

Economic Value and Tourism Impact of Chatham Historic Dockyard

Final Report

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KEY FINDINGS

DC Research was appointed by Chatham Historic Dockyard Trust (CHDT) in July 2018 to assess the Economic Value and Tourism Impact of Chatham Historic Dockyard. DC Research delivered a similar study in 2012, which provides a benchmark for this study using a comparable.

The Chatham Historic Dockyard manages the Dockyard as a mixed-use maritime heritage site, and this research provides an independent and robust assessment of the economic impact and value the Trust, and its activities and assets, has on the local economy.

Activity at The Dockyard generates a range of diverse and significant economic impacts:

- **Chatham Historic Dockyard Trust itself employs 114.5 full-time equivalent staff**, which generates additional Gross Value Added (GVA) impacts of an **estimated £4.54million in the Medway and Kent economies**.
- **Spending on goods and services** by the Trust generates a further **estimated £308,838 of GVA** in Medway and Kent.
- There are over **100 businesses and organisations operating in Trust buildings**. The research estimates that **these businesses employ a total of 498 full-time equivalent staff**, generating a further **estimated £19.54million of additional GVA** in the Medway and Kent economies. For the purposes of comparison, the 2012 impact report estimated there were 336.5 FTE jobs in tenant businesses at the Dockyard.
- Finally, off-site¹ visitor spend impacts from the Historic Dockyard's 168,850 visitors in 2017/18 generated an estimated **£1.83million in additional GVA** in Medway and Kent.

In total, activity at the Dockyard is estimated to have contributed an estimated £26.2million to the Kent and Medway economies in 2017/18.

The previous impact report estimated that the Dockyard supported at least 442.5 FTE jobs in 2012, and this report estimates that for the 2017/18 financial year the site supports 612.5 FTE jobs, an increase of 28%.

In terms of future impacts, visitor numbers are understood to be significantly up so far in 2018/19, and the Fitted Rigging House, which is currently being developed as workspace and business units for digital and creative businesses, will generate a **further estimated £2.88million of GVA** in Medway and Kent when fully finished and let.

¹ On site visitor spend impacts are excluded to avoid the potential for double counting

1. INTRODUCTION

This section introduces the report by outlining the aims of the research, providing an overview of the approach and method that has been used, as well as setting out the structure of this Final Report.

Introduction and overview of approach and method

- 1.1 DC Research was appointed by Chatham Historic Dockyard Trust (CHDT) in July 2018 to assess the Economic Value and Tourism Impact of Chatham Historic Dockyard. DC Research delivered a similar study in 2012, and recently helped the Historic Dockyard secure Local Growth Funding for the Fitted Rigging House development. This research assesses progress and captures the additional impacts that recent developments at the Dockyard have generated.
- 1.2 The methodology adopted was a **portfolio approach**, combining **quantitative and qualitative elements** and techniques. The main research tasks that have been carried out as part of this Final Report are summarised below.
- **Discussions with partners and stakeholders.** Between August and October 2018, a select number of **one-to-one consultations took place** with staff and trustees at CHDT and other stakeholders. The list of consultees is included in Annex 1 to this report.
 - **Surveys:**
 - An online visitor survey was carried out in September 2018. A total of **727 surveys were completed**.
 - An online business survey was carried out in September 2018. A total of **32 surveys were completed**.
 - **Desk research.** The desk research involved reviewing a range of data sources, information and reports concerning Chatham Historic Dockyard Trust.
 - **Development of the economic impact model.** This involved bringing together and synthesising the results and findings from all tasks to assess the economic impact of Chatham Historic Dockyard Trust.

Structure of the Final Economic Impact Report

- 1.9 The remainder of this section of the report (**Section 1**) provides an introduction to CHDT, and an overview of the approach and method set out above.
- **Section 2** presents the key findings of the visitor survey conducted in September 2018.
 - **Section 3 presents an assessment of the current economic impact of Chatham Historic Dockyard Trust**, focussing particularly on the visitor impacts generated by current users.
 - **Section 4 presents an assessment of the wider benefits of Chatham Historic Dockyard Trust to Medway and the rest of Kent.**
- 1.10 The **Annexes** consist of:
- Annex 1: Economic Impact Assumptions.
 - Annex 2: List of Consultees.
 - Annex 3: Further Business Survey Results.

Introducing Chatham Historic Dockyard

The Historic Dockyard Chatham

- 1.11 The Historic Dockyard Chatham is a **mixed-use maritime heritage environment** located on the site of the former Royal Naval dockyard in Chatham, Kent. The Dockyard closed in 1984, after the Royal Navy ended its 400-year association with the River Medway and the Dockyard in Chatham. Following the closure, the Dockyard was divided into 3 sections, with one section now a commercial port run by Medway Ports, another section is now a mix of commercial, leisure and residential sites, and the third section (which included the Georgian yard with 100 buildings and structures of which 47 are Scheduled Ancient Monuments) passed to the stewardship of a newly formed, independent charity, The Chatham Historic Dockyard Trust.
- 1.12 The Historic Dockyard Chatham is a multi-use 80 acre site that is comprised of:
- **3 historic warships**, including: HMS Gannet (1878), HMS Cavalier and HMS Ocelot.
 - **The Ropery**: A Georgian and Victorian rope factory, which in 2010/11 had a turnover of £533,000 generating a profit of £43,353.
 - **Wooden Walls**: A re-creation of the working life of the dockyard in 1758, centred on the construction of HMS Valiant.
 - **Museum of the Royal Dockyard**: With model ships and other exhibits, dating from the Spanish Armada to the Dockyard's closure shortly after the Falklands War. This gallery is being remodelled to tell the story of the 19th and 20th century Dockyard with the Age of Sail story transferring to the proposed new galleries at the northern end of the site.
 - **RNLI Historic Lifeboat Collection**: A museum about the work of the Royal National Lifeboat Institution which has 17 historic vessels.
 - **3 Slip - The BIG Space**: Originally a covered slipway, now a display of large objects from the Dockyard and the nearby Royal Engineers Museum.
 - **No 1 Smithery**: Originally an iron-working building, restored and re-opened in July 2010 to house temporary exhibitions, permanent displays and stores of objects from the National Maritime Museum and Imperial War Museum, including paintings and ship models.
 - **Command of the Oceans**: Opened in 2016 following grants from the Heritage Lottery Fund and the Homes and Communities Agency. A new entrance on the north side of the visitor attraction, revealing the full dockyard story. It features two internationally significant maritime archaeological discoveries – the timbers of the Namur (1756), found beneath the floor of the old Wheelwrights' workshop, and archaeological objects recovered from the sea bed, from the Invincible (1758).
 - **Retail and catering facilities.**
- 1.13 Since its closure, and development as a mixed-use maritime heritage environment, the Dockyard has also become a thriving community, with:
- Over 100 commercial tenants using many of the Historic Dockyard's buildings, with further units being commercially leased for storage.

