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DORSET
COAST FORUM

C-SCOPE

SOCIO-ECONOMIC STUDY
OF THE
DORSET MARINE MANAGEMENT AREA

RESEARCH & INFORMATION GROUP

DORSET COUNTY COUNCIL

March 2011

SUMMARY

The Dorset Marine Management area includes the area of coast between Durlston Head in Purbeck and Portland Bill and 12 miles out to sea. There are a total of 15 parishes along with a number of wards in Weymouth & Portland Borough which share this stretch of coastline and make up the study area for this report.

The study area has a wealth of environmental and landscape designations it's almost totally covered by the Dorset Area of Outstanding Natural Beauty as well as a number of international, national and local environmental designations. The majority of the 'Jurassic' coastline and its immediate hinterland within the study area is designated a natural world heritage site.

The total population of this area is 56,400. Over half of these people (28,440) live in Weymouth and a further 12,460 are in the parish of Portland. Swanage is the other significant centre of population along this stretch of coast with 9,850 residents. Within the study area there are quite large variations in terms of age profile. Swanage has one of the highest proportions of older people in the County, Preston in Weymouth also has a very higher proportion of older people with over 37% aged 65+ years. In contrast the most rural parishes in Purbeck have the lowest proportion of people aged 65+, in Steeple just 11% are in this age group and 15% in Chaldon Herring and Kimmeridge parishes.

The majority of households in the study area are classified as either 'wealthy achievers' or 'comfortably off' according to the ACORN socio-economic classifications. However there are variations within the area, in parts of Weymouth, Portland and Swanage there are higher levels of deprivation than found in the rural parishes.

The rural parishes have some of the highest proportions of second homes in the County; this is reflected in house prices which are higher in these parts of the study area.

The C-SCOPE area has about 22,700 employees in employment with an above average proportion of female workers and part time workers. Leisure & tourism

(direct[1]) alone accounting for 13% of employment in the C-SCOPE area, compared with about 5% in DCC Dorset as a whole, the most significant broad employment sector is Distribution, hotels & restaurants which covers more than a third of employment in the area: considerably more than the proportions seen nationally or in the county.

Data from the monthly unemployment claimant count shows that rates in DCC Dorset and the C-SCOPE area have consistently been below the level of England & Wales since 2006.

The C-SCOPE area has about 2,800 workplace units, this represents about 15% of all workplaces in DCC Dorset. The size profile of businesses in the C-SCOPE area was much in line with that of DCC Dorset as a whole. The majority of businesses were small (with 1-24 employees), representing 94% of all workplaces

In 2008, there were about 700 employees in employment in marine industries in the C-SCOPE area representing about three per cent of all employment. This is above the DCC Dorset average figure of 0.6%. By district, marine industries employment was highest in Weymouth & Portland at just over two per cent and in Purbeck at just over one per cent. Castle ward (Purbeck) and Underhill ward (Weymouth & Portland) had particularly high dependence on marine industries employment at about a fifth of total employment.

The Dorset Marine Management Area is served by three main ports and harbours: Poole, Weymouth and Portland (of which, Poole is the largest) with Swanage Pier also offering a few marine services. Between them, the ports have a long history and a wide range of current uses from commercial freight shipping to small fishing trips, along with supporting infrastructure and supply chain companies providing employment to the local economies.

[1] ie does not include employment supported by tourism such as retail

INTRODUCTION

Content of this report

Three sections:

1. The local environment and access to the area.
2. Socio-Economic Profile of the Study area which includes information on population, housing and the local labour market.
3. Focus on the Marine Industries including a profile of industrial sectors of employment in the area. Focus on the fishing industry, marine tourism and recreation and on Ports and shipping in the area. Economic Impact of these industries on the local economy.

THE STUDY AREA

The Dorset Marine Management area includes the area of coast between Durlston Head in Purbeck and Portland Bill and 12 miles out to sea. There are a total of 15 parishes along with a number of wards in Weymouth & Portland Borough which share this stretch of coastline.

Figure 1.

Dorset Marine Management Area - Parish and Ward Boundaries

The parishes and wards highlighted on the map above indicate the 'study area' for this report, for which the information below has been collected. For some sections data is not available at this level and therefore provided by ward or for the local authorities.

SECTION 1: ENVIRONMENT AND ACCESS

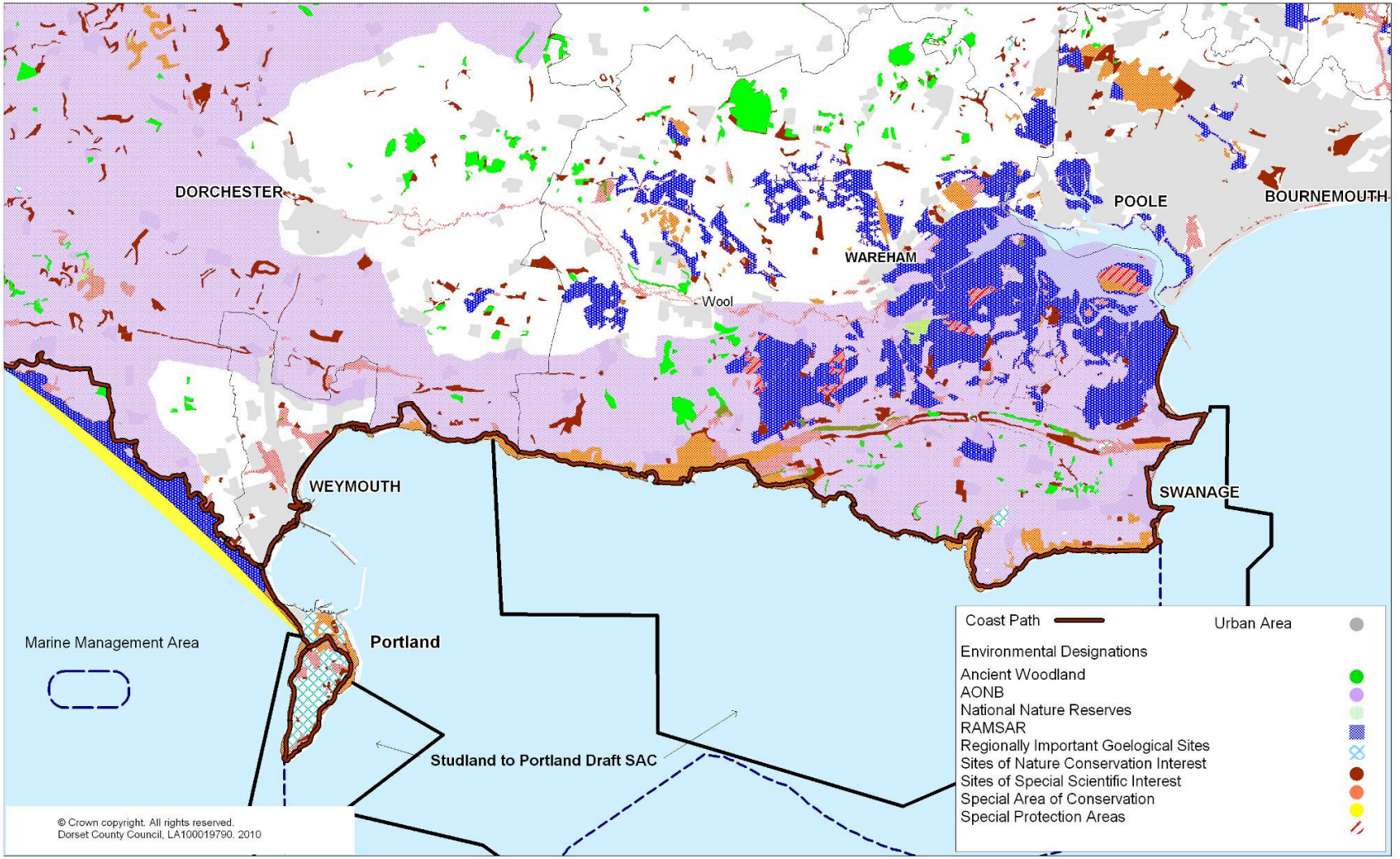
E N V I R O M E N T A L D E S I G N A T I O N S

The study area has a wealth of environmental and landscape designations it's almost totally covered by the Dorset Area of Outstanding Natural Beauty as well as a number of international, national and local environmental designations. The majority of the 'Jurassic' coastline and its immediate hinterland within the study area is designated a natural world heritage site.

The figure 2 highlights the range of designations within both the study area as well as the scope of the Draft Special Area of Conservation within the Marine Management Area.

Figure 2

Environmental Designations and Coast Path - Dorset Marine Management Area



THE ECOSYSTEM APPROACH

The C-SCOPE Marine Spatial Plan will take the ecosystem approach as a guiding principle throughout. The Marine Policy Statement identifies that *"An ecosystem-based approach to the management of human activities means an approach which ensures that the collective pressure of human activities is kept within the levels compatible with the achievement of good environmental status; that does not compromise the capacity of marine ecosystems to respond to human-induced changes; and that enables the* ***sustainable use of marine goods and services****."*

Marine goods and services can be defined in many ways, but all *"emphasise the beneficial role played by ecosystems in enhancing or maintaining aspects of human well being and thereby human society."*

A recent approach to classifying ecosystem goods and services is 'The Economics of Ecosystems and Biodiversity' (TEEB) project, which distinguishes between ecological processes and the benefits experienced by humans.

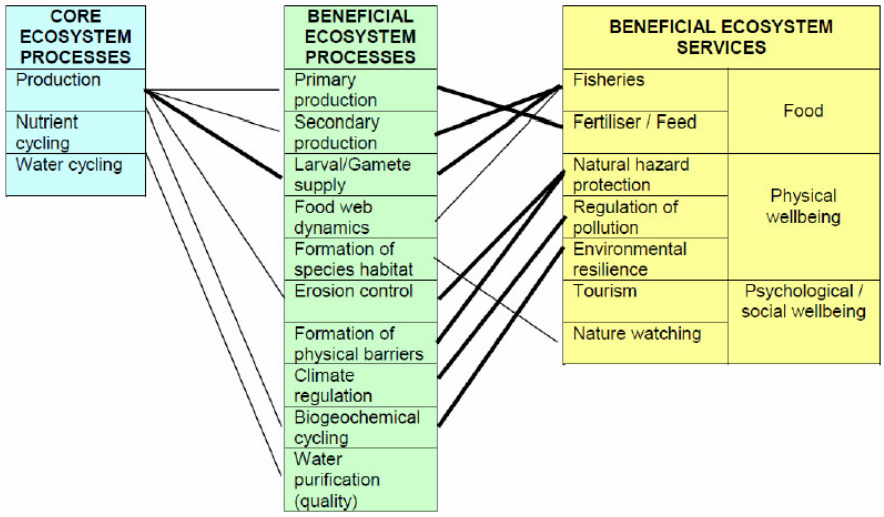
The TEEB (2009) classification has three components:

- Core ecosystem processes: these describe the basic ecosystem processes supporting ecosystem functions.
- Beneficial ecosystem processes: these are the specific ecosystem processes that directly underpin benefits to people.
- Beneficial ecosystem services: these are the products of ecosystem processes that directly impact human wellbeing.

This work was used to inform recent research for Natural England, entitled "Description of the ecosystem services provided by broad-scale habitats and features of conservation importance that are likely to be protected by Marine Protected Areas in the Marine Conservation Zone Project area".

A specific classification of marine ecosystem services was developed based on the TEEB classification. A literature review was undertaken for marine species and habitats (marine features) which are to be protected to identify both beneficial ecosystem processes and beneficial ecosystem services. Tables and linkage diagrams were created, giving higher confidence levels to UK, feature specific, peer reviewed literature. Figure x shows an example of a habitat linkage diagram.

Coastal saltmarshes and saline reedbeds



Solid line: indicates evidence is UK related, feature specific and peer reviewed
Thin line: indicates UK related but grey literature
Dashed line: indicates overseas papers or expert evidence

It is important to note that the evidence base is inconsistent as some marine features offer relatively strong conclusions whereas others have little or no evidence. Equally, insufficient evidence should not be equated with insignificant ecosystem value; therefore a precautionary view of this work is needed.

Placing an economic value on these marine goods and services is not currently feasible, but should be addressed in the future as knowledge and techniques evolve.

A C C E S S

The study area is accessed in part by a frequent and regular rail network in Weymouth that has links with London Waterloo to the east and Bristol and Cardiff to the west. The rail link from Weymouth to the east skirts the periphery of the study area with a number of stations along the route. There is also a tourist steam rail service linking Corfe Castle to Swanage with plans initiated to link a permanent service through to Wareham with connections to London and Weymouth.

Figure 3 illustrates the major road network in the study area. The main trunk roads across Dorset, the A31T and the A35T, run from east to west to the north of the study area. Within the study area the A351 links Wareham to Swanage and the A352 just to the north links Wareham via Wool to Dorchester. The A354 joins Dorchester with Weymouth and Portland. This road is undergoing major work as part of the 2012 Olympic Games Transport Package creating in part a single carriage relief road for Weymouth.

An hourly bus service runs from Wareham through Corfe Castle to Swanage and then onto Poole via a chain link ferry at Studland. There is also an hourly service that runs from Dorchester through Weymouth to Portland. Outside of the main towns public transport is not as frequent. Some of the smaller settlements do not have a daily service. Figure 33 indicates the regularity of the services across the area. The nearest commercial airport - Bournemouth Airport is approximately 30 miles to the east of the study area just outside Christchurch with regular services to the UK, Europe and beyond.

There are regular pedestrian and vehicular ferry services that run to France and the Channel Islands from both Weymouth to the west and Poole to the east.

Figure 3

Transport Links to the Dorset Marine Management Area

Figure 4

Public Transport Links to the Dorset Marine Management Area

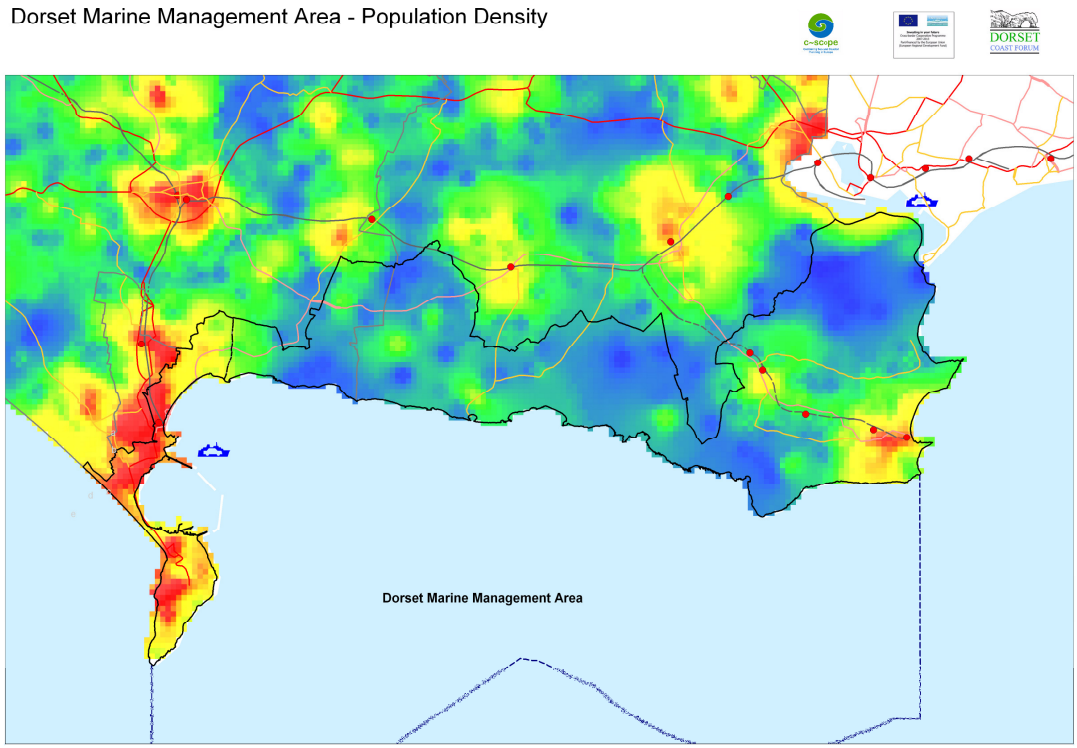
SECTION 2: SOCIO-ECONOMIC OVERVIEW

D E M O G R A P H I C S

TOTAL POPULATION & POPULATION DENSITY

The total population of this area is 56,400. Over half of these people (28,440) live in Weymouth and a further 12,460 are in the parish of Portland. Swanage is the other significant centre of population along this stretch of coast with 9,850 residents. The remainder are spread across the more rural parishes in both Purbeck and West Dorset districts. Population density in these rural parishes is less than one person per hectare. This increases to 2.2 persons per hectare in Portland, 8.7 per hectare in Swanage and up to 46 persons per hectare in central Weymouth. Figure 5 shows the population density in the study area.

