey (but one that also a number of respondents said was 'inconvenient'), and can also be used to compare with composite journey times via road. Bus route 83 was used on the Gosport leg, and route 17/18 for the Portsmouth leg.

4.3.7 The tables below show AM Peak (towards Portsmouth) and PM Peak (towards Gosport) journey time durations. Timing points were taken at boarding and alighting the ferry.

Table 4.35 Cumulative Journey Time Route 5 AM Peak

Survey Start Time	Brockhurst - Ferry	Ferry Boarding	Ferry Journey	The Hard – Portsmouth TC	Total Journey Time (Mins:Secs)
0720	7:29	1:50	6:21	12:13	31:21
0822	9:27	2:55	5:49	14:00	35:22

Table 4.36 Cumulative Journey Time Route 5 PM Peak

Survey Start Time	Portsmouth TC - The Hard	Ferry Boarding	Ferry Journey	Ferry - Brockhurst	Total Journey Time (Mins:Secs)
1639	10:23	11:05	14:27	10:23	47:18
1730	9:23	9:41	9:41	15:31	48:54

4.3.8 It can be seen that evening peak journeys take up to 15 minutes longer than AM peak journeys, but there is little variability between journey durations. There are no obvious factors that explain the differences between AM and PM durations, but it echoes the patterns found in the car and bus-only based surveys.

Route 7 Portsmouth City Centre to Fareham Town Centre by bus

- 4.3.9 This route was included as a comparison to route 6, the same journey by car (the car journey was deliberately routed to echo the bus route through Portsmouth). Bus routes 1A and 5 were used. The tables below show journey time results for AM (towards Fareham) and PM (towards Portsmouth) Peaks.

Table 4.37 Cumulative Journey Time Route 7 AM Peak

Survey Start Time	Portsmouth CC – North End Jn	North End Jn - Portchester	Portchester – Fareham TC	Total Journey Time (Hrs:Mins:Secs)
0717	18:52	24:28	19:21	1:02:31
0822	37:50	13:35	17:49	1:09:15

- 4.3.10 Both journeys took over one hour to complete, significantly longer than the same journey by car (the longest car journey was 47 minutes). There are also large variations between journey segments between Portsmouth and Portchester. The segmentation is not detailed enough to identify particular pinch points on the network.

Table 4.38 Cumulative Journey Time Route PM Peak

Survey Start Time	Fareham TC - Portchester	Portchester - North End Jn	North End Jn - Portsmouth CC	Total Journey Time (Hrs:Mins:Secs)
1552	20:58	30:43	12:16	1:03:57
1619	19:33	26:47	10:28	56:48

- 4.3.11 Unlike all the other surveys, PM durations are the same or less than AM durations, and there is reasonable consistency between journey segments across survey times. However, total journey times are still close to an hour, and are longer than comparable car journey durations on Route 6.

4.4 Average Speeds

- 4.4.1 Although comparison of journey times as described in the above sections is a useful comparison, its usefulness to compare between routes is somewhat limited as each route is of a different length. In this regard, a helpful comparison is that of average speed and, where possible. This puts journey time measurements in context. Average speeds between routes are shown below:

Table 4.39 Average Speed Comparison (mph)

Route	Average Speed AM Peak	Fastest Survey Period	Slowest Survey Period	Average Speed PM Peak	Fastest Survey Period	Slowest Survey Period
Route 1 Gosport town centre to M27 Junction 11 via A32	21	0900	0730	17	1730	1800
Route 2 Gosport Town centre to M27 Junction 11 via Newgate Lane	23	0830	0700	19	1600 / 1800	1730
Route 3 Gosport town centre to M27 Junction 9	25	0700	0800/0830	22	1630	1730
Route 6 The Hard to Fareham Town Centre via M27	27	0800	0730	15	1630/1730	1600/1700

- 4.4.2 Despite route 6 including a motorway section, this does not increase average speeds significantly; in fact the PM peak speed on route is the lowest of all routes. The table also confirms journey time data that the PM peak experiences higher levels of delay and congestion.
- 4.4.3 It also supports both the journey time surveys and household surveys by confirming the extent of morning peak spreading, particularly for journeys through Fareham.
- 4.4.4 Comparisons with off-peak surveys for routes 1 and 2 have also been completed as shown below. This has not been extended to routes 3 and 6 as no survey data was available with which to complete a reliable comparison.

Table 4.40 Off Peak Speed Comparisons

Route	Outbound Average Speed	Inbound Average Speed
Route 1 Gosport town centre to M27 Junction 11 via A32	22	22
Route 2 Gosport Town centre to M27 Junction 11 via Newgate Lane	25	23

4.4.5 It is perhaps surprising to note that off-peak speeds are not significantly higher than peak period average speeds, particularly when compared to AM Peak. It is also worth noting that long sections of both A32 and Newgate Lane are subject to 40mph speed limit, which, in the context of this information, appears to be set too high. However, further work would be required before a justified decision to change speed limits could be made.

4.4.6 Our overall conclusion from the speed analysis is that all routes measured suffer from peak congestion in approximately equal measure, including the Portsmouth route. The main difference is the time at which congestion and delay is at its worst, with greatest delay occurring on routes from Gosport through Fareham earlier than other routes.

4.5 Time Lost to Congestion

4.5.1 The main objective of the journey time surveys was to measure the effect of congestion as a 'time lost' indicator. The table below compares peak and off-peak journey times for each route.