- 115 houses, both historic and new build with long term leasehold arrangements².
 - As a fully accredited museum, Chatham Historic Dockyard Trust collects, preserves, researches and exhibits objects and materials connected with the history of the dockyard and its people. It studies the development of Royal Navy warship design, construction and the use of the River Medway by the Royal Navy.
- 1.3 The Fitted Rigging House Project (FRH) converts a large, Grade 1, former industrial building into office and public benefit spaces initially providing a base for 3 organisations employing over 350 people and freeing up space to create a postgraduate study facility elsewhere onsite for the University of Kent's Business School.

Overview of the Economic Impact approach

- 1.14 The impact assessment considers the impact of employment and procurement patterns at Chatham Historic Dockyard, the impacts of business tenants, and the Trust's commercial activity, as well as the impacts of the total spend that Chatham Historic Dockyard's visitors have on the local economy. It also includes analysis of the additional impact of recent developments, such as Command of the Oceans, as well as the future impact of the Fitted Rigging House.
- 1.15 This approach allows the analysis to provide an estimation of the GVA (i.e. economic value) of the overall site, and wider strategic and catalytic impacts.
- 1.16 In terms of **study parameters**, Medway is the local impact area, and the rest of Kent the wider impact area, with the analysis focusing on the most recent full financial year – 2017/18.
- 1.17 To ensure that the study is robust, the economic impact is assessed by applying a '**Green Book**' approach. The Green Book is an HM Treasury approach used to make an economic assessment of the costs and benefits of new policies, projects and programmes. In terms of impact assessment, the 'Green Book' approach compares a baseline scenario (i.e. do nothing) and the proposed intervention or investment scenario (i.e. the project). This allows an estimation of **deadweight, displacement, leakage, substitution and multiplier effects** for the project, and therefore provides an overall assessment of the **gross and net additional economic impacts** in terms of total spend, jobs created/safeguarded and GVA (Gross Valued Added) providing baseline and projection assessments of:
- **Direct Impacts** – i.e. the Dockyard's employment, spend/turnover and GVA impacts.
 - **Indirect Impacts** – i.e. the supplier linkage effects: spend/turnover, GVA and employment generated elsewhere in the local economy due to the Dockyard.
 - **Induced Impacts** – i.e. the income multiplier effects: spend/turnover, GVA and employment generated in the local economy as a consequence of the spending of wages/salaries of those employed through both the direct and indirect impacts.

² Resident impacts are not counted as (i) onsite impacts are assumed to be already included (such as those residents who work at The Dockyard, or (ii) would relate to offsite activity (i.e. employment elsewhere) that is not included in the scope of this study).

2. KEY VISITOR SURVEY ECONOMIC IMPACT FINDINGS

This section presents the key economic impact findings of the visitor survey conducted in September 2018. This information is important to ensure that any attribution of a proportion of a local trip, a day trip, or part of an overnight trip to Chatham Historic Dockyard Trust is reasonable, justifiable, and robust.

- 2.1 In assessing visitor economic impacts, it is important to understand the profile of visitors to a site or venue, and to make a distinction between local visitors, day visitors and overnight visitors, with the latter typically spending more in the local economy per visit. Visitor survey information is useful in informing the factors and assumptions that underpin the economic impact model set out Section 3.
- 2.2 To ensure that the study is informed by robust primary evidence, an online visitor survey was conducted in September 2018. A total of 727 surveys were completed as part of this process.
- 2.3 Table 2.1 below sets out the proportion of the Visitor Survey respondents in each age category. The responses peak with visitors aged between 65 and 74 (accounting for 25.5% of respondents), followed by 35-44 (22.5%) and 55-64 (20.5%).

Table 2.1: Which of the following age categories do you fit within		
Answer Choices	Responses	
15-19	0.00%	0
20-24	0.14%	1
25-34	9.89%	69
35-44	22.49%	157
45-54	16.76%	117
55-64	20.49%	143
65-74	25.50%	178
75+	4.73%	33
Source: DC Research, Chatham Historic Dockyard Visitor Survey 2018, n = 698		

- 2.4 Table 2.2 shows that 37% of visitors were from within the Medway towns of Chatham, Rochester, Gillingham & Strood, 34.1% from elsewhere in Kent, 26.5% from elsewhere in the UK, and 2.1% from outside the UK.

Table 2.2: Please specify your home location:		
Answer Choices	Responses	
Within the Medway towns of Chatham, Rochester, Gillingham & Strood	37.3%	264
Elsewhere in Kent	34.1%	241
Elsewhere in the UK	26.5%	187
Outside the UK	2.1%	15
Source: DC Research, Chatham Historic Dockyard Visitor Survey 2018, n = 707		

- 2.5 12% of respondents said they stayed overnight in Chatham/Medway. Of those visitors that were staying overnight, nearly two-thirds (65%) were staying in a hotel/inn, and 10% were staying with friends or relatives.
- 2.6 Regarding **duration of stay**, a typical visit to CHD lasts between 1.5 and 7 hours, with the average length of stay being 4.5 hours.

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- For 'Within the Medway towns of Chatham, Rochester, Gillingham & Strood', the average length of visit is 4 hours.
- For 'Elsewhere in Kent', the average is 4.3 hours.
- For 'Elsewhere in the UK' and 'Outside the UK', the average is 5.3 hours.

2.7 Table 2.3 shows the alternatives that visitors may have chosen had they not visited CHD. 36% would have gone to an attraction elsewhere in Kent, 22% would have stayed at home, and 12% would have visited a different attraction in Medway.