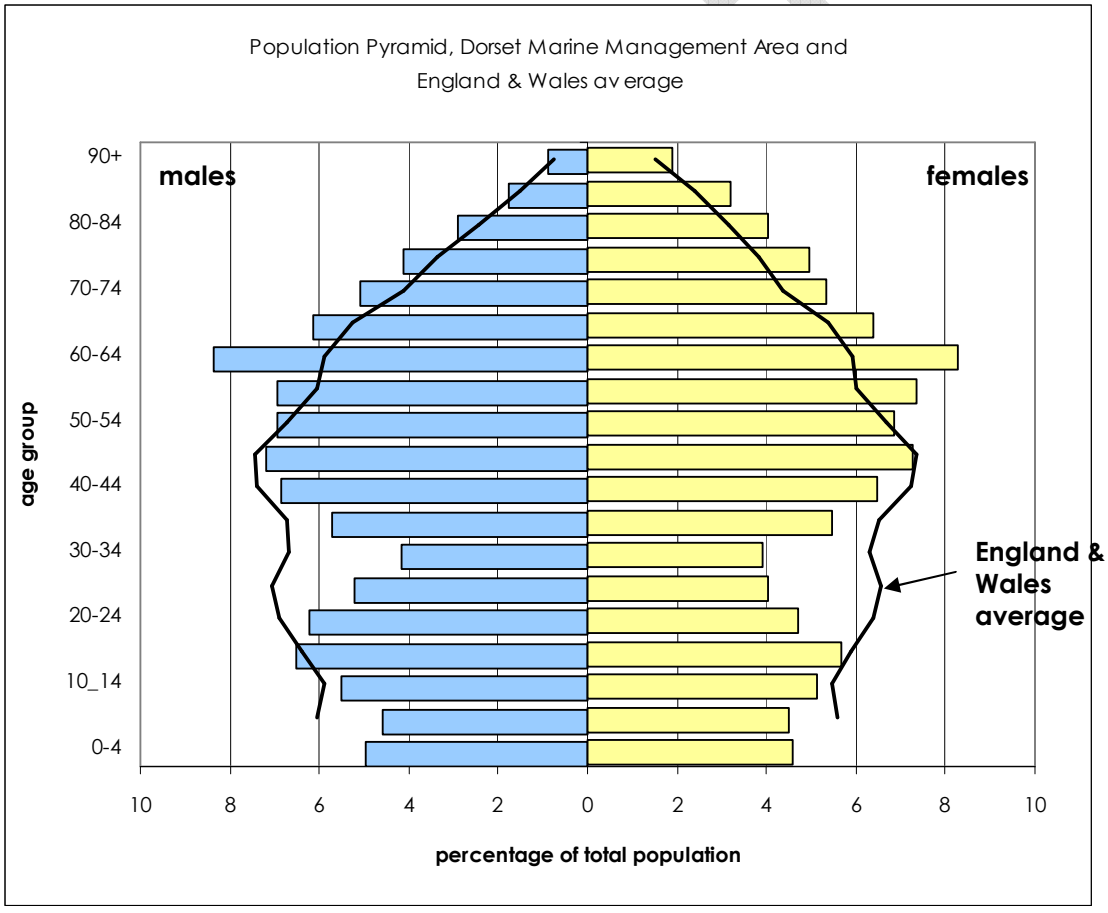
Figure 5



AGE PROFILE OF RESIDENTS

Just over 23% of the population in this area are aged 65+ years. This is significantly higher than the national average of 16%, however across Dorset County Council area (DCC) as a whole just over 25% of the population are aged 65+ years (2009 mid-year population estimates). Figure 6 below shows the most significant difference between the population in the study area and the national average is the number of young adults. In particular those aged in their 20s and 30s. This age group (20-39 years) account for less than 20% of the total population. In England & Wales almost 27% of the population are in this age group.

Figure 6



Within the study area there are quite large variations in terms of age profile. Swanage has one of the highest proportions of older people in the County, in the northern part of the town (Swanage North ward) over 38% are aged 65+ years. Preston in Weymouth also has a very higher proportion of older people with over 37% aged 65+ years. In contrast the most rural parishes in Purbeck have the lowest proportion of people aged 65+, in Steeple just 11% are in this age group and 15% in Chaldon

Herring and Kimmeridge parishes. This may be due to the remoteness of these parishes.

ETHNICITY

At the time of the last census, 2001, just over 4% of the population in the study area were of Black or Minority Ethnic (BME) backgrounds. This figure was slightly higher than the average across Dorset as the time (3.2%) but significantly lower than the national average of 13% (England).

This figure does include those living in communal establishments such as the prisons on Portland and the International School in Swanage, where the BME population is higher. When looking just at those living in households in the study area the percentage of the population that are of BME groups is just under 3%.

Population estimates by ethnic group have been produced since the last census, the latest available are for 2007, but only at local authority level. These show that the BME population in Dorset has almost doubled since 2001 to 6.5%. However, the BME population in Dorset remains significantly lower than the national average of 16%. These estimates are experimental statistics form the Office for National Statistics which can only be validated following the 2011 Census.

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I N E Q U A L I T I E S

ACORN SOCIO-ECONOMIC CLASSIFICATIONS

The study area has been analysed using ACORN classifications which consider socio-economic data drawn from a number of different sources including the Census, national and household surveys.

Figure 7 and Table 1 illustrate the breakdown of ACORN classifications at the most general level that is given and show that households classified as either " Wealthy Achievers" or "Comfortably off" make up 60% of the households in the study area. This figure is higher than the national figure of 52% but lower than the figure for Dorset (78%). The rural part of the study area is almost wholly classified within one of these two categories, with some areas in the towns included too. Approximately one in five households in the study area (21%) are classified as of "Moderate Means" this figure is substantially higher than for Dorset (9%) and higher than the national figure of 14.5%. The majority of those living in these "Moderate Means" households are from Portland with small pockets in Weymouth, Swanage and Corfe Castle. The proportion of "Hard Pressed" households in the study area is 6.4% a figure that is significantly lower than the national figure of 22.4% and lower than for Dorset (9.1%). The "Hard Pressed" households are all within the urban areas of Swanage and Weymouth and also on Portland. There are approximately one in ten households (9.2%) classified as "Urban Prosperity", mainly within Weymouth and Swanage town centres. This classification of "Urban Prosperity" does not particularly accord with the make up of Weymouth Town Centre which is one of the most deprived areas of the County. It is important to remember that the ACORN classifications can only act as a guide. The characteristics applied to a postcode and the households within that postcode are derived from a range of sources some of which are based on household returns such as the Census whilst others are drawn from sample based national surveys.

Table 1.

ACORN Category	Number of Households	Percentage of Households
Wealthy Achievers	644	31.7%
Comfortably Off	584	28.7%
Urban Prosperity	187	9.2%
Moderate Means	441	21.7%
Hard Pressed	130	6.4%
Unclassified	47	2.3%
total	2033	
Source CACI 2009		

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Figure 7

Dorset Marine Management Area - ACORN Classifications

COUNCIL TAX BENEFIT DATA

The percentage of people reliant on Council Tax benefit (a means tested benefit) within the study area is 17.6%. This figure looks at the number of people claiming the benefit as well as their partners and dependents. If this is compared to the data for Bournemouth, Dorset and Poole (16.5%) and Dorset County Council Area (14.5%) it highlights a slightly higher proportion of people reliant on this benefit within the study area.

When the data is looked at in more detail (figure 8 and table 2) it can be seen that the greatest concentration of benefit claimants are within the urban areas of Weymouth and Portland and Swanage. In general the rural communities within the study area have relatively low levels of benefit claimants with only East Lulworth having just above the average level of population reliant on benefits.

Table 2

NAME	Benefit Population	Population	Percentage Benefit Population
Melcombe Regis Ward	1820	5900	30.9%
Underhill Ward	1140	3940	28.9%
Weymouth East Ward	802	3310	24.2%
Tophill West Ward	1000	4930	20.3%
Weymouth West Ward	935	5140	18.2%
Wyke Regis Ward	936	5470	17.1%
Swanage CP	1515	9850	15.4%
East Lulworth CP	26	170	15.3%
Tophill East Ward	502	3590	14.0%
Corfe Castle CP	197	1500	13.1%
Radipole Ward	478	3670	13.0%
Winfrith Newburgh CP	77	670	11.5%
Kimmeridge CP	13	120	10.8%
Langton Matravers CP	94	920	10.2%
Osmington CP	57	580	9.8%
West Lulworth CP	49	570	8.6%
Owermoigne CP	42	490	8.6%
Steeple CP	6	90	6.7%
Preston Ward	289	4930	5.9%
Studland CP	25	450	5.6%
Worth Matravers CP	27	630	4.3%
Chaldon Herring CP	4	140	2.9%
Tyneham*	0	0	0.0%
Source: Population 2009 DCC Estimates, Benefit Data July 2010 DWP			

*Tyneham was evacuated during WW2, and has been uninhabited since.

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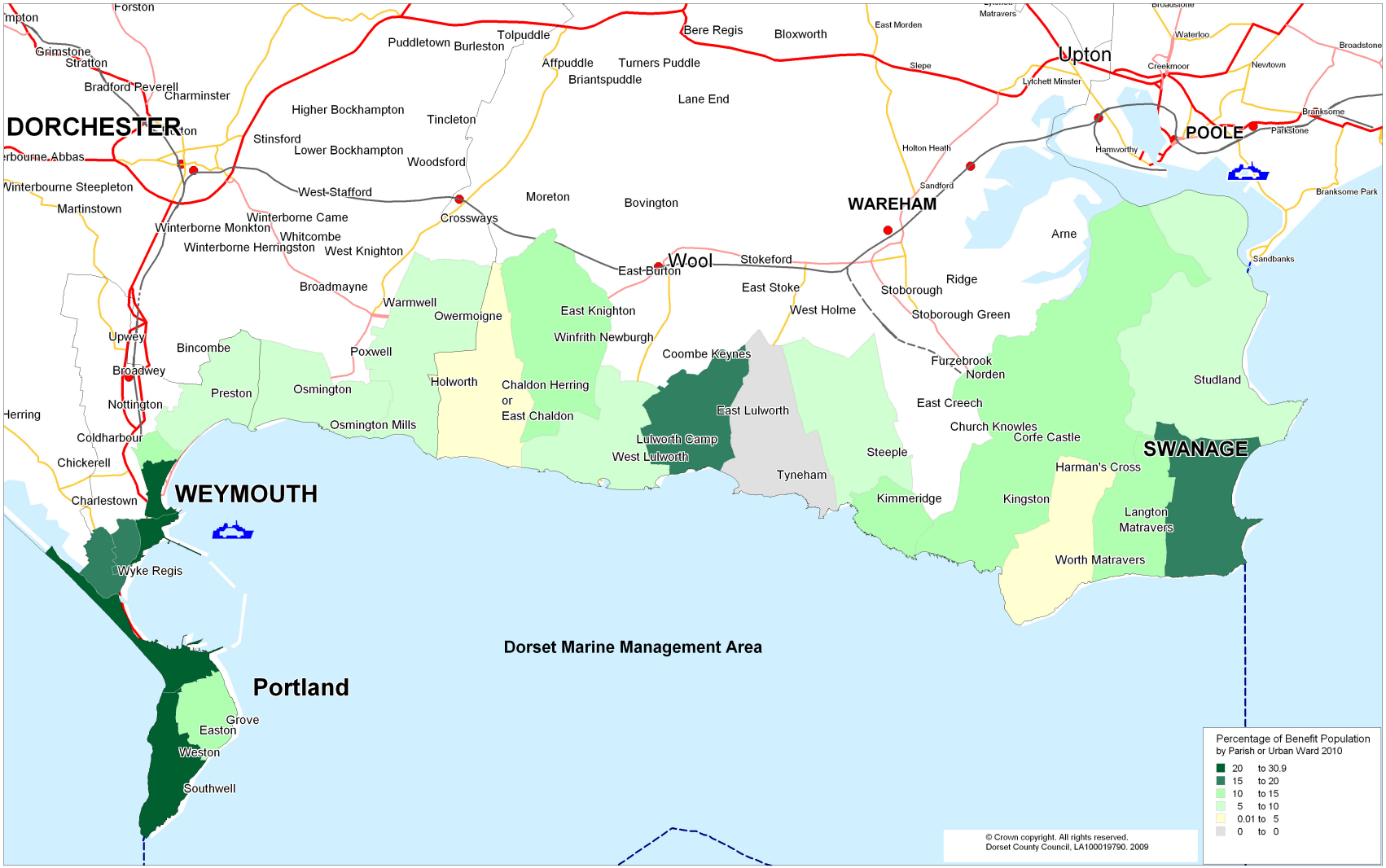
Figure 8

Percentage of Council Tax Benefit Claimants by Parish and Urban Ward - Dorset Marine Management Area



INDICES OF DEPRIVATION 2007

The Indices of Deprivation 2007 dataset is the national benchmark for measuring deprivation and its individual facets at a small area level across the country. It has been produced for the Department of Communities and Local Government by the Social Disadvantage Research Unit at the University of Oxford.

The Indices measure seven distinct aspects of deprivation and also combine these to produce an overall index of multiple deprivation. The deprivation is measured at Lower Super Output Area[2] (LSOA) and given a score. The areas are then ranked across the country with 1 being the most deprived area nationally and 32,482 the least deprived.

The LSOAs that make up the study area have been compared nationally for multiple deprivation and divided into quintiles to indicate where the areas fall into the top 20%, 40% most deprived etc.

MULTIPLE DEPRIVATION

The map below illustrates the relative lack of multiple deprivation across most of the study area. However, in the urban borough of Weymouth and Portland there are areas of significant deprivation with five Lower Super Output Areas within the top 20% most deprived areas nationally for this composite measure of deprivation. Five further areas fall into the top 40% most deprived nationally these are all within Weymouth and Portland borough.

The table below shows the ten LSOAs within the study area that fall into the top 40% most deprived with the areas that are within the top 20% highlighted in green.

Table 3

LSOA Code	District	LSOA Name	National IMD Rank
E01020554	Weymouth and Portland	Melcombe Regis Town Centre	2051
E01020553	Weymouth and Portland	Melcombe Regis Carlton Road	3702
E01020555	Weymouth and Portland	Melcombe Regis Park District	3835
E01020569	Weymouth and Portland	Fortuneswell North	4550
E01020582	Weymouth and Portland	Rodwell and Chapelhay	6410
E01020556	Weymouth and Portland	Melcombe Regis Lodmoor Hill	6642
E01020567	Weymouth and Portland	Castletown and Chiswell	9868
E01020568	Weymouth and Portland	Fortuneswell South	12176
E01020585	Weymouth and Portland	Weymouth West Doncaster Rd	12391
E01020564	Weymouth and Portland	Weston West	12727

[2] Lower Super Output Areas are Census based geographies with an average population of 1,500 people.

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Figure 9

Dorset Marine Management Area - Index of Multiple Deprivation National Ranking 2007

GEOGRAPHICAL ACCESS TO SERVICES

One of the distinct aspects of deprivation measured by the Indices of Deprivation is Barriers to Housing and Services. This domain is split further into two sub-domains one that measures wider barriers and concentrates on access to housing; the second sub-domain specifically looks at geographical barriers and measures distances to a range of important services: Post Offices, Schools, Shops and GPs.

Ten of the LSOAs within the study area fall within the top 20% most deprived nationally for this measurement. A further five areas are within the top 40% most deprived based on this measure of deprivation. Figure 10 and Table 4 illustrate the level of access deprivation across the study area. For people without easy access to private transport such as older people, low income households, young people and those with mobility problems, poor access to services can have a significant impact on their quality of life.

Table 4

LSOA Code	District	LSOA Name	National Geog. Access Rank
E01020489	Purbeck	West Purbeck	430
E01020490	Purbeck	Winfrith	441
E01020537	West Dorset	Owermoigne South & Osmington	1053
E01020467	Purbeck	Creech Barrow	1377
E01020466	Purbeck	Castle	3117
E01020480	Purbeck	New Swanage & Ulwell	3244
E01020569	Weymouth and Portland	Fortuneswell North	4260
E01020557	Weymouth and Portland	Preston Overcoombe	4387
E01020468	Purbeck	Langton	4620
E01020566	Weymouth and Portland	Southwell and Portland Bill	5774
E01020483	Purbeck	Swanage Herston	7569
E01020559	Weymouth and Portland	Preston	8949
E01020567	Weymouth and Portland	Castletown and Chiswell	10319
E01020581	Weymouth and Portland	Rodwell and the Nothe	10999
E01020585	Weymouth and Portland	Weymouth West Doncaster Rd	11733

Within many of these areas levels of car ownership are relatively high, therefore mitigating the issue. However, on average 10% of households in rural Purbeck did not have access to a car in 2001. For these households accessing services would be a significant issue.

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Figure 10

Dorset Marine Management Area - Geographical Access to Services National Ranking 2007

H E A L T H

LIFE EXPECTANCY

In general Dorset's residents are relatively healthy and have some of the highest life expectancies in the Country. In Purbeck district life expectancy is around 2 years longer than the national average, female life expectancy is 84 years, ranked 30th of all local authorities in England and for males 80.7 years, ranked 17th. (Rankings out of a total of 354 local authorities in England). The figures are just slightly lower in West Dorset district (83.9 years for females and 79.9 for males) whilst in Weymouth & Portland figures are lower still, but still higher than the national average.

DISABILITY AND LONG TERM ILLNESS

The Census, in 2001, asked all residents to state if they had a disability or limiting long term illness. At the time 19% of Dorset's population answered yes to this question. For the C-SCOPE study area the figure was slightly higher at 21%, and within it the figures ranged from just 10% in Chaldon Herring Parish up to 29% in central Weymouth (Melcombe Regis ward).