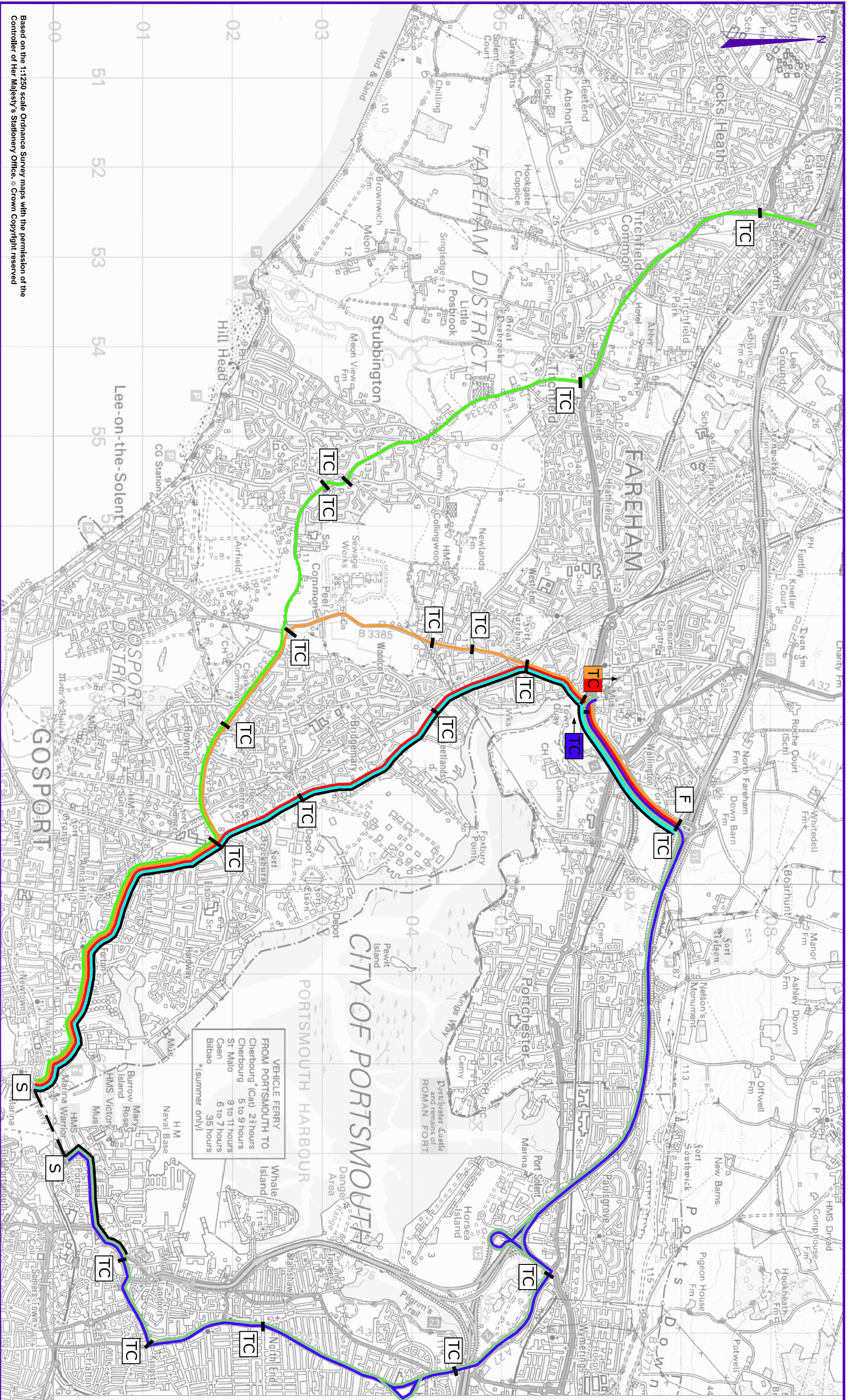
Table 4.41 Average Journey Time Comparison

Route	AM Peak Average	Outbound Off Peak Average	Time Lost	PM Peak Average	Inbound Off Peak Average	Time Lost
Route 1 Gosport town centre to M27 Junction 11 via A32	25:14	20:58	5:16	29:10	22:50	7:40
Route 2 Gosport Town centre to M27 Junction 11 via Newgate Lane	27:28	22:45	4:37	36:51	24:48	12:03

Route	AM Peak Average	Outbound Off Peak Average	Time Lost	PM Peak Average	Inbound Off Peak Average	Time Lost
Route 3 Gosport town centre to M27 Junction 9	27:10	21:00*	6:10	30:21	21:00*	9:39
Route 6 The Hard to Fareham Town Centre via M27	34:40	20:15*	14:25	48:44	20:15*	28:29

* estimated journey times, excluding 'underestimation' factor

- 4.5.2 Overall, it can be seen that more time is lost to congestion in the PM peak than in the morning. Looking at the Gosport based routes (1, 2 & 3) an additional delay of between 4 and 6 minutes during the morning peak is not significant and, in our experience, would be acceptable to most people. But it should also be remembered that morning commuting journeys are taking place measurably earlier than the traditional peak period. Commuters have adjusted their commuting habits to avoid the traditional peak period, having the effect of reducing the measured time lost to congestion.
- 4.5.3 Analysis of inbound journeys shows greater levels of time lost to peak period congestion. It is also clear from other data that there is less peak spreading taking place during the evening peak, with a more traditional profile to traffic levels. This pattern could be caused by a number of factors, probably working in combination, but points towards workers having less control over when they leave their place of work than when they start, either from family pressures or employer demands. The result is greater demands on the road network during the evening peak and, consequently more time lost to congestion.
- 4.5.4 Route 6 exhibits a similar pattern but suffers from far greater differences between peak and off peak journey time. As observed earlier, this may be influenced by M27 conditions, which in turn are influenced by a wide range of external factors. From the data available, it is not possible to disaggregate these impacts.
- 4.5.5 However much time is lost on car journeys, all bus journeys measured took longer to complete than the comparable car routes. In this context, it is not surprising that bus mode share is low, as it offers no advantage over car journeys, even in congested conditions.
- 4.5.6 In conclusion, and bearing in mind comments about Route 6 above, it suggests that car commuters in Gosport experience comparable time delays during peak periods as commuters from Portsmouth; it is not possible to extend this comparison any wider as no other cities were surveyed. Gosport commuters have also changed their travel time to accommodate limitations of the transport network, but are unwilling to change mode to bus as it offers no real journey time savings.



Based on the 1:1250 scale Ordnance Survey maps with the permission of the Controller of Her Majesty's Stationery Office. © Crown Copyright reserved

Gosport

Title
Gosport Journey time survey routes

Project No.	Figure No./Drawing No.	Scale	Rev. No.	Drawn	SW	KEY.
C36428/00	C36428/00/D/001	NTS at A2	-	Designed	DH	Route 1
				Approved	DH	Route 2
						Route 3
						Route 4
						Route 5
						Route 6
						Route 7

VEHICLE FERRY
FROM PORTSMOUTH TO
Cherbourg* (Cat) 2½ hours
Cherbourg 5 to 9 hours
St Malo 9 to 11 hours
Caen 6 to 7 hours
Bibao 35 hours
*(summer only)

5 Business Decision Making

5.1 Introduction

- 5.1.1 This Chapter looks at the economic factors influencing the Gosport economy, and briefly explores the potential to expand sector-based employment opportunities. It has been compiled through a desk-based appraisal of existing constraints and opportunities using existing available datasets, and analysis of market perceptions and aspirations. This has included discussions with selected commercial property agents.
- 5.1.2 The Gosport economy has relied heavily on MOD influence and manufacturing to supply jobs. As both of these sectors have been subject to decline, rationalisation and / or restructuring the number of jobs within Gosport has declined. The economy has not yet diversified sufficiently to replace jobs lost in traditional markets. This chapter considers the key factors that affect businesses making locational decisions.

