Gosport Borough Council

FINAL
Economic Development Strategy Evidence Base

August 2020

Contents

Chapter 1: Introduction and Approach

The purpose of this Strategy is to provide a framework for the future growth and diversification of Gosport's economy

Introduction & Approach

Gosport Borough Council is developing its 2021-2031 Gosport Economic Development Strategy. This Strategy will provide the framework for future growth and diversification of Gosport's economy. Delivery priorities will be set within the context of the Solent 2050 Strategy and Gosport Infrastructure Investment Plan.

The starting point of this commission was to undertake a review of the existing evidence base; identify gaps in the data and then secure a better understanding of economic performance, drivers of growth and causal factors by undertaking a detailed stakeholder engagement exercise (see Appendix).

A large amount of the data is already available and a number of reports have informed the work. These include:

- Gosport Economic Profile 2019
- Solent Economic Profile 2019
- Solent LIS Emerging Evidence Base 2019
- Gosport Infrastructure Investment Plan 2019
- Economic Development Land Study 2018

In order to avoid duplication this report updates existing data where required and includes new data such as the Index of Multiple Deprivation. This report also includes data at more detailed 2 and 4 digit SIC Codes.

Comparators

In order to provide a benchmark for Gosport, key data is included on four comparator locations to help indicate in which areas Gosport is performing/under-performing so as to provide context to some of the local issues.

The following Local Authorities have been chosen due to their coastal locations combined with a larger urban centre nearby. These are:

- Wirral
- South Tyneside
- East Riding of Yorkshire
- Medway

In addition, Kirkcaldy and Amble are included as case studies due to the recent launches of waterfront initiatives to reconnect these significant assets to their town centres.

Chapter 2: Data Review

Gosport is a densely developed location with a marine heritage – employment land is at a premium although the Daedalus site offers both housing and employment land – with further potential at Fort Blockhouse/ Haslar

Overview

Chapter 2 sets out the detailed data as well as key findings from recent reports. However, to summarise, at a high-level Gosport has:

- A very constrained urban form for both employment land and housing.
- A retail function across the town centre which has suffered decline.
- Low median gross workplace and resident earnings with a recent decrease in earnings.
- Residents who will earn more by out-commuting with Gosport's median annual gross workplace earnings having decreased by 2% compared to 2014 earnings.
- High levels of outbound commuting.
- Low levels of educational attainment compared to the regional/sub-regional average, as well as one which ranks Gosport number 47 out of 317 local authorities in the education domain of the Index of Multiple Deprivation.
- A number of local businesses unable to grow in the Borough due to space constraints with some loss of businesses to Fareham.
- A very high occupancy rate for commercial premises.

Whilst there is a high occupancy rate for commercial premises and resident unemployment is lower than the national average; employment within Gosport workplaces has declined and there is a strong outbound commuting pattern – predominantly to Portsmouth and Fareham. This commuting pattern and the road infrastructure leads to congestion in and out of the town.

Sector employment strengths include paper (Huhtamaki); engineering related employment (StandardAero and also the engineering facility at HMS Sultan) and marine related activities.

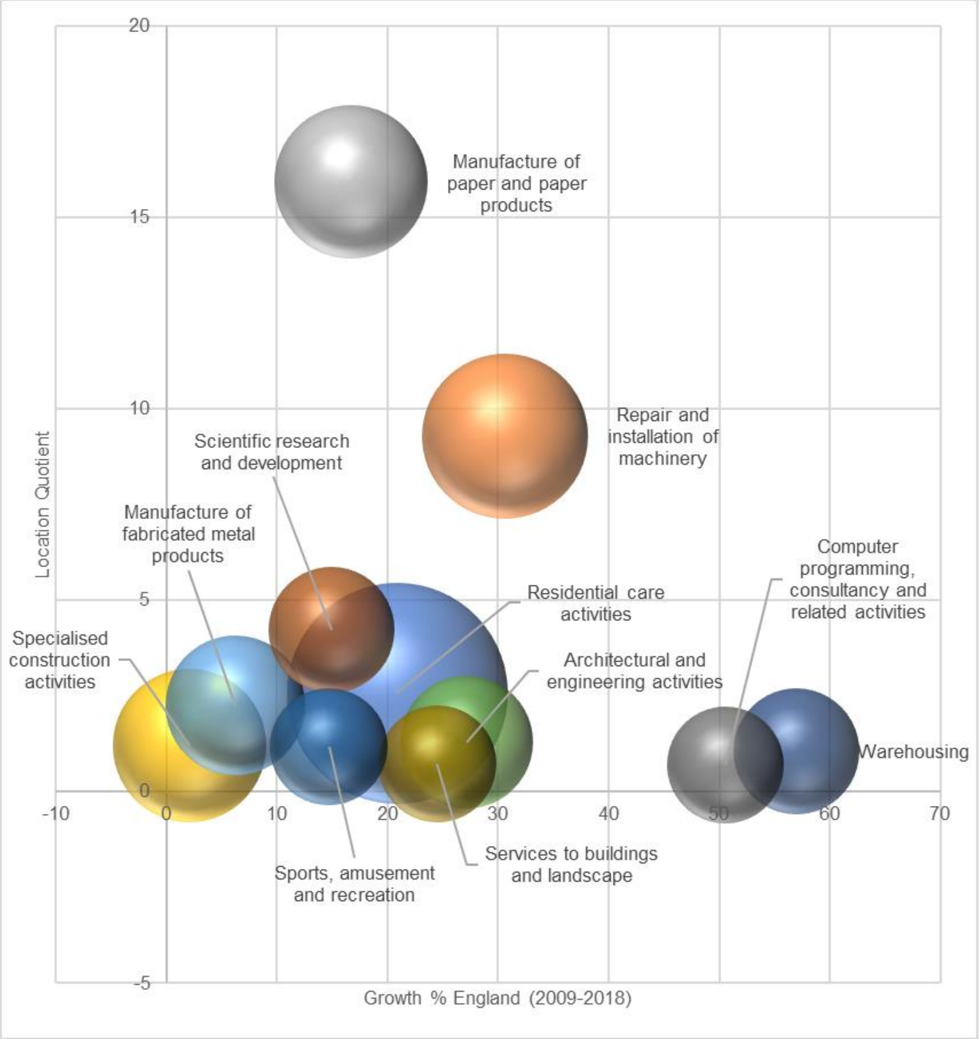
A graph showing sector size, relative strengths and employment growth in the wider economy is shown overleaf.

Sector employment strengths include paper (Huhtamaki), engineering related employment (StandardAero and the engineering training facility at HMS Sultan) and marine related activities

Data Review

Graph: Productive sectors employing >350 people in Gosport

Key: LQ compares proportion of employment to English average; size of bubble refers to total employment



Demographics

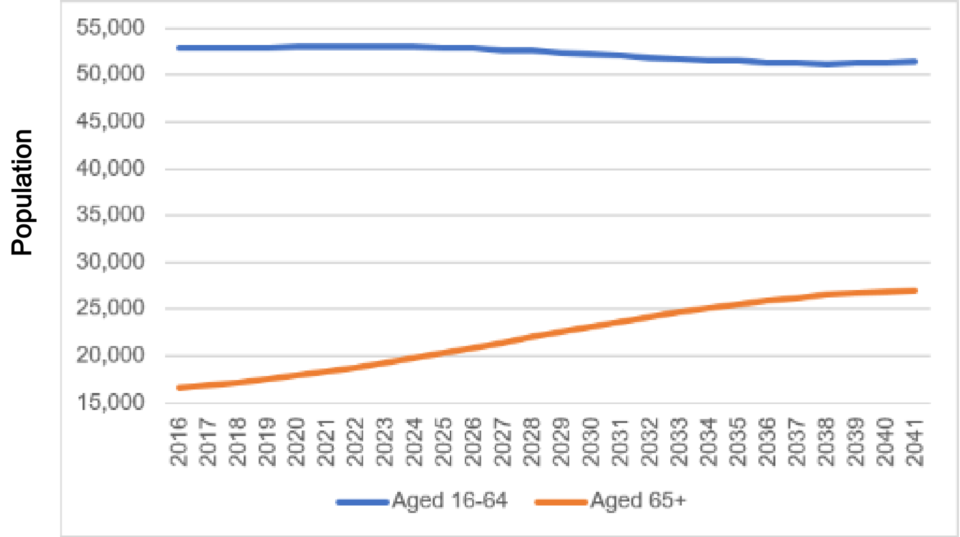
The low growth rate of Gosport's working age population (1%) may impede the ability of employers to recruit from a sustainable pool of local labour

In 2018 Gosport's estimated population totalled 85,300 of which 52,335 were of working age (16-64). The estimated population of the Solent is 1.26m which increased by 6.1% since 2010 compared to Gosport which only grew by 3.6%. By comparison, the populations of the South East and UK grew at rates of 7.1% and 6.3% respectively.

A key challenge for Gosport in the years ahead is the projected increase in the population aged 65 and above. This increase in the ageing population is likely to impact on the levels of economic productivity locally.

The flattened profile of the estimates of the working age population in Gosport with an estimated reduction from 2028 could also make it more challenging for employers to recruit from the local resident base.

Population Projections by Age, Gosport



Source: Population Estimates Local Authority by Single Year, NOMIS, 2019

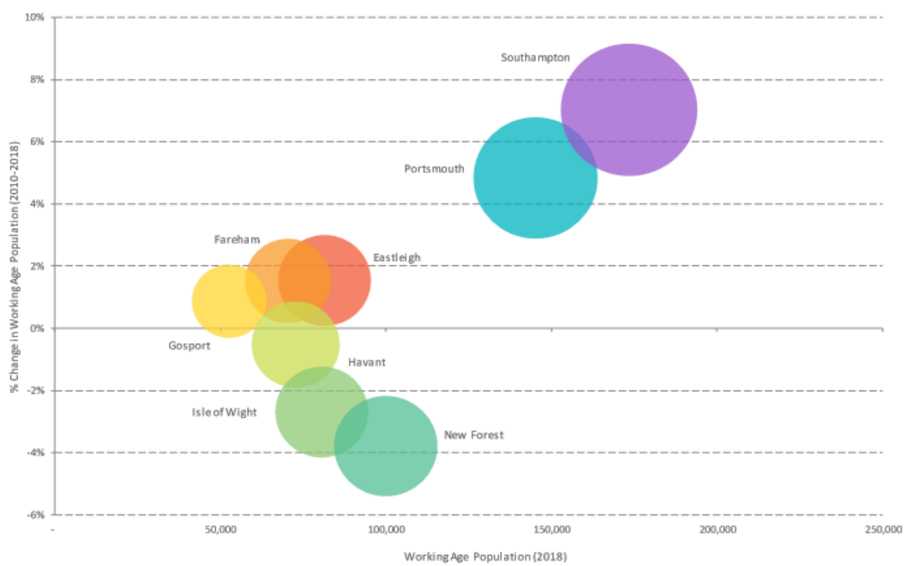
Demographics

The low growth rate of the working age population in Gosport combined with the decreases in all the neighbouring authorities apart from Portsmouth and Southampton is likely to further impact on the ability of employers outside of the cities to easily recruit staff

The chart below (Solent Economic Profile, 2019) indicates the change in working age population between 2010 and 2018 within the Solent Local Authorities; with the size of the bubble relating to the proportion of change within the total working age population.

Of note is the contrast between the small rate of growth of the working age population in Gosport compared to the cities of Portsmouth and Southampton. However, the contrast is even more notable with Havant, Isle of Wight and the New Forest – all of which had a decrease in their working age Population.