Table 2.3: If you had not visited Chatham Historic Dockyard what would you have done instead?		
Answer Choices	Responses	
Stayed at home	21.7%	152
Visited a different attraction locally (i.e. in the Medway towns of Chatham, Rochester, Gillingham & Strood)	12.3%	86
Visited a different attraction in Kent	36.0%	252
Visited an attraction elsewhere (outside Kent)	11.3%	79
Carried out a different activity in Medway	5.4%	38
Carried out a different activity in Kent	8.4%	59
Carried out a different activity outside Kent	4.9%	34
Source: DC Research, Chatham Historic Dockyard Visitor Survey 2018, n = 700		

2.8 Impacts from Medway and Rest of Kent visitors that would have stayed at home, visited a different attraction, or carried out a different activity in Medway, or visited a different attraction or carried out a different activity in Kent, can be regarded as **displacement**. Impacts from those that would have visited an attraction elsewhere outside Kent, or carried out a different activity outside Kent, or stayed at home can be regarded as **additional**.

2.9 In terms of **visit motivation**, most surveyed visitors (96%) said that CHD was the main reason for their visit to the area.

2.10 Table 2.4 shows the specific elements of the site that responding visitors wanted to see or do.

Table 2.4: Was there something at Chatham Historic Dockyard that you specifically wanted to see/do?		
Answer Choices	Responses	
Historic Warships	55.7%	395
Attending a special event run by Chatham Historic Dockyard	29.6%	210
Number 1 Smithery	18.3%	130
RNLI Historic Lifeboat Collection	28.5%	202
3 Slip: The Big Space	17.8%	126
The Victorian Ropery	42.7%	303
Steam, Steel and Submarines	33.9%	240
History and Buildings	41.9%	297
Dockyard Explorers	11.6%	82
Command of the Oceans	19.3%	137
Temporary Exhibitions	35.4%	251
Family Activities	35.1%	249
Other	16.5%	117
Source: DC Research, Chatham Historic Dockyard Visitor Survey 2018, n = 709		

- 2.11 Table 2.5 shows what alternatives responding visitors would have chosen if the Dockyard did not provide these events/activities.

Table 2.5: Thinking about the main reason(s) why you visited Chatham Historic Dockyard, what would you do as an alternative if the Dockyard did not provide these events/activities?		
Answer Choices	Responses	
Go elsewhere locally (i.e. in or around the Medway towns of Chatham, Rochester, Gillingham & Strood)	17.3%	124
Go elsewhere in Kent	44.1%	317
Go elsewhere in England	21.4%	154
Would not be able to engage in such events/activities	17.3%	124
Source: DC Research, Chatham Historic Dockyard Visitor Survey 2018, n = 719		

- 2.12 Most would have gone elsewhere locally in Medway (17.3%) or in the rest of Kent (44%). Impacts from Medway and Rest of Kent visitors that would have gone elsewhere in in Medway or Rest of Kent as an alternative to the Dockyard would have happened anyway and can be regarded as **deadweight**.
- 2.13 Impacts from those who would have gone elsewhere in England; or would either not have been able to engage in such events/activities; or not have done anything can be regarded as **additional**.
- 2.14 Nearly two third (65%) of respondents to the survey rated their most recent visit as 'excellent', with a further 31% rating it as 'good'. Table 2.6 shows how respondents rating a range of aspects of their visit to Chatham Historic Dockyard.

Table 2.6: How would you rate your most recent experience at Chatham Historic Dockyard?							
	Excellent	Good	Average	Poor	Very Poor	N/A	number
The friendliness and welcome from staff	66.5%	28.7%	4.0%	0.3%	0.1%	0.3%	693
The ease of accessing facilities and exhibits and getting around the site	59.3%	35.4%	4.6%	0.3%	0.1%	0.3%	692
The staff's knowledge about the collections and displays	63.0%	27.6%	2.9%	0.4%	0.0%	6.1%	692
Having opportunities to think and learn	53.6%	37.4%	5.4%	0.3%	0.0%	3.3%	690
Finding inspiration and new ideas	36.3%	41.3%	14.9%	0.6%	0.2%	6.7%	683
Enjoyment and fun	58.2%	34.9%	5.2%	0.3%	0.3%	1.2%	693
A family friendly day out	61.1%	26.7%	4.8%	0.3%	0.0%	7.1%	686
Overall atmosphere	61.4%	34.4%	3.6%	0.3%	0.2%	0.2%	689
Source: DC Research, Chatham Historic Dockyard Visitor Survey 2018							

- 2.15 75% of respondents were 'very likely' to recommend a visit to Chatham Historic Dockyard to friends and family, with 19% 'likely'.

Visitor spending at Chatham Historic Dockyard

- 2.16 The visitor survey asked questions about spending patterns during a visit to Chatham Historic Dockyard. Responding visitors were asked in terms of their most recent visits, approximately how much they spent on:
- Admission
 - Food and drink on site at the Dockyard
 - Merchandise (including programmes) on site at the Dockyard
 - All other spend elsewhere in Chatham/Medway areas as part of a trip (including food and drink, accommodation, shopping, car parking, etc.)
- 2.17 Responding visitors were also asked how many adults and children this spend covered.
- 2.18 Table 2.7 below presents both the **total** estimated spend for each visitor type (i.e. spend both on-site Chatham Historic Dockyard and within the local economy as part of their trip) and also **off-site** spend (i.e. the spend in the local economy as part of the trip excluding any spend on-site at Chatham Historic Dockyard).

Table 2.7: Average Spend per visit to Chatham Historic Dockyard

	Average Spend: on site	Average Spend: off site	Average Spend Per day: Total	n
Within the Medway towns of Chatham, Rochester, Gillingham & Strood	£16.58	£3.36	£19.94	254
Elsewhere in Kent	£21.94	£2.69	£24.63	228
Elsewhere in the UK	£25.20	£30.15	£55.35	176
Outside the UK	£41.90	£51.75	£93.65	10
ALL VISITORS	£21.06	£10.91	£31.97	668
Source: DC Research analysis based on DC Research, Chatham Historic Dockyard Visitor Survey 2018. Totals subject to rounding.				

3. ASSESSMENT OF THE CURRENT ECONOMIC VALUE AND TOURISM IMPACT OF CHATHAM HISTORIC DOCKYARD

This section of the report sets out the current quantitative economic impact of Chatham Historic Dockyard, assessing its direct, indirect and induced economic impacts of on the Medway and Kent economies.