5.2 Business Location Decisions

- 5.2.1 This section identifies a series of key locational requirements for businesses and assesses – on a strategic level – Gosport’s performance against these factors. The locational requirements assessed are:
- availability of land and premises;
 - access to production factors;
 - access to markets; and
 - external economies of scale.

Availability of Land and Premises

- 5.2.2 Studies have shown that the availability of suitable land or premises is an important factor in locational decisions of businesses.
- 5.2.3 With the exception of small industrial units Gosport has limited availability of business premises. Average annual industrial take-up between 1996 and 2006 has been around 24,000 m². Available data sources show that current supply is estimated to be in a similar order (of which the majority is second hand). This gives a notional supply of 1 year (see Table 5.1), which is very low for the property market to work effectively.
- 5.2.4 However, this data fails to take into that since 2004, a number of MOD land holdings have become available, increasing land supply, and take-up of employment space. No precise figures have been available for this study. As historic land supply has been limited, considerable latent demand has developed, leading to rapid take-up of newly available space.

Table 5.1 Industrial Availability and Take-up by Size in Gosport

Floorspace Range	Available Floorspace (Sq.m)			Annual Avg. Take-up (m ²)	Notional Years Supply
	Second-hand	New / Refurbished	Total		
<185 sqm	879	2,928	3,807	204	19
185 – 465 sqm	1,235	229	1,464	483	3
465 – 1,850 sqm	2,588	617	3,205	1,231	3
>1,850 sqm	8,503	6,514	15,017	22,430	1
TOTAL	13,205	10,288	23,493	24,348	1

Source: FOCUS

- 5.2.5 The situation in the office market is even more precarious and our research indicates that there is only a very limited office market in Gosport as shown in Table 5.2. Discussions with local property agents confirm that Gosport is not viewed by the market as an attractive office location. This is also supported by the limited stock of office according to the VOA (28,000 m², which is 6.4% of all business floorspace compared to 20.1% in Hampshire).

Table 5.2 Office Availability and Take-up by Size in Gosport

Floorspace Range	Available Floorspace (Sq.m)			Annual Avg. Take-up (m ²)	Notional Years Supply
	Second-hand	New / Refurbished	Total		
<185 sqm	109	0	109	81	1
185 – 465 sqm	0	0	0	139	0
465 – 1,850 sqm	743	0	743	312	2
>1,850 sqm	0	0	0	2,608	0
TOTAL	852	0	852	3,139	0.3

Source: FOCUS

- 5.2.6 Commercial yields for retail premises are the second highest in Hampshire, indicating a lack of market confidence by investors.¹
- 5.2.7 There were 28 ha of employment land available in Gosport in March 2005 of which 23 ha are suitable for a combined use of B1, B2 and B8. There is greater recognition in the property market that Gosport has capabilities in and some capacity for industry related businesses, although increasing land supply will help to cement the market view.
- 5.2.8 The background document on employment for the South Hampshire Sub-regional Strategy by the Partnership for Urban South Hampshire identifies a need for additional employment in Gosport to offer local alternatives to commuters who currently travel to Fareham and further afield. The main source of new employment land will be that which has been declared surplus by the Ministry of Defence.
- 5.2.9 With the regeneration of Daedalus a significant amount of employment land will come available in Gosport. Daedalus is one of the largest brownfield sites in Hampshire. SEEDA, who has purchased the site, with the potential to develop the site focusing on new aviation and marine related businesses, exploiting access to the existing runways and the Solent. Plans are to create a quality business location that will attract inward investment and provide accommodation for start-up, growing and established businesses.
- 5.2.10 Other past and emerging development opportunities have been and are housing driven with relatively limited employment components (e.g. Priddy's Hard, Royal Clarence Yard, and North Fareham Strategic Development Area to the north of the Borough).

Access to Production Factors

- 5.2.11 Access to production factors is one of the key aspects in locational decisions of companies. With today's efficient transport systems for goods and the shift of the economy from industrial production to a 'knowledge economy' labour is the most important production factor and access to the right labour market one of the key locational factors.
- 5.2.12 Labour requirements vary from sector to sector. Large parts of business services, high tech, research and development and public sector organisations are looking for access to a highly qualified and motivated labour force. Personal services, retail, catering and large parts of manufacturing businesses have a need for medium skilled employees. In today's demanding economic environment there is more limited need for low- or un-skilled labour.
- 5.2.13 Due to Gosport's location on a peninsula and its relatively poor transport infrastructure access to goods is limited. However, we do not perceive this as a major limiting factor for the attractiveness of Gosport as an industrial location with maybe the exception of industries relying on large quantities goods.

¹ The 'all risks yield' is a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as percentage of the capital value. A high yield indicates concern by investors that rental income might grow less rapidly than towns with low yields. Where there are high yields, investors will only commit where the returns are proportionally that much higher. Areas with low yields are therefore more attractive for investment (DoE 1994).

- 5.2.14 The issue of access to labour is somewhat more multifaceted. Gosport has a potential labour force of approximately 38,000 (economically active resident population including full and part time employees, self employed and unemployed). The economic activity rate is relatively low in Gosport (81.4%²) slightly below Hampshire (84%) and the South East (82%). However, unemployment rates have constantly been lower in Gosport than in the UK, South East and Hampshire over recent years³. The number of Gosport residents in employment has risen from 34,000 to 40,000 and there has been a 9% increase in the percentage of employees in managerial and professional roles, compared to 6% increase in South East.
- 5.2.15 Gosport has relatively few residents in higher skilled occupations and a relative high number in low and unskilled occupations compared to the South East as shown in Table 5.3. Although proportions of managers living in Gosport remains lower than the South East average, the proportion of residents employed within this groups has risen faster in Gosport than the South East between 2003 and 2006 – 32% rise in Gosport against 17% rise for South East.