Solent LEP Local Authorities Working Age Population



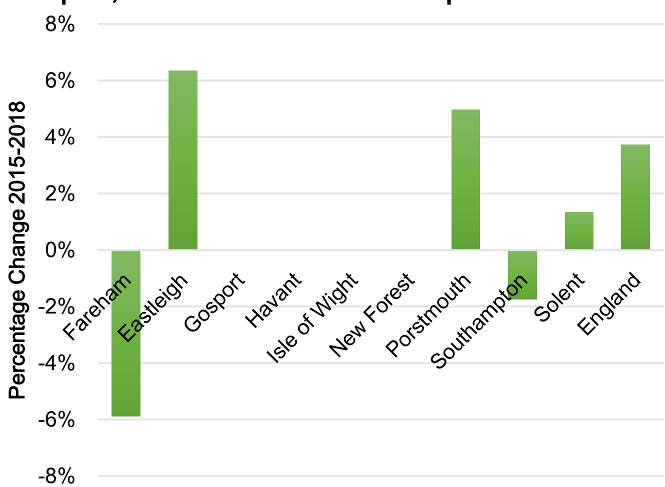
Source: Solent Economic Profile, Lichfields, 2019

The Business Base – Total Jobs

Gosport's number of total employee jobs remained stable between 2015 and 2018, compared to 6.3% growth in Eastleigh and a decrease of 1.7% in Southampton

There is a total of 20,000 employee jobs in Gosport, a number which remained constant between 2015 and 2018 apart from in 2016 when there were an additional 1,000 employees. The industries that increased the most in employment were: manufacturing of paper; architecture & engineering activities; and food & beverage. By contrast, the most significant sub-regional changes in employee jobs were in Eastleigh which increased by 6.3% (from 63,000 to 67,000) and Fareham which decreased by 5.9%.

Total Employee Jobs, % Change 2015-18, Gosport, Solent LEP & other Comparators



Source: BRES from NOMIS, 2018

The 2019 Gosport Economic Profile sets out the area's strengths at a broad industry level through Location Quotients (LQs). LQs help to ascertain an area's sector strengths in terms of density of employment relative to the national position so as to provide a better understanding of the comparative advantage of a locality. LQs of over 2.00 indicate that Gosport has double the proportion of employees in a particular industry compared to the national average for England.

At a broad industry level, the top 3 industries highlighted in the Gosport Economic Profile as representing the highest LQs are: manufacturing (1.7); construction and accommodation & food sectors (both at 1.4).

The report highlights that 'ICT' and 'professional, scientific & technical' are relatively under represented in Gosport relative to the Solent, South East and UK averages and so may be impacting on the Solent's lower GVA rate.

Examining industry strengths at a 2 digit Standard Industrial Classification provides a more detailed understanding of Gosport's strengths (see following page).

Gosport has a nationally significant proportion of employment in the manufacture of paper & paper products – over 15 times higher than the national average. Also of note is scientific R&D which represents over 4 times a higher rate of employees than the average for England

The Business Base – Concentration of Industries

The three industries by 2 digit SIC code that represent the highest proportion of employees in Gosport are: retail trade; education and public administration and defence.

LQs of >2.0, Gosport & Solent, 2018

Industries at 2 Digit SIC (Standard Industrial Classification)	Gosport LQ	Solent LQ
13 : Manufacture of textiles	4.5	0.8
17 : Manufacture of paper and paper products	**15.9**	0.8
18 : Printing and reproduction of recorded media	2.9	0.9
25 : Manufacture of fabricated metal products, except machinery and equipment	2.3	1.0
33 : Repair and installation of machinery and equipment	**9.3**	3.0
50 : Water transport	2.4	13.4
72 : Scientific research and development	**4.2**	1.6
87 : Residential care activities	2.6	1.0

Industries Representing Over 2% of Total Employees in Gosport, 2018

Industries at 2 Digit SIC (Standard Industrial Classification)	Gosport No.	% Employees
25 : Manufacture of fabricated metal products, except machinery and equipment	500	2.5
33 : Repair and installation of machinery and equipment	700	3.5
43 : Specialised construction activities	600	3.0
46 : Wholesale trade, except of motor vehicles and motorcycles	500	2.5
47 : Retail trade, except of motor vehicles and motorcycles	**2,000**	**10.0**
52 : Warehousing and support activities for transportation	400	2.0
56 : Food and beverage service activities	**1,750**	**8.8**
71 : Architectural and engineering activities; technical testing and analysis	450	2.2
72 : Scientific research and development	400	2.0
84 : Public administration and defence; compulsory social security	1,250	6.2
85 : Education	**2,500**	**12.5**
86 : Human health activities	1,000	5.0
87 : Residential care activities	1,250	6.2
88 : Social work activities without accommodation	500	2.5

Sources: BRES from NOMIS, 2018

The Business Base – Business Profile

The proportion of micro and small businesses in Gosport has increased at much lower rate (13%) as the average for the Solent and England (27% and 28% respectively)

The table below indicates the number of business units in Gosport by employment size band and change since 2010. A local unit is an individual site associated with an enterprise.

The growth of total units in Gosport represents a growth rate that is half that of the Solent's. Whilst there has been an increase in the number of business units, the largest increase in the number of local units in Gosport has been by medium sized units - unlike the Solent and England as whole. Gosport has a considerably higher proportion of its medium sized units represented by the public sector (42% compared to 26% in the Solent) and the large units in Gosport are all represented by the public sector.

The considerably smaller proportion of growth in micro businesses in Gosport compared to the Solent and England may indicate a lack of entrepreneurship locally. It is also likely to be compounded by the lack of available start-up business space as well as a shortage of business support generally.

The Gosport Economic Report (2019) sets-out business survival rate trends for start-ups from 2012. Survival rates for start-ups in Gosport, the Solent and the UK were high in Year 1, but by Years 3 and 5, Gosport business survival rate declined in contrast to the comparators. In Year 5, the number of businesses surviving in Gosport was 41.3% compared to 44.4% for the Solent as a whole.

Total Local Units by Employment Size Band, Percentage Change 2010-2019

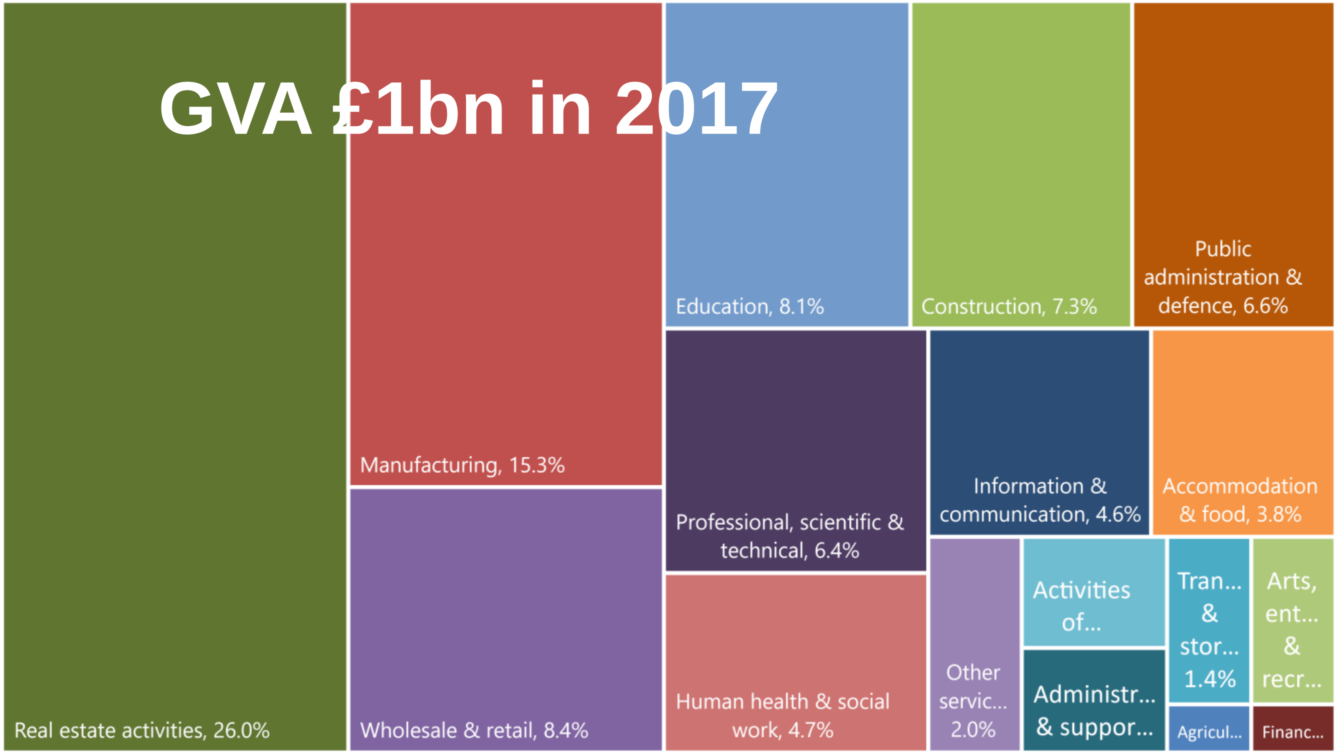
Employment Size Band	Gosport No. 2019	Gosport % Change	Solent % Change	England % Change
Total	2,345	12%	24%	25%
Micro (0 to 9)	1,955	13%	27%	28%
Small (10 to 49)	320	0%	12%	13%
Medium-sized (50 to 249)	60	20%	11%	11%
Large (250+)	5	0%	0%	6%

Sources: UK Business Counts, NOMIS

Total GVA is calculated at the national level and then estimated by apportioning output to the local level – as a result, this data needs to be treated with caution when developing an economic strategy

Total GVA (Gross Value Added) in Gosport is around £1bn (2017). GVA measures the contribution to the economy of each industry and is calculated at the national level and then estimated by apportioning output to the local level. This results in the data effectively being a local estimate and as such should be treated with caution in determining the conclusions drawn in developing an economic strategy. Both the Gosport Economic Profile 2019 and the Solent Economic Profile contain considerable information on GVA and as such, only key points from each report have been included in the following two pages.

Gosport Total Output (GVA) by Broad Industrial Sector, as Proportion of Total GVA



Source: Gosport Economic Profile 2019

Economic Output and Productivity

In relation to GVA per head, Gosport is the local authority in England with the lowest GVA per head – whilst this provides a comparative measure, this data should also be treated with caution

Gosport's total output is £1bn (2017) with the sectors representing the most significant proportion of output (GVA) being 'real estate activities' and manufacturing (Gosport Economic Profile, 2019). Gosport's economic output represents the smallest output in the Solent LEP area as a whole (£30.5bn).

The Gosport Economic Profile notes that the real estate sector which accounted for over £250 million (over a quarter) of the economy is mostly made up of owner occupiers' imputed rents and not activities associated with real estate businesses. In 2017, Gosport's manufacturing industry accounted for just over 15% of GVA.

With a total GVA of around £1bn in 2017 Gosport was the smallest economy in the Solent LEP area but this is also reflected by it being the smallest local authority in the Solent in terms of both residents and employees.

Small areas, such as local authorities, can be subject to very large distortions and this should be borne in mind when interpreting the statistics as an indicator of relative economic prosperity.

GVA Per Head

GVA per head relates the value added by production activity in a region to the resident population of that region. This can be subject to distortion due to the effects of commuting and variations in the age distribution of the population. However, it does provide a measure for comparative analysis. Gosport has the lowest GVA per head by local authority in England.

GVA Per Head by Lowest 5 Local Authorities, England

Local Authority, England	GVA Per Head	Total Population
Gosport South East	**£13,620**	**84,672**
East Northamptonshire East Midlands	£14,281	89,746
Weymouth & Portland South West	£14,311	65,166
South Tyneside North East	£14,341	148,671
Gedling East Midlands	£14,441	115,889

Source: Regional Gross Value Added (Income Approach, ONS 2015

Resident Occupations

Whilst Gosport has a lower proportion of residents in 'professional occupations' than the majority of comparators; the proportion within this grouping increased locally from 12.1% in 2011 to 18% in 2019

In relation to the occupations of Gosport's residents; professional occupations are less well represented locally compared to all the other comparators apart from Portsmouth. Whilst the proportion of 'associate professional and technical' occupations is similar to the average for England; this proportion is higher than for the Solent as a whole. Gosport has a higher proportion of employees in 'skilled trade occupations' (e.g. metal, electrical & electronic and construction supervisors) category than all other comparators.

