

Gosport Commuting and Employment Study

Conclusions

What has become apparent through this study is that, although peak period congestion is in clear evidence, it has occurred as a result of changes over the long term within Gosport and south Hampshire, and is influenced as much the diminishing number of jobs on the peninsula as it is by growth in employment opportunities along the M27 corridor and beyond.

The response to these challenges is equally complex and requires co-ordinated action over the medium and long term by a range of stakeholders in both the public and private sector. There is no single answer to the problems experienced by Gosport, but a response is necessary for the Gosport economy to remain competitive.

Commuting Patterns

Chapters 2 and 3 analysed data from the household and employment surveys. From that information, we conclude that:

- Based on all responses from the Household survey, two-thirds of employed Gosport residents work outside the Borough;
- The A32 has a multi-function role as a strategic route and access to local employment, for all commuting groups. Out-commuters have adjusted to congestion on this route by using Newgate Lane, but internal or in-commuters have no route choice when accessing major employment centres along Fareham Road;
- Strong evidence of peak spreading, particularly in the AM Peak, with many out-commuting journeys starting around 6.30am;
- Journey times estimated by respondents correlate well with measured journey times;
- There is limited evidence of car sharing – 80% of Gosport workers responding to the Household survey stated they never car shared;
- The availability of employer provided Private Non-Residential parking has a strong influence on mode choice;
- The majority of those using public car parks do so without a season ticket;
- Although car ownership amongst the respondent group is high, car mode shares are equivalent to other urban areas in the South East. Mode shares for cycling are high relative to Hampshire and national averages, particularly amongst internal commuters and those leaving via Gosport Ferry, but bus use is low for all groups;
- Use of the Gosport ferry depends strongly on home and job location with rapid drop-off as the distance from the terminal increased beyond the wards immediately surrounding it;
- A higher proportion of Gosport residents are part-time workers than in-commuters.

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

Congestion

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

- Significant peak spreading occurs during the morning peak to combat the effects of congestion.
- In terms of commuting destinations, traffic is distributed proportionately between A32, Newgate Lane and Stubbington, ie Stubbington is used predominantly for destinations to the west;
- Delays on all three routes are experienced equally, but at different times, with A32 and Newgate routes experiencing delays earlier in the peak period;
- Longer overall delays are experienced in the PM Peak, primarily due to pinch points in the network;
- Quay Street Roundabout, Stubbington centre and Segensworth roundabout are identified as peak period pinch points during both AM and PM peaks;
- Buses operate unreliable services as they have no means of bypassing congestion;

- Bus journey times are significantly longer than comparable car journeys. In combination, these two points contribute to low mode share;
- Journey times vary considerably on most sections of the road network, suggesting the network is operating close to effective capacity for extended periods. This pattern is holds true during peak and off-peak periods;
- There is evidence of a mid-afternoon peak (school run) causing some delays.

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

Employment

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

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

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

Linkages between Commuting, Congestion & Employment

From the issues raised above, a number of common themes have been identified:

Employment Patterns

Evidence suggests that one of the reasons for the large volume of out-commuters is the actual and perceived lack of diversification in the local economy. As individual skills levels have increased in line with demand for high end jobs, employed Gosport residents have not been able to find suitable work within the Borough and have therefore chosen to commute. Family connections emerge as one of the main reasons for not relocating from Gosport.

Two main responses emerge from the above analysis:

In the short – medium term, investment is required to alleviate road network pinch points to ease congestion and improve access to markets for companies located in Gosport; and

In the medium to long term, the economy needs to continue to diversify within traditional sectors to provide higher end / hi-tech manufacturing. This will also help to support emergence of knowledge and service based industries.

A number of major schemes to address the identified pinch points have previously been identified, but have either been abandoned, or in the case of Stubbington Bypass, deferred until post 2016. A number of proposals have emerged to resolve difficulties at Quay Street Roundabout over the years. There are significant constraints at this location and to date an acceptable / affordable scheme has not come forward. In this context, identification of 'quick win' traffic management measures would be appropriate.

Route Choice

Out-commuting will remain a feature of Gosport for some time to come, but there is a reasonable amount of internal commuting taking place, predominantly on A32. The multi-function role of A32 provides an opportunity to target local commuting patterns.

A significant number of Gosport employers are located along A32, including several MOD facilities, large industrial estates and St Vincent's College. It attracts commuting trips from internal and in-commuting groups.

A large proportion of internal commuters use A32 to access their place of work and there is an opportunity to increase access to these sites by sustainable modes. As discussed previously, cycle mode share amongst employed Gosport residents is high, particularly for access to Gosport ferry. Facilities for cyclists already exist along A32, but onward links to main residential areas are less in evidence. High frequency bus services use A32, but are poorly used due to congestion and unreliability.

A combined strategy focused on the A32 that sought to achieve the following objectives would provide some benefits.

- improve connections for cyclists between employment areas and local residential areas;
- targeted bus priority measures to improve reliability; and
- work with existing employers to develop Travel Plans

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

Mode Choice

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

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

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

Co-ordinated action with the County Council and neighbouring planning authorities is required to reduce the level of PNR at employment locations. This will have greatest influence on new developments, through reductions in parking standards and introduction of employer travel plans, but reducing PNR levels retrospectively is likely to remain a longer term objective.