Table 5.3 Occupational level

	Gosport (numbers)	Gosport (% at Feb 2003)	Gosport (% at Dec 2006)	South East (% at Feb 2003)	South East (% at Dec 2006)
Manager and professional	15,900	30%	39.8%	39.7%	46.6%
Admin and service	14,100	45.2%	35.1%	39%	37.9%
Low and unskilled	10,100	24.8%	25.1%	16.7%	15.4%

Source: ONS Population Survey 2006

- 5.2.16 Average hourly earnings of Gosport residents are with £9.95 lower than in the South East (£12.39) and Great Britain (£11.26). A slightly different picture emerges when considering the average hourly earnings of people working in Gosport, which at £11.36 are comparable to the figures for the South East (£11.82) and Great Britain (£11.24)⁴. There are two possibilities to explain this disparity:
- many Gosport residents with low incomes commute out of the Borough to work; and/or
 - many better paid jobs in Gosport are taken by in-commuting employees.
- 5.2.17 Data from the household and employee surveys suggest the latter. The findings above indicate that the local labour market is not geared towards modern, knowledge based and

² December 2006, ONS Population Sample

³ Gosport's Baseline Information – Sustainability Appraisal Scoping Report, 2006

⁴ ONS Annual Survey of Earnings 2006

high productivity sectors although there is some recent evidence to suggest that this is beginning to change.

Access to Markets

- 5.2.18 In today's globalised economy access to markets is not as important for manufacturing as it was in the past. Goods and their components are produced across the world and distributed to the world markets by cheap and effective transport means. In western developed countries this has led to a shift from production of goods to distribution of goods.
- 5.2.19 For distribution purposes access to markets is one of the key locational requirements. Preferred locations for distribution centres are close to the motorway system with the possibility to cover an area as large as possible within a one day drive. With its coastal location Gosport's attractiveness as a major centre for distribution is therefore relatively limited, although a sizable logistics company operates successfully at the northern borough boundary with more convenient access to the motorway network than the rest of the borough.
- 5.2.20 Where as head offices and major commercial firms are looking for prestigious addresses in locations with high external economies of scale (see below) small professional firms and branch offices require locations with good access to their markets, which are predominantly residents and other small companies. That is the reason why many of these companies prefer high street locations.
- 5.2.21 Retail is highly dependent on access to markets and the spending power within the catchment area. The actual site location is also very important for retail efficiency. Within short distance one site may be very superior to another. Due to its location on a peninsula Gosport's primary retail catchment area is limited more or less to the Borough and average hourly earnings of Gosport residents are lower than the regional and national average. Although there are a significant number of tourists visiting Gosport most stay with families and friends contributing little to the local retail trade.⁵

External Economies of Scale

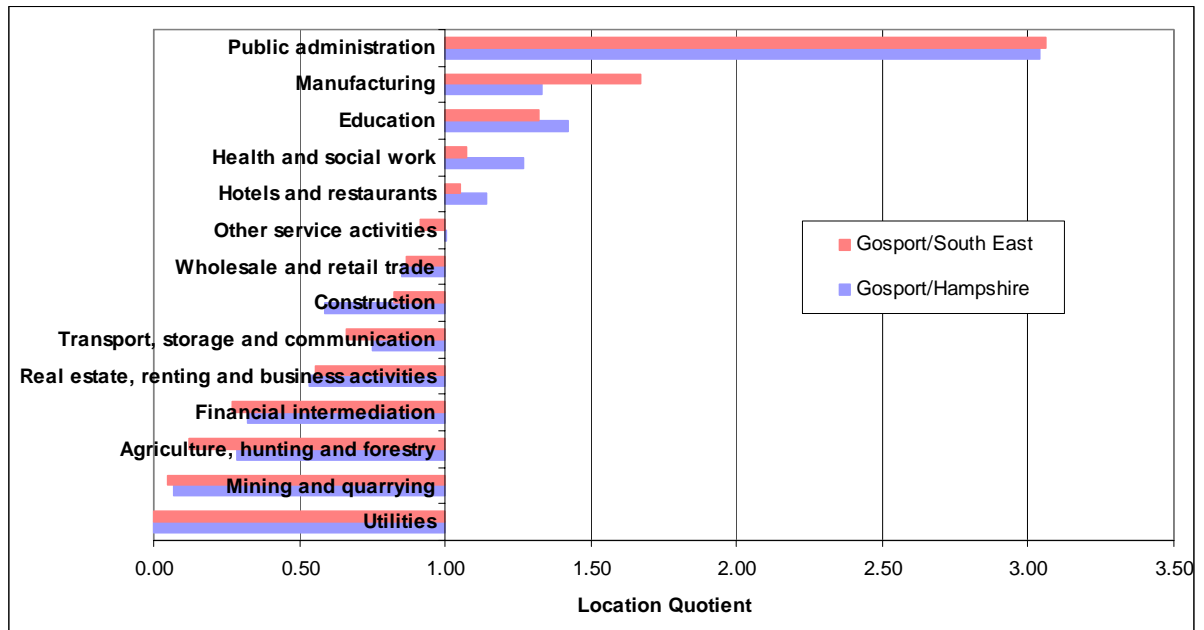
- 5.2.22 External economies of scale arise as a result of the spatial proximity of economic activities⁶. The literature differentiates between two types of external economies of scale:
- **localisation economies** arising from proximity of businesses in the same industries as a result of input-output ties, shared labour markets and access to tacit information through informal networks. Localisation economies are the reason for sector clusters to form in a specific location; and
 - **agglomeration economies** as a result of geographical association of a large number of economic activities not necessarily in the same industry. They arise because of the concentration of many facilities jointly serving different industries such as public transport facilities, well-organized labour markets, legal and commercial services, cultural and recreational activities.

⁵ Gosport Local Development Framework Baseline Report

⁶ In contrast internal economies of scale refer to the fact that large business can generally operate more efficiently.

- 5.2.23 In Gosport there are a relatively high proportion of people employed in public administration (including defence), manufacturing and education compared to Hampshire and the South East as shown by the location quotient in Figure 5.1. The location quotient compares the employment structure in Gosport with Hampshire and the South East. A location quotient above 1 indicates a higher degree of concentration of employment in that sector in Gosport than in the comparator area and is an indicator that Gosport might provide localization economies for this sector. A quotient of below 1 indicates a relatively lower concentration of employment in Gosport.