In comparing percentage change in occupational groupings since 2011, the categories that increased the most were: 'professional occupations' (5.9 percentage points); caring, leisure etc (3.1 percentage points); and skilled trades (2.9 percentage points).

There was a slight decrease in the number of occupations within the groupings of 'managers, directors etc' and 'plant operatives' of 1 and 1.3 percentage points respectively.

Occupations by Standard Occupational Classification (SOC2010),Gosport Neighbouring Authorities and Regional Comparators, 2019

Occupations	Gosport		Fareham	Porstmouth	Winchester	Solent	South East	England
1: managers, directors and senior officials	4,700	11.1	8.8	10.5	19.8	10.1	13.3	11.7
2: professional occupations	7,500	18.0	23.1	17.8	25.1	19.6	22.8	21.5
3: associate prof & tech	6,100	14.6	16.8	14.4	18.1	13.9	16.2	14.7
4: administrative and secretarial occupations	!	!	13.4	9.7	8.1	10.1	9.5	9.6
5: skilled trades occupations	6,200	14.8	7.4	10.9	8.0	10.4	9.0	9.9
6: caring, leisure and other service occupations	5,200	12.5	7.5	8.5	5.5	10.2	8.7	8.9
7: sales and customer service occupations	4,800	11.5	7.7	8.5	2.6	7.6	6.7	7.0
8: process, plant & machine operatives	3,200	7.6*	2.9	9.1	3.8	6.7	4.8	6.2

! Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2). * Estimate and confidence interval unreliable since the group sample size is small (3-9). Source: Annual Population Survey 2019

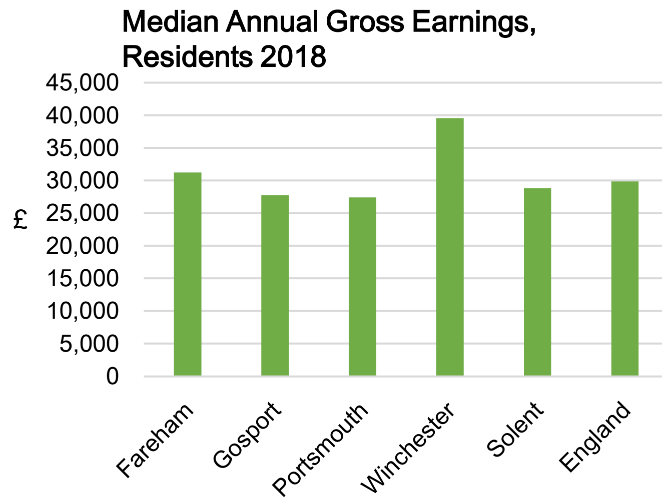
Resident & Workplace Median Annual Gross Earnings

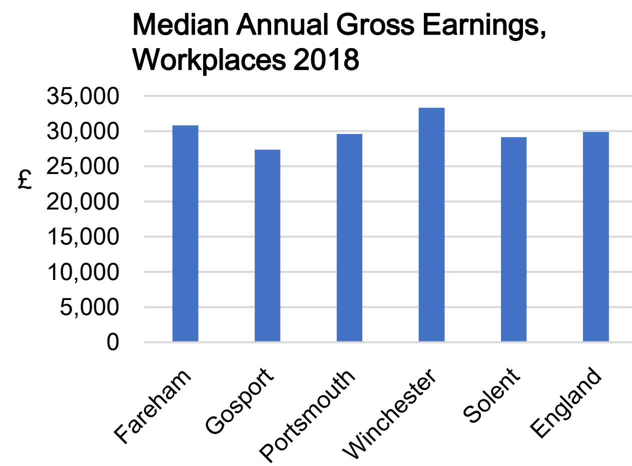
Gosport residents will earn more by out-commuting and Gosport's median annual gross workplace earnings in 2018 decreased by 2% compared to 2014 - from £27,998 to £27,372 in 2018

In considering earnings in Gosport and neighbouring authorities, 2018 data has been used instead of 2019 d. This is because the 2019 figures for Gosport and Fareham are suppressed due to them being 'statistically unreliable'. The data has been considered for the neighbouring authorities of Fareham, Portsmouth and Winchester as these are the ones representing the highest level of out-commuting from Gosport.

Whilst Gosport **residents'** median salaries are similar to those in Portsmouth, resident earnings in neighbouring Fareham are 12.5% higher than those in Gosport. Median **workplace** annual gross earnings are higher in all of the three local authorities representing the largest number of Gosport net out-commuters, with the most significant differentiator being in Winchester where workplace earnings are 21.7% higher than in Gosport. On average, median workplace earnings in the Solent are 6.4% higher than those in Gosport.

In terms of median workplace earnings between 2014 and 2018, Gosport salaries in 2018 decreased to £27,372 from £27,998 in 2014. This is in contrast with the median workplace salary in Fareham which increased by 10.2% for example.





Source: Annual survey of hours and earnings - resident & workplace analysis, NOMIS

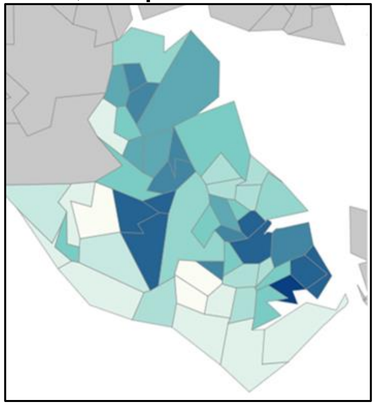
Index of Multiple Deprivation (IMD)

Education, Skills & Training ranks as the domain representing the highest level of deprivation in Gosport – ranked no. 47 out of 317 English Local Authorities (No.1 being the most deprived)

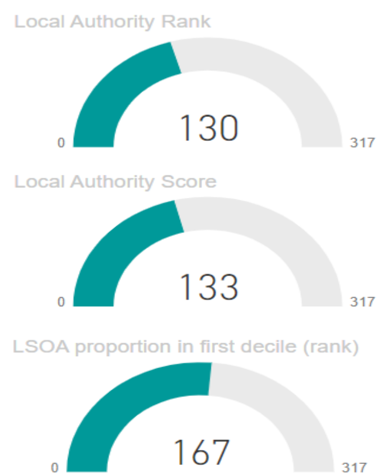
The IMD ranks Lower Super Output Areas (LSOA) in England from 1 (most deprived area) to 32,844 (least deprived area). The adjoining map illustrates the LSOAs in Gosport and the IMD rank and decile is included below. 1 represents the 10% most deprived (the darkest blue) and 10 being the least 10% deprived (the palest blue).

Gosport is ranked no. 130 out of 317 local authorities (with no. 317 being the least deprived) in England with the most significant deprivation domain (ranked at 47) relating to 'Education, Skills & Training'. This domain measures the lack of attainment and skills in the local population and reflects the 'flow' and 'stock' of educational disadvantage within an area respectively.

Map Indicating Deprivation by LSOA, Gosport



Index of Multiple Deprivation – Gosport Dashboard, 2019



Deprivation Domains

154
Income Rank

147
Employment Rank

47
Education, Skills & Training Rank

118
Health & Disability Rank

68
Crime Rank

115
Living Environment Rank

214
Barriers to Housing & Services

128
IDACI Rank

199
IDAOPI Rank

LSOA Code	LSOA Name	IMD Rank	IMD Decile
E01022843	Gosport 008D	3134	1
E01022818	Gosport 005D	4757	2
E01022819	Gosport 004A	5143	2
E01022820	Gosport 004B	5595	2
E01022833	Gosport 008C	4730	2
E01032878	Gosport 008F	4950	2
E01032879	Gosport 008G	3843	2
E01032882	Gosport 004G	4313	2
E01022801	Gosport 001B	7260	3
E01022803	Gosport 001D	6605	3
E01022807	Gosport 005A	9188	3
E01022811	Gosport 008B	7815	3
E01022839	Gosport 007E	9635	3
E01022840	Gosport 002E	6898	3
E01022841	Gosport 004E	7748	3
E01022800	Gosport 001A	12217	4
E01022804	Gosport 002A	11030	4
E01022805	Gosport 002B	12837	4
E01022817	Gosport 005C	11624	4
E01022834	Gosport 002C	11956	4
E01022806	Gosport 007A	13634	5
E01022810	Gosport 008A	14360	5
E01022814	Gosport 003B	15475	5
E01022816	Gosport 005B	15945	5
E01022832	Gosport 007D	15859	5
E01022835	Gosport 002D	14547	5

Note: IDACI Rank – Income Deprivation Affecting Children IDAOPI – Affecting Older people

Chapter 3: Educational Attainment & Skills

At 18.9%, Gosport has the lowest proportion of working age residents educated to NVQ4+ compared to selected neighbouring local authorities and regional comparators

The IMD highlights Gosport's high levels of deprivation relating to skills 'Education, Skills & Training'. The proportion of Gosport's resident population (16-64) educated to degree equivalent (NVQ4) and above is the lowest of all the local and regional comparators. This is also the case for the comparators in other regions (see Appendix 1).

The Gosport Economic Profile (2019) indicates that school performance in Gosport at Progress 8 (a measure of school performance) is below the national and Hampshire average. Under Progress 8 any positive value implies that the school as a whole does on average better at Key Stage 4 than the national (England) average.

Educational Attainment by Working Age Population (16-64), Gosport, Selected Neighbouring Local Authorities, Solent LEP, Regional & National Comparators, 2018

Location	% with NVQ4+	% with NVQ3+	% with NVQ2+	% with NVQ1+	% with other qualifications (NVQ)	% with no qualifications (NVQ)
Gosport	**18.9**	46.3	69.8	88.4	4.7*	6.9*
Fareham	39.7	60.9	80.9	90.7	7.4	1.9
Havant	22.1	40.5	64.9	82.2	9.9	7.9
Portsmouth	35.6	57.7	75.6	86.6	6.5	6.9
Southampton	38.1	62.2	77.9	88.0	6.2	5.8
Winchester	47.6	71.0	85.1	94.1	3.8	2.2
Solent	35.7	58.0	76.5	88.9	5.9	5.2
South East	42.2	61.8	78.9	89.2	5.2	5.6
England	39.0	57.7	75.0	85.6	6.8	7.6

* Estimate and confidence interval unreliable since the group sample size is small (3 to 9).
Source: Annual Population Survey, NOMIS, 2019

FE and HE

CEMAST's 'outstanding' rated engineering training centre which has partnerships with BAE Systems, GE Aviation and others, could provide Gosport opportunities to engage with notable engineering companies

Further Education

Gosport's local FE provision includes St. Vincent College and Fareham College's CEMAST (Centre of Excellence for Engineering, Manufacturing and Advanced Skills Training) located at the Daedalus airfield in Lee-on-the-Solent. The latter's training and facilities (Ofsted rated as 'Outstanding' in 2017) are focused on amongst other areas: aeronautical & aerospace; electrical & electronic engineering; marine engineering; manufacturing and CAD/CAM.

Industry partners include: BAE Systems, GE Aviation and Wartisila (smart technologies and lifecycle solutions for the marine and energy markets).

St Vincent College has been steadily improving over the last few years, and achieved a 'Good' rating in the 2018 Ofsted inspection.

The College is now ranked in the top 10% of all colleges for Vocational Level 3 provision in each of the past four years. The College offers BTEC Level 3 in Applied Science but not in engineering disciplines. The College offers Foundation Degrees in Early Years Care and Education and Learning Support.

In addition, Gosport based HMS Sultan is home to the Defence School of Marine Engineering and the Royal Naval Air Engineering and Survival School. The former delivers the Institute of Marine Engineering, Science & Technology (iMarEST) HE accredited courses.

Higher Education

There are three universities in close proximity to Gosport.