More recent data on disability is based on those claiming attendance allowance (AA) or disability living allowance (DLA). In February 2010 just 8% of Dorset's population were claiming one of these benefits. The figure was slightly higher in the C-SCOPE study area (based on wards) at 8.5%. Within the study area the highest level of claimants was in Melcombe Regis ward (11.5%) and lowest in Winfrith ward (5.2%), which includes Chaldon Herring parish. These figures are much lower than those recorded by the Census. This is due to the fact that the census was a broader question, asking people to include problems related to old age. Many of these people would not be entitled to disability related benefits. Although the numbers are different the patterns are same in terms of highest and lowest figures within the study area.

TEENAGE CONCEPTIONS

Overall the rate of teenage conceptions in Dorset is low. The latest figures are for the three year period 2006 to 2008 there were 26.3 conceptions per 1000 females aged 15-17 years in Dorset. During this same period the figure for England & Wales was 41 per 1000. Within the County teenage conception rates were highest in Weymouth & Portland Borough at 45.6 per 1000, and just above the national average. In Purbeck the rate was much lower at around 30 per 1000, but still above the County average. Based on wards the teenage conception rate in the C-SCOPE study area was 38 per

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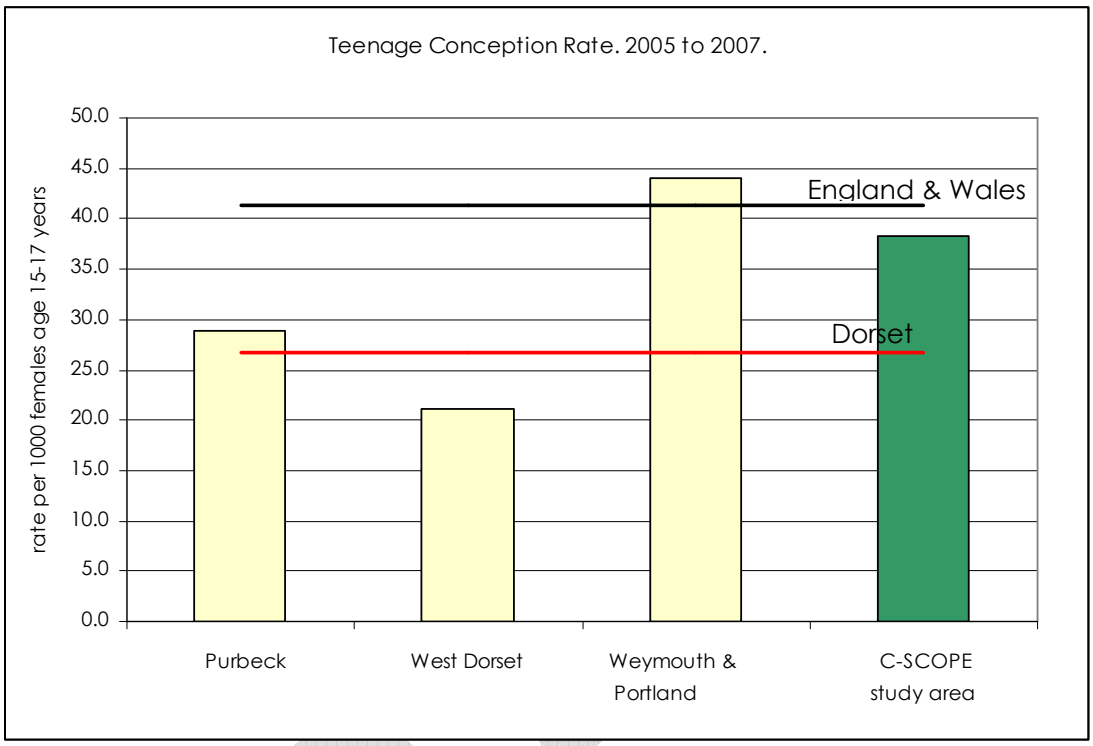
1000. This is due to the fact that it includes areas with the highest teenage conception rates in the County, such as central Weymouth.

Figure 11



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H O U S I N G

ACCOMMODATION TYPE

Within the study area there is quite a distinct urban rural split in terms of the type of housing. In the rural parishes there is a high proportion of detached properties, and very few flats, whilst the opposite is true in the urban areas. In central Weymouth (Melcombe Regis ward) almost 65% of properties are flats and in Swanage over 35% are flats. In the more rural parishes detached properties dominate, in Worth Matravers almost 83% are detached and in Owermoigne the figure is 72%. Portland is slightly different, here terraced properties dominate making up almost 52% of the housing stock.

TENURE

There are links with all of the housing data; where there are more detached properties average prices are higher and there are also tends to be more owner occupiers, particularly those who own outright. Overall almost 40% of households in the study area are owned outright, this is similar to the County average but much higher than the average across England & Wales (30%). The figures are highest for Worth Matravers where 65% of households are owned outright, Preston (Weymouth) 58% and Owermoigne 57%.

Within the study area there is also a large proportion of households in the 'other rented' category which includes renting from your employer. These figures are particularly high in East Lulworth (37%), West Lulworth (24%), Chaldon Herring (19%) and Kimmeridge (18%). This is due to the large private estates such as the Smedmore Estate and the Lulworth Estate in this area of Purbeck's coast.

HOUSE PRICES

The latest data on house prices from HM Land Registry is based on sales from April to June 2010 by postcode sector area (e.g. DT2 1). There are ten postcode sectors that cover the study area. Based on these the average selling price between April and June 2010 was £246,190, this is higher than the national average of £230,560 but below the county average (£262,675). There is a huge variation in price within the study area; the highest prices were for sales in BH19 3 (Swanage South) between April and June 2010 seven detached properties sold in this area with an average price of £514,280. The lowest prices were in DT4 7, DT5 1 and DT5 1; Central Weymouth and Portland, with prices all around £175,000.

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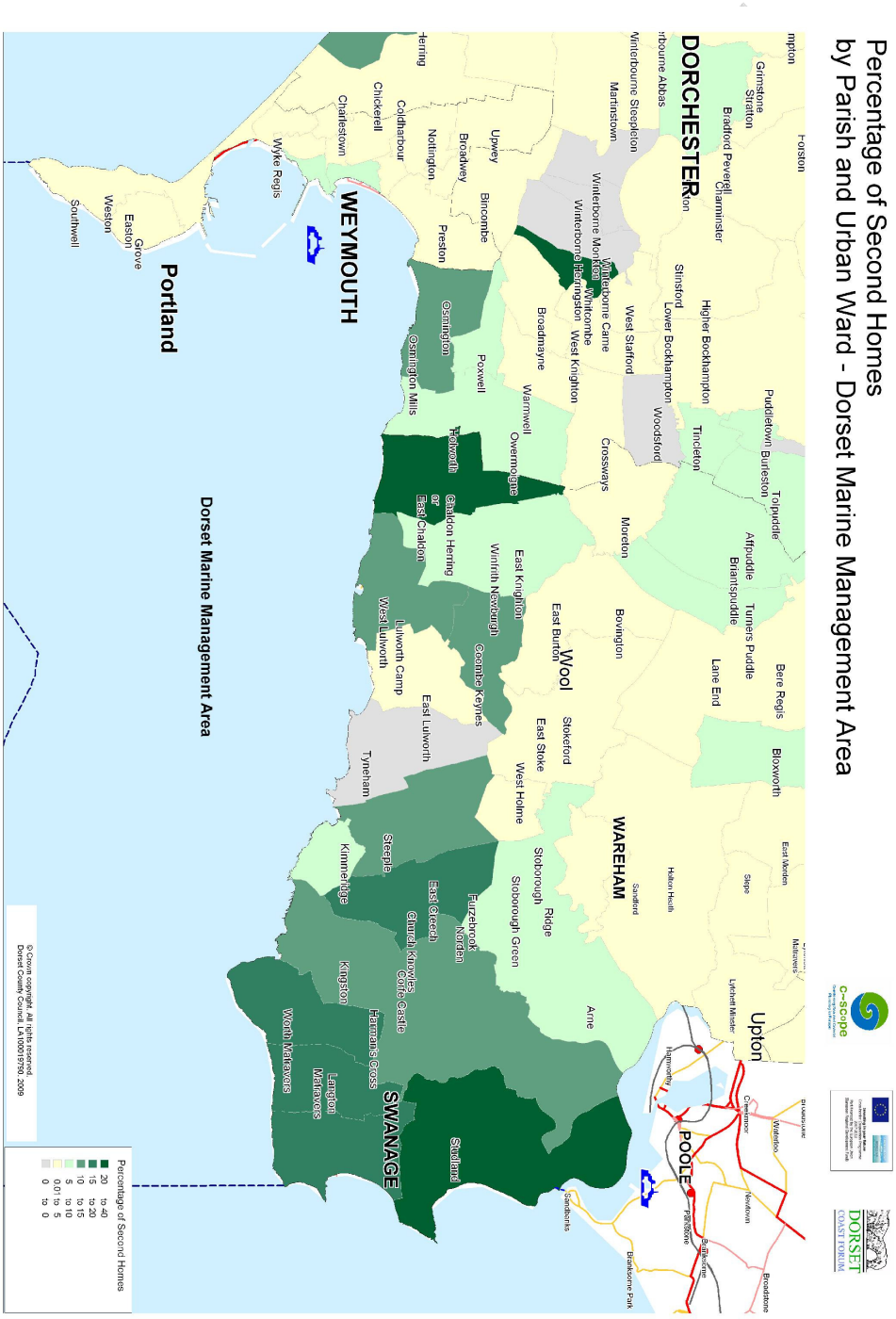
SECOND HOMES

In 2001 (Census) almost 3% of properties in Dorset were second homes / holiday homes, significantly higher than the national average of just 0.7%. Within the County second homes / holiday homes are concentrated along the coast areas of Purbeck and West Dorset. More recent data from the 2010 Council Tax returns shows that second homes make up almost 21% of dwellings in Chaldon Herring and 20% in Worth Matravers. Figure 12 illustrates.

Figure 12



LABOUR MARKET

EMPLOYMENT

2008 data indicates that the C-SCOPE area has about 22,700 employees in employment. This represents about 15% of all employees in DCC Dorset. Around 67% of these employees work in Weymouth & Portland; 29% in Purbeck and just 4% in West Dorset.

The C-SCOPE area has an above average proportion of female workers: 54% compared with 51% in DCC Dorset as a whole and 49% in England & Wales. This is largely due to high representation of female employees in Weymouth & Portland: 58%. At ward level, wards in Weymouth and Swanage have particularly high representation of female employees.

In addition, the C-SCOPE area has an above average proportion of part time employees: 45% compared with 40% in DCC Dorset as a whole and just 31% in England & Wales. This is again largely due to high representation of part time employees in Weymouth & Portland: 48%. At ward level, wards in Weymouth and Swanage South in particular had high representation of female employees.

EMPLOYMENT SECTORS

With leisure & tourism (direct[3]) alone accounting for 13% of employment in the C-SCOPE area, compared with about 5% in DCC Dorset as a whole, the most significant broad employment sector is Distribution, hotels & restaurants which covers more than a third of employment in the area: considerably more than the proportions seen nationally or in the county.

Another big difference between the C-SCOPE area and the England & Wales average is in Banking, finance & insurance etc employment: with the national average at more than 20% of employment but the C-SCOPE average at just 14% - more in line with DCC Dorset.

Public administration, education & health is the second largest sector in the C-SCOPE area employing about the same percentage as the county as a whole and above the national average. The area is poorly represented in manufacturing employment with the service sector accounting for 90% of employees – above the average for England & Wales (84%) and DCC Dorset (80%).

[3] ie does not include employment supported by tourism such as retail

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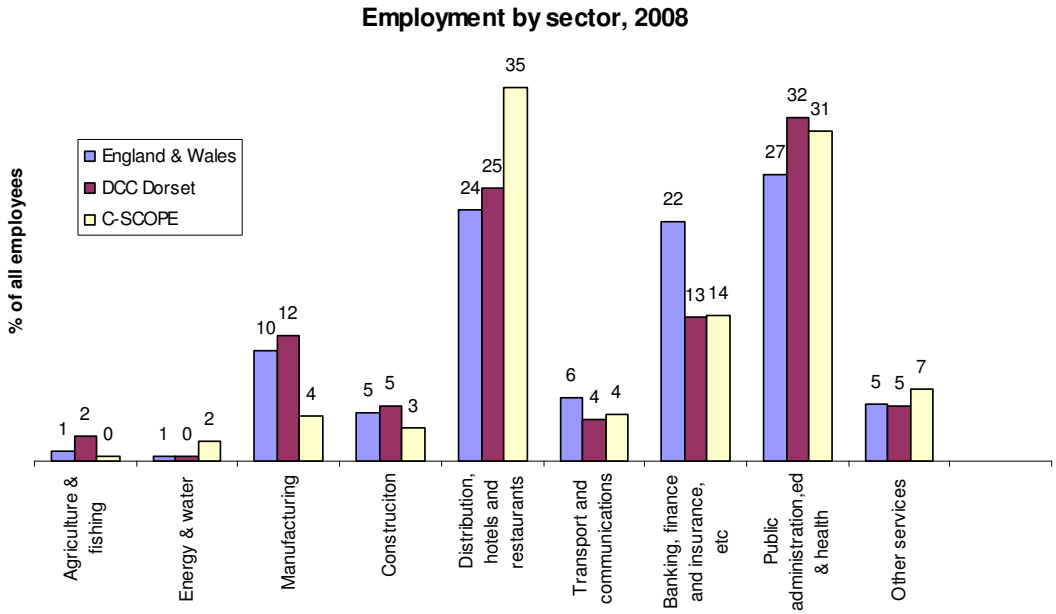
Figure 13



At 45% of employment, the knowledge intensive sector is marginally below the county average of 47% with Dorset itself below the England & Wales average of 51%.

By local authority area, Purbeck has the highest percentage employed in leisure & tourism across the district: ten per cent compared with eight per cent in Weymouth & Portland and six per cent in West Dorset. However, as in West Dorset and also in Weymouth & Portland, Purbeck's most significant sector is Public administration, education & health with Distribution, hotels & restaurants the second most important sector. Purbeck has a more significant level of employment in manufacturing than the other two districts: 16%.

Employment in the service sector is particularly high in some of the Weymouth wards. Employment in manufacturing is above average in some of the Portland wards.

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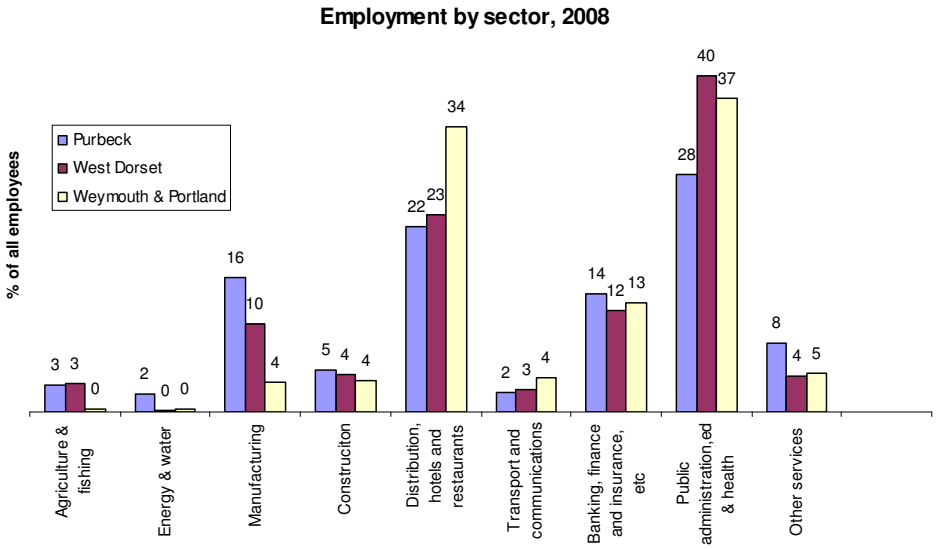
Figure 14



Source: Annual Business Inquiry, 2008 (Office for National Statistics)

UNEMPLOYMENT

Data from the monthly claimant count shows that rates in DCC Dorset and the C-SCOPE area have consistently been below the level of England & Wales since 2006. They have also followed the same trend, apart from a period between April 2009 and January 2010, where the England & Wales claimant rate increased and then levelled off, whereas both the claimant rates for DCC Dorset and the C-SCOPE area fell during the same period until September 2009 when they increased.

Comparing the C-SCOPE area to DCC Dorset shows that the claimant rate has remained greater in the C-SCOPE area than in DCC Dorset since 2006 although the trend has been the same for both. This is because of the high unemployment levels found within districts that make up the C-SCOPE area.