- 3.1 The approach adopted has sought, where possible, to ensure that all aspects of activity at Chatham Historic Dockyard have been included in analysis. This has included the impact of **employment** (i.e. direct employment at Chatham Historic Dockyard), the impact of **procurement/supply chain** (i.e. the procurement and supplier expenditure involved in operating Chatham Historic Dockyard), and **visitor impacts** (i.e. the impacts on the economy from the expenditure of visitors to Chatham Historic Dockyard).
- 3.2 In addition to employment and procurement generated by Chatham Historic Dockyard Trust, the businesses that are tenants at the Dockyard also employ staff. To capture as much of this activity as possible, a business survey was developed and distributed to businesses at the Dockyard to further capture the employment activity that is generated by the Dockyard, and this was supplemented by DC Research analysis of the total employment workspace at the Dockyard.

Employment impacts

- 3.3 In 2017/18 a total of 157 staff were employed at Chatham Historic Dockyard Trust in a range of full-time and part time positions. In order to carry out the economic impact assessment, the jobs are converted into full-time equivalent positions and the results are summarised in Table 3.1 below. In total there were 114.5 Full Time Equivalent (FTE) jobs at the Trust in 2017/18.
- 3.4 As Table 3.1 shows, the vast majority of Chatham Historic Dockyard’s staff are from the Medway local authority area (76% of FTEs), and a high proportion of the remaining staff are from within Kent (22% of FTEs). This means that the majority of the Trust’s direct and indirect employment benefits are retained within Medway, and most of the remainder within Kent.

Table 3.1: Number of Jobs at Chatham Historic Dockyard Trust in 2017/18

	Full time	Part time	Total (Posts)	Total (Full Time Equivalent)
Medway	51	72	123	87
Rest of Kent	19	13	32	25.5
Rest of UK	2	0	2	2
Total	72	85	157	114.5

Source: DC Research analysis based on Chatham Historic Dockyard direct employment figures 2018
 Note: 2 PT jobs = 1FTE

Therefore, of the total direct employment of 114.5 FTE jobs at the Dockyard, 112.5 reside in the impact areas of Medway and Rest of Kent, therefore generating indirect and induced employment effects in these areas.

- 3.5 In addition, it is important to include in the analysis employment impacts generated by tenant businesses at the Dockyard. This number has been generated by undertaking a survey of all commercial tenants at the Dockyard, supplemented

with employment estimates based on floorspace and use type for those businesses who did not respond to the survey.

- 3.6 32 respondents to the tenant business survey reported a total of 351 FTE staff, two thirds of whom lived in Medway, with 26% living elsewhere in Kent, and the remainder further afield³.
- 3.7 Whilst this captures significant additional employment at the Dockyard, not all businesses responded to the survey, so analysis of let employment workspace by use type was conducted using Homes and Communities Agency Guidance on Employment Densities (2015), to supplement the survey findings.
- 3.8 The scale of office, workshop and industrial space let and occupied by businesses who did not respond to the survey was established, and Table 3.2 shows the SQM and Net Internal Area (NIA) SQM, where applicable, for space occupied by these active businesses.

Table 3.2: Floorspace used by non-responding tenant businesses

Use type	SQM	NIA SQM
Office	4482	3587
Workshop	1305	1044
Industrial	5110	5110*
Total	13,303	11,664

Source: DC Research analysis based on survey of tenant businesses, supplemented by analysis of let employment workspace by use type, and Homes and Communities Agency Guidance on Employment Densities, 2018.
Note: * Gross Internal Area is used for analysis of industrial workspace,

- 3.9 The analysis then assumed 50% occupancy of this workspace to reflect higher deadweight (as much activity would have occurred locally/in Kent) and displacement (given local economic and labour market conditions, choice of comparable commercial space elsewhere). Further adjustments were made based on knowledge of activity on the Dockyard in consultation with Chatham Historic Dockyard Trust. Based on this, the analysis estimated that the businesses who did not respond to the survey employed 201 people at the Dockyard.
- 3.10 Using the same geographic and full-time equivalency assumptions as the respondents to the tenant survey, this resulted in a total of 147 FTE jobs – see Table 3.3.

³ See Table A3.2 in Annex 3.

Table 3.3: Number of Jobs at tenant businesses 2017/18

	Total FTE (business survey)	Total FTE (workspace analysis)	Total estimated FTE jobs at tenant businesses
Medway	234	112	345
Rest of Kent	91	33	124
Rest of UK	26	3	29
Total	351	147	498

Source: DC Research analysis based on survey of tenant businesses, supplemented by analysis of let employment workspace by use type, and Homes and Communities Agency Guidance on Employment Densities, 2018.
*2 PT jobs = 1FTE

Therefore, of the estimated total direct employment of 498 FTE jobs at tenant businesses at the Dockyard, 470 reside in the impact areas of Medway and Rest of Kent, therefore generating indirect and induced employment effects in these areas.

- 3.11 Chatham Historic Dockyard Trust and business tenant FTE jobs will support further employment through indirect effects (i.e. procurement/supply chain effects) and induced effects (from the local spend from employment income of those employed at Chatham Historic Dockyard). Building on the approach and assumptions set out in Annex 1, the net additional impact of this employment can be estimated.
- 3.12 Tables 3.4 and 3.5 set out the geographic distribution of this direct employment in Medway and the Rest of Kent, and also the estimated net indirect and induced employment created in these impact areas as a consequence (with assumptions and underpinning rationale set out in Annex 1).

Table 3.4: Direct, Indirect and Induced Employment Impacts of Chatham Historic Dockyard Trust

	Total Gross Direct Jobs	Total Net Direct Jobs	Indirect & Induced Jobs	Net Additional Jobs (Net Direct, Indirect & Induced)
Medway	87	37.2	19.7	56.9
Rest of Kent	25.5	14.1	9.7	23.8
Total	112.5	51.3	29.4	80.7

Source: DC Research analysis of Chatham Historic Dockyard direct employment figures 2018.

Table 3.5: Direct, Indirect and Induced Employment Impacts of Dockyard tenant businesses

	Total Gross Direct Jobs	Total Net Direct Jobs	Indirect & Induced Jobs	Net Additional Jobs (Net Direct, Indirect & Induced)
Medway	345.4	129.4	62.6	192.0
Rest of Kent	123.5	64.3	43.2	107.4
Total	468.9	193.7	105.7	299.4

Source: DC Research analysis of Chatham Historic Dockyard direct employment figures 2018.

Tables 3.4 and 3.5 estimate that employment at Chatham Historic Dockyard supports a total of 192 net additional FTE jobs in Medway, and 107.4 net additional FTE jobs elsewhere in Kent.