Figure 5.1 Location Quotient



Source: Annual Business Enquiry 2005

- 5.2.24 The sectors strongly represented in Gosport, which might profit from external economies of scale, are either manufacturing or are strongly dependent on public sector funding (public administration, education, health and social work) and largely outside the sphere of influence of the local authority and its economic development efforts. Although traditional manufacturing has declined, the 2005 Annual Business Inquiry recorded 800 new jobs in advanced manufacturing between 2004-1005. Other growing and highly productive sectors such as business activities and financial intermediation are underrepresented in Gosport and do not profit from localization economies.
- 5.2.25 A number of factors need to be present to achieve economies of scale, but there are no absolute thresholds at which economies are realised. Business sector clustering is an important aspect of achieving economies, where similar organisations co-locate to benefit from efficient supply chains and information exchange. Access to a commonly skilled labour market also has a valuable bearing. The cluster model could either be a large company with smaller local suppliers, or a larger number of small – medium size organisations trading in a similar business.

- 5.2.26 Gosport's economy with an estimated 1,295 VAT registered businesses⁷ is not large enough to provide strong agglomeration economies. These are especially important for high productivity service sector businesses and high tech companies which require highly skilled employees and specialist suppliers/services and put a premium on tacit information.

5.3 Locational Advantages

- 5.3.1 For many of the locational requirements of modern businesses Gosport performs relatively poorly. Nevertheless, there are some strong locational advantages which are described below.

- **Location within a thriving economy:** The South East of England is one of the most thriving economies in Europe. With the regeneration and the economic development of South Hampshire Gosport should be able to profit more from this locational advantage. Although there is clear evidence of a local transport infrastructure deficit, exacerbated by its peninsula geography, Gosport is well connected to the regional, national and international economy. Heathrow and Gatwick are both about 125 km away and can be reached by rail or road (subject to no congestion) within 1 hour and 40 minutes;
- **Quality of life:** Gosport's location on the South coast, next to the Solent provides it with a high quality of life. It is within easy reach of many of the South Coasts' outstanding natural landscapes (South Downs, New Forest) and exciting urban centres (Southampton);
- **Low housing costs:** Housing costs are relatively low in Gosport which can be attractive for young professionals and families. This in turn can be – especially in combination with the good quality of life – an attractive factor for young, growing businesses;
- **MoD:** MoD rationalisation is expected to continue over the next few years. Nevertheless, the MoD will stay an important employer within Gosport providing jobs and a backbone to the local economy;
- **Tradition in manufacturing:** Gosport has a tradition in manufacturing and still has in relative terms more manufacturing employment than Hampshire and the South East. This tradition and the existing skills can build the bases for a new, high tech based manufacturing industry focusing on aviation and marine technologies; and
- **Tourism:** Tourism contributes already significantly to the local economy providing around 1,200 jobs. There is a potential to increase this aspect of the economy especially with the redevelopment of the waterfront sites in Gosport.

5.4 Potential for Economic and Business Change

- 5.4.1 On the bases of this high level assessment it is impossible to identify potentials for economic and business changes. However, we have identified some steps which might lead to an improved economic development:

⁷ DTI Small Business Service 2005

- **Economic Strategy:** Ensure that the current review of the Councils' Economic Strategy includes identification of the sectors and types of business most likely to thrive in Gosport and how the Council can support these;
- **Tourism strategy:** Tourism has been identified as a potential growth sector by the Council. Review the Tourism Strategy to ensure that it focuses the limited resources available towards the most effective ways to improve and grow the tourism sector and help difference stakeholders towards a common goal;
- **Employment Land Study:** We understand that Gosport is currently undertaking an Employment Land Study. This will aid understanding of the current supply – in terms of quantity and quality – and the future demand which will help form policies towards the provision of employment land; and
- **Strengthening of town centre and waterfront:** A strengthening of the town centre and the waterfront will most likely have a positive knock-on effect of all sectors.

6 Conclusions & Recommendations

6.1 Introduction

- 6.1.1 The main objective of this study is to identify possible links between commuting patterns, congestion and employment. The previous chapters report on all of these issues independently. In this chapter, we draw together the main strands, identify conclusions implied by the data, and present a series of evidence based recommendations.
- 6.1.2 What has become apparent through this study is that, although peak period congestion is in clear evidence, it has occurred as a result of changes over the long term within Gosport and south Hampshire, and is influenced as much by the diminishing number of jobs on the peninsula as it is by growth in employment opportunities along the M27 corridor and beyond. There is also a recognised transport infrastructure deficit on the peninsula contributing to a poor public transport offering.
- 6.1.3 The response to these challenges is equally complex and requires co-ordinated action over the medium and long term by a range of stakeholders in both the public and private sector. There is no single answer to the problems experienced by Gosport, but a response is necessary for the Gosport economy to remain competitive.

6.2 Commuting Patterns

- 6.2.1 Chapters 2 and 3 analysed data from the household and employment surveys. From that information, we conclude that:
- based on all responses from the Household survey, two-thirds of employed Gosport residents work outside the Borough;
 - the A32 has a multi-function role as a strategic route and access to local employment, for all commuting groups. Out-commuters have adjusted to congestion on this route by using Newgate Lane, but internal or in-commuters have no route choice when accessing major employment centres along Fareham Road;
 - strong evidence of peak spreading, particularly in the AM Peak, with many out-commuting journeys starting around 6.30am;
 - journey times estimated by respondents correlate well with measured journey times;
 - there is limited evidence of car sharing – 80% of Gosport workers responding to the Household survey stated they never car shared;
 - the availability of employer provided Private Non-Residential parking has a strong influence on mode choice;
 - the majority of those using public car parks do so without a season ticket;
 - although car ownership amongst the respondent group is high, car mode shares are equivalent to other urban areas in the South East. Mode shares for cycling are high relative to Hampshire and national averages, particularly amongst internal commuters and those leaving via Gosport Ferry, but bus use is low for all groups;

6 Conclusions & Recommendations

- use of the Gosport ferry depends on home and job location with rapid drop-off as the distance from the terminal increased beyond the wards immediately surrounding it; and
- a higher proportion of Gosport residents are part-time workers than in-commuters.