University of Portsmouth

The University was rated TEF 'Gold' in the 2019 Teaching Excellence Framework. Schools include:

- School of Mechanical & Design Engineering
- School of Energy & Electronic Engineering
- School of Computing
- School of Mathematics & Physics

In the REF (Research Excellence Framework 2014); 61% of its Aeronautical, Mechanical, Chemical and Manufacturing Engineering research was assessed as 'world-leading or internationally excellent'.

Local university R&D expertise in engineering, electronics, computing as well as testing and simulation facilities presents openings for Gosport to build strong relationships in order to support local businesses to innovate

FE and HE continued…

The University also has a Future Technology Centre with research expertise in additive manufacturing.

Southampton University

Southampton is a Russell Group university located within a 45 minute drive time of Gosport. Over 96% of their research was assessed as 'world-leading' and 'internationally excellent' in the REF 2014.

Ocean and Earth Science, based at the National Oceanography Centre was Ranked 2nd in the UK for its proportion of research recognised as world-leading (4*) and 93% of the overall submission was judged as world-leading or internationally excellent.

Southampton University is home to the Lloyd's Register Foundation University Technology Centre in ship design for enhanced environmental performance.

Other research centres include:

- Centre of Excellence for In-situ and Remote Intelligent Sensing
- Southampton Marine and Maritime Institute
- Zepler Institute for Photonics & Nanoelectronics

In addition, the Wolfson Unit provides consultancy services to the marine and industrial aerodynamics sector including: experimental model testing; marine design software and full scale trials.

Solent University, Southampton

Solent University is home to the Warsash School of Maritime Science and Engineering. The latter has the UK's largest ship and port simulation centre in addition to an engine room simulator.

Other areas of research include materials science and additive manufacturing; acoustics; computer networks, immersive technologies, multimedia communication, and software engineering.

Chapter 4: Key Sectors - Marine and Maritime Industries

Enhancing the marine & maritime sector in the Solent is a key priority in the LEP's emerging Solent 2050 Strategy

The marine and maritime sector is a key strategic sector for the Solent LEP. The Solent LEP Evidence Base (July 2019) highlights that estimates of the economic impact of the Solent maritime sector comprises at least £5.5 billion GVA in 2015, equivalent to 19.3% of the Solent LEP economy, 2.2% of the South-East economy and 0.3% of the entire UK economy.

The LEP's Progress Update (December 2019) on its Solent 2050 Strategy has as a key priority to: 'enhance the marine and maritime cluster, attracting innovative engineering and advanced manufacturing industries to the area'.

Gosport has three marinas and boatyards. It is home to both Clipper Ventures and Alex Thomson Racing.

The marine and maritime industry in Gosport (excluding defence) employs an estimated 115 employees in total (see table below).

This small number of employees is likely to be an under-representation of the local marine and maritime industry and may omit marine engineering related businesses registered under another SIC Code for example.

The following page highlights a selected number of marine and maritime related employers as well as local units by size band. Employers range from manufacturers of marine underwater systems to sail makers; and from indigenous businesses to foreign owned companies. The industry is characterised by micro-businesses.

Marine Related Employment, Proportion of Total Employees, 4 Digit SIC Code, Gosport & Comparators 2019

Industry	Gosport No. and % of Total Employees		Solent %	England %
3011: Building of ships and floating structures	20	0.1	0.1	0.1
3012: Building of pleasure and sporting boats	75	0.4	0.1	0.0
5010: Sea and coastal passenger water transport	20	0.1	0.5	0.0
5020: Sea and coastal freight water transport	0	0.0	0.1	0.0

Source: BRES, NOMIS

Marine and Maritime Industries

Gosport has a diverse base of marine and maritime related businesses – ranging from the manufacture of underwater engineering systems to sail manufacturers

Selected Local Units by 4 Digit SIC Code and Employment Size Band, 2019

Industry	Total	Micro (0 to 9)
3011 : Building of ships and floating structures	5	5
3012 : Building of pleasure and sporting boats	5	5
5010 : Sea and coastal passenger water transport	5	5
Column Total	**15**	**15**

Sources: UK Business Counts, NOMIS

Selected Marine and Maritime Related Employers, Gosport

Company Name	Activity
Advanced Marine Innovation Technology Subsea	Development of innovative marine and underwater engineering systems for the marine, oceanographic and offshore oil and gas industries.
Marine Tech Engineering	Marine engineering services covering all aspects of custom design, installation, refit, service, maintenance, repair and diagnostics.
Mathison Engineering	Precision engineering and manufacturing to the marine industry.
AC Marine and Composites	Manufacture of composite components for boat building and manufacture of tidal turbine blades and tidal flow buoys.
Crewsaver	Manufacturer of lifejackets and other safety equipment. Part of the multinational Survitec Group.
Marina Projects	Specialist marina consultancy with clients worldwide and an office in Hong Kong to support its Asia Pacific operations.
S.W. Marine	Engine installation from 16metre ocean going ribs to complete build power sending boats installed with engines such as Caterpillar engines, Cummins and Perkins.
Clarence Marine Engineering	Marine engineering & maintenance.
North Sails	Making of sails for one-design and Olympic classes and it also manufactures more cruising sails than any sailmaker in the world. It has operations in 29 countries with its UK HQ in Gosport.
Palfinger Marine	Austrian owned manufacturer of deck equipment and handling solutions.
Selden Masts	UK production operation of the Seldén Group – one of the world's leading manufacturer of masts, spars and rigging systems in carbon and aluminium for dinghies, keelboats and yachts.
Clipper Ventures	HQ, training centre and the base of the Clipper Race fleet.
Marine Power & Servicing	Small marine engineering company with a branch workshop & servicing operation in Gosport.

Marine & Maritime – Industry Trends

The main trends impacting on the marine & maritime industry are targets to reduce the industry's greenhouse gas emissions by at least 50% by 2050 and increase the take-up of digital technology

The main trends affecting the marine and maritime industry are the pressures to reduce carbon omissions and increasing the uptake of new technologies, particularly in the digital field.

Decarbonisation

The International Maritime Organization (IMO) target is to reduce the industry's greenhouse gas emissions by at least 50% by 2050.

This target is putting pressure on the industry to reduce emissions not only by using different fuels but also by using digital technologies to manage data more accurately to measure efficiency, fuel consumption and emissions. Batteries in short-sea markets and on-shore power supply are seen as playing an important role in reducing the dependency on fossil fuels.

In the UK, the Lloyd's Register (based in Southampton) is leading on decarbonising the industry with the UK's University Maritime Advisory Services and other partners. This includes areas such as energy development, digitisation and vessel design.

Autonomous Systems & Digital Transformation

Big Data and analytics are clearly key in helping to address decarbonisation measures. Other technologies such as robotics, Artificial Intelligence, Augmented/Virtual Reality all present opportunities for improving efficiencies such as in optimising supply chains and for use in predictive maintenance. Autonomous systems and digital transformation are highlighted as opportunities for building on existing strengths in the Hampshire 2050 Vision For the Future.

The growth of autonomous shipping is also a new trend; with the UK Hydrographic Office (UKHO) estimating that by 2030 the global autonomous shipping sector will be worth £111bn and employing 554,000 people.

The trends in digitisation are likely to encourage tech companies and start-ups to bring digital innovation into the industry. An example of an organisation working to support this is 'Start-up Wharf' (based in London). This represents an independent virtual hub devoted to maritime innovation which is encouraging tech entrepreneurs from a wide range of backgrounds to support the maritime industry.

Marine & Maritime Industry Trends

The MEZ is a key opportunity for Gosport and the Solent to maximise their maritime strengths and to 'underpin the Solent as the leading global maritime region'

UK Maritime 2050 Strategy

The importance of the UK maritime industry and the need for transformation to meet challenges and opportunities such as decarbonisation and Brexit, is highlighted in the Department for Transport's (DfT) Maritime 2050 Strategy (launched January 2019). The trends outlined in the previous page such as digitisation are recognised in Maritime 2050 and as such the DfT has put a considerable emphasis on technology within its Maritime Strategy. Key plans are to:

- Transition to zero-emissions shipping
- Diversify the workforce (due to over reliance on labour from Eastern Europe)
- Set out a commitment to ship automation and remote operation

As part of the Government's support for encouraging innovation in the maritime industry, it launched the UK's first Maritime Innovation Hub at the Port of Tyne in July 2019. The purpose of this 'Hub' is to encourage collaborations to meet technological industry challenges. Partners include Port of Tyne, PD Ports, Nissan, the Connected Places Catapult, Accenture, Royal HaskoningDHV and Ubisoft.

Sub-Regional Context

The Solent LEP has positioned the marine and maritime industry as a priority sector. The economic contribution of the Maritime Sector in the Solent LEP (CEBR, 2019) indicates that in 2017 the Solent's Maritime sector and Portsmouth Naval Base supported £12bn in turnover, £5.8bn in GVA; representing 152,000 jobs and £2.5bn in employee compensation'.

The importance of the marine and maritime sector is also highlighted in the Hampshire 2050 Vision and the Portsmouth Economic Development & Regeneration Strategy (2019-36).

The Solent Maritime Enterprise Zone (MEZ) is positioned as providing the 'development of the coastal estate and the renaissance of coastal communities', bringing together local maritime assets and creating an opportunity for Gosport.

In July 2019, the Solent LEP launched Solent Maritime, a new body established to bring together the Solent's marine and maritime strengths and assets and champion the region as a globally significant maritime hub.

The Defence Industry

Gosport's defence industry represents a higher proportion of total employees than Portsmouth; indicating the importance of this type of employment in the Borough

The defence industry in Gosport according to BRES (4 Digit Sic Code) data employed 600 staff in 2018; representing 3% of total employees compared to the average for the Solent of 0.6% and Portsmouth 1.4%.

Between 2015 and 2018, defence employment in Gosport grew by 20%, remained at the same level in Portsmouth (3,000 employees) and increased by 50% for the Solent as whole. However, with the potential downsizing of MOD naval activity in Gosport, levels of employment in this sector could reduce in the near future.

In terms of business units, by the four digit 8422 'Defence Activities' SIC code, the data indicates that Gosport has 5 local business units, a number that has stayed constant at 5 for every year between 2010 and 2019. However, it is important to note that businesses may use different SIC Codes to register their local operations and as such may not figure under the 8422 SIC Code.

Defence Activities

The Gosport Economic Review 2019 notes that according to Ministry of Defence (MOD) figures for April 2019, there were 1,710 service personnel in Gosport. MOD civilian figures were 580.

Defence Employment as a Proportion of Total Employees, 4 Digit SIC Code, 2019

	8422 : Defence activities
Gosport	3.0
Portsmouth	1.4
Solent	0.6
South East	0.2
England	0.2

Source: BRES, NOMIS

The MOD at HMS Sultan is the primary defence employer. HMS Sultan is also home to the Defence School of Marine Engineering and the Royal Naval Air Engineering & Survival School. The centre also provides engineering training for a number of private sector companies including Railtrack.

The Nuclear Department within HMS Sultan has a range of training facilities including a Basic Principles Simulator (to illustrate the dynamic response of the plant) plus laboratories used to provide practical training in radiation science, chemistry, materials and thermal hydraulics.

The Defence Industry – Private Sector Employers

Gosport has unique marine testing facilities which attract international customers to the area

The main private sector defence related employers in Gosport include US owned StandardAero (following the acquisition of Vector Aerospace in 2017) QinetiQ and STS Defence.

StandardAero's site represents Military, Energy and General Aviation activities. The Gosport site is a large maintenance, repair and overhaul (MRO) facility and has 7 helipads. Capabilities include: plating, refinish/paint, composites and non-destructive testing. In order to facilitate the expansion of on-site activity, the company has been working with local universities and colleges to establish technician-training programs as part of their recruitment drive.

QinetiQ has their Marine Consultancy and Test & Evaluation facility based at Haslar Marine Technology Park. The Haslar operation employs 500 staff in the design, integration and operation of systems and equipment in surface ships and submarines.