Procurement impacts

- 3.13 Procurement impacts are generated through expenditure by Chatham Historic Dockyard on purchasing of various goods and services over and above the expenditure on staffing.
- 3.14 Table 3.6 shows that of the total procurement expenditure, 21% is spent within the Medway economy (with a further 23% being spent within the Rest of Kent).

Table 3.6: Procurement Expenditure at Chatham Historic Dockyard		
	Total Procurement Spend	%
Medway	£1,371,195	20.6%
Rest of Kent	£1,540,065	23.2%
Elsewhere	£3,736,216	56.2%
Total	£6,647,476	100%
Source: DC Research analysis of Chatham Historic Dockyard procurement expenditure figures 2018. Totals subject to rounding.		

- 3.15 Table 3.7 sets out the geographic distribution of procurement expenditure and the estimated net direct, indirect and induced expenditure created as a consequence within Medway and the Rest of Kent.

Table 3.7: Direct, Indirect and Induced Procurement Impacts of Chatham Historic Dockyard				
	Direct Gross Expend.	Direct Net Expend.	Indirect & Induced Expend.	Net Additional Expend. (Direct, Indirect & Induced)
Medway	£1,371,195	£159,098	£22,890	£181,988
Rest of Kent	£1,540,065	£379,390	£115,892	£495,282
Total	£2,991,260	£538,488	£138,782	£677,270
Source: DC Research analysis of Chatham Historic Dockyard procurement expenditure figures 2018.				

- 3.16 Table 3.4 estimates that the **direct procurement expenditure on Castle and Grounds operations at Chatham Historic Dockyard generates net additional expenditure of £677,270 in the local economy.**

Visitor spend impacts

- 3.17 This section considers the visitor impacts (i.e. the impacts on the economy from the expenditure of visitors to Chatham Historic Dockyard).
- 3.18 In adopting the approach used in this economic impact assessment, it is important to ensure that the potential for double counting is dealt with. Specifically in assessing visitor impacts, this means that the assessment of visitor impacts needs to ensure that on-site visitor impacts (i.e. expenditure by visitors on-site at Chatham Historic Dockyard) are not included in the visitor impact assessment - as

this expenditure and impact is already captured through the employment and procurement impact assessment set out above.

- 3.19 As such, only off-site visitor expenditure is included in the final analysis as this ensures that no double counting occurs, and that the impacts from the various strands of analysis can be aggregated together to provide an overall economic impact assessment for Chatham Historic Dockyard.
- 3.20 Visitor spend impact analysis is drawn from specific data, provided both by Chatham Historic Dockyard Trust and generated through the visitor survey set out in Section 2 on the number of visitors, type of visitor, dwell time, on-site spend etc.
- 3.21 According to Chatham Historic Dockyard Trust, the annual number of visitors to Chatham Historic Dockyard in 2017/18 was in the order of 168,850. This total includes both adults and children, and for economic impact analysis the number of adults needs to be identified.
- 3.22 Using information about the age profile of visitors from aggregated ticketing information provided by Chatham Historic Dockyard Trust, an estimate can be made of the number of adult visitors to Chatham Historic Dockyard in 2017 (as the impact model assumes the expenditure by adult visitors includes/captures spend relating to relevant children). Table 3.8 shows that 73% of visitors were adults, and 27% were children.

Table 3.8: Visitors to Chatham Historic Dockyard	
	2017/18
Total Number of Visitors	168,850
Proportion of Children from aggregated ticketing information*	28%
Proportion of Adults from aggregated ticketing information*	72%
Total Number of Adult Visitors (for impact model)	122,392
Source: DC Research analysis of survey data, 2018	
*n=57,356	

- 3.23 It is the total adult visitor figure (**122,392**) from Table 3.8 that is used to estimate the on-site and off-site expenditure impacts from visitors.
- 3.24 In assessing visitor economic impacts, it is important to make a distinction between local visitors, day visitors and overnight visitors, with the latter typically spending more in the local economy per visit. The visitor survey informs the factors and assumptions that underpin the impact model in this regard and is important to ensure that any attribution of a proportion of a local trip, a day trip, or part of an overnight trip to Chatham Historic Dockyard is reasonable, justifiable, and robust.
- 3.25 Table 3.9 shows the home location of visitors to Chatham Historic Dockyard, based on a combination of findings from the visitor survey and Chatham Historic Dockyard aggregated ticketing data and visitor numbers. This allows the geographic location and type of visitors to Chatham Historic Dockyard to be estimated.

Visitor Type and Home Location	Number of Visitors
Within the Medway towns of Chatham, Rochester, Gillingham & Strood	31,245
Elsewhere in Kent (day trip)	41,016
Elsewhere (day trip)	45,697
Elsewhere (overnight stay)	4,434
Total	122,392
Source: DC Research analysis based on DC Research, Chatham Historic Dockyard Visitor Survey 2018. Totals subject to rounding.	

- 3.26 Table 2.7 in the previous section presented both the **total** estimated spend for each visitor type (i.e. spend both on-site at Chatham Historic Dockyard and within the local economy as part of their trip) and also **off-site** spend (i.e. the spend in the local economy as part of the trip excluding any spend on-site at Chatham Historic Dockyard).
- 3.27 Taking all of this information together, and assuming attribution of a full day of off-site spend based on the survey dwell time results in paragraph 2.6, Table 3.10 below provides a summary of the total gross visitor spend for Chatham Historic Dockyard. This is the **total gross visitor spend (off-site) of adult visitors to the Dockyard in 2017/18 – more than £1.8 million.**

Visitor Type	Average total (off-site) expenditure	Number of adult visits in 2017/18	Gross Expenditure (rounded)
Within the Medway towns of Chatham, Rochester, Gillingham & Strood	£3.36	31,245	£104,982
Elsewhere in Kent (day trip)	£2.69	41,016	£110,334
Elsewhere (day trip)	£30.15	45,697	£1,377,773
Elsewhere (overnight stay)	£51.75	4,434	£229,475
TOTAL		122,392	£1,822,563
Source: DC Research analysis 2018. Totals subject to rounding.			