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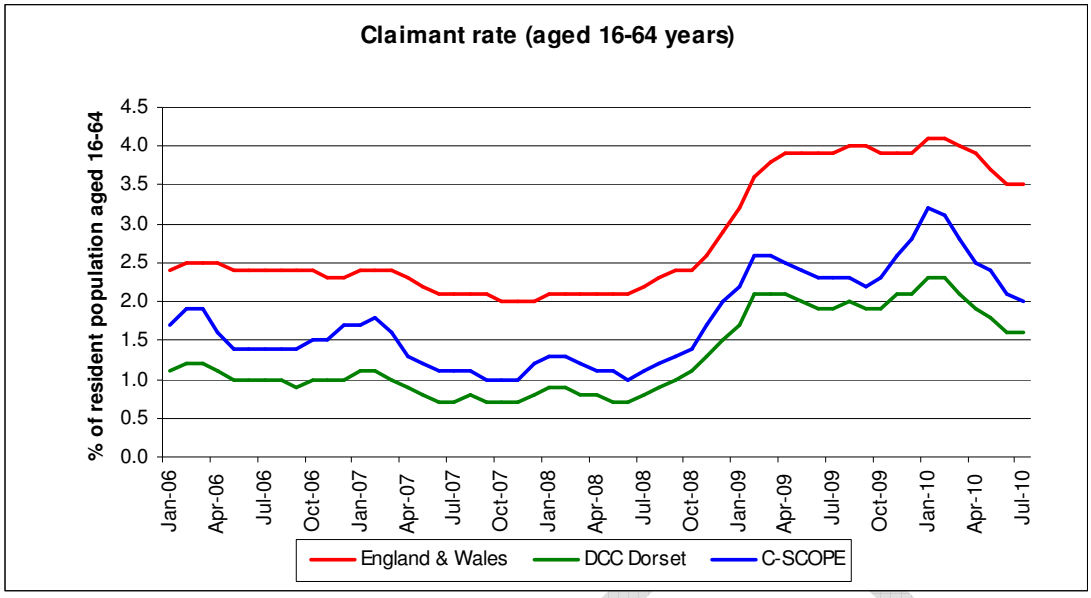
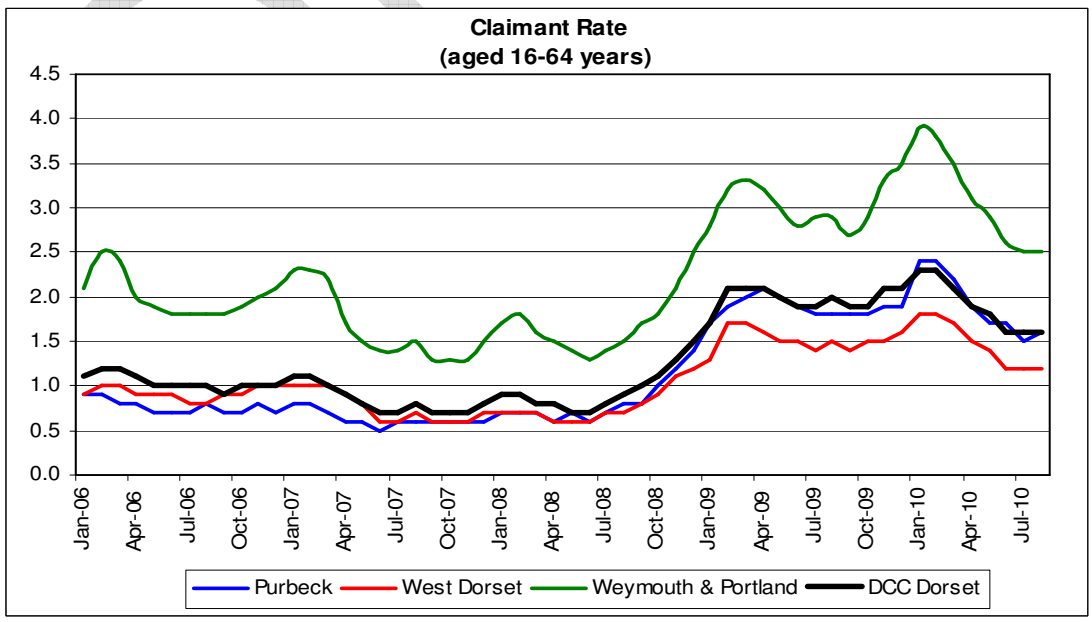
Figure 15



Source: ONS Crown Copyright Reserve

The districts that lie within the C-SCOPE area are Purbeck, West Dorset and Weymouth & Portland. Since January 2009, the claimant rate for Purbeck has been very much in line with the rate for DCC Dorset, while the rate for West Dorset has tended to fall slightly below. It is the high claimant rate in Weymouth & Portland that has pushed up the overall rate for the C-SCOPE area. Although closely following the trend of the DCC Dorset level, Weymouth & Portland has consistently been above it, and the lower rates of Purbeck and West Dorset did not compensate for this.

Figure 16



Source: ONS Crown Copyright Reserve

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Within the C-SCOPE area, the five wards with the highest average claimant rates (for the first six months of 2010) are in the Weymouth & Portland borough. Melcombe Regis has the highest rate (5.7%), which is greater than the average rate for England & Wales, and Weymouth East has a claimant rate equal to that of England & Wales. The five wards with the lowest claimant rates in the C-SCOPE area are all within the Purbeck district and are less than half the rate of England & Wales. Overall the high rates of unemployment in the Weymouth & Portland wards pull up the average for the C-SCOPE area as a whole.

Over the four years from 2006 to 2009 (inclusive), all the wards and districts/ boroughs in the C-SCOPE area have seen an increase in the annual average claimant rate and, with one exception, this appears to be continuing for 2010, given the average rates for the first six months. The exception is Castle Ward in Purbeck, where the claimant rate for January to June of 2010 is slightly less than the average rate for 2009. In addition, in the first half of 2010, Tophill East Ward's rate was equal to 2009 as was the case in DCC Dorset as a whole.

Table 5.

Average Claimant Rate						
		2006	**2007**	**2008**	**2009**	**Jan - Jun 2010**
England and Wales		2.4	2.2	2.3	3.8	3.9
DCC Dorset		1.0	0.8	0.9	2.0	2.0
Purbeck		0.8	0.6	0.8	1.9	2.0
West Dorset		0.9	0.8	0.8	1.5	1.6
Weymouth and Portland		2.0	1.6	1.7	3.0	3.3
CScope area		1.6	1.3	1.3	2.4	2.7
C-SCOPE Ward	**District**	**2006**	**2007**	**2008**	**2009**	**Jan - Jun 2010**
Melcombe Regis	W&P	4.0	3.3	3.0	5.3	5.7
Weymouth East	W&P	2.2	1.8	1.9	3.4	3.9
Underhill	W&P	2.6	2.0	1.9	3.5	3.6
Tophill West	W&P	1.8	1.2	1.4	2.9	3.0
Weymouth West	W&P	1.5	1.3	1.3	2.6	2.9
Swanage South	Purbeck	0.8	0.7	0.9	2.1	2.6
Wyke Regis	W&P	1.5	1.2	1.1	2.2	2.4
Radipole	W&P	1.3	1.0	1.0	1.7	2.1
Tophill East	W&P	1.2	1.0	1.0	2.0	2.0
Swanage North	Purbeck	0.8	0.5	0.6	1.5	1.8
Preston	W&P	0.8	0.6	0.8	1.3	1.6
Owermoigne	W. Dorset	0.6	0.9	0.8	1.2	1.5
West Purbeck	Purbeck	0.7	0.7	0.4	1.4	1.5
Creech Barrow	Purbeck	0.5	0.2	0.2	1.1	1.4
Winfrith	Purbeck	0.5	0.5	0.6	1.1	1.4
Langton	Purbeck	0.6	0.5	0.4	0.9	1.1
Castle	Purbeck	0.3	0.3	0.5	1.2	1.0

Greater than or equal to the Claimant rate for England & Wales

Less than or equal to half the Claimant rate for England & Wales

Source: ONS Crown Copyright Reserve

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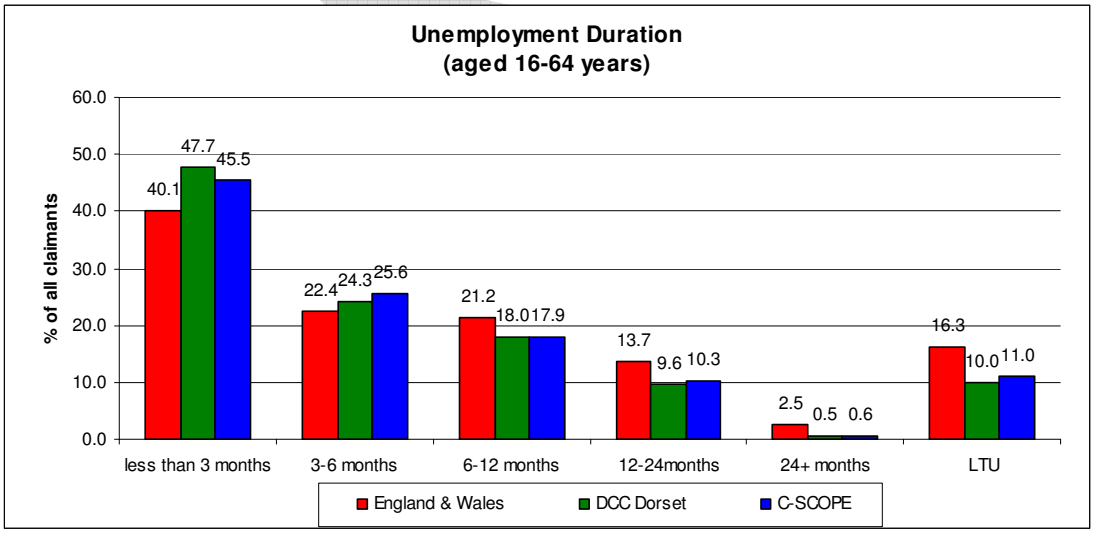
DURATION OF UNEMPLOYMENT

Data relating to the length of time spent claiming Job Seekers Allowance (JSA), between January and June 2010, shows that the average proportion of claimants in DCC Dorset and the C-SCOPE area that have spent less than three months as claimants is greater than England & Wales. The same is true for the claimant duration of three to six months.

For the longer durations of 6-12 months, 12-24 months and 24+ months the proportion of claimants in DCC Dorset and the C-SCOPE area is less than England & Wales. Long Term Unemployment (LTU) is the proportion of claimants who have been claiming JSA for longer than 12 months. Both DCC Dorset and the C-SCOPE area have LTU averages for January – June 2010 that are below the level for England & Wales (by approximately five and six percentage points respectively). In August 2010, 110 claimants in the C-SCOPE area were long term unemployed – 450 in the DCC Dorset area altogether.

The proportion of claimants in the C-SCOPE area, for all duration bands, is very much in line with DCC Dorset, although the proportion claiming JSA for less than three months is slightly below the level of DCC Dorset and the proportion claiming JSA for three to six months is slightly above. LTU in the CScope area is one percentage point greater than in DCC Dorset.

Figure 17



Within the C-SCOPE area, the districts Purbeck, West Dorset and Weymouth & Portland have very similar proportions of claimants in each duration band. The largest difference is for 12-24 months, where the proportion of claimants in Purbeck is approximately three percentage points greater than in West Dorset and Weymouth

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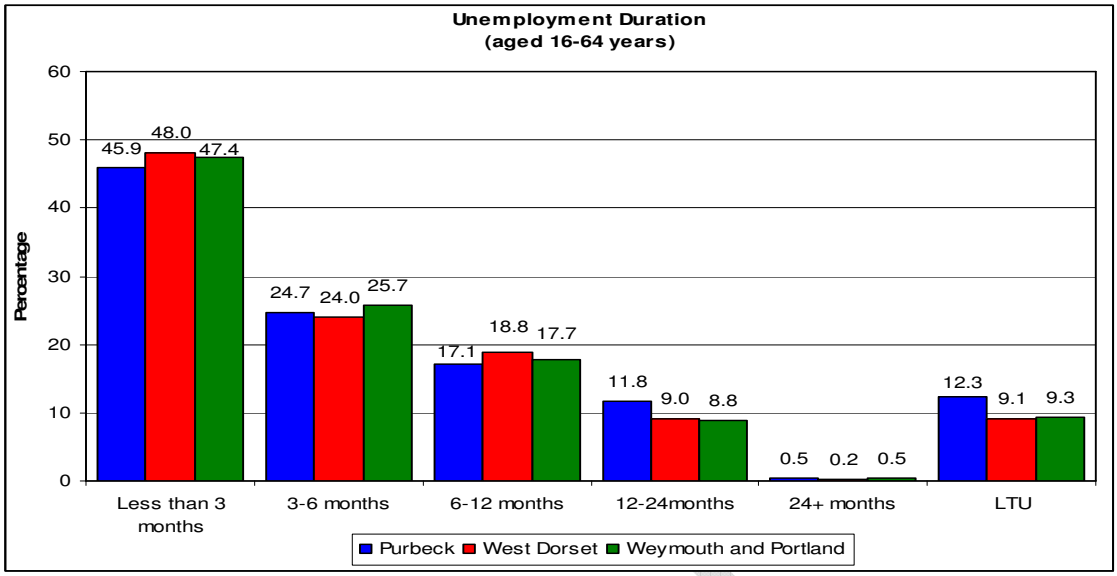
& Portland. This is also reflected in the proportion of claimants who are Long Term Unemployed overall (12 months or more).

Figure 18



The three wards with the highest levels of LTU are in the Purbeck district, where the proportions of LTU are greater than in England & Wales (16.3%). These are Swanage North Ward (25.9%), Castle Ward (21.5%) and Swanage South Ward (17.7%). Radipole (Weymouth & Portland borough) has the lowest level of LTU (2.4%), which is significantly lower than the level of England & Wales (16.3%). There are eight wards within the C-SCOPE area where the proportion of claimants who are LTU is less than half the proportion of England & Wales. Four of these are in Purbeck and four are in Weymouth & Portland. The one ward in the C-SCOPE area that is in West Dorset (Owermoigne) has the fourth highest level of LTU (14.9%) but is less than England & Wales.

Winfrith Ward in Purbeck, however, has the highest proportion of people claiming JSA for less than three months (53.6%), which is more than ten percentage points greater than the level in England & Wales. The next five wards with the highest levels of people claiming JSA for less than three months are approximately ten percentage points greater than England & Wales and all in Weymouth & Portland. The lowest proportion of claimants claiming JSA for less than three months is in the Swanage North Ward (30.1%) in Purbeck. In the C-SCOPE area, three other wards have fewer individuals claiming JSA for less than three months (all in the Purbeck district) than England & Wales: Castle Ward (32.9%); Creech Barrow Ward (38.8%); West Purbeck Ward (39.5%).

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Table 6

Claimant Duration: January - June 2010 (Average)		Less than 3 months	3 - 6 months	6 - 12 months	12 - 24 months	24+ months	LTU
England and Wales		40.1	22.4	21.2	13.7	2.5	16.3
DCC Dorset		47.7	24.3	18.0	9.6	0.5	10.0
Purbeck		45.9	24.7	17.1	11.8	0.5	12.3
West Dorset		48.0	24.0	18.8	9.0	0.2	9.1
Weymouth and Portland		47.4	25.7	17.7	8.8	0.5	9.3
CScope		45.5	25.6	17.9	10.3	0.6	11.0
C-SCOPE Ward	**District**						
Swanage North	Purbeck	30.1	26.4	17.6	25.5	0.4	25.9
Castle	Purbeck	32.9	22.8	22.8	20.3	1.3	21.5
Swanage South	Purbeck	43.6	22.7	16.0	16.6	1.1	17.7
Owermoigne	W.Dorset	48.8	22.9	13.4	12.4	2.5	14.9
Melcombe Regis	W&P	42.1	24.8	19.5	12.3	1.3	13.6
Weymouth East	W&P	44.2	26.9	17.5	11.0	0.4	11.3
Weymouth West	W&P	50.4	24.8	13.7	10.0	1.1	11.1
Wyke Regis	W&P	46.4	25.0	18.7	9.9	0.0	9.9
Underhill	W&P	50.7	26.2	14.1	8.5	0.5	9.0
Preston	W&P	50.0	25.2	16.7	8.1	0.0	8.1
Winfrith	Purbeck	53.6	26.8	12.4	7.2	0.0	7.2
Langton	Purbeck	43.5	33.3	17.4	5.8	0.0	5.8
Tophill East	W&P	42.7	25.2	26.8	5.4	0.0	5.4
Tophill West	W&P	50.0	26.7	19.0	4.3	0.0	4.3
Creech Barrow	Purbeck	38.8	31.1	26.2	3.9	0.0	3.9
West Purbeck	Purbeck	39.5	29.1	27.9	3.5	0.0	3.5
Radipole	W&P	52.1	28.1	17.5	2.4	0.0	2.4

Greater than or equal to the proportion of 'England & Wales'

Less than or equal to half proportion of 'England & Wales'

Source: ONS Crown Copyright Reserve

AGE OF CLAIMANT

The average proportions of claimants from January to June 2010 show very little difference between England & Wales, DCC Dorset and the C-SCOPE area for all the age groups. However, the proportion for England & Wales is slightly greater than DCC Dorset and the C-SCOPE area in the 16-24, 25-34 and 35-49 years age groups. The largest difference is for the 50+ years age group, where the proportion of claimants for England & Wales is approximately four and five percentage points below those of the C-SCOPE area and DCC Dorset respectively. For all three geographies, it is the 35-49 years age group where there is the largest proportion of claimants: England & Wales – 31.3%; DCC Dorset – 30.7%; C-SCOPE area – 29.7%. In contrast, the 50+ years age group has the lowest proportions of claimants: England & Wales – 15.4%; DCC Dorset – 20.8; CScope area – 19.7%.