Facilities include a Diving & Hyperbaric Test Centre, Quiet Water Tunnel, Ship Tank and Ocean Basin – one of the largest tanks of its kind, used to test scale models of submarines, warships, commercial ships and yachts.

The Haslar facilities are managed by QinetiQ in a long-term partnership with the MOD. These unique facilities are being used to support the government's defence export activity and to attract overseas customers to use the facilities.

Another notable defence company STS Defence (owned by Key Technologies Group), a design and manufacturing electronics company headquartered in Gosport. Local specialisms include: communications, electronics and intelligent systems for the defence, marine, aerospace and nuclear industries. The company has recently opened (2019) Research and Technology Centre in Gosport. STS Defence uses AI (Artificial Intelligence) in intelligent monitoring systems and industrial applications. There are 150 staff based at facilities in Gosport and Great Yarmouth (the latter being a manufacturing site).

The Key Technologies Group states on its website that the company 'is actively seeking acquisitions in its core markets, Defence and Homeland Security'. Further acquisitions by this Group could provide an opportunity for Gosport to attract consolidation projects and build on the company's existing local presence.

Defence Industry Trends

Planned MOD expenditure from 2019 to 2029 is £176.2bn; with £24bn allocated to 'Information & Services'

Global & Domestic Outlook

The global aerospace and defence market is estimated to be valued at US$1600bn by 2025; growing at a CAGR (Compound Annual Growth Rate) of 3.5% in the period 2019 to 2025. (Global Newswire, January 2020).

Prior to the Covid-19 pandemic, the industry outlook for 2020 was positive due to increased spend on military modernisation. Given the considerable increase in government funding around the world to address the impact of Covid-19; analysis by firms such as PwC and Global Data anticipate that whilst there will be some impact; budgeted spending by governments is likely to safeguard the defence industry.

However, a number of key defence contractors are putting in place measures to respond to any potential downturn in defence budgets. This includes QinetiQ who recently announced fiscal measures to reduce the impact of COVID-19, including postponing dividend announcements.

In terms of global spend, the US drives the defence industry. The Middle East and Asia are increasing defence expenditure, with Japan expected to be a key market. In Europe, a number of NATO members (e.g. France) are reportedly targeting to increase defence spending to 2% of GDP (2020 Global Aerospace and Defense Industry Outlook Deloitte).

UK Expenditure

For 2020/21, the MOD's allocated budget is £41.5bn and contribution to NATO is at 2.1% of GDP. The UK is the 2nd largest defence exporter in the world (source: Defence Industries in Numbers, MOD, 2019).

Planned expenditure from 2019 to 2029 is £176.2bn, with the two largest categories of expenditure allocated to Submarines (£46.7bn) and 'Information & Services' (£24bn).

In March 2020, the government announced a major review of the defence industry (led by MOD) to 'revitalise the UK's defence and security industrial sectors and improve productivity'. In addition, the review will also suggest how defence 'might better drive investment and prosperity across the UK'.

Defence Industry Trends cont/…

The drive to encourage the adoption of new technologies within the defence industry is likely to lead to stronger collaborations with universities and innovative SMEs.

Technological Drivers

This major government review of the UK's defence industry includes an examination of how the industry is being impacted on by technological change and the ensuing need for greater innovation, partnerships and collaborations.

This emphasis follows on from the government's Defence Technology Framework (September 2019) which emphasised the need for the industry to adopt new technologies such as Artificial Intelligence, Big Data analytics, robotics and autonomous systems.

The Defence Technology Framework and the current review of the UK's defence need to increase the use of new technologies is likely to lead to more emphasis on collaboration with industry, universities and international partners.

The need for innovation is also likely to encourage more engagement with non-traditional defence suppliers (i.e. digital companies). The local universities such as Southampton University are likely to be key to help support such engagement as well as other organisations such as the Defence and Security Accelerator (DASA).

Chapter 5: Property Market - Overview

The on-going shortage of modern industrial property is impacting on the ability of local businesses to expand

This chapter builds on the earlier work undertaken for the Joint Economic Development Needs Assessment and Economic Land Availability Assessment (2018) which provided an assessment of the commercial property market in Gosport.

The 2018 analysis found that the commercial property market in Gosport was very tight. In particular, the need for good quality commercial units was urgent in Gosport. This shortage was most acute for industrial premises, rather than office units.

Good quality units that have become available have quickly been taken up.

It is considered that many of the issues in place in 2018 are still prevalent in 2020. Overall vacancies appear to still be low for commercial premises, particularly modern units, with transaction volumes dampened due to lack of supply.

The table below lists the key employment areas in Gosport.

Gosport Employment Areas

Node	Comments
Solent EZ (Daedalus)	A major node on the boundary of Fareham and Gosport. Most employment growth within the EZ has occurred within the Fareham site, though the Daedalus Park scheme is within Gosport and provides a range of new-build industrial/warehousing units.
Fareham Rd Corridor	A large range of industrial and warehouse units are located along this corridor, particularly in the north-west. This is not a single industrial estate, rather a range of premises attracted to the major road corridor. Units include larger premises (+5,000 sqm)
Waterfront	Employment units are located in several locations along the waterfront, including marine enterprises requiring direct access to the water, other engineering and office spaces. Pressures for other uses on valuable waterfront sites are likely to continue.
Town Centre and Surrounds	The town centre includes some B1 office space, including public sector offices and small private sector units. However, demand is lower than for dedicated business parks in surrounding local authorities.

Property Market - Issues

The overarching commercial property issue in Gosport is the lack of capacity to expand with the risk that businesses will relocate out of the Borough

The overarching issue impacting the commercial property market is the lack of capacity for growth; with limited choice of existing premises and lack of vacant employment land. This is impacting on businesses as they are unable to find premises to meet their requirements. With greater availability of commercial property in neighbouring authorities, there is a risk that businesses will relocate out of Gosport.

The densely developed footprint of Gosport means that expansion options are limited. Recent new build has emerged at Daedalus Park within the Solent EZ but additional existing units within the Gosport boundary require substantial investment to repurpose older buildings. The MOD sites in Gosport are seen as potential areas for employment growth once they are vacated or the MOD reduces their on-site presence. However, there is uncertainty as to if and when this will happen, which means uncertainty for planning and businesses.

Fort Blockhouse is in the shorter-term the site most likely to become partially available, and represents an opportunity for a mixed-use site with direct water access. HMS Sultan is likely to remain within the control of the MOD until the of the decade. There may however be the potential for incorporating non-military, private sector employment uses within surplus land/buildings whilst the site is still occupied by the MOD.

The Gosport Infrastructure Investment Plan reviewed the key potential development opportunity sites at Daedalus, Fort Blockhouse, Victoria Quay (Royal Clarence Yard), Haslar Barracks, HMS Sultan and Royal Hospital Haslar. The review of sites included a summary of the opportunities and constraints for each site. in summary, the report stated that in many cases:
“detailed technical work is required to more accurately determine site conditions and constraints, whilst initial masterplanning work is needed to test the potential feasibility of different uses and forms of development (particularly in relation to heritage issues which are relevant on all sites). Notwithstanding, it is clear that there are some significant barriers to delivery and viability challenges present on all sites, and that initial investment is needed to help unlock and accelerate their potential and ultimately leverage private sector investment.”

Property Market - Issues

Likely land values achievable in Gosport would not be sufficient to match the abnormal infrastructure and remediations costs

Additionally, the Gosport Infrastructure Investment Plan highlighted that the likely land values achievable in Gosport would not be sufficient to match the abnormal costs relating to infrastructure, in particular the heritage assets in poor condition. The Investment Plan highlighted a number of required potential infrastructure investments, including: tidal flooding defence works at the Gosport waterfront and improving vehicle access to and from the Gosport Peninsula.

The Marine Industry
The marine industry is of significant importance to Gosport and includes component manufacturing, refit and maintenance. Parts of the industry require direct deep water access so as to be able to lift vessels in and out of the water; undertake refits and servicing and for testing. Waterfront sites are valuable and rare; with pressure for other uses that could achieve higher values.

Gosport Borough Council has sought to protect waterfront employment sites and will need to continue to ensure that there are opportunities for marine sector businesses to continue to work within such sites, without encroachment from incompatible uses.

Gosport Town Centre
The town centre is under-performing and only has a limited B-class employment role (B1 offices). Revitalisation opportunities within the town centre are likely to be led by uses other than B-class employment (e.g. leisure, residential, retail), though the Council should look to encourage some B1 offices within a mixed-use scheme.

Property Demand
The demand for employment units within Gosport in recent years has been predominantly for industrial (B2 and B8) stock, as is illustrated in the graph overleaf. This graph indicates the overall volume of occupational transactions (leases and sales) since 2007 in square metres.

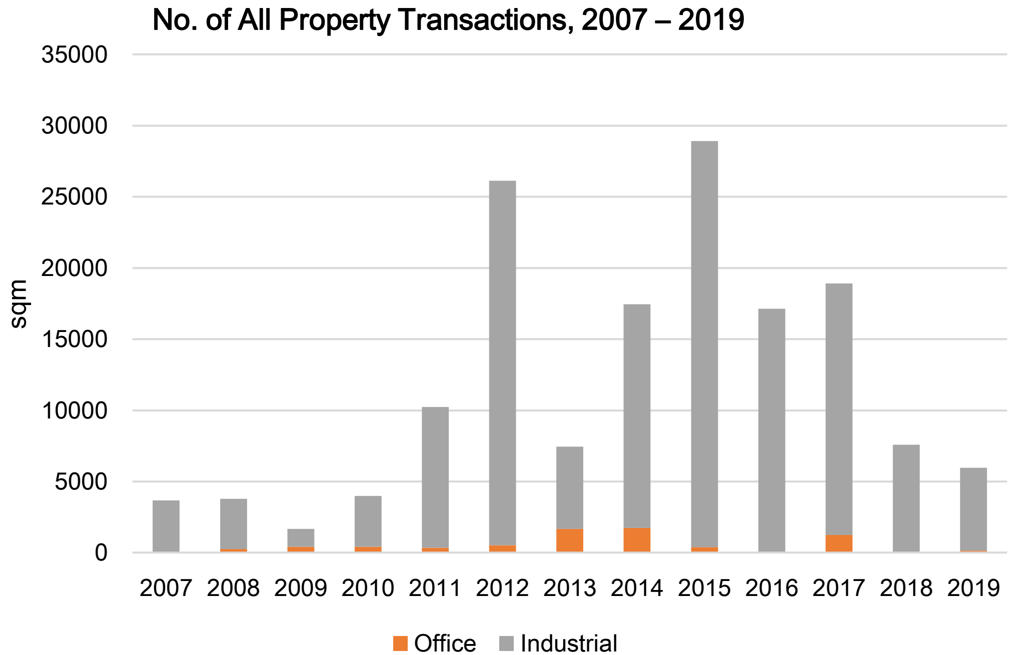
It is noted that the volume of transactions has fallen in 2018 and 2019, which is considered to be primarily due to lack of available stock. During these two years, the transacted units were new premises at Daedalus Reach and a small number of larger secondary units at Fareham Reach and Fareham Business Park.

Property Market – Demand

The decrease in the level of transactions in 2018 and 2019 are considered to be primarily due to lack of available stock

Importantly, the market has seen a wide range of unit sizes being transacted. While the bulk of demand is for smaller units, mid (1,000-2,000 sqm) and larger units (+3,000 sqm) have also been transacted and form critical parts of the property market. The demand for office units is for very small premises, typically less than 200 sqm. There has been good interest in serviced office/shared space stock in recent years.

The impacts of Covid-19 on demand for units is likely to be significant in the short term, both for industrial and office space, with the return to market normality dependent on the broader economic health and recovery.



Appendices

Appendix I: Comparators – Employment by Industry

Of all the comparator areas, Gosport's resident population has the lowest proportion of educational attainment at NVQ Level 4+

Wirral, Medway, South Tyneside and the East Riding of Yorkshire are included as comparators to Gosport as they all have coastal towns and an adjacent large urban centre. Whilst these comparators have a larger population than Gosport's, they provide a useful benchmark in terms of indicators such as unemployment, proportion of working age population and educational attainment. Kirkcaldy is also included as it recently launched a regeneration project to revitalise the High Street by maximising its seafront.