- 3.28 To properly capture the net additional visitor impacts it is necessary to take into account visitor motivation, and what visitors might have done had they not visited Chatham Historic Dockyard, and the survey analysis in Section 2 highlighted deadweight (Table 2.5) and displacement (Table 2.3) as well as visitor motivation.
- 3.29 Using these displacement and deadweight assumptions, along with appropriate multiplier values (see Annex 1 for details about the approach and assumptions), Table 3.11 overleaf sets out the estimated **net additional expenditure impact of visitors to Chatham Historic Dockyard.**

Table 3.11: Direct, Indirect and Induced Off Site Visitor Expenditure Impacts for Chatham Historic Dockyard

Visitor Type	Gross expenditure	Net expenditure	Indirect & induced expenditure	Net additional expenditure (direct, indirect & induced)
Within the Medway towns of Chatham, Rochester, Gillingham & Strood	£104,982	£71,453	£67,113	£138,565
Elsewhere in Kent (day trip)	£110,334	£34,292	£14,708	£49,000
Elsewhere (day trip)	£1,377,773	£1,377,773	£1,901,327	£3,279,101
Elsewhere (overnight stay)	£229,475	£229,475	£316,675	£546,149
Total	£1,822,563	£1,712,993	£2,299,823	£4,012,816

Source: DC Research analysis, 2018. Total subject to rounding

Taking all of this into account, the results show that the estimated **net additional economic impact of on and off-site from visits to Chatham Historic Dockyard in 2017/18 was just over £4 million.**

Summarising the current economic impacts of Chatham Historic Dockyard

- 3.30 In order to estimate the current overall impacts of Chatham Historic Dockyard all of the various separate elements of analysis set out in this section can be brought together.
- 3.31 BRES and ONS data on employment and GVA in relevant sectors have been used to establish GVA per head, using the most recent confirmed data, at the NUTS 2 level (Kent and Medway). This is set out in Table 3.12.

Table 3.12: GVA and FTE employment in relevant sectors

	Arts, entertainment and recreation	All industries
GVA £million*	£568	£39,112
FTE**	12,000	599500
GVA per head	£47,333	£65,241

Source: DC Research analysis of BRES and ONS data, 2018

* 2016 Gross Value Added (Income Approach) by SIC07 industry at current basic prices⁴, ONS Crown Copyright Reserved (accessed via ONS, 1 October 2018)

** 2015 BRES Business Register and Employment Survey (accessed via NOMIS, 9th February 2018), ONS Crown Copyright Reserved

Note: FTE was calculated by taking all full-time employees as 1 FTE, and treating each part time employee as 0.5FTE. Employment additional to number of employees (i.e. self employed) was added and assumed to be FTE.

⁴<http://www.ons.gov.uk/businessindustryandtrade/business/businessservices/datasets/uknonfinancialbusiness/economyannualbusinesssurveysectionsas>.

- 3.32 In terms of net overall employment impacts, all of the various expenditure impacts have been converted to jobs and then to GVA by using sector specific data about employment, turnover and GVA⁵.
- 3.33 Table 3.13 summarises the overall economic impact of Chatham Historic Dockyard.

Table 3.13: Summary of Overall Economic Impact of Chatham Historic Dockyard			
	Net additional expenditure	Net FTE Jobs	Equivalent Gross Value Added (rounded)
Employment (CHDT)	-	80.7	£4,539,119
Employment (tenanted businesses)	-	299.4	£19,536,285
Procurement	£677,270	4.7	£308,837
Off-site visitor impacts	£4,012,816	28.0	£1,829,859
Totals		412.4	£26,214,102
Notes:			
CHDT GVA per head is a composite of Arts, Entertainment and Recreation, and All Industries, reflecting the mixed cultural, heritage and commercial roles of the Trust's activities.			
The two totals (jobs and GVA) reported above are two different ways of reporting the <i>same</i> impact – i.e. the impact is 412.4 jobs which can also be expressed as £26.2m GVA.			

Expressing all of these impacts in terms of employment, the overall impact of Chatham Historic Dockyard is **412.4 FTE jobs in Medway and Kent**.

Expressing all of these impacts in terms of GVA, the overall impact of Chatham Historic Dockyard is **just over £26.2million GVA in Medway and Kent**.

Further impacts

Development of the Fitted Rigging House

- 3.34 Analysis undertaken by DC Research in support of successful funding bids to the redevelopment of the **Fitted Rigging House**, which is currently being developed as workspace and business units for digital and creative businesses, will generate an **estimated further £2.88m of GVA** in Medway and Kent when fully finished and let.

One-off Construction Impacts

- 3.35 Using capital expenditure data provided by Chatham Historic Dockyard Trust, the impacts created by capital investment at the Dockyard in the past three years, and planned future investments, can be estimated.
- 3.36 An estimate of the number of jobs and value of turnover that this level of capital spend will support can be provided by applying turnover per job and GVA per job ratios to this total spend. Data from the most recent Annual Business Survey⁶ can

⁵ Data from the Annual Business Survey for all industries, with 'Section R - Arts, Entertainment and Recreation' has been used as a proxy for tourism generally.

⁶<http://www.ons.gov.uk/businessindustryandtrade/business/businessservices/datasets/uknonfinancialbusiness/economyannualbusinesssurveysectionsas>. Data released in November 2017 are the revised 2016 results. In 2016 average turnover per employee in the UK construction sector was £182,557.

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be used to provide an estimate of the average turnover per employee for the construction sector.

- 3.37 The total value of capital spend on the development of the Fitted Rigging House was currently estimated to be £8,400,000 including fees, which is reduced to £7,140,000 once fees of 15% are excluded. In addition, the development of 'Command of the Oceans' was £9.3million, reduced to £7,905,000 once fees of 15% are excluded.
- 3.38 Table 3.14 shows that the development of Fitted Rigging House-Business Space Development is likely to support 39 temporary person years' worth of construction employment over its lifetime, which will provide a boost to the local economy and result in the provision of employment and training opportunities. The Command of the Oceans project, which opened in 2016, was likely to have supported 43 temporary person years' worth of construction employment over its lifetime

Table 3.14: Temporary construction impacts generated by capital investment at CHD					
Year	Past three years	2018/19	2019/20	2020/21+	Total
Command of the Oceans	£7,905,000	-	-	-	£7,905,000
Fitted Rigging House	-	£4,239,800	£2,560,200	£340,000	£7,140,000
Temporary person years	43	23	14	2	82
		39			
Source: DC Research calculations based on data provided by Historic Dockyard Chatham, February and October 2018. Totals subject to rounding					

4 ADDITIONAL AND CATALYTIC IMPACTS, AND ADDED VALUE

This section highlights additional impacts (not modelled in the previous section), and related catalytic and strategic arguments as to the wider value of The Historic Dockyard Chatham to Chatham, Medway and Kent, and to its key partners.