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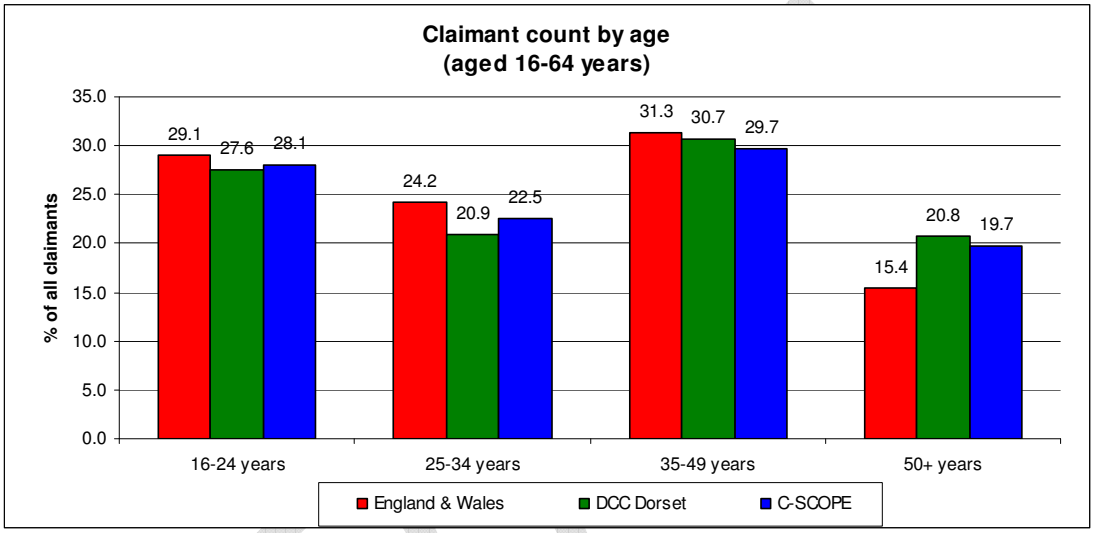
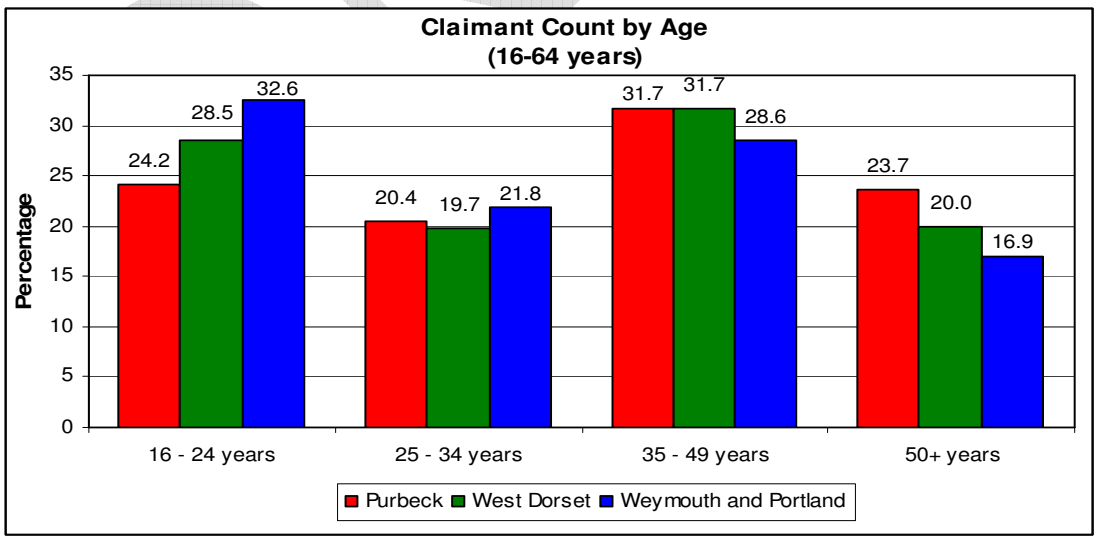
In all the age groups there is very little difference between DCC Dorset and the C-SCOPE area. The largest difference between the two areas is in the 25-34 years age group, where the proportion of claimants in the C-SCOPE area (22.5%) is 1.6 percentage points greater than DCC Dorset (30.9%). In the younger age groups of 16-24 years and 25-34 years, the C-SCOPE area has a slightly higher proportion of claimants than DCC Dorset, whereas in the older age groups of 35-49 years and 50+ years, it is DCC Dorset that has a higher proportion of claimants.

Figure 19



Source: ONS Crown Copyright Reserve

Figure 20



Source: ONS Crown Copyright Reserve

For districts that are in the C-SCOPE area, the largest differences are in the 16-24 years age group. Purbeck has the smallest proportion of claimants in this age group (24.2%). West Dorset is around four percentage points higher (28.5%) and Weymouth

& Portland is approximately eight percentage points greater (32.6%). The proportions of claimants in the 25-34 years and 35-49 years age group for the three districts are fairly similar but there are larger differences in the 50+ years age group. Purbeck (23.7%) is approximately four percentage points greater than West Dorset (20%) and seven percentage points higher than Weymouth & Portland (16.9%).

There are only five wards in the C-SCOPE area where the proportion of claimants in the 50+ years age group is less than the level for England & Wales (15.4%); three in Weymouth & Portland and two in Purbeck. These are Castle Ward (15.2%); Wyke Regis Ward (15.0%); Underhill Ward (13.1%); Radipole Ward (12%) and Creech Barrow Ward (2.9%). Winfrith Ward in Purbeck has the highest proportion of claimants in this age group of 35.1%, which is about 20 percentage points greater than the level for England & Wales.

Consequently, four out the five wards that had the lowest proportions of claimants in the 50+ years age group count for half of the eight wards that have proportions of claimants in the 16-24 years age groups that are higher than England & Wales (29.1%). The ward with the highest proportion of claimants who are aged 16-24 years is Weymouth West Ward (Weymouth & Portland) with 35.7%, which is over six percentage points higher than England & Wales. Langton Ward in Purbeck has the lowest proportion of claimants aged 16-24 years (8.7%), over 20 percentage points below the level of England & Wales.

Table 7.

Claimant Count by Age: January - June 2010 (Average %)		**16 - 24 years**	**25 - 34 years**	**35 - 49 years**	**50+ years**
England and Wales		29.1	24.2	31.3	15.4
DCC Dorset		27.6	20.9	30.7	20.8
Purbeck		24.2	20.4	31.7	23.7
West Dorset		28.5	19.7	31.7	20.0
Weymouth and Portland		32.6	21.8	28.6	16.9
CScope		28.1	22.5	29.7	19.7
C-SCOPE Ward	**District**				
Winfrith	Purbeck	18.6	17.5	28.9	35.1
Langton	Purbeck	8.7	5.8	50.7	34.8
West Purbeck	Purbeck	29.1	17.4	19.8	33.7
Swanage North	Purbeck	17.2	25.5	29.7	27.6
Tophill East	W&P	27.7	16.9	28.7	26.8
Swanage South	Purbeck	21.3	19.3	33.9	25.6
Owermoigne	W.Dorset	22.9	24.4	27.4	25.4
Melcombe Regis	W&P	25.5	25.7	28.6	20.2
Tophill West	W&P	33.3	20.7	26.2	19.8
Weymouth East	W&P	26.7	23.3	31.0	19.0

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Weymouth West	W&P	35.7	19.3	26.5	18.5
Preston	W&P	30.9	20.3	32.9	15.9
Castle	Purbeck	17.7	26.6	40.5	15.2
Wyke Regis	W&P	30.6	23.1	31.4	15.0
Underhill	W&P	33.0	25.6	28.4	13.1
Radipole	W&P	34.2	28.1	25.7	12.0
Creech Barrow	Purbeck	34.0	13.6	49.5	2.9

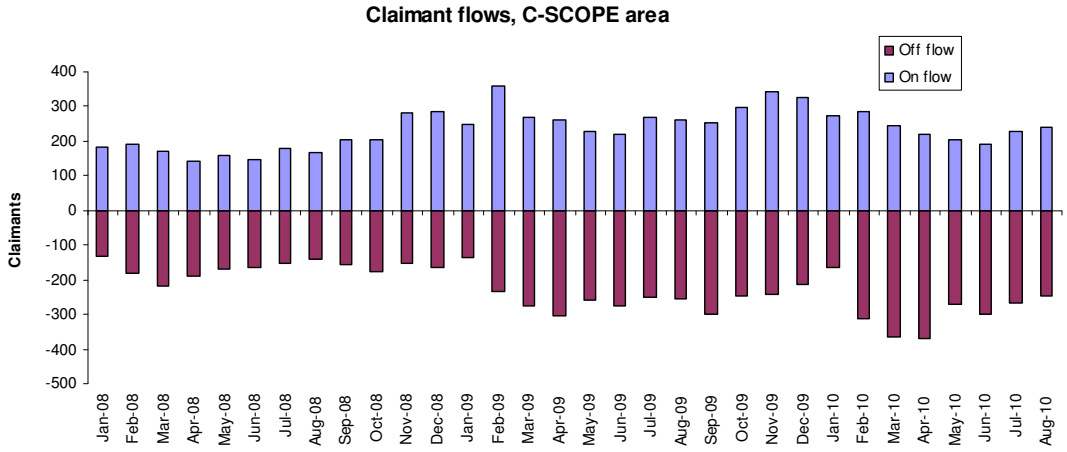
Greater than or equal to Great Britain

Source: ONS Crown Copyright Reserve

CLAIMANT FLOWS

Flows of claimants on and off the register are much in line with the DCC Dorset average with an increase in activity evident over 2008 and a peak in on-flows in February 2009. Off-flows peaked in March and April 2010, but have since reduced. On-flows appear to be rising again, in line with the county. Other than differences in scale, with Weymouth & Portland having the highest volume of claimant movements, the three C-SCOPE districts see much the same pattern.

Figure 21



On average over the first half of 2010, the main reason for leaving the unemployment count in the C-SCOPE area was 'found work' – 74% of leavers, in line with the county and above the England & Wales average of 68%. By district, Purbeck had the highest percentage moving into work (79%), whilst at 74% and 73% respectively, West Dorset and Weymouth & Portland were both much in line with the county average.

Weymouth & Portland had a higher proportion of claimants moving into government supported training: nine per cent compared with five per cent in Purbeck and seven per cent in West Dorset. This is below the national average of 11% and gives an average of eight per cent for the C-SCOPE area.

VACANCIES

With 223 vacancies in August 2010, the C-SCOPE area had a ratio of 3.6 claimants for every one live unfilled vacancy compared with 4.8 in England & Wales and 3.1 in DCC Dorset. Weymouth & Portland's ratio was more in line with the national average at 4.9 and Purbeck was also above the county average at 4.4. West Dorset was below the county average at 2.0 claimants per live unfilled vacancy.

In line with the county, the majority of vacancies in the C-SCOPE area were for Elementary administration & service occupations (43%). A further 12% were for Caring personal service occupations and 10% were for Sales occupations. This was a similar pattern to DCC Dorset. Elementary administration & service occupations were more significant locally – particularly in the CScope area – than nationally where there was a higher proportion of vacancies for Transport & mobile machine drivers and for Business & public service associate professionals.

In the C-SCOPE area, with 96 live unfilled vacancies in Elementary administration & service occupations and 105 claimants seeking work in that occupation, the ratio was fairly even at 1.1 claimants per vacancy in August 2010. More significant mismatches were evident in:

- Administrative occupations (25:1);
- Skilled agricultural trades (25:1);
- Secretarial & related occupations (15:1);
- Corporate managers (10:1);
- Skilled construction & building trades (9:1);
- Elementary trades, plant & storage occupations (8:1).

Most claimants sought work in Sales occupations, Elementary trades, plant & storage occupations and Elementary administration & service occupations: these accounted for 47% of all claimants. More than half of vacancies were in these three occupations, but the number of vacancies is insufficient to match the demand (2.8 claimants per vacancy).

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EARNINGS

Earnings data are only available to local authority area[4]. Data are available on a workplace or residence basis.

Workplace based data reflects the earnings offered by businesses in the area. With workplace based earnings in DCC Dorset as a whole below the national average, those in Weymouth & Portland were just 80% of the England & Wales average. In contrast, workplace based earnings in Purbeck were just above the national average.

Residence based earnings were higher in DCC Dorset at about 91% of the England & Wales averaged (compared with 88% of workplace based earnings). Weymouth & Portland was marginally higher (82% of the national average) and West Dorset was also higher (91% of England & Wales compared with 86% on a workplace basis). However, residence based earnings in Purbeck were lower than workplace based earnings and were only 89% of the England & Wales average).

Where residence based earnings are higher than workplace based earnings (DCC Dorset, West Dorset and Weymouth & Portland) the suggestion is that residents may be commuting to other areas for higher paid work as local employers are offering lower paid work. In cases such as Purbeck, where workplace based pay is higher than residence based pay, businesses are offering higher paid employment but this appears not to be taken up by residents. This implies that people are commuting in to the area to work. Higher workplace based earnings in Purbeck may derive from the oil and gas sector and from the high tech businesses based at Winfrith Green.

Table 8

Median gross weekly pay for full time employees, 2009		
	Workplace based	Residence based
England & Wales	£492.10	£492.80
DCC Dorset	**£433.80**	**£446.50**
Christchurch	£466.40	£434.80
East Dorset	£429.60	£499.30
North Dorset	£392.40	£423.30
Purbeck	**£510.60**	**£440.00**
West Dorset	**£421.90**	**£449.90**
Weymouth & Portland	**£391.40**	**£401.80**

Source: Annual Survey of Hours and Earnings 2009, Office for National Statistics

[4] The Annual Survey of Hours and Earnings is a sample survey and subject to sample error, particularly at its lowest geography.

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BUSINESS AND INDUSTRY

2008 data indicates that the C-SCOPE area has about 2,800 workplace units. This represents about 15% of all workplaces in DCC Dorset. 59% of these employees work in Weymouth & Portland; 35% in Purbeck and just 6%in West Dorset.

The size profile of businesses in the C-SCOPE area was much in line with that of DCC Dorset as a whole. The majority of businesses were small (with 1-24 employees), representing 94% of all workplaces. This matches the county average and is much the same as the England & Wales average of 93%. 6% of workplaces were medium sized with 25-199 employees – much in line with the county average of 5% and the same as the national average. Nationally, about 1% of businesses were large with 200 or more employees. Both Dorset and the CScope area had lower representation of large businesses. About 3% of C-SCOPE area workplaces had 50 or more employees: the same as in the county as a whole and in England & Wales.

At 86%, representation of micro firms (1-10 employees – a subset of 'small') was much the same as DCC Dorset (87%) and England & Wales (85%).

BUSINESS SECTOR

With leisure & tourism (direct[5]) alone accounting for 10% of workplaces in the C-SCOPE area, compared with six per cent in DCC Dorset as a whole, the most significant broad employment sector is Distribution, hotels & restaurants which accounts for more than a third of business units in the area: considerably more than the proportions seen nationally or in the county.

Another big difference between the C-SCOPE area and the England & Wales average is in Banking, finance & insurance etc employment with the national average at more than a third of business units but the C-SCOPE average at just over a fifth – also below the DCC Dorset average. Banking, finance & insurance etc is the second largest business sector in the CScope area.

Most business units in the C-SCOPE area are in the service sector which accounts for 81% of businesses – above the average for the county (76%) and much in line with England & Wales (82%).

[5] ie does not include employment supported by tourism such as retail

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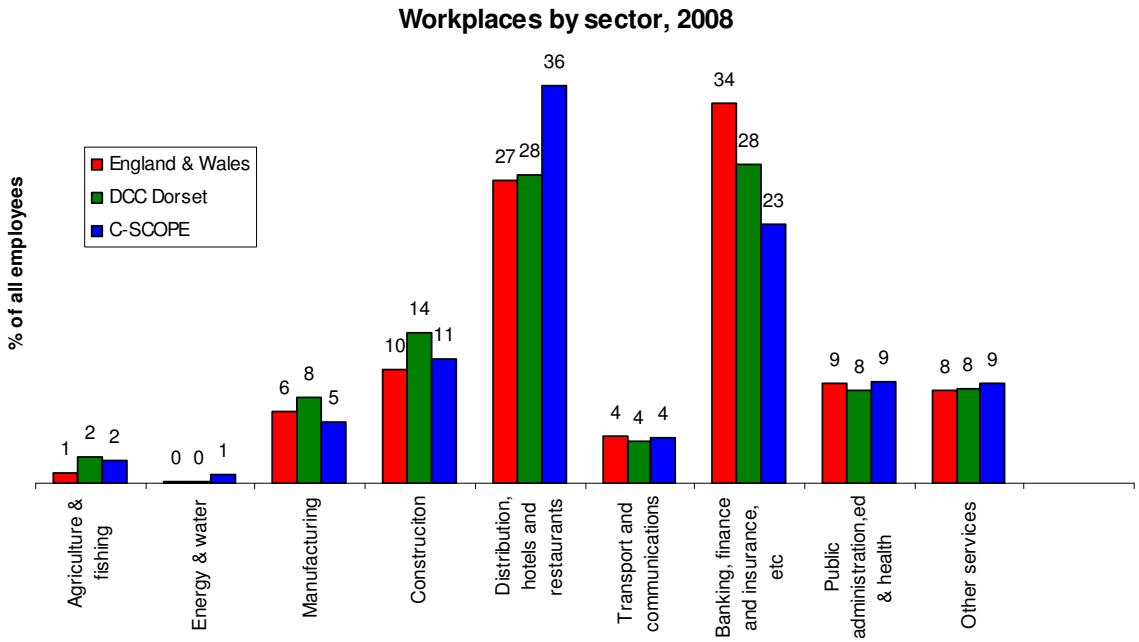
Figure 22



At 39% of business units, the knowledge intensive sector is marginally below the county average of 42% with Dorset itself below the England & Wales average of 48%.