Gosport has the 2nd highest proportion of employees in manufacturing amongst the comparators; as well as the 2nd highest proportion of employees in 'public administration & support services'. Gosport has a higher proportion of employees in 'professional, scientific & technical than three of the comparators and a considerably higher proportion of employees in education compared to the average for England.

Proportion of Total Employment by Broad Industry, Gosport & Comparators, 2018

Industry	Gosport	South Tyneside	East Riding of Yorkshire	Medway	Wirral	England
1 : Agriculture, forestry & fishing	0.0	0.1	2.8	1.1	0.2	0.6
2 : Mining, quarrying & utilities	0.2	0.5	1.8	1.9	1.2	1.2
3 : Manufacturing	**12.5**	**11.9**	**15.2**	7.4	7.9	8.0
4 : Construction	4.5	6.0	4.0	6.4	4.0	4.6
5 : Motor trades	1.5	2.4	1.8	2.1	1.7	1.8
6 : Wholesale	2.5	3.0	3.6	3.7	3.0	4.2
7 : Retail	**10.0**	9.5	9.6	9.6	**11.9**	9.4
8 : Transport & storage (inc postal)	3.5	4.8	4.8	6.4	3.5	4.9
9 : Accommodation & food services	8.8	7.1	8.8	6.4	6.9	7.5
10 : Information & communication	2.5	1.7	2.4	2.4	1.5	4.4
11 : Financial & insurance	0.8	0.8	1.0	3.2	1.0	3.5
12 : Property	1.2	2.1	1.2	1.3	1.5	1.7
13 : Professional, scientific & technical	**7.5**	4.2	6.4	4.8	**7.9**	9.0
14 : Business administration & support services	5.0	8.3	6.4	8.5	6.9	9.2
15 : Public administration & defence	**6.2**	4.8	**6.4**	4.3	5.0	4.0
16 : Education	12.5	10.7	8.8	11.7	9.9	8.9
17 : Health	15.0	16.7	12.0	14.9	**22.8**	12.7
18 : Arts, entertainment, recreation & other services	4.5	4.8	3.6	4.3	5.0	4.5

Source: BRES from NOMIS, 2018

Wirral Profile

Local capacity in skills development has been a local driver in the Wirral

Whilst Wirral has a considerably larger population than Gosport's it is a useful comparator given its peninsula location directly opposite Liverpool, with its major port and Post-Panamax Deep Water Container Facility. Wirral has its own Ro-Ro Terminal.

Wirral has a similar unemployment rate to Gosport's and is ranked lower (i.e. higher levels of deprivation that Gosport) in the Index of Multiple Deprivation. Wirral has a considerably higher proportion of its residents educated to degree level and above that of Gosport.

Employers include include Cammell Laird (ship building & repair) and Orsted Operations & Maintenance.

Demographic Profile, Gosport & Wirral

	Gosport	Wirral
Total Population	85,300	323,200
Aged 0 - 15	18.6%	18.7%
Aged 16 - 64	61.4%	59.7%
Aged 65 and over	20.0%	21.6%
% with NVQ4+ - aged 16-64 (2018)	18.9%	35.1%

Sources: Population Estimates, 2018 & Annual Population Survey, NOMIS, 2019

Wirral's maritime heritage is maximised via Wirral Waters, a 500 acre regeneration mixed scheme led by Peel (a property group). This includes plans for a Maritime Knowledge Hub; a £23m skills, training, commercial and cultural project which includes a business accelerator.

Skills development has been critical to positioning the area for investment. As well as Wirral Met College located at Wirral Waters (a new campus which opened in 2015); Liverpool John Moores University has its Maritime Centre in the Wirral, delivering maritime training including maritime simulation. This simulator is also being used for research activity.

Total Employee Jobs; Job Density; Unemployment & Economic Activity; IMD

	Gosport	Wirral
Total Employee Jobs (2018)	20,000	101,000
Job Density (2018)	0.50	0.61
Unemployment Rate 16-64 (Oct 2018-19)	4.8%	4.3%
Economic activity rate (16-64) Oct 2018-19	81.3%	79.9%
IMD Local Authority Ranking 2019	130	77

Sources: BRES, Annual Population Survey & IMD 2019

Medway Profile

The lack of financial viability for the future of Chatham Docks has led to the decision to close the docks and re-develop it as a mixed-use site

After South Tyneside and Wirral, Medway is the lowest ranking local authority in terms of its position in the IMD ranking. Despite Medway ranking as 98th of most deprived Local Authorities in England (compared to 130 for Gosport), the Medway has a lower unemployment rate than Gosport in addition to a higher proportion of residents educated to degree level and above.

The Medway ports include Sheerness and Chatham which are run by Peel Ports. In December 2019 Peel L&P announced the expiry of leases in 2025 of industrial businesses based at Chatham Docks including Peel Ports. Chatham Docks port was becoming financially unviable due to the investment required in the infrastructure for the long-term. Peel Ports has plans to create a mixed-use scheme on the site including a mix of housing and employment uses as well as apartments; waterfront dining, shopping and high-tech new office and conference suites.

The first phase of the Chatham Waters development (26 acres) represented an investment of c. £50m over 5 years. This phase included a new University Technical College (UTC), an ASDA superstore and a chain restaurant and pub. There are currently 400 homes for rent and private sale under construction. The remaining part of the Chatham Docks Estate, is c75 acres.

Demographic Profile, Gosport & Medway

	Gosport	Medway
Total Population	85,300	277,900
Aged 0 – 15	18.6%	20.8%
Aged 16 – 64	61.4%	63.2%
Aged 65 and over	20.0%	15.9%
% with NVQ4+ - aged 16-64 (2018)	18.9%	28.1%

Sources: Population Estimates, 2018 & Annual Population Survey, NOMIS, 2019

Total Employee Jobs; Job Density; Unemployment & Economic Activity; IMD

	Gosport	Medway
Total Employee Jobs	20,000	94,000
Job Density (2018)	0.50	0.63
Unemployment Rate 16-64	4.8%	3.6%
Economic activity rate - aged 16-64	81.3%	81.8%
IMD Local Authority Ranking	130	98

Sources: BRES, Annual Population Survey & IMD 2019

South Tyneside Profile

The downturn in South Shield's town centre has led the Council to develop a number of initiatives to revert its decline; including investment in infrastructure and cultural facilities

Of all the comparators, South Tyneside represents the most deprived Local Authority, ranked no. 26 in the IMD. South Tyneside has the highest rate (7.3%) of unemployment of all the comparators. Whilst the proportion of working age population is similar to that of Gosport's, educational attainment in South Tyneside is considerably higher than in Gosport, with over 30% of residents educated to NVQ4+ compared to 18.9% in Gosport.

South Shields coastal town centre has suffered considerably over the last 10 years with a notable number of store closures. In order to address this reversal, the Council initiated the '365 Project'.

This represents a £100m (Phase 1) redevelopment of South Shields town centre. Developments include The Word, National Centre for the Written Word (a cultural venue) and a public art installation celebrating South Tyneside's maritime connections with the rest of the world.

In addition there has been investment in infrastructure. The South Shields Transport Interchange which opened in July 2019 includes the expansion and refurbishment of the current Metro Station and a new Bus Station interchange facility linked to the centre of the South Shields Town Centre regeneration scheme.

Demographic Profile, Gosport & South Tyneside

	Gosport	South Tyneside
Total Population	85,300	150,300
Aged 0 - 15	18.6%	17.9%
Aged 16 - 64	61.4%	62.1%
Aged 65 and over	20.0%	20.0%
% with NVQ4+ - aged 16-64 (2018)	18.9%	30.2%

Sources: Population Estimates, 2018 & Annual Population Survey, NOMIS, 2019

Total Employee Jobs; Job Density; Unemployment & Economic Activity; IMD

	Gosport	South Tyneside
Total Employee Jobs	20,000	42,000
Job Density (2018)	0.50	0.51
Unemployment Rate 16-64	4.8%	7.3%
Economic activity rate - aged 16-64	81.3%	75.1%
IMD Local Authority Ranking	130	26

Sources: BRES, Annual Population Survey & IMD 2019

The East Riding of Yorkshire has diversified into renewable energy

East Riding of Yorkshire Profile

Of all the Gosport comparators, the East Riding of Yorkshire is the location with the lowest level of deprivation in the Local Authority Index of Multiple Deprivation. It has an older population than Gosport and a lower unemployment rate.

The administrative boundary of the East Riding of Yorkshire does not include Kingston upon Hull but includes the towns of Bridlington, Hornsea and Beverley. Bridlington is a notable shellfish port, with landings valued at c£7m per year.

This comparator has a considerably larger population than Gosport and represents an economy mainly based on agriculture and tourism. The rural and maritime aspects and lack of major urban development have led to investment in energy generation schemes from renewable sources.

Employment levels fluctuate over the course of the year with lower levels of unemployment during the summer months due to increased employment in the tourism and food production. However, over 1,000 civilians are employed at the Defence School of Transport at RAF Leconfield which trains 14,000 personnel from the Army, the Royal Air Force and the Royal Marines.

Demographic Profile, Gosport & East Riding of Yorkshire

	Gosport	East Riding of Yorkshire
Total Population	85,300	339,600
Aged 0 - 15	18.6%	16.4%
Aged 16 - 64	61.4%	57.8%
Aged 65 and over	20.0%	25.8%
% with NVQ4+ - aged 16-64 (2018)	18.9%	33.4%

Sources: Population Estimates, 2018 & Annual Population Survey, NOMIS, 2019

Total Employee Jobs; Job Density; Unemployment & Economic Activity; IMD

	Gosport	East Riding of Yorkshire
Total Employee Jobs	20,000	125,000
Job Density (2018)	0.50	0.76
Unemployment Rate 16-64	4.8%	3.2%
Economic activity rate - aged 16-64	81.3%	80.3%
IMD Local Authority Ranking	130	217

Sources: BRES, Annual Population Survey & IMD 2019

Kirkcaldy, Fife Case Study

Fife Council has recently launched a regeneration project to connect the High Street with the seafront in order to attract more visitors and increase town centre vitality

Kirkcaldy (population of 50,180) is a town in the unitary authority of Fife (population of 371,910) and is located 12 miles north of Edinburgh. Unemployment is 3% compared to 4.1% for Scotland as a whole. 50.6% of Kirkcaldy's working age population is educated to NVQ4+ compared to 45.6% for Fife as whole and 43.9% for Scotland.*

The town is a major service centre for the central Fife area with facilities including a leisure centre, theatre, museum & art gallery and ice rink. The service sector dominates the economy and manufacturing represents 11.7%* of total employment. Manufacturing businesses include Smith Anderson (paper packaging), Forbo Flooring and Whitworth Flour Mills.

The town's working harbour re-opened in 2011 with financial support from the Scottish Government following 20 years of closure. This investment was to enable the delivery of wheat from ships to the Whitworth Flour Mills.

Between April 2014 and April 2018, the town centre's vacancy rate based on retail floor space increased by 11.5 percentage points* and this combined with the loss of major tenants such as BHS and loss of vitality in the town led to in 2019, the launch of the Kirkcaldy's Waterfront Regeneration Project. This £1.6m council funded project was established to improve the streetscape to make the area between the High Street and the waterfront more inviting. The project was developed with the Kirkcaldy Waterfront Group, the Kirkcaldy's Ambitions Partnership, Kirkcaldy 4 All, residents and businesses. The scheme includes:

- New road layout/signal-controlled pedestrian crossings to provide more pedestrian and cyclist friendly access
- Altering the Esplanade to encourage more use of the outdoor space around key buildings
- Constructing raised viewing platforms with shelters and seating
- Improved public spaces offering outdoor seating and available for pop-up businesses
- New street furniture, planting, lighting and better signage

It is anticipated that this regeneration project will encourage more visitors to the town whilst creating a bustling and attractive waterfront with a retail offering.