6.2.2 The two strongest factors here are the high proportion of out-commuters and the influence of PNR on mode-choice.

6.3 Congestion

6.3.1 Information was obtained on congestion from a combination of the household and employer questionnaires and journey time surveys, as summarised below:

- significant peak spreading occurs during the morning peak to combat the effects of congestion;
- in terms of commuting destinations, traffic is distributed proportionately between A32, Newgate Lane and Stubbington, i.e. Stubbington is used predominantly for destinations to the west;
- delays on all three routes are experienced equally, but at different times, with A32 and Newgate Lane routes experiencing delays earlier in the peak period;
- longer overall delays are experienced in the PM Peak, primarily due to pinch points in the network;
- Quay Street Roundabout, Stubbington centre and Segensworth roundabout are identified as peak period pinch points during both AM and PM peaks;
- buses operate unreliable services as they have no means of bypassing congestion;
- bus journey times are significantly longer than comparable car journeys. In combination, these two points contribute to low mode share;
- journey times vary considerably on most sections of the road network, suggesting the network is operating close to effective capacity for extended periods. This pattern holds true during peak and off-peak periods; and
- there is evidence of a mid-afternoon peak (school run) causing some delays.

6.3.2 The key points from this analysis are the sensitivity of the network, difference between car and bus journey times, and the relationship with the identified pinch points.

6.4 Employment

6.4.1 The main points derived from analysis of employment and economic patterns are as follows:

- a high proportion of in-commuters have higher skilled / paid professional jobs than Gosport residents. Many more low skill jobs are taken by Gosport workers;
- half of all employed Gosport residents have professional job roles, but most professionals are employed elsewhere;

- in terms of business sector, in-commuters make up a larger proportion of employees in service industries, employed residents making up a larger proportion in retail and support roles.
- links to the MOD are in evidence, based on stated factors drawing residents and workers to Gosport. These are not as strong as the historic connections between Gosport and the MOD would suggest, bearing in mind that the MoD has historically been one of the largest employers in the town;
- there are large variations in household income between Gosport wards, but on average, in-commuters are on higher salaries;
- employment land supply is very limited, although recent land made available through MoD rationalisation has been in high demand;
- the economy is over-dependent upon the public sector (including MOD) and declining traditional manufacturing sector, and is therefore vulnerable to external factors changing either or both markets;
- poor access to markets (caused by congestion) limits the attractiveness of Gosport to small companies seeking localisation economies of scale (clusters);
- Gosport is not generally perceived by the market to be a modern or attractive location to invest, although some evidence suggests that marine and advanced manufacturing sectors have invested; and
- the tourism market has scope for development but is limited by a lack of local hotel facilities.

6.4.2 There are a number of important factors emerging from this data. There is a clear contradiction in locally available professional skills and proportion of in-commuters in professional roles. At this level of analysis it is not possible to determine whether some of the locally available skills could be used in the Gosport economy. The other main point that emerges is the vulnerability of the economy in terms of reliance on declining sectors and limited diversification.

6.5 Linkages between Commuting, Congestion & Employment

6.5.1 The conclusions emerging from the household and employee surveys is a greater need to create jobs within Gosport that meet the needs and aspirations of Gosport residents in terms of salary and skills. A further point, identified most strongly by in-commuters, is the apparent unwillingness to work and live in the same town.

6.5.2 From the issues raised above, we have sought to identify common threads. Five themes emerge; the table on the following page groups issues and themes together:

- Theme 1: Employment Patterns;
- Theme 2: Route Choice;
- Theme 3: Mode Choice;
- Theme 4: Value of Time
- Theme 5: Employment Sectors

6 Conclusions & Recommendations

Commuting	Theme	Congestion	Theme	Employment	Theme
Two-thirds of employed Gosport residents work outside the Borough;	1	Significant peak spreading occurs during the morning peak to combat the effects of congestion	1	A high proportion of in-commuters have higher skilled / paid professional jobs than Gosport residents. Many more low skill jobs are taken by Gosport workers	5
The A32 has a multi-function role as a strategic route and access to local employment, for all commuting groups.	2	In terms of commuting destinations, traffic is distributed proportionately between A32, Newgate Lane and Stubbington	2	Half of all employed Gosport residents have professional job roles, but most are employed elsewhere	5
Strong evidence of peak spreading, particularly in the AM Peak, with many out-commuting journeys starting around 6.30am	1	And delays on all three routes are experienced equally, but at different times, with A32 and Newgate routes experiencing delays earlier in the peak period	2	In terms of business sector, in-commuters make up a larger proportion of employees in service industries, employed residents making up a larger proportion in retail and support roles	1, 5
Journey times estimated by respondents correlate well with measured journey times	4	Bus journey times are significantly longer than comparable car journeys.	4	The economy is over-dependent upon the public sector (including MOD) and declining manufacturing sector, and is therefore vulnerable to external factors changing either or both markets.	1
There is limited evidence of car sharing – 80% of Gosport workers stated they never car shared;	3	Quay Street Roundabout, Stubbington centre and Segensworth roundabout are identified as peak period pinch points	1,3	There are large variations in household income between Gosport wards, but on average, in-commuters are on higher salaries	5
The availability of employer provided Private Non-Residential parking has a strong influence on mode choice;	3	Buses operate unreliable services as they have means of bypassing congestion.	3	Employment land supply is very limited, with less than one years' supply currently available to the market	1
The majority of those using public car parks did so without a season ticket;	3	Longer overall delays are experienced in the PM Peak due to pinch points on the network	3	Links to the MOD are in evidence, but not as strong as the historic connections between Gosport and the MOD would suggest	1
Although car ownership amongst the respondent group is high, car mode shares are equivalent to other urban areas in the South East. Mode shares for cycling are high, but bus use is low for all groups;	3	There is a high degree of variability on most sections of the road network, suggesting the network is operating close to effective capacity for extended periods	4	Poor access to markets (caused by congestion) limits the attractiveness of Gosport to small companies seeking localisation economies of scale (clusters)	1, 5
Use of the Gosport ferry depends strongly on home and job location;	2	There is evidence of a mid-afternoon peak (school run) causing some delays	4	Gosport is not perceived by the market to be a modern or attractive location to invest, with limited evidence of a knowledge driven or hi-tech economy	1,5
A higher proportion of Gosport residents are part-time workers than in-commuters.	5			The tourism market has scope for development but is limited by a lack of local hotel facilities	5

Theme 1 Employment Patterns

- 6.5.3 Evidence suggests that one of the reasons for the large volume of out-commuters is the actual and perceived lack of diversification in the local economy, related to a perceived lack of available jobs providing the desired salary or skill levels. As individual skills levels have increased in line with demand for high end jobs, employed Gosport residents have not been able to find suitable work within the Borough and have therefore chosen to commute. Family connections emerge as one of the main reasons for not relocating from Gosport.
- 6.5.4 Two main responses emerge from the above analysis:
- in the short – medium term, investment is required to alleviate road network pinch points to ease congestion and improve access to markets for companies located in Gosport; and
 - in the medium to long term, the economy needs to continue to diversify within traditional sectors to provide higher end / hi-tech manufacturing. This will also help to support emergence of knowledge and service based industries.
- 6.5.5 A number of major transport schemes to address the identified pinch points have previously been identified, but have either been abandoned, or in the case of Stubbington Bypass, deferred until post 2016. A number of proposals have emerged to resolve difficulties at Quay Street Roundabout over the years, the latest proposal emerging through development proposals by Tesco. There are significant constraints at this location and we understand that the Tesco related scheme seeks to overcome some of these. In the context of these constraints, identification of other 'quick win' traffic management measures would be appropriate.