By local authority area, Purbeck has the highest percentage employed in leisure & tourism, but it is little different to the other districts of the C-SCOPE area: eight per cent compared with seven per cent in both Weymouth & Portland and West Dorset. In all three local authority areas, the most significant sector is Distribution, hotels & restaurants – accounting for more than a third of businesses in Weymouth & Portland. The second most significant sector is Banking, finance & insurance etc. Purbeck has a more significant level of manufacturing businesses than the other two districts: nine per cent, which is above the national and county averages.

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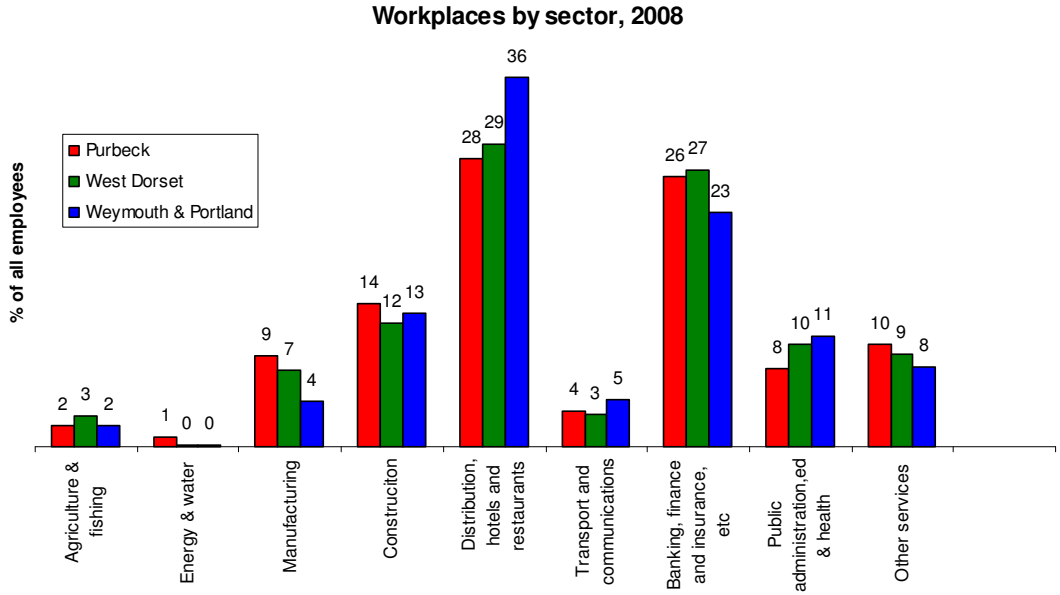
Figure 23



Source: Annual Business Inquiry, 2008 (Office for National Statistics)

SKILL LEVELS

At NVQ level 4 or above (equivalent of first degree level or higher), the proportion of those aged 16-64 resident in Purbeck and West Dorset is much in line with the county average of 29% and above than that in Weymouth & Portland. Weymouth & Portland has a higher proportion of 16-64 year old residents with no qualifications (14%) – above the England & Wales average of 12%[6].

Weymouth & Portland has a marginally higher percentage qualified to NVQ3 (advanced level – equivalent to two or more good A levels) than West Dorset or Purbeck and above the DCC Dorset (17%) and national level (16%).

At NVQ2 level (intermediate – equivalent to five or more GCSEs A*-C), Purbeck has an above average proportion, higher than the county or national averages.

At NVQ1 level (foundation – lower GCSE level), the three districts are much in line with the county (17%) and above the England & Wales average of 14%.

[6] However, caution is needed with these figures as they are from a sample survey and subject to sample error.

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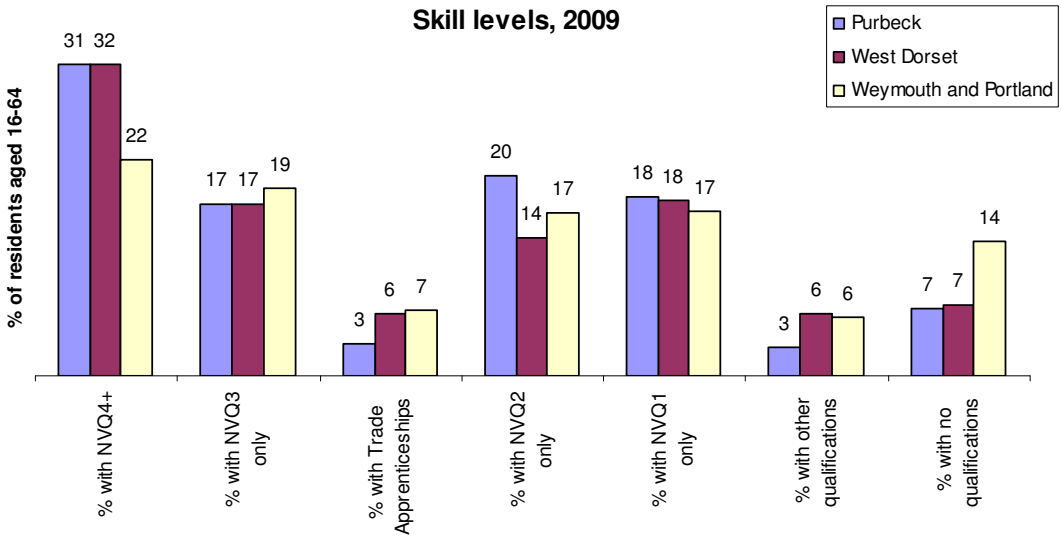
Figure 24



Broadly, at the intermediate/foundation level (NVQ 2/1), DCC Dorset has above the national average percentage of 16-64 year olds (34% compared with 30% in England & Wales. At 38%, Purbeck is particularly high whereas West Dorset is more in line with England & Wales and Weymouth & Portland is more in line with the county. Weymouth & Portland has an above average percentage of residents aged 16-64 at NVQ3, but a below average proportion at NVQ4 or higher. Purbeck and West Dorset are much in line with the county/national average at NVQ3 level, but marginally above the national average at NVQ3.

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SECTION 3: FOCUS ON MARINE INDUSTRIES

INDUSTRY SECTOR PROFILE

The following analysis of employees in employment and workplaces uses the following definition of marine and maritime industries:

Table 9

Description:	SIC07 code:
Marine resource-based industries: those industries directly involved in recovery of marine resources such as offshore oil and gas, fisheries, marine-based pharmaceuticals, aquaculture and seabed mining.	
crude petroleum extraction	0610
natural gas extraction	0620
marine fishing	0311
marine aquaculture	0321
Marine system design and construction: ship design, construction and repair, offshore engineering and coastal engineering	
building of ships and floating structures	3011
building of pleasure and sporting boats	3012
service activities incidental to water transportation	5222
support activities for petroleum/natural gas extraction	0910
Marine operations and shipping: marine transportation systems, diving operations, dredging and waste disposal.	
sea and coastal passenger water transport	5010
sea and coastal freight water transport	5020
construction of water projects (including dredging)	4291
cargo handling	5224
Marine-related equipment and service providers: manufacturers, engineering consultant firms in marine electronics and instrumentation, machinery, telecommunications, navigation systems, special-purpose software and decision support tools, ocean research and exploration, and environmental monitoring, training and education. This category also includes tourism and leisure-related service providers and industries[7]	
manufacture of engines/turbines (not aircraft, vehicle, cycle engines)	2811

Source: Marine and Maritime Industries Topic Paper, Dorset Coast Forum

EMPLOYEES IN EMLOYMENT

In 2008, there were about 700 employees in employment in marine industries in the C-SCOPE area representing about three per cent of all employment. This is above the DCC Dorset average figure of 0.6%. By district, marine industries employment was highest in Weymouth & Portland at just over two per cent and in Purbeck at just over one per cent. Castle ward (Purbeck) and Underhill ward (Weymouth & Portland) had

[7] This description is so wide that non-marine related industries cannot be excluded, therefore only the specific sector SIC 2811 has been included.

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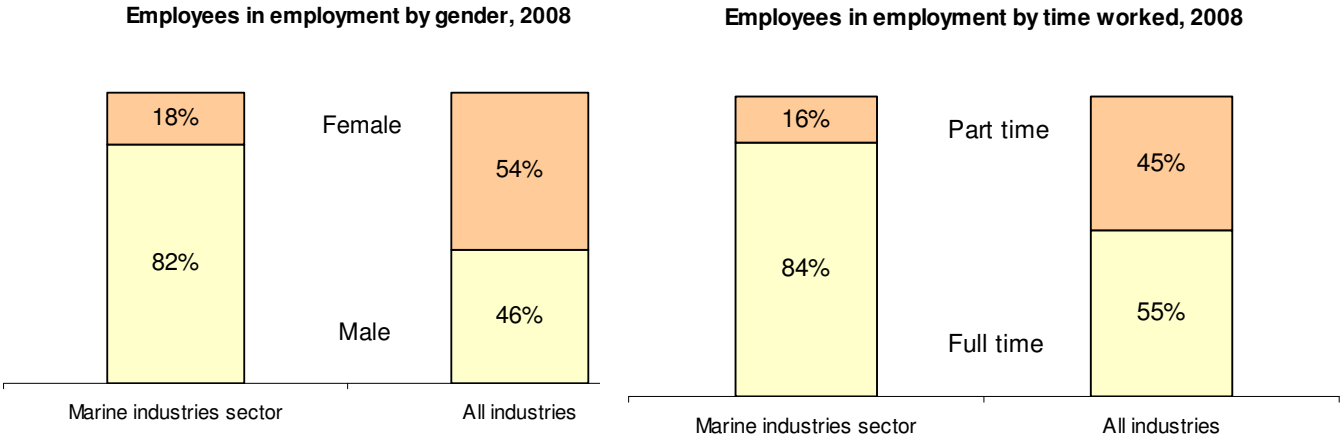
particularly high dependence on marine industries employment at about a fifth of total employment.

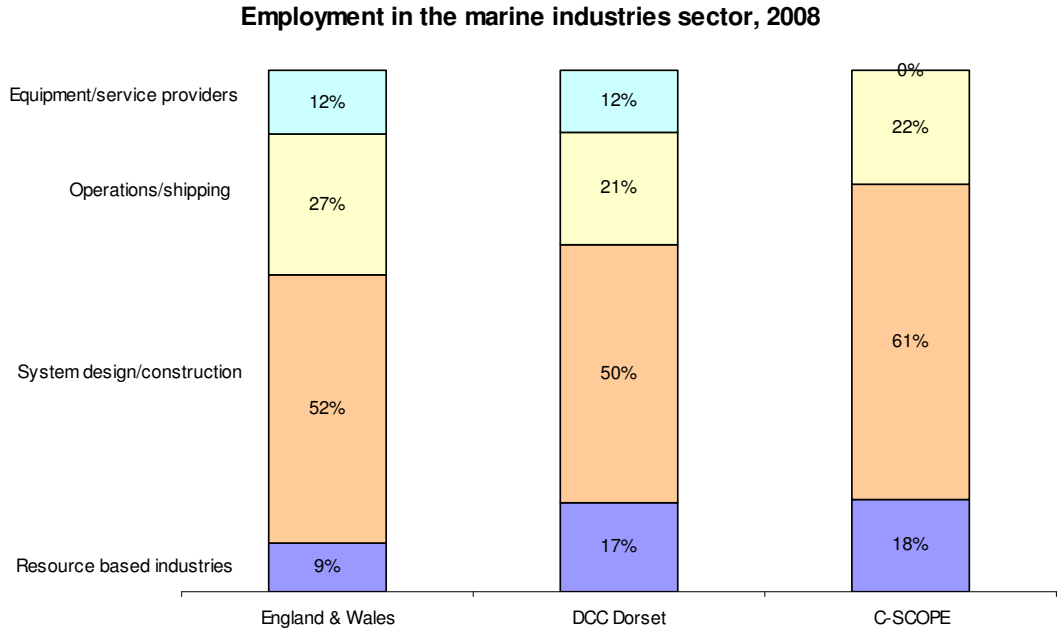
Employees in the marine industries sector are largely male (82% - much higher than the all industry average of 46% for the C-SCOPE area). Similarly, employment in this sector is largely full time: 84% of all employees compared with 55% on average in the C-SCOPE area. Both of these factors are in line with the averages for the sector in the county as a whole suggesting that the characteristics are those of the sector rather than the area.

Figure 25



By broad sub-sector, the majority of employment was in Marine system design & construction which accounted for 61% of employment in the marine industries sector in the C-SCOPE area – above the England & Wales average of 52%. Almost a fifth of employment in the sector was in Marine resource based industries (18% - also above the national average of nine per cent) and 22% was in Marine operations & shipping – marginally below the national average of 27%. Local employment in Marine-related equipment & service providers was negligible compared with 12% in England & Wales.

Figure 26



Source: Annual Business Inquiry 2008, Office for National Statistics

WORKPLACES

In 2008, there were about 70 marine industry business units in the C-SCOPE area representing about 3% of all businesses. This is above the DCC Dorset average figure of 1%. By district, the percentage of marine industries businesses was highest in Weymouth & Portland at 3%. Tophill West and Underhill wards (Weymouth & Portland) in particular had above average numbers and percentages of marine industries firms.

Business units in the marine industries sector in the C-SCOPE area were largely small. There was above average representation of micro-businesses with 1-10 employees: 88% in the C-SCOPE area compared with 86% for all industries. However, businesses with 11-49 employees were under-represented, as were those with 50-199 employees. There were no marine industries sector firms with more than 200 employees in the C-SCOPE area.

By broad sub-sector, almost half of businesses in the C-SCOPE area in the marine industries sector were in Marine resource based industries (48% - above the national average of 32%) and 29% were in Marine system design & construction – below the national average of 34%. The remaining 23% of firms in the marine industries sector were in Marine operations & shipping and Marine-related equipment & service providers with representation in the latter very minor. Again, representation in Marine

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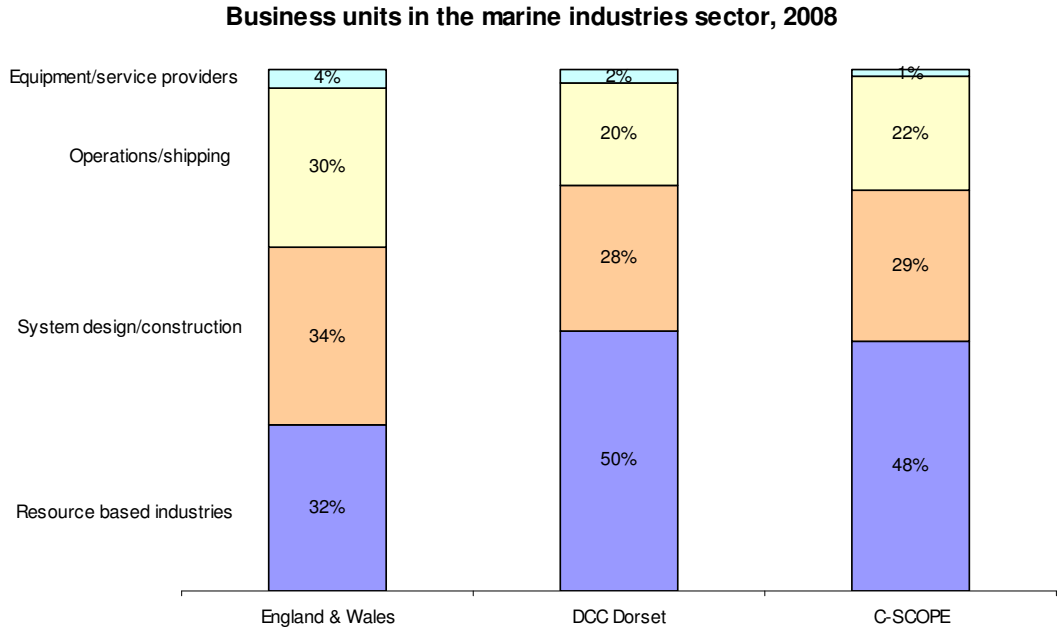
operations & shipping and Marine-related equipment & service providers was below average compared with England & Wales.

Figure 27



Source: Annual Business Inquiry 2008, Office for National Statistics

F I S H I N G

Statistics from 'UK Sea Fisheries Statistics 2009' (Marine Management Organisation), indicate that in 2009, the UK fishing industry had around 6,500 fishing vessels – a fall of 17% on the number in 2000 – and about 12,200 fishermen – down 22% since 2000.