*Source: Kirkcaldy Economic Profile 2018

Amble, Northumbria Case Study

The establishment of a community trust and a well organised volunteer network in Amble has been fundamental in changing its fortunes and reconnecting the town centre to the harbourside.

Amble is a harbour town with a population of circa 6,000 people. Amble's prosperity originated from its role in serving local coalfields. Sea fishing, ship building/repair were also important industries. By 1969, the port was no longer exporting coal and around the same period, the nearby airbase of RAF Acklington closed.

These changes led to the decline of the town and in 1994 the Amble Development Trust was established with a mission to: 'take a lead in most aspects of economic, social and community regeneration in partnership with other agencies'.

Over the years, the Trust has worked with local partners to access funding including from the European Regional Development Fund, Defra and Northumberland County Council. The Trust has 300 members and five salaried staff and also works to improve digital skills, support the fishing industry and boost volunteering.

Projects have included: converting a pub into offices; refurbishing the pier; Northumberland College locating to the town; the creation of a new town square as well as a new small apartment development. The harbour development includes a restaurant & hotel (The Amble Inn) and 15 attractive wood constructed 'pods'. The latter are small spaces specifically for independent retailers. The quayside also includes the Northumberland Seafood Centre & Market. This incorporates a hatchery, where young lobsters are reared and then returned to the sea, both to support the fishing fleet and as a visitor attraction.

These developments located on the quayside with its attractive coastal views have been used to encourage footfall from visitors with directional signage to explore the high street. Funding from the Coastal Community Fund was also used to link the harbour area to the town centre's main thoroughfare to the harbour area so as to encourage visitor footfall to the high street.

Following the loss of some major retailers from Amble over the last decade and local initiatives to make the town more attractive; the majority of business in Amble town centre are now represented by independent traders. In 2015, Amble was named the UK's best coastal community in the Great British High Street Awards 2015.

Comparators – Conclusion

Well organised voluntary groups can be effectively mobilised to drive local regeneration activity as has been the case in Amble

The comparators of the Wirral, Medway, South Tyneside and the East Riding of Yorkshire all have a lower (i.e. more deprived) Index of Multiple Deprivation (IMD) Local Authority Ranking than Gosport apart from the East Riding of Yorkshire.

Despite these lower rankings in relation to levels of deprivation; all these comparators have a higher level of educational attainment within their working age population than Gosport.

Gosport has the lowest job density of the comparators. Job density is defined as the number of jobs in an area divided by the resident population aged 16-64 in that area (e.g. a job density of 1.0 would mean that there is one job for every resident aged 16-64. Apart from South Tyneside, Gosport also has the highest unemployment rate.

The comparators also provide interesting examples of local initiatives. The Wirral which was working to improve education outcomes, in 2015 opened a new campus for Wirral Met College (offering degrees and foundation degrees) at the Wirral Waters. In addition, Liverpool John Moore's University recently opened a Maritime Training Centre.

The Wirral as well as Medway are both local authorities that are maximising their coastal locations to re-purpose sites for mixed-uses. The recently announced closure of Chatham Docks has been positioned as creating more housing, commercial, restaurants and retail developments. The 1st Phase of the Chatham Waters regeneration scheme was used to establish a University Technical College in Engineering, Construction and Design.

The case studies of Kirkcaldy and Amble provide examples of towns which maximised their coastal positions to encourage more footfall to their high streets. This has been done by providing a stronger and more attractive physical connection between the high street and waterfront so as to attract more residents and visitors to help increase town centre vitality.

In the case of Amble's regeneration, a well organised group of volunteers came together to establish the Amble Development Trust (a registered charity). The Trust works with local partners to access funding including from Europe, Defra and the County Council. It now provides a structure for managing local volunteers and increasing local volunteering activity.

The feedback from the consultation has been set out in a number of themes including employment land and partnership & collaboration

Appendix II: Consultation

The consultations were undertaken via one-to-one telephone interviews. The consultations covered a range of topics and were not a rigid question and answer format, rather they were a semi-structured discussion relevant to the consultee's background. A full list of consultees is included in Appendix III.

It was widely considered among respondents that Gosport has a low profile in the sub-region, this is due to its geographic position at the of the peninsula and perceived as being in the 'shadow' of Portsmouth.

The perception of Hampshire more broadly as a relatively affluent area, hides local pockets of deprivation, such as in parts of Gosport, which means that Gosport is missing out on support and investment.

It was suggested that the Strategy should look to support and promote the environmental assets in Gosport, identifying ways that they can be enjoyed and visited in a sustainable, low-impact way.

It was felt that there a lack of aspiration in the town – both by residents and the Council and as such an ambitious vision was required.

The following pages provide a summary of the findings that emerged from the consultations. These have been grouped together in a number of themes that were most frequently referred to during the course of the consultation:

- Employment Land/Commercial Premises
- MOD Sites
- Housing
- Access
- Town Centre & High Street
- Maximising Waterfront Assets
- Tourism
- Employment Growth
- Skills
- Partnership & Collaboration

Access

The poor access in and out of Gosport was mentioned frequently as has been raised in previous consultations. However, the Stubbington Bypass (construction has already commenced) was seen as a potential catalyst

Consultation

A significant number of consultees highlighted the need to ensure that land was focussed more on employment use rather than housing

Access cont/…

for growth in Gosport, including the Solent EZ.

Access in and out of Gosport is seen as problematic, not helped by high levels of congestion. Broadband remains poor in some areas of Gosport, which discourages business investment in the Borough.

Concerns were raised regarding the financial impact on the Gosport ferry due to the considerable reduction in passengers following restrictions imposed as a consequence of Covid-19.

A number of references were made to the potential for water taxis along the Solent which would help to link up Gosport more effectively with other centres. The Solent LEP's 2020 Strategy highlights a private sector led proposal for water taxi use on Southampton Water and it was felt this could also be explored for Gosport.

This was also highlighted in the Gosport Investment Plan as well as an expanded bus rapid transport system

Housing

Many consultees raised the issue of the pressure to release land to meet housing targets which it was felt should be used for employment use.

The issue of nitrates in the Solent which has led to Natural England advising councils to refuse housing schemes which were not nitrate neutral is affecting neighbouring areas of Fareham, Gosport, Portsmouth, Southampton and Winchester. This makes it more challenging to collaborate with neighbouring local authorities in terms of sharing allocation of targets.

It was also mentioned by a number of respondents that more housing would further exacerbate congestion caused by the area's limited transport infrastructure.

Consultation

The need to ensure that land should be allocated for employment rather than housing use was frequently raised as a critical issue

Employment Land/Commercial Premises

The shortage of development land led to a significant number of consultees raising the critical issue of ensuring that where land is available that it should be allocated for employment use rather than for housing.

Other points raised include:

- A shortage of existing commercial premises, particularly quality, new-build premises. When such units become available, they are taken up very quickly.
- Quality employment spaces are required to encourage new businesses to the area and retain existing businesses.
- There is a need for more employment land at the marina for marine based businesses.
- The growing shortage of employment land in Portsmouth presents an opportunity for Gosport to attract new businesses to the area.
- The potential for creating additional flexible workspace should be explored as it was felt there was demand for this type of space. The impact of Covid-19 may make residents less willing to commute to Portsmouth and take-up local workspace instead.

MOD Sites

Given the shortage of employment land it was felt imperative by many consultees that the economic leverage of the MOD sites due to be vacated in the future must be maximised. Additional points are noted below:

- The MOD sites represent potential redevelopment opportunities, but the unknown elements of the timing of the release of any land, how much will be released, and the slow process are frustrating planning and frequently cited as a huge obstacle.
- Fort Blockhouse was referred to as being an excellent potential mixed-use redevelopment site, with its waterfront position providing the potential for marine related employment. There is some concern that the MOD may want to keep the deep water access for its own use. The site also requires substantial infrastructure investment including to the sea walls.
- HMS Sultan's release to the market is now scheduled for 2029 which has the benefit of retaining the military use, but limits planning for any uses beyond the MOD.

Consultation

The Heritage Action Zone was viewed as a considerable opportunity to create a more attractive town centre

MOD Sites cont/…

- Some consultees suggested that private sector employment uses could expand on the HMS Sultan site while the MOD is still on-site to take-up surplus land/existing buildings.
- Daedalus EZ provides further opportunities for growth. The Homes England site requires substantial investment to bring it forward and was seen as not being viable as a standalone development. Public sector funds would be required to realise any development on this site.

Town Centre & High Street

Gosport's town centre was perceived as being lacklustre and in need of substantial regeneration. It was felt that the town centre could be better linked to the waterfront and that this would also help to draw in more visitors. At present there is limited appeal within the town centre for the visitor market.

The Heritage Action Zone (HAZ) for Gosport's town centre was viewed very positively. This was seen as an opportunity to maximise the historic assets, creating more of a different and independent town centre. The future programme of cultural events also has the potential to animate the town.

Other feedback included:

- The lay-out of the High Street was seen as being too 'strung-out' and that it needed to be condensed to help make it more attractive.
- The lack of a evening economy could be addressed if there was a residential offer in the town.
- The paucity of evening public transport was also viewed as discouraging the evening economy.
- Retail uses should be where possible positioned for the town centres.
- The lack of performance space in the town centre also reduces the opportunity for attracting more visitors to the locality.

The huge potential of Gosport's waterfront assets was mentioned by almost every consultee

High Street cont/…

The repurposing of existing buildings such as the Gosport Old Grammar School with the re-instatement of the local museum and gallery as well as the creation of social space and café (opening 2021); reconnecting it to the High Street was viewed very positively.

The centre will also be used for engagement in STEM based science base as well as delivering adult education programme. It is hoped that these activities will also lead to the need to take further space for pop-ups for example in un-occupied town centre units.

Maximising Waterfront Assets

The Gosport waterfront was mentioned by almost every consultee in relation to it being a considerable asset which was not maximised.

The redevelopment of the bus station site was raised as being a challenge to make the scheme viable with housing use due to the limited footprint of the area.

Other comments included:

- Some consultees felt that rather than seeing Gosport's peninsula location as negative in relation to its potential as a business location, its coastal amenities should be promoted to relevant industries.
- The waterfront and harbour are key assets for Gosport and should be promoted.
- Gosport's position on the Solent means that it has the best part of the harbour for leisure vessels and marinas.
- The Council needs to be more ambitious in its plans to create an attractive marina/waterfront.
- The Ferry and Bus terminal sites represent a strong redevelopment opportunity and Gosport should continue to investigate opportunities for improving these areas.

Consultation

The collaborative tourism activity with Portsmouth was viewed very positively but it was felt that more could be done to capitalise on the Portsmouth Harbour brand

Tourism

The consultation highlighted that the tourism industry should be maximised to increase visitor numbers/spend to the area by growing tourism assets and establishing year-round visitor assets. It was also suggested that given the impact of Covid-19, the leisure and tourism industry in Gosport may require considerably more support than other sectors. Other areas raised included:

- Heritage assets are not 'packaged' and so do not maximise opportunities for attracting tourists from Portsmouth.
- Gosport lacks a broad range of visitor accommodation. Respondents considered that there are opportunities for growth in brand name hotels, including in the mid-market.
- Portsmouth Harbour should be promoted as one single entity with Gosport part of it. Consider developing smaller events to complement the large events held in Portsmouth.
- Gosport's branding does not capitalise on proximity to Portsmouth.
- Deliver a quirky/independent offer that can complement Portsmouth.
- Gosport has good beaches that are presently under-utilised.
- Heritage assets 'mothballed' by the MOD should be capitalised on but working with the MOD is a slow process. Gosport's naval heritage and assets should be promoted further.
- The marinas could provide growth opportunities; most likely through mixed-use schemes that broaden uses on the site and increase values.
- The marinas attract high-net worth individuals, but there are limited retail and services to encourage significant visitor expenditure. An improved offer for this market would help to increase spend.
- Post lockdown, there will be opportunity to attract the domestic visitor market back to Gosport if people are limited in travelling abroad. About 80% of Gosport's visitors are from the UK so this is a key market.
- The international visitors were seen as being a medium term growth opportunity, with key markets being Europe and USA.
- A number of references were made to the valuable joined-up tourism activity being undertaken in partnership with Portsmouth.
- The tourism sector is perceived as a low-wage sector, and so continually struggles to attract and retain staff.