Theme 2 Route Choice

- 6.5.6 Out-commuting will remain a feature of Gosport for some time to come, but there is a reasonable amount of internal commuting taking place, predominantly on A32. The multi-function role of A32 provides an opportunity to target local commuting patterns.
- 6.5.7 A significant number of Gosport employers are located along A32, including several MOD facilities, large industrial estates and St Vincent's College. It attracts commuting trips from internal and in-commuting groups.
- 6.5.8 A large proportion of internal commuters use A32 to access their place of work and there is an opportunity to increase access to these sites by sustainable modes. As discussed previously, cycle mode share amongst employed Gosport residents is high, particularly for access to Gosport ferry. Facilities for cyclists already exist along A32, but onward links to main residential areas are less in evidence. High frequency bus services use A32, but are poorly used due to congestion and unreliability.
- 6.5.9 A combined strategy focused on the A32 that sought to achieve the following objectives would provide some benefits:
- improve connections for cyclists between employment areas and local residential areas;
 - targeted bus priority measures to improve reliability; and

- work with existing employers to develop Travel Plans, particularly around employment clusters to achieve economies of scale.

6.5.10 Once a successful model has been developed and implemented, it can then be used at other employment clusters within Gosport. The main benefit of this approach is to separate out local and out-commuting movements.

Theme 3 Mode Choice

6.5.11 Although many local commuting trips are undertaken by bicycle, car use remains the main mode choice for all three commuter groups. For many out-commuters, two factors contribute to high car use:

- lack of mode choice – limited rail connections and poor bus services; and
- availability of employer provided car parking at workplace. The factor also applies to those employed within Gosport.

6.5.12 The Borough Council has no influence on the level of PNR parking provided by employers outside the Borough, but can have some influence on locally provided PNR through the development process.

6.5.13 Co-ordinated action with the County Council and neighbouring planning authorities is required to reduce the level of PNR at employment locations. This will have greatest influence on new developments, through reductions in parking standards and introduction of employer travel plans, but reducing PNR levels retrospectively is likely to remain a longer term objective. However, there is a need to find the right balance with PNR so as not to put off new business opportunities, particularly where attractive alternatives are not available.

6.5.14 There appears to be greater scope for car sharing to have a greater influence on travel patterns. Hampshire County Council operates a car share scheme (www.hantscarshare.com) with almost 190,000 registered users, but only a small proportion located in Gosport. Raising awareness of this facility amongst out-commuters in particular will help to influence mode choice.

6.5.15 The actions identified in the previous section relating to targeted bus improvements and traffic management at pinch points will help to create greater choice for commuters and alleviate some congestion.

Theme 4 Value of Time

6.5.16 The evidence base points to a congested road network operating close to its capacity over extended periods of time, caused by high levels of out-commuting. As a response, out-commuters have adjusted their travel times, particularly in the morning peak period. One of the consequences of this action is that time spent commuting is less than if travelling during the 'traditional' peak period (8-9am, 5-6pm), so the measure of 'time lost to congestion' is comparable to Portsmouth.

6.5.17 Household survey results indicate that around half of commuters are willing to travel up to an hour in each direction, with most journeys taking between 30 and 45 minutes. 90% of respondents considered commuting journey time as very or quite important.

- 6.5.18 As we shall discuss in Theme 5, expanding the range of local job opportunities, and encouraging new positions to be filled by Gosport residents, is likely to have the double effect of reducing travel time and reducing the need to peak-spread. This must remain a medium – long term objective.
- 6.5.19 In the short-medium term, greater resilience is needed in the transport system to combat vulnerabilities. Although no incidents were recorded during the journey time surveys, it is known that relatively minor incidents can have significant knock-on effects across the transport network. During 2005, a relatively insignificant incident in Portsmouth caused major congestion and gridlock across the city, leading to a review of incident management by the City Council and emergency services. It is suggested that a similar approach is taken in Gosport to reduce the potential impact of incidents when they occur.
- 6.5.20 The impact that school traffic has on overall peak traffic levels is well known – up to 20% of peak period traffic may be related to the school run. Of the responses received, only a minority stated that dropping / collecting children formed a regular part of their journey. Developing school Travel Plans should assist in reducing the impact of the school run.

Theme 5 Employment Sectors

- 6.5.21 Although there are fewer higher level jobs within the Gosport economy than in neighbouring economic units (due to the relative size of Gosport), the majority of those that do exist are taken by in-commuters. This is not necessarily associated with a local skills shortage, but probably relates to perceptions by employers.
- 6.5.22 Anecdotal evidence suggests that Gosport employers cast a wider search net for senior posts than for junior posts. Although this practice is widespread across most industries, and is not confined to Gosport, it suggests that local employers are not confident in their local employment base. Evidence suggests that locally available skills for senior posts exist within Gosport, but further work is needed to identify any links between these skills and local opportunities.
- 6.5.23 The over-reliance on the manufacturing and public sectors has contributed to economic decline within Gosport, and the general reduction in available employment opportunities. At the current time, the poor market perception of Gosport particularly in the office sector would suggest that it is not a location primed for large-scale inward investment by new and emerging business sectors.
- 6.5.24 At a local level, improved access to markets might be achieved for some sectors through co-ordinated logistical activity. Freight Quality Partnerships are emerging as effective means of managing this activity across sectors and organisations.
- 6.5.25 A three - pronged economic strategy is proposed to bring confidence to the wider marketplace in what Gosport has to offer as an employment location:
- **Completion of detailed analysis of current market sectors** – the aim is to identify sub-sectors, particularly within manufacturing, where higher value-added industries might be exploited. The marine and aviation sectors have strong potential;
 - **Strengthening of Existing Industries** - an employment strategy based on organic growth should aim to maximise existing opportunities for local employers,

strengthening existing businesses and minimising opportunities for existing employers to leave Gosport. The Employment Land Study and Tourism Strategy should be reviewed in line with comments in Chapter 5 as part of this exercise.;

- **Promotion of Growth Opportunities** – there are a small number of key opportunities to maximise employment growth and diversification with Gosport. A major current opportunity exists at Daedalus, and further MOD disbursements may provide new opportunities in the future. Building on the first two parts of the strategy, the aim should be to exploit these opportunities to the wider marketplace, encouraging suitable employers to locate within Gosport, eventually building clusters based around existing strengths.