Commercial fishing has always played an important part in the Dorset economy and way of life. Most of the inshore fleet are multi purpose vessels which can use several methods of fishing to take advantage of seasonal fisheries. Fishers target a mix of species depending on the season, using whichever method and location best suits the prevailing conditions and enable them to earn a reasonable wage.

239 fishing vessels were registered in the Bournemouth, Dorset and Poole area (BDP) – 151 excluding Poole. 100 were in the C-SCOPE ports of Swanage, Kimmeridge, Lulworth Cove, Weymouth and Portland. The C-SCOPE area accounted for 42% of fishing vessels in BDP and 67% of those in DCC Dorset. The majority of fishing vessels were 10 metres or under (91% in the C-SCOPE area compared with about 75% of the UK fleet).

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72% of the fishing fleet in the C-SCOPE area was built prior to 1991 compared with 67% of the UK fleet and 67% of the BDP fleet in total.

Looking at fish landings in the major ports of Weymouth and Poole, shellfish (including lobster and crab) are of considerable importance. In Weymouth, shellfish account for 94% of landings by tonnage and 71% of landings by value. In Poole, shellfish account for 89% of landings by tonnage and 74% of landings by value.

A major threat to the fishing industry is the continued decline in fish stocks. The Common Fisheries Policy (CFP) sets Total Allowable Catches (TACs) by species of fish which are then divided into quotas by EU member state. Fish stocks, however, have declined both in the UK and elsewhere in Europe and are expected to continue to do so without change in management methods. The CFP is due for reform in 2012 with implementation in 2013. The Marine Strategy Framework Directive (MSFD 2008) requires an ecosystem approach to the management of human activities in the marine environment.

More locally From April 2011 the Southern Sea Fisheries Committee, currently responsible for controlling fisheries within six nautical miles, will be replaced by the new Southern Inshore Fisheries Conservation Authority (IFCA), with a remit of not only sustainable management of inshore fisheries, but also to support the conservation objectives of designated sites, such as SSSIs and Ramsar sites and Marine Conservation Zones (MCZs) within the IFCA district.

Sources: 'UK Sea Fisheries Statistics 2009', Marine Management Organisation
Houses of Parliament Postnote no 357, May 2010, 'EU Fisheries Management'
'Industry and the British Economy, analysis and forecasts to the year 2020 for the British Economy', Cambridge Econometrics, January 2009

OIL AND GAS

The UK's reserves of oil and gas and its associated industry are still vital for the nation's economy and future energy security. Not only is the industry of importance to the UK's supply of energy, but it provides skilled jobs, contributes significantly to exports and provides a large amount of tax revenue due to the high price of oil and gas in recent years.

BP's Wytch Farm is located about six miles from Wareham in Dorset and comprises three separate oil fields under Poole Harbour and Poole Bay with a total estimated recoverable capacity of 480 million barrels:

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- The Bridport reservoir 900 metres below the surface of Poole Bay;
- The Sherwood reservoir which lies below the Bridport reservoir and extends eastwards with a capacity of about 430 million barrels – the sixth largest in the UK;
- The Frome reservoir with a capacity of 7.5 million barrels.

In addition, about 65 barrels of oil a day are still being produced at Kimmeridge, and the Wareham oilfield at Worgret contains reserves of about six million barrels (300-400 barrels a day) under the town, not physically connected with Wytch Farm. Crude oil is piped from Wareham to Wytch Farm but is moved by road tanker from Kimmeridge to Wytch Farm.

Wytch Farm is western Europe's largest onshore oil field in an area of extreme environmental sensitivity including:

- Sites of Special Scientific Interest (SSSI);
- Special Protection Areas;
- World Heritage Coastline;
- Ramsar sites (designated wetlands of international importance);
- National Trust land;
- National Nature Reserves.

The Wytch Farm Development won The Queen's Award for Environmental Achievement 1995 in light of the innovative and environmentally beneficial development of the offshore section of the Sherwood reservoir and BP has been at the forefront of extended reach drilling techniques.

Wytch Farm facilities include:

- A gathering station on Wytch Heath where crude oil and liquid petroleum gases (LPG) are separated;
- A sea water pumping station;
- Infield pipelines to transport oil from the 80 wells to the gathering station;
- A 91 kilometre pipeline exporting 25,000 barrels (equivalent) of crude oil to the Hamble oil terminal via Fawley;
- A crude oil storage/loading facility at Hamble (Southampton Water).

One million cubic feet a day of methane gas is piped to Sopley (Christchurch) to be fed into the main domestic gas trunkline system.

About 120 operations staff are employed on the 105 acre development site. Over 310 acres of land are managed by BP, including a 64 acre conservation area.

Threats to the industry nationally include:

- Depletion of reserves – in 2004 the UK became a net importer of gas and imports are projected to account for 80% of UK demand for gas by 2020;

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- Increasing unit technical costs (the cost of producing a single new barrel of oil/gas equivalent) – affects the volume of reserves it becomes worthwhile developing;
- High taxation on oil and gas extraction.

Employment, output and productivity are expected to fall over 2010-2015.

Source: 'Industry and the British Economy, analysis and forecasts to the year 2020 for the British Economy', Cambridge Econometrics, January 2009
BP website at
http://www.bpnsi.com/index.asp?id=7369643D312669643D313531

MARINE MANUFACTURING
(marine equipment, boat/ship building and repair)

Nationally, this sector largely comprises small/medium sized businesses in niche market positions with significant exports. The sector is particularly important in the south of England.

Commercial shipbuilding has suffered from strong competition from Eastern Europe and the Middle East, but naval warship and submarine building continues and there are large naval yards in Portsmouth and Plymouth in the south and also the Clyde, Barrow and Rosyth.

Boat building includes both sail and motor vessels with the superyacht sector becoming increasingly significant with Poole and Portland based Sunseeker now a global brand. Sunseeker is one of four major superyacht companies in the UK together with Princess Yachts, Fairline and Sealine which together account for over 80% of the UK sector. Sunseeker has developed on a customer-focused basis, starting as Poole Power Boats in the 1970s. Now, 98% of the vessels manufactured at Poole and Portland are exported and Sunseeker yachts are sold in 61 countries across the world. With Sunseeker's new 40 metre motoryacht launched at the PSP Southampton Boat Show 2010, the firm is driven by the need for constant innovation and the pursuit of excellence.

About 300 yachts a year are produced by the 2,000 employees and the 40 metre yacht is already in production with orders into 2012. Global demand for superyachts is sustained by new wealth in resource-rich countries and emerging markets such as Russia and the Middle East. This has insulated the industry from the effects of the recession. The supply of equipment and the re-fit side of the industry are also important with an ageing worldwide superyacht fleet of around 5,000. All this suggests that the industry is likely to continue to perform well.

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Source: 'Industry and the British Economy, analysis and forecasts to the year 2020 for the British Economy', Cambridge Econometrics, January 2009 Sunseeker website at http://www.sunseeker.com/index.php
PSP Southampton Boat Show website at http://www.southamptonboatshow.com/2010_home/more_links/pressarea/press_releases/sunseeker_to_launch_new_flagsh.aspx

WATER TRANSPORT

Whilst the water transport sector accounts for only a tiny amount of the UK's total GVA and employment, we have the largest single share of maritime freight transport in the EU, followed by Italy, the Netherlands and France. UK ports are significant conduits for seaborne imports and exports and the attendant road and rail freight industries and the port cities/towns and surrounding areas benefit from supply chain activities as well as access to leisure cruising. The cruise market is expanding in the UK with discounted offers fuelling demand through the recession[8]. Around 42 ports acting as the starting point for regular cruises or as ports of call for cruises and cruise ships now call at Portland and Poole in the BDP area. With cruise ships now more family-orientated, the average passenger age has gone down. Appeal to a younger target market has allowed the sector to increase its market size, but it is still very dependent on its existing consumer base with most passengers having already been on a cruise at least once before. The demand for ultra-luxury cruises is also increasing with greater margins for cruise companies and leading to the introduction of a number of new ultra-luxury ships between 2008 and 2012. More detail on ports and shipping in the C-SCOPE area is in the 'Ports and Shipping' section.

In the south of England, the water transport sector is dominated by the carriage of containerised traffic through the ports. Containerised shipping is the fastest growing means of shipping freight worldwide and bulk carriers account for more than three-quarters of the UK's maritime traffic. The southern England ports are significant for containerised traffic because of the location of population here and ease of access to the large ports of northern Europe.

In terms of passenger traffic, the largest share of ferry traffic is to France, between which country and the UK more people still travel by sea than by air. After France, the most significant routes are between the UK and the Irish Republic, the Netherlands and Belgium followed by Spain and Norway. The two largest UK international ferry companies are P&O Ferries (owned by DPWorld (Dubai)), and

[8] http://www.campaignlive.co.uk/news/941797/P-O-Cruises-parent-plans-new-CRM-system-strategy-demand-cruises-grows/?DCMP=ILC-SEARCH

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Stena Line (Swedish owned). Brittany Ferries (French owned) operates on a smaller scale between Portsmouth, Poole and Plymouth to four ports in Brittany and between Portsmouth and Santander in Spain and expanding to offer Portsmouth to Bilbao, Spain, next spring[9]. From Weymouth, Condor operates to the Channel Islands and St Malo in France.

Threats to the water transport sector include:

- Rising fuel costs leading to reduced profits;
- Poor availability of credit – especially affecting those operating in the short-term spot market[10];
- A fall in global demand with the economic slowdown in parallel with increased shipping capacity which could lead to job losses;
- Financial penalties if contracts for new ships (ordered pre-recession) are cancelled – or the additional cost of maintaining/storing these new ships if there are insufficient cargoes.

Short term prospects for the water transport sector as a whole look poor, particularly in the dry bulk sector[11] which handles the majority of the UK's maritime traffic. The UK cruise market was expected to see slow growth over 2009. Overall, in 2010-2015 the sector is projected to see declining employment but increased output and productivity.

Source: 'Industry and the British Economy, analysis and forecasts to the year 2020 for the British Economy', Cambridge Econometrics, January 2009

MECHANICAL ENGINEERING

Whilst it is hard to disaggregate the marine related element of this section, it seems likely that defence related engineering will be a most significant source of demand during the economic downturn with the manufacture of naval vessels. The luxury superyacht market will also be important in terms of both building and repair. Engineering work associated with the exploration, extraction and transport of oil and gas is also likely to be sustained as companies seek greater efficiency and lower costs. For the sector as a whole, 2010-2015 is projected to see job losses but increased output and productivity.

Source: 'Industry and the British Economy, analysis and forecasts to the year 2020 for the British Economy', Cambridge Econometrics, January 2009

OFFSHORE RENEWABLES

[9] http://www.shipsmonthly.com/news/501152/new-portsmouth-to-bilbao-route-for-brittany-ferries
[10] Goods sold for cash and delivered immediately or in very short term.
[11] Includes coal; grain; dry edibles; iron; chemicals; cement etc.

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At the end of 2009, Eneco Wind UK[12] was given exclusive rights by The Crown Estate to develop an offshore wind project to the west of the Isle of Wight off the Hampshire and Dorset coasts in an area known as 'Zone 7'. Of the 723 sq km zone, about 30% could potentially be developed providing approximately 900MW capacity. Consultation, environmental assessments and survey work will take place over the next four years and the wind farm is expected to be delivering electricity by the end of 2016. The exact number of turbines has not yet been finalised but is likely to be in the region of 180.

900 MW is equivalent to powering approximately 587,000 homes annually and would avoid emissions of approximately 1,186,000 tonnes CO^2. The electricity will be fed into the National Grid for domestic and commercial supplies.

The Tullo Wind Farm in Aberdeen marked its inauguration in September 2010. This is a 17 MW, seven turbine project sufficient to power around 9,000 homes. Construction of the Tullo Wind Farm included use of locally sourced concrete for turbine foundations and local aggregate for roadways. Local labour was also used giving a total local spend during construction of around £1.3 million which will have had a beneficial effect on the local economy. The much larger Zone 7 development can be anticipated to have a larger local impact if contracts for building and then maintaining the wind farm are awarded locally.

The Zone 7 site, off the Hampshire and Dorset coasts, was chosen after an assessment of wind speeds, geology and shipping lanes by The Crown Estate. Whilst the UK is one of the windiest parts of Europe, Britain is at the bottom of the European league table for percentage of electricity generated from renewables.

Three possible substation locations are being considered where power cabling will come ashore: Fawley (near the refinery); Chickerell (near Weymouth); and Mannington (New Forest).

During construction of the wind farm, all vessels will be kept out of the development site for safety reasons, but will be able to travel around the wind park. Once operational, smaller sailing vessels will be able to pass between the turbines as they will be spaced from 700m to 1km apart.

[12] Eneco Wind UK Ltd is a subsidiary of the Dutch utility Eneco BV

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Key issues include a shortage of skilled labour in the supply chain, and in terms of wind turbine suppliers and offshore installation vessels, the supply chain is having difficulty in meeting demand.

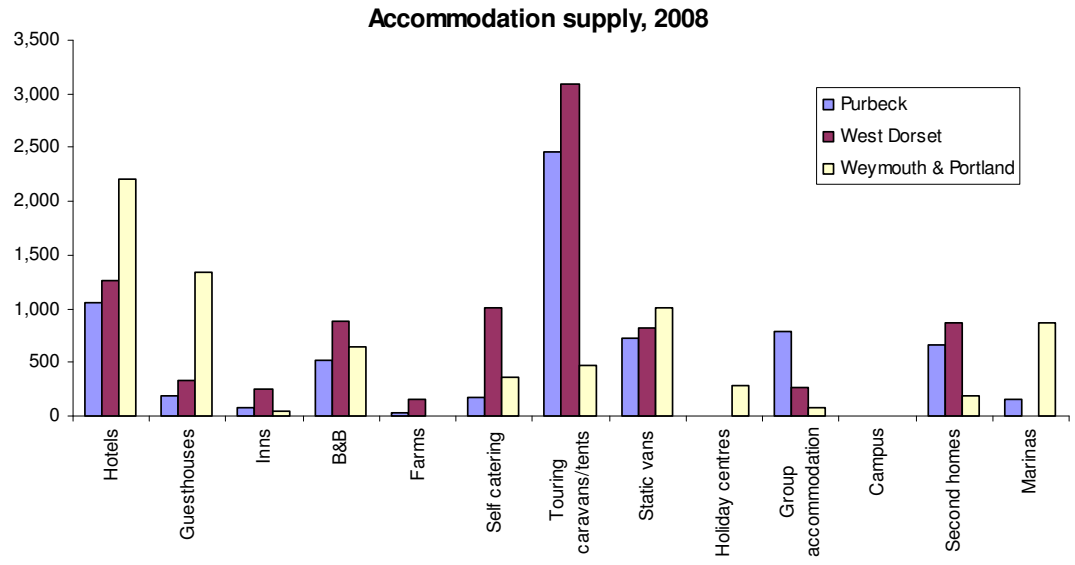
Source: Eneco website
http://corporateuk.eneco.nl/outlook_and_strategy/innovation/Pages/TheEnecoWindPark.aspx

MARINE TOURISM AND RECREATION

Tourism data are available through South West Tourism at local authority district level. Whilst some elements can be specifically identified as 'marine' tourism, such as the number of berths in marinas, it is largely impossible to segregate marine tourism from other tourism, especially as the coast plays such an important part in the characteristics and attraction of the three districts in the C-SCOPE area.

By accommodation type, it can be seen from figure 25 below that of the three districts, Weymouth & Portland has the highest number of hotel and guesthouse bedspaces; marina berths[13]; static van pitches; and holiday centre units. There is greater availability of pitches for touring caravans/tents in West Dorset and Purbeck. West Dorset has the highest number of self-catering units, farm/B&B/inn bedspaces and second homes. Purbeck has the highest number of bedspaces in group accommodation.

Figure 28



[13] Based on RYA numbers.

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In 2008, the three local authority areas attracted £547.9 million of visitor spending (day and staying visitors). This was more than two-thirds of the total spend in DCC Dorset.

Staying visitor spend was more significant than day trip spend in the CScope area: £299.3 million from 1.4 million staying visitors accounting for 74% of spend in the county as a whole.

Day trip spend totalled £248.7 million accounting for 63% of spend in DCC Dorset as a whole. However, day trip spend is less significant to the C-SCOPE area as a whole accounting for 45% of total day/staying visitor spend compared to 50% in the county as a whole. The difference was most marked in Weymouth & Portland where staying visitors accounted for 61% of total visitor spend and day trippers accounted for 39% (each 50% in DCC Dorset) of the three districts, day trip numbers and spend were most significant to West Dorset of the three districts.

62% of all day visits to DCC Dorset were to Purbeck, West Dorset or Weymouth & Portland attracting £248.7 million. 37% of trips to the three C-SCOPE districts were coastal visits (rather than urban or countryside) and these accounted for 38% of day trip spending – slightly above the county average (36%).