Consultation

Most business investment comes from existing businesses rather than from attracting businesses from outside the area – as a result, business engagement is critical to supporting local economic growth

Business Growth & Diversification

Low employment density and the lack of employment diversity were consistently highlighted during the consultation process. A number of consultees suggested that the Strategy should look to further grow Gosport's key sectors but also allow for the emergence and growth of other industries, particularly those complementary to the Borough's and sub-regions' strengths. For example tech/digital companies serving the defence and marine industries. Points raised included:

- Activities should include increasing employment opportunities through: new business start-ups, expanding existing businesses and attracting businesses from elsewhere to Gosport.
- Gosport Borough Council could undertake more business engagement activity (though it is recognised that some is already undertaken), and that the Strategy should provide a catalyst for expanding this.
- It was suggested that the contacts with businesses obtained through the Covid-19 support programmes should be followed-up and built upon.
- Business engagement with key employers should be undertaken on a strategic basis, with the most significant employers in the Borough engaged with both locally and at a Head Office level.
- Attracting new business investment to the area is an opportunity for creating a wider employment base but any activity in this area should be undertaken collaboratively with sub-regional partners.
- The Strategy should address specific sectors (e.g. marine, tourism, manufacturing) and specific geographies (e.g. coastal, Daedalus, MOD sites, town centre).
- Maximising Gosport's water frontage including using it as test bed from autonomous water systems.
- Ensure that the range of commercial premises also includes flexible workspace to encourage new business start-ups.
- The need to develop stronger relationships with the University of Southampton (there are already relationships with Portsmouth) in order to further facilitate collaborative R&D support to locally based businesses.

Consultation

CEMAST was perceived as a valuable training asset but with the potential to deliver more to meet local needs, particularly in relation to marine engineering

Skills

The issue relating to Gosport's poor level of skills attainment was raised on frequent occasions.

- The lack of skills in the area means more businesses are recruiting from outside the area and this compounds congestion problems further.
- School leavers are not entering the market 'job-ready' as they lack the soft skills required by businesses (phone skills, organisation, etc.). Education and local businesses should work more closely to prepare students.
- Local employees with appropriate STEM skills are difficult to find and retain.
- The CEMAST campus of Fareham College within the EZ was seen as a key educational asset, though two respondents suggested that the curriculum for aviation and automotive was better than for the marine sector, which would be of particular importance for Gosport.
- Additionally, it was also suggested that CEMAST could not only deliver more in the area of marine engineering but also in design engineering and software development for example.
- In some areas it was seen that educational attainment is improving and St Vincent College is now rated 'Good' by Ofsted.
- Whilst the Colleges were felt to be good educational assets, it was also commented on that it would be beneficial for Gosport to have more such assets including the potential for a small university training facility.
- HMS Sultan is perceived as very valuable asset due to its Defence School of Marine Engineering which is also used by the private sector.
- Hampshire County Council was seen as 'resting on its laurels' in terms of overall education attainment in the county, but that this masked deeper attainment issues in Gosport. As such, it was felt more could done to work with the County Council to improve educational outcomes in Gosport.

A number of existing collaborative partnerships have worked well in Gosport and developing this approach further was seen as being key to Gosport's success

Consultation

Partnerships & Collaboration

A number of existing collaborations with neighbouring local authorities and partnerships were seen as having worked well and it was felt that developing more collaboration and partnerships was key to achieving better outcomes for Gosport, particularly as it is a small entity on its own.

A number of points raised during the consultation process are listed below:

- The collaboration between Gosport and Fareham on the Solent Enterprise EZ was seen to have worked well and resulted in good outcomes for Daedalus.
- The collaboration between Gosport and Portsmouth on tourism marketing and promotion was cited as an example by some respondents of success.
- Collaboration with neighbouring authorities in the past included the development of a united and 'virtual' FDI team approach to inward investment but as yet this has not developed into a proper structure and as such needs to be re-explored and discussed with partners.
- Gosport Borough Council's work with the MOD was seen as a strength, but it was felt that relationships should also be developed with key MOD HQ staff in addition to local staff.
- The Gosport Task Force was seen as an opportunity to raise the game for Gosport and that the Task Force needed more resources to drive it forward. Presently the Task Force meets every 3 months. As well as the local MP it includes the MoD, One Public Estate Ministry of Justice (Haslar Barracks) and HMS Sultan.
- Given the pressures on Gosport and neighbouring areas on meeting housing targets, it was felt that a collaborative, cross-region approach would be more effective. The housing issue has also been impacted on by the high levels of nitrates in the Solent leading to a moratorium on planning permission relating to new housing. Other neighbouring issues such as the National Park in New Forest are also creating constraints to housing growth.

Appendix III: Consultees

Gosport Borough Council

- Andrew Sugden, Economic Development & Regeneration Manager
- Jayson Grygiel, Planning Policy Manager
- John Gibbs, Tourism Officer
- Ian Bridges, Economic Development Officer – representing Coastal Communities Alliance
- Debbie Gore, Head of Planning and Regeneration
- Cllr June Cully
- Cllr Peter Chegwin
- Cllr Mark Hook
- Cllr Stephen Philpott

Other

- Mark Pembleton, Portsmouth City Council
- Ross McNally Hampshire Chamber
- Paul Sapwell and Rebekah Wait, Hampshire Cultural Trust
- Andy Pringle, Enterprise South
- Nichola Bailey, Federation of Small Businesses
- Marion Brinton, Historic England
- Caroline Dinenage, Member of Parliament for Gosport, Stubbington, Lee-on-the-Solent and Hill Head
- Claire Upton-Brown, PfSH
- David Fletcher, Hampshire County Council
- Siobhan Flynn, Solent LEP
- Lynsey Skaskiewicz, St Vincent College
- Claire Burnett, Fareham Borough Council
- John Till, Thinking Place
- Captain Allan Youp, Royal Navy, Solent Maritime Enterprise Zone Team Leader
- Mark Bowden, Portsmouth Harbour Marine
- Andrew Bateman, Hampshire County Council

Appendix IV: Labour Market - Commuting: geographical barriers and limited transport links (Gosport Economic Profile2019)

Out-commute

Net outflow 13,386

Resident Worker Population: 40,213

Live & Work Locally: 16,013

No fixed place: 3,4161

Out-commute: 20,784

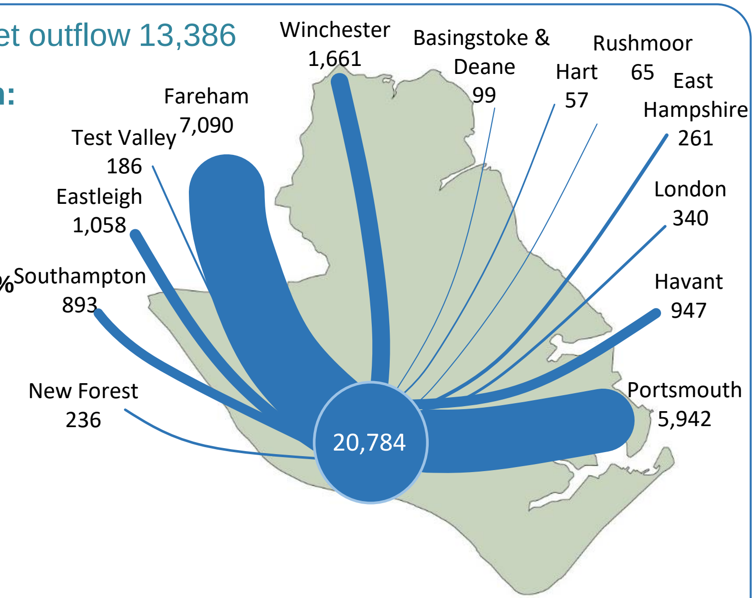
Resident Self-Containment Ratio: 48%

Out-commuting

To known destinations with 300+ residents & all Hampshire LAs

To rest of UK Destinations = 1,718 resident workers.

Offshore Installations & Outside UK = 231



In-commute

Workplace Population: 26,827

Live & Work Locally: 16,013

No fixed place: 3,416

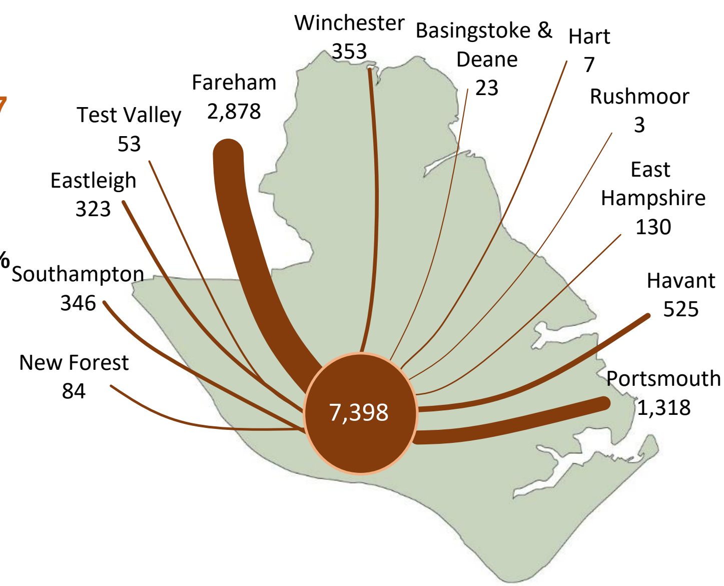
In-commute: 7,398

Workplace Self-Containment Ratio: 72%

In-commuting

From known origins with 300+ residents & all Hampshire LAs

From rest of UK Origins = 1,355 workers



- Gosport has been historically disadvantaged from limited transport connections, that in part simply reflects a peninsula geography but also sits alongside insufficient jobs to support the resident population. This has seen significant out-commuting although recent infrastructure investment in Gosport has already seen some modal shift to bus travel[1] while future housing and commercial developments[2] will seek to further reduce commuting and congestion through local job creation.
- The only local commuter data available is the 2011 Census and this pre-dates recent improvements. This needs to be borne in mind when interpreting the data as there is no new evidence to show any major shift in commuter flow patterns since 2011. There is limited evidence of some change in recent studies[3,] while innovations in technology and transportation will continue to transform the workplace and as new commuting habits continue to evolve.
- With reference to the Census 2011 Gosport was on the one hand characterised by high workplace self-containment, with approximately 3 in every 4 workers living in the Borough (72%), and on the other by fluid resident self-containment (48%) where just over half of all residents commuted to a place of work outside of the Borough.
- In 2011 Gosport had 19,400 residents that both lived and worked in the Borough (including 3,400 of no fixed place[4]) and fewer than the estimated 20,800 out-commuters. As in-commuters numbered just 7,400 there is an overall net out-flow of 13,400 resident workers to a place of work beyond Gosport.
- The focus for commuter flows in 2011 in either direction is within South Hampshire but firmly biased to Fareham and Portsmouth; notably for out commuting, although down in relative terms on 2001. There was an absolute and relative increase in out-commutes to Winchester (2001-11), that could be down to the expansion of Solent Business Park.

Source: ONS 2011 Census. Notes 1. KPMG (2015) 2. Gosport Borough Council Local Plan (2014) and BPP Regenerations (2015) 3. KPMG (2015) 4. For No fixed place it is assumed that people remain within the geographical area i.e. Gosport.

Gosport Borough Council is committed to equal opportunities for all.

If you need this document in large print, on tape, CD, in Braille or in other languages, please ask.

Mickledore 2020