- 4.1 Whilst not quantifiable, the wider economic role of Chatham Historic Dockyard provides a number of significant catalytic and strategic added value impacts in addition to those quantitatively estimated in Section 3.
- 4.2 Since the 2012 Economic Impact study, Chatham Historic Dockyard Trust has continued to make progress **make progress in moving the Historic Dockyard towards a fully sustainable position by regenerating historic buildings and bringing them into heritage, residential and commercial use.**
- 4.3 The success of **the Dockyard continues to be very important in supporting Medway Council's work in changing perceptions of the area,** and in diversifying the local economy. Since 2012, the Dockyard has furthered its standing as a unique and nationally regarded heritage attraction arts venue, the top visitor attraction in Medway, and a significant one in Kent.
- 4.4 The Dockyard is able to **create positive stories about Chatham and Medway,** and together with Chatham Maritime, is a very attractive leisure space. Some consultees highlighted that the Dockyard's audiences are changing, with **a notable increase in family visits** in addition to audiences interested specific themes or objects. There is a recognition that this development is a result of the investments made in recent years, such as Command of the Oceans, as well as in marketing and social media.
- 4.5 Partners hope that Chatham Historic Dockyard Trust can further help **signpost visitors to other parts of Medway,** and that the area can develop to towards an overnight destination rather than a place for a day trip. Currently, visitors tend to spend a significant proportion of a visitor day at the Dockyard itself and tending not to explore the wider offer.
- 4.6 There are **a range of learning and volunteering opportunities supported by the Dockyard.** For example, over 14,000 young people were engaged with formal education sessions throughout 2017/18 with an additional 372,000 engaged through digital platforms across the year, contributing to the Trust's learning charitable objective. In addition, over 6,000 people have been engaged through outreach sessions in the local community, including local schools, Dementia Centres, Care Homes and other community groups – bringing The Historic Dockyard to those in the community that cannot physically visit.
- 4.7 The Historic Dockyard supports over 320 volunteers on an annual basis who support the Trust in a wide variety of roles including running its historic railway, maintaining historic ships, providing research support and customer care roles alongside other more specialist roles.
- 4.8 The **University of Kent** has had a longstanding presence at the Dockyard, and now uses a number of buildings. The Sail and Colour Loft, and the transformation of the Royal Dockyard Church into a lecture theatre and conference facility, has significantly improved the student experience at the Dockyard, as has improved

transport connections with the Medway Campus⁷ (shared with University of Greenwich and Canterbury Christchurch University) and also Canterbury Campus with a 'campus shuttle'.

- 4.9 Nevertheless, the University is finding that **students are increasingly demanding about facilities** on site, and in partnership with the Trust is working hard to improve student experiences on the site through improved transport, and catering facilities. The University is also investigating a rent and ride cycle pilot in Medway.
- 4.10 Partners feel that **the Fitted Rigging House will be a significant step to making the Dockyard largely sustainable**. This sustainability strategy has created employment, has further developed what is a high quality and highly regarded heritage maritime mixed-use environment. The successful application for South East Local Enterprise Partnership (SELEP) South East Growing Places Fund resources to help develop the Fitted Rigging House has further reinforced perceptions of the **economic development credibility of Chatham Historic Dockyard Trust**.
- 4.11 The development of the Fitted Rigging House, building on the success of the Chatham Basepoint Business Centre in the Joinery Workshop, is also helping to position **Chatham Historic Dockyard Trust as a key partner in the development of the creative economy sector** in Medway and in Kent. Dovetail Games, an anchor tenant at the Fitted Rigging House will help influence positive perceptions of the area as a place for creative businesses to establish and flourish and has evolved into a desirable business location.
- 4.12 These developments mean that the Trust now has gained considerable experience and expertise in developing workspace in historic buildings and could look to offer this expertise to others.
- 4.13 The Dockyard is seen to be a competent and responsible landlord, and partners continue to feel that Chatham Historic Dockyard Trust is an active partner, highlighted that strategic discussions are always positive, and the trust takes a solutions-based approach to all its operations.
- 4.14 As much of the site is now back in use, the medium-term challenge for Trust will be to ensure that space is put to its best use to support the sustainability of the Dockyard.

⁷ built as a Royal Naval Barracks, HMS Pembroke

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ANNEX 1: ASSUMPTIONS, KEY METRICS AND GLOSSARY

Table A1.1: Assumptions and metrics for current economic impact of Chatham Historic Dockyard

Factor	Standard (EP) Assumption	Adjusted Value for Chatham Historic Dockyard	Rationale for adjustment
Deadweight (employment)	Low - 25%	No adjustment	Rationale based on established status of CHDY in local, sub regional and regional commercial and visitor economy
Deadweight (procurement)	Low - 25%	No adjustment	Rationale based on established status of CHDY in local, sub regional and regional commercial and visitor economy
Deadweight (Visitors)	No ready reckoner – used survey driven assumptions	<ul style="list-style-type: none"> ▪ 17.7% of Medway visits ▪ 44.4% of rest of Kent trips 	Primary survey data used
Leakage (employment)	Low - 25%	<ul style="list-style-type: none"> ▪ 24% for Medway ▪ 1.75% for Rest of Kent 	Primary data used
Leakage (procurement)	High - 50%	<ul style="list-style-type: none"> ▪ 79% for Medway ▪ 56% for Rest of Kent 	Primary data used
Leakage (Visitors)	N/A	0	All impacts take place in the impact areas.
Displacement (employment and spend)	Low – 25%	Low – 25%	Rationale based on established status of CHDY in local, sub regional and regional commercial and visitor economy.
Displacement (Visitors)	Low - 25%	<ul style="list-style-type: none"> ▪ 17.3% for Medway ▪ 44.1% for Rest of Kent 	<ul style="list-style-type: none"> ▪ Primary survey data used
Substitution (all)	N/A - 0	No adjustment	No potential for substitution.
Multiplier (CHDT, visitor spend)	1.38 “recreation”	No adjustment	
Multiplier (Tenanted businesses)	1.29	No adjustment	Use of the same EP/HCA multipliers as used for the analysis of Fitted Rigging House for SELEP funding

Source: DC Research adapted from English Partnership Additionality Guidance⁸ (4th Edition, 2014)

⁸https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/378177/additionality_guide_2014_full.pdf

Glossary

Additionality: the extent to which an activity is undertaken on a larger scale, takes place at all, or earlier, or within a given geographical area as a result of the intervention. Thus, an impact arising from an intervention is additional if it would not have occurred in the absence of the intervention.