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

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

Value of Time

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

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

As we shall discuss under Employment Sectors, expanding the range of local job opportunities, and encouraging new positions to be filled by Gosport residents, is likely to have the double effect of reducing travel time and reducing the need to peak-spread. This must remain a medium – long term objective.

In the short-medium term, greater resilience is needed in the transport system to combat vulnerabilities. Although no incidents were recorded during the journey time surveys, it is known that relatively minor incidents can have significant knock-on effects across the transport network. During 2005, a relatively insignificant incident in Portsmouth caused major congestion and gridlock across the city, leading to a review of incident management by the City Council and emergency services. It is suggested that a similar approach is taken in Gosport to reduce the potential impact of incidents when they occur.

The impact that school traffic has on overall peak traffic levels is well known – up to 20% of peak period traffic may be related to school run. Of the responses received, only a minority stated that dropping / collecting children formed a regular part of their journey. Developing school travel plans should assist in reducing the impact of the school run.

Employment Sectors

Although there are fewer higher level jobs within the Gosport economy than in neighbouring economic units (due to the relative size of Gosport), the majority of those that do exist are taken by in-commuters. This is not necessarily associated with a local skills shortage, but probably relates to perceptions by employers.

Anecdotal evidence suggests that Gosport employers cast a wider search net for senior posts than for junior posts. Although this practice is widespread across most industries, and is not confined to Gosport, it suggests that local employers are not confident in their local employment base. Evidence suggests that locally available skills for senior posts exist within Gosport, but further work is needed to identify any links between these skills and local opportunities.

The over-reliance on the manufacturing and public sectors has contributed to economic decline within Gosport, and the general reduction in available employment opportunities. At the current time, the poor market perception of Gosport particularly in the office sector would suggest that it is not a location primed for large-scale inward investment by new and emerging business sectors.

At a local level, improved access to markets might be achieved for some sectors through co-ordinated logistical activity. Freight Quality Partnerships are emerging as effective means of managing this activity across sectors and organisations.

A three - pronged economic strategy is proposed to bring confidence to the wider marketplace in what Gosport has to offer as an employment location:

Completion of detailed analysis of current market sectors – the aim is to identify sub-sectors, particularly within manufacturing, where higher value-added industries might be exploited. The marine and aviation sectors have strong potential;

Strengthening of Existing Industries - an employment strategy based on organic growth should aim to maximise existing opportunities for local employers, strengthening existing businesses and minimising opportunities for existing employers to leave Gosport. The Employment Land Study and Tourism Strategy should be reviewed in line with comments in Chapter 5 as part of this exercise.;

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

Recommendations

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

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

Promotion

Access

Prominence

Available Skills

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

Promotion

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

Marketing based on site-specific opportunities will do little to reverse the current market perception. A co-ordinated branded marketing approach is suggested which would overturn the market view.

A branded approach would need to identify what Gosport means as an employment location, for investors, existing companies and current and future employees alike. It should sell a vision of Gosport that is modern, diversified, capable and receptive to inward investment. To sell this brand convincingly, a number of actions need to take place, outlined in following sections.

Once the brand is established, investors will have a clearer picture of the openings presented by site specific opportunities, and be able to make an informed balanced decision on whether to invest in Gosport.

Access

There is no doubt that congestion and delay is a clear attribute of commuting in Gosport. At a strategic level, the Borough Council has only limited influence; the main pinch points on the road network are in Fareham Borough, and development of a major scheme to replace the failed South Hampshire Rapid Transit project is being progressed by the County Council. However, it is largely Gosport residents that have to cope with these infrastructure deficiencies on a regular basis.

We have identified previously a range of interventions that in combination aim to improve access:

- development and implementation of schemes to ease congestion at identified pinch points on the road network (Quay St Roundabout, Stubbington centre and Segensworth Roundabout). The lack of current major schemes for these locations suggests an approach based on incremental improvements, delivered within a relatively short timescale;
- improvements to connections for pedestrians and cyclists between employment areas and local residential areas;
- targeted bus priority measures to improve reliability. It is suggested that the initial focus is on A32 to improve access to existing employers. Detailed analysis of opportunities is required, including land ownership issues and appraisal analysis;
- development of Workplace and School Travel Plans. There exists extensive guidance on this subject not least the Smarter Choices report itself. We believe some travel plans are already in place or being developed. Extension of this work to a cluster-based approach will help to bring economies of scale in implementation, and greater effectiveness for those changing travel habits. Travel Plans should be based on the full range of initiatives identified in Smarter Choices, including investigation of teleworking and home working where appropriate;
- as part of the Travel Plan work, promotion of the Hampshire Car Share database amongst Gosport residents and employers. The 'Smarter Gosport' brand would be one way of promoting this database;
- through the development planning process, seek reductions in PNR parking levels in new developments. Co-ordination with other planning authorities is required to ensure a consistent approach across South Hampshire;
- review incident management procedures with emergency services to build greater resilience in the transport network against unexpected events;
- development of a Freight Quality Partnership to co-ordinate delivery and logistic activity, and reduce the impact of congestion on essential deliveries

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

Prominence

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

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

The employment strategy outlined under Employment Sectors above should create the economic conditions under which high end manufacturing cluster can develop.

Available Skills

There is a mismatch between available skills in the Gosport workforce and those employed by Gosport employers.

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

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