6.6 Recommendations

6.6.1 The evidence set out in this report suggests clear, but complex, linkages between commuting, employment and congestion. Resolving the issues of congestion and out-commuting will require investment and time. Essentially, Gosport needs to reposition itself as an employment location of choice, using its existing strengths in manufacturing as a basis for that repositioning.

6.6.2 At present, there are few external indicators of co-ordinated economic growth within Gosport. However, the Borough Council is actively pursuing a more co-ordinated approach which will emerge publicly during 2008. This is important as, without a clear strategy, opportunities are likely to be missed and existing employment and commuting patterns will be perpetuated. Our research indicates four key drivers to sustainable economic growth:

- Promotion;
- Access;
- Prominence; and
- Available skills.

6.6.3 The recommended strategy is based around these four drivers. The approach we have adopted has its origins in the Smarter Choices agenda. These are techniques for influencing people's travel behaviour towards more sustainable options such as encouraging school, workplace and individualised travel planning. They also seek to improve public transport and marketing services such as travel awareness campaigns, setting up websites for car share schemes, supporting car clubs and encouraging teleworking. Department for Transport published the Smarter Choices report in June 2005, which provided a menu of techniques for applying 'soft' measures. In parallel, we have identified areas where action is needed to support soft measures.

Promotion

6.6.4 The general market view of Gosport as an employment location is weak. It is perceived to be in decline, in line with the manufacturing and MOD sectors on which it relies. Analysis of market sectors and future demand, as outlined above, will identify opportunities for inward investment. These need to be actively promoted to the wider market if opportunities are to be maximised.

6 Conclusions & Recommendations

- 6.6.5 Marketing based on site-specific opportunities will do little to reverse the current market perception. A co-ordinated branded marketing approach is suggested which would overturn the market view.
- 6.6.6 A branded approach would need to identify what Gosport means as an employment location, for investors, existing companies and current and future employees alike. It should sell a vision of Gosport that is modern, diversified, capable and receptive to inward investment. To sell this brand convincingly, a number of actions need to take place, outlined in following sections.
- 6.6.7 Once the brand is established, investors will have a clearer picture of the openings presented by site specific opportunities, and be able to make an informed balanced decision on whether to invest in Gosport.

Access

- 6.6.8 There is no doubt that congestion and delay is a clear attribute of commuting in Gosport. At a strategic level, the Borough Council has only limited influence; the main pinch points on the road network are in Fareham Borough, and development of a major scheme to replace the failed South Hampshire Rapid Transit project is being progressed by the County Council. However, it is largely Gosport residents that have to cope with these infrastructure deficiencies on a regular basis.
- 6.6.9 We have identified previously a range of interventions that in combination aim to improve access:
- development and implementation of schemes to ease congestion at identified pinch points on the road network (Quay St Roundabout, Stubbington centre and Segensworth Roundabout). The lack of current major schemes for these locations suggests an approach based on incremental improvements, delivered within a relatively short timescale;
 - improvements to connections for pedestrians and cyclists between employment areas and local residential areas;
 - targeted bus priority measures to improve reliability. It is suggested that the initial focus is on A32 to improve access to existing employers. Detailed analysis of opportunities is required, including land ownership issues and appraisal analysis;
 - development of Workplace and School Travel Plans. There exists extensive guidance on this subject not least the Smarter Choices report itself. We believe some travel plans are already in place or being developed. Extension of this work to a cluster-based approach will help to bring economies of scale in implementation, and greater effectiveness for those changing travel habits. Travel Plans should be based on the full range of initiatives identified in Smarter Choices, including investigation of tele-working and home working where appropriate ;
 - as part of the Travel Plan work, promotion of the Hampshire Car Share database amongst Gosport residents and employers. The 'Smarter Gosport' brand would be one way of promoting this database;

- through the development planning process, seek reductions in PNR parking levels in new developments. Co-ordination with other planning authorities is required to ensure a consistent approach across South Hampshire;
- review incident management procedures with emergency services to build greater resilience in the transport network against unexpected events;
- development of a Freight Quality Partnership to co-ordinate delivery and logistic activity, and reduce the impact of congestion on essential deliveries

6.6.10 The LTP provides policy support for this range of initiatives, and is one possible funding source. However, it is likely that alternative funding will also be required.

Prominence

6.6.11 Access to markets is an important factor in locational choice for many industry sectors. A diversification of the economy into high end manufacturing will be supported by the availability of key site(s) with good access to a skilled employee base, raw material sources and distribution networks.

6.6.12 The peninsula geography and identified network constraints are potential barriers to achieving high levels of prominence for some markets. However, building on existing business sectors, improving localisation economies will help to create clusters. Prominence in the market place then becomes a driven by the cluster, rather than an individual site or industry. In order to facilitate diversification and growth, key sites should be identified and protected for employment uses.

6.6.13 The employment strategy outlined in Theme 5 above should create the economic conditions under which high end manufacturing cluster can develop.

Available Skills

6.6.14 There is a mismatch between available skills in the Gosport workforce and those employed by Gosport employers. This mismatch might, in part, be driven by the strong desire not to work and live in the same community.

6.6.15 Although Gosport is not currently perceived as a hi-tech economy, some out-commuters will be employed within knowledge-based or more advanced economies. Anecdotal evidence suggests a common perception of a skill shortage within Gosport. Whilst some wards demonstrate lower skill levels, based on this high level analysis, we cannot conclude that a skills shortage exists at a Borough level.

6.6.16 Diversification of the economy into high end manufacturing may however require skills not currently available. Detailed work with employers needs to be undertaken to analysis skills and opportunities further.

MVA Consultancy provides advice on transport and other policy areas, to central, regional and local government, agencies, developers, operators and financiers.

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