Reference case: The position in terms of target outputs over a set period of time if the intervention did not take place. (The situation, in terms of benefits, that would occur if the intervention was not implemented).

Target area: The area within which benefits will be assessed.

Deadweight: Output that would have occurred without the intervention (gross direct effects – the level of benefits that would have happened without the intervention).

Displacement: The proportion of intervention benefits accounted for by reduced benefits elsewhere in the target area (market share - product market displacement; factor market displacement – land, labour, capital).

Leakage: The proportion of outputs that benefit those outside of the intervention's target area or group.

Substitution: Where a firm substitutes one activity for a similar activity (such as recruiting a different job applicant) to take advantage of public sector assistance (within firm displacement).

Multiplier effects: Further economic activity (jobs, expenditure or income) associated with additional local income, local supplier purchases and longer term effects.

Supply linkage multiplier (indirect multiplier): due to purchases made as a result of the intervention and further purchases associated with linked firms along the supply chain.

Income multiplier (consumption/induced multiplier): associated with local expenditure as a result of those who derive incomes from the direct and supply linkage impacts of the intervention.

ANNEX 2: LIST OF CONSULTEES

Consultee	Role	Organisation
Celia Glynn Williams	Head of Communications	Medway Council
Professor Nick Grief	Dean of Medway Campus	University of Kent
Paul Hudson	Trustee	Chatham Historic Dockyard Trust
Paul Barnard	Director of Communications and Development, Assistant Chief Executive	Chatham Historic Dockyard Trust
Bill Ferris OBE DL	Chief Executive	Chatham Historic Dockyard Trust

Business Turnover

Table A3.1: Approximately what was your turnover in the last financial year? (please select):		
Answer Options	Response Percent	Response Count
£0 to £49,999	18.8%	6
£50,000 to £100,000	15.6%	5
£101,000 to £200,000	12.5%	4
£201,000 to £300,000	6.3%	2
£301,000 to £400,000	6.3%	2
£401,000 to £500,000	3.1%	1
£501,000 to £600,000	9.4%	3
£601,000 to £700,000	3.1%	1
£701,000 to £800,000	3.1%	1
£801,000 to £900,000	3.1%	1
£901,000 to £999,999	0.0%	0
£1,000,000 plus	18.8%	6
Total	100.0%	32

Table A3.1 shows a range of turnover from responding businesses highlighting the range of business sizes at the Dockyard.

Employees

The total number of employees employed by the responding businesses/organisations was 481. On average, there were 16 employees per organisation, with 90% of respondents indicating that they employed less than 20 people.

Table A3.2: What proportion of your employees (as an estimated percentage) live in the following locations?	
Area	Average Percentage
At the Historic Dockyard itself:	1.8%
Elsewhere locally (i.e. Chatham, Rochester, Gillingham, Strood etc):	58.2%
Elsewhere in Kent:	25.6%
Elsewhere in the South East, and further afield:	7.7%
Total	100%

A small proportion of employees (1.8%) were estimated to live within the Historic Dockyard itself, while well over half of the total employees were indicated to live elsewhere in the local area, a quarter elsewhere in Kent. The surveyed businesses indicated that only 7.7% of their total employees lived elsewhere in the South East/further afield.

Business Location

Table A3.4 shows that respondents to the business survey have a variety of positive reasons for their location at the Dockyard.

Table A3.4: In terms of location, what are the main reasons for your business being located at The Historic Dockyard? (Please tick all that apply)		
Answer Options	Response Percent	Response Count
Business was founded locally	57.6%	19
Business is owned locally	57.6%	19
Access to key markets/customers	24.2%	8
Local trading relationships/networks	33.3%	11

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Local workforce specialisms	9.1%	3
Maritime connections are important to the business	15.2%	5
Heritage environment is important to the business	36.4%	12
Quality of workspace/offices available	45.5%	15
Price/cost of workspace/offices/property	69.7%	23
Cost of labour/workforce locally	21.2%	7
Total	100%	33

As shown in Table A3.5, the majority of respondents did not consider their business activity to be linked to the Historic Dockyard (in either in its current form or historically).

Table A3.5: Is your business activity linked to The Historic Dockyard (in either its current form, or historically)?

Answer Options	Response Percent	Response Count
Yes	30.3%	10
No	69.7%	23
Total	100%	33

It is clear from the responses in Table A3.6 that the majority of businesses would remain in Kent, if they weren't based at the Dockyard (representing 19 out of 33 responses). Seven respondents overall indicated that they would otherwise be located elsewhere in the South East/further afield.

Table A3.6: If you weren't based at the dockyard where would you locate your business/organisation?

Answer Options	Response Percent	Response Count
Elsewhere locally (i.e. Chatham, Rochester, Gillingham, Strood etc):	57.6%	19
Elsewhere in Kent:	21.2%	7
Elsewhere in the South East, and further afield:	21.2%	7
Total	100.0%	33

Other Comments

"It has become a fantastic creative, cultural and business centre from which all can benefit and thrive".

"Being a part of the Dockyard Community is what makes the business enjoyable - it's NOT just another day at work".

"We love having our office based here at the Historic Dockyard. However, as we are expanding year on year, we are very close to outgrowing the office in terms of space".

"As a lot of our clients come from London and in Kent it brings people to this site who may not have known about it before".

"The Brunel Sawmill was designed for the processing of timber. I think that Marc Brunel would have been very happy to know that 200 years later, his workshop was still being used for the processing of timber (bespoke joinery anyway!) As the Brunel Sawmills, is the most intact Sawmills in the world from the Golden Age of Sail, we do get the occasional

visiting group to the workshop who are interested in the history of engineering and technology”.

“It is really beneficial to be part of a long standing community of individuals and companies supported by CHDT, whose work contributes to the creative and cultural industries locally and further afield”.

“The nature of our manufacturing/creative business feeds well off other companies and skills within the Dockyard, and receives a lot of interest from clients and new business because of this. It would be beneficial (for us and the Trust) to enable/encourage this creative element to expand, by improving the use of available and under-used space”.