Of the 1.4 million staying visitors to the C-SCOPE districts, about 7,000 stayed at boat moorings (none in West Dorset). The spend from these was about £615,000 and, with only Christchurch additionally having boat moorings accommodation, this accounted for 89% of total visitor spend from boat moorings in the county. In addition to this, apart from the 'normal' tourism spend associated with boating, additional expenditure on berthing charges, servicing and maintaining and upgrading of equipment accounted for an additional £2.1 million in the C-SCOPE districts. This gives a total spend of £2.7 million associated with boating – about one per cent of total staying visitor spending. Boating spend is most important to Weymouth & Portland of the three districts totalling about £2.3 million: about 2% of staying visitor spend.

Tourism supported about 14% of employment in the three districts: about 13,500 jobs. Tourism also added about £361.4 million to GVA in the area.

Table 10

Value of tourism, 2008:		

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	Purbeck	West Dorset	Weymouth
Staying visitor spend	£78,899,000	£128,900,000	£91,459,000
Day visitor spend	£71,377,000	£119,871,000	£57,404,000
Total visitor spend:	£150,276,000	£248,771,000	£148,863,000
GVA	£96,396,000	£161,389,000	£103,643,000
Tourism supported employment	14%	13%	16%

Source: South West Tourism, 2008

The multiplier effect of tourism

This analysis makes use of the ECON - i Economic Impact Analysis package provided by the South West Observatory (SWO). The contents and findings of the report do not necessarily reflect the views of the SWO.

The model is based on a set of economic and social accounts that allows analysis of the structure of and relationships within the economy. Economic impact analysis using this model takes into account not only the direct impact of a change on a particular industry, but also the indirect effects which occur through changes in purchases by that industry from domestic suppliers, and also the induced effects arising from changes in household incomes and consumption expenditures.

Considering the importance of tourism to the area, any increase or decrease in tourism spending will have an economic impact through the economy as supply chain businesses are affected. There will be an additional 'household effect' as employees in tourism businesses change their spending behaviour as a result of any change such as jobs created or shed.

Impact of increased tourism spending:

Employment:

For every £10 million change in tourism spending, 88 FTE positions would be gained or lost as an initial impact. In addition, with a multiplier of approximately 1.37, an additional **32 FTE positions** are created or lost in the Dorset economy giving a total impact of 121 FTE jobs.

13 of these would be created (with an injection of tourism spending) through the impact on immediate suppliers in the tourism supply chain (such as business services and distribution & retail) as they meet the change in demand created by the initial

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impact: this is the first round effect. The direct effect consists of the initial change plus the first round effect. The net direct effect therefore would be **102** FTEs.

Further to this, the indirect effect is that experienced by other local industries as they accommodate the change in purchases in other sectors. For every £10 million additional tourism spending, the indirect effect would be a further **four** FTEs.

The induced effect is the change in demand arising through changes in household expenditure on local goods and services. These occur through changes in net employment and self-employment income caused by the changes in demand between local industries. For every £10 million increase in tourism spending, the induced effect would be a further **15** FTEs.

Table 11

	Initial	**First Round**	**Indirect**	**Induced**	**Total**
FTEs	**88**	**13**	**4**	**15**	**121**

The greatest impact would be felt in the hotels & catering and distribution & retail sectors.

Output:

Change in tourism spending also has an impact on output. The multiplier effect shows that for every initial £1 million increase in output arising from the additional spending, a further £0.49 million of demand for goods and services is generated within the Dorset economy. The initial impact of an additional £10 million tourism spend would be to increase the demand for goods and services in Dorset firms by about £8.1 million. Together with the first round effect on immediate suppliers, this gives a direct impact of about £9.8 million and a total impact of about £12.1 million.

Table 12

	Initial	**First Round**	**Indirect**	**Induced**	**Total**
Output (£m)	**8.1**	**1.7**	**0.5**	**1.8**	**12.1**

The greatest impact would be felt in the hotels & catering, distribution & retail and business services sectors.

Gross Value Added

The increased net output of £12.1 million in Dorset equates to a total of £2.7 million GVA which is added to the local economy. With the multiplier effect, every initial £1

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million increase in GVA arising from the additional investment adds a further £0.54 million to total GVA in the Dorset economy. The net direct impact on GVA is £2.1 million.

Table 13

	Initial	First Round	Indirect	Induced	Total
GVA (£m)	**1.8**	**0.4**	**0.1**	**0.5**	**2.7**

The greatest impact is again evident in the hotels & catering, distribution & retail and business services sectors.

Source: Regional Accounts (Econ-i), South West Observatory (adjusted with local DCC Dorset multipliers)

Economic impact of diving tourism

In 2005, an economic impact assessment of diving tourism in Weymouth & Portland was carried out. This was based on findings from the 2002-2003 diving survey carried out by the Weymouth & Portland Dive Charter Association[14]. The survey estimated a total of £5.013 million was spent by divers in Weymouth & Portland. Converting this to current prices and running it again through the revised and updated economic impact model – but assuming as previously that 6.1% of this is from overseas visitors and the rest is UK based – the findings are as follows:

- Diving tourism contributes about £8 million demand for goods and services in DCC Dorset;
- This adds about £2 million to DCC Dorset GVA;
- And it supports about 76 jobs in the local economy.

Source: Regional Accounts (Econ-i), South West Observatory (adjusted with local DCC Dorset multipliers)

PORTS AND SHIPPING

The Dorset Marine Management Area is served by three main ports and harbours: Poole, Weymouth and Portland (of which, Poole is the largest) with Swanage Pier also offering a few marine services. Between them, the ports have a long history and a wide range of current uses from commercial freight shipping to small fishing trips, along with supporting infrastructure and supply chain companies providing employment to the local economies.

POOLE

Although Poole sits just to the East of the Dorset Marine Management Area, its activities have an impact on the area investigated. There has been a port at Poole

[14] 'More than a drop in the ocean' – the contribution of scuba diving to the Weymouth and Portland economy; Weymouth & Portland Dive Charter Association

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since Roman times and it has been important for trading over many centuries[15]. It currently provides many services for commercial ships/ferries sailing in the English Channel as well as supporting the local fishing and tourist industry. The port is owned by a trust; Poole Harbour Commissioners. In Poole, the Royal National Lifeboat Institution (RNLI) has its National Training Centre along with its own All-weather Lifeboat (ALB) and Inshore Lifeboat (ILB).

Employment & Businesses

The Annual Business Inquiry is a sample survey of businesses and employees. This provides an indication of the number of people employed in businesses in different industry sectors. However, the survey only samples a small number of businesses in the Bournemouth, Dorset and Poole area, meaning that the statistics are estimates with less reliability than for higher geographies and it does not include self employed individuals. Using the 2008 data, for Poole, middle layer super output areas that surround the port were investigated for the number of businesses and employees working in marine related industries. The map below (from NOMIS) shows the areas that were selected and the marine related industries looked at were (using SIC 2007 definitions):

- 0610: Extraction of crude oil
- 0620: Extraction of natural gas
- 0311: Marine fishing
- 0321: Marine Aquaculture
- 3011: Building of ships and floating structures
- 3012: Building of pleasure and sporting boats
- 0910: Support activities for petroleum and natural gas extraction
- 5010: Sea and coastal passenger water transport
- 5020: Construction of water projects
- 4291: Service activities incidental to water transportation
- 5222: Cargo handling
- 2811: Manufacture of engines and turbines, except aircraft, vehicle and cycle engines

Figure 29

[15] www.ports.org.uk

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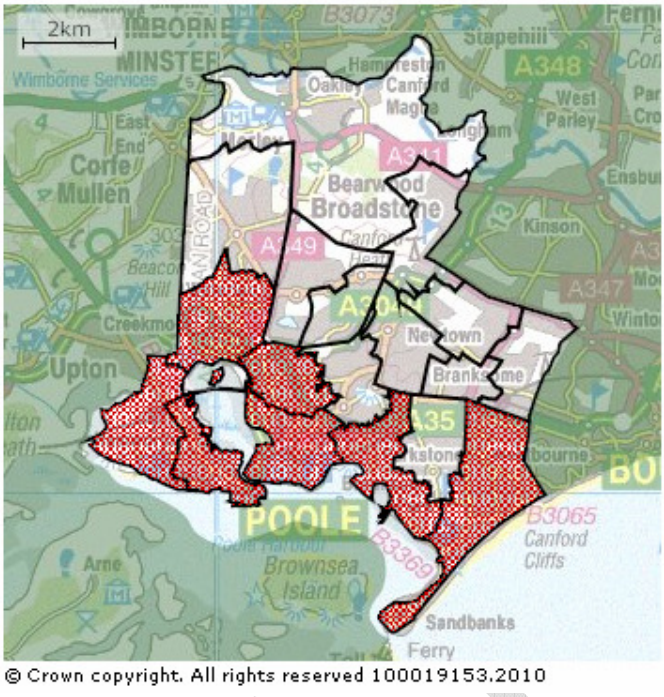
Ward map of Borough of Poole highlighting areas in and around Poole Port.



Data from the 2008 ABI gives an estimate of 50 businesses in the marine related industries, employing roughly 1,800 people for the area surrounding Poole Port. This is likely to be a low estimate compared to the actual number of businesses due to the exclusion of the self employed from the survey. The data suggests that this accounts for around 14% of all businesses and 58% of all employees within the middle layer super output areas selected.

Many businesses and companies are located in the vicinity of the harbour to support and take advantage of Poole Port's location and the services if offers. Cafes, restaurants and gift shops are plentiful around the quay and marine services available include insurance, boat sales, electronics, repairs, equipment and moorings amongst others.

Passenger Ferries

Ferry services in Poole travel to the Channel Islands and France (Cherbourg and St Malo). There are two ferry companies that operate from Poole Harbour: Condor Ferries and Brittany Ferries. Condor Ferries makes seasonal crossings during the summer from April-October[16]. This includes 12 weekly crossings to Guernsey, nine weekly crossings to Jersey and seven crossings a week to St. Malo. Brittany Ferries

[16] Source: www.condorferries.co.uk

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also makes daily crossings to Cherbourg between April and October[17]. The Sea Passenger Statistics 2009[18] give the number of passengers that travelled to these destinations from Poole.

Table 14

Passenger Statistics 2009 (000s):								
	2004	**2005**	**2006**	**2007**	**2008**	**2009**	**Change 04-09**	**% Change 04-09**
Poole - Cherbourg	437.1	321.4	416.3	406.6	414.5	332.7	-104.4	-23.9%
Poole – St Malo	83.0	76.5	62.5	61.6	51.9	49.1	-33.9	-40.9%
Poole - Jersey/Guernsey	227.4	146.2	114.6	122.3	104.2	111.7	-115.6	-50.9%
Weymouth - St Malo	*19.6*	*20.9*	*18.5*	*18.8*	*14.5*	*10.5*	*-9.1*	-46.4%
Weymouth - Jersey/Guernsey	*186.4*	*185.0*	*174.4*	*179.2*	*169.1*	*176.7*	*-9.7*	-5.2%

The numbers of passengers crossing the channel from Poole has declined in the past five years. This is particularly on trips to the Channel Islands, although there has been a 7% increase in the year (2008-2009). Numbers have decreased by approximately 115,600 passengers between 2004 and 2009, a 51% decrease. The service to St. Malo has also had a large decline in passenger numbers of around 40% from 83,000 passengers in 2004 to 49,100 in 2009. Crossings to Cherbourg have seen the smallest decline in passenger numbers of nearly 25% and it is this crossing that has the largest number of passengers. In total, passenger numbers from Poole have dropped by a third from 747,500 in 2004 to 493,500 in 2009.

In comparison to Weymouth, Poole carries the majority of passengers that travel to France (St. Malo and Cherbourg). Weymouth only accounts for 2.7% of the total passengers that travel to France from Poole and Weymouth. However, Weymouth carries 61.3% of the total passengers that travel to the Channel Islands from Poole and Weymouth.

Freight and Commercial Shipping[19]

Poole has commercial shipping companies that operate out of the port. Condor Ferries makes daily summer crossings (April – October) to the Channel Islands and to St. Malo (May – September) of light freight. Brittany Ferries makes daily crossings to Cherbourg and a weekly journey to Santander in Spain of Roll on/Roll off (Ro-Ro)

[17] Source: www.brittany-ferries.co.uk
[18] Department for Transport (www.dft.gov.uk)
[19] Sources: www.condorferries.co.uk and www.phc.co.uk

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freight. Channel Seaways also transports conventional cargo to Alderney, Jersey and Guernsey on a tri-weekly liner service.

Data from Poole Harbour Commissioners' Annual Commerce Statistics shows that the majority of cargo handled in Poole Port is Roll on/Roll off. In 2009/2010, Ro-Ro freight accounted for approximately two-thirds of the total tonnage shifted. In the past five years, the amount of cargo passing through Poole Port has declined. Conventional cargo has seen a decline of over 32,500 tonnes since 2005/6 and Ro-Ro cargo had decreased by over 23,000 tonnes. This gives a total decline in the tonnage of cargo handled of 56,000 tonnes (32%) from 2005/6 to 2009/10.

Table 15

YEAR TO	Conventional Cargo			Roll on/Roll off (Ro-Ro)			Total Cargo *
(March 25th)	Stevedoring	Private tonnes	Total	Freight (Units)	Production Cars	Total	1000 (Tonnes)
2005/06	*463,825*	*249,888*	*713,713*	*70,126*	*28*	*70,154*	*1,766*
2006/07	*468,382*	*155,111*	*623,493*	*77,968*	*9*	*77,977*	*1,793*
2007/08	*353,832*	*201,995*	*555,827*	*75,948*	*15*	*75,963*	*1,695*
2008/09	*335,483*	*214,451*	*549,934*	*69,741*	*5*	*69,746*	*1,596*
2009/10	*288,072*	*100,288*	*388,360*	*54,574*	*NIL*	*54,574*	*1,206*

** Total cargo includes freight units @ 15 tonnes each and private and production cars @ 1 tonne each.*
APW/31.03.10
SOURCE: PORT OF POOLE - ANNUAL COMMERCE STATISTICS – 31st March 2010

Fishing

Poole is the administrative port for all nine of the home ports along the Dorset coast. Of these, five home ports are within the C-SCOPE area: Kimmeridge, Lulworth Cove, Portland, Swanage and Weymouth. The number of fishing vessels registered to these ports accounts for 43% of the total for the BDP area.

The Vessels Lists (as at 1 October 2010) gives a total of 88 fishing boats as having Poole registered as their home port, which is 36% of the total number of vessels in the BDP area. The majority of the boats are ten metres or under in length, with only 5.7% of the boats being over ten metres long

Table 16

Fishing vessels by home port - as at 1 October 2010			
Home Port	**10m or Under**	**Over 10m**	**Total**
Christchurch	21	1	22
Kimmeridge	1	0	1
Lulworth Cove	3	1	4
Lyme Regis	13	1	14
Poole	83	5	88

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Portland	26	1	27
Swanage	11	1	12
West Bay	14	1	15
Weymouth	53	6	59
BDP	**225**	**17**	**242**
C-SCOPE	**94**	**9**	**103**
DCC	142	12	154

Home ports within the C-SCOPE area

Source: Vessel Lists (Oct 2010), Marine Management Organisation (www.marinemanagement.org.uk)

According to the UK Sea Fisheries Statistics 2009, the majority of landings from fishing boats to Poole are of shellfish. In 2009, 1,366 tonnes of shellfish came into Poole, which made up 89% of the total landings. One tonne of Pelagic fish (fish than do not live on/near the seabed, such as mackerel and sprats) was caught and 169 tonnes (11%) of Demersal fish (fish that live on/near the seabed including plaice, sole, cod) were brought into Poole. In terms of value, the shellfish were worth £1,413,000 (74% of the total value), Demersal fish were worth £488,000 (26% of total value) and Pelagic fish had a value of £1,000, which was less than one percent of the total value.

Table 17

Landings in Poole 2009 – UK Sea Fisheries Statistics 2009		
Tonnes	**Number**	**%**
Demersal fish	169	11%
Pelagic fish	1	0%
Shellfish	1,366	89%
Total	**1,536**	**100%**
£000s	**Value**	**%**
Demersal fish	488	26%
Pelagic fish	1	0%
Shellfish	1,413	74%
Total	**1,901**	**100%**

Leisure & Port facilities[20]

There is a diverse range of leisure activities in and around Poole Harbour. Pleasure cruises offer sightseeing tours of the islands in Poole Harbour and the surrounding coast, while self-drive boats and jet skis can also be hired to take out and around the

[20] Source: www.phc.co.uk

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harbour. Activities such as yacht racing, water-skiing, rowing, canoeing, windsurfing, kite surfing, diving and angling are available to partake in and are popular with visiting tourists.

There are also facilities to aid the freight and passenger services from the port. For freight handling, these include: storage, cargo forwarding, weighbridges, cranage, pilotage and forklift trucks. Passengers have the use of a passenger terminal, which includes the ferry check-in service & enquiries, a restaurant, bar, left luggage, washrooms and a car park. Poole Port can also accommodate visiting cruise ships and provides services for this: check-in facilities, baggage handling, passenger transfer and shore side security. Day trips to the local area are available and there are dis/embarking services at Poole Port to facilitate this.

Future Development

Information from the Poole Harbour Commissioners' website gives details of future development plans for the port. These include a Moorings Policy Review, which will look to see if moorings can be moved away from environmentally sensitive areas of the harbour. Another project is to look to install a 'Liquid Petroleum Gas Tank' and to 'purchase a new LPG run plant'.

Poole is also going to benefit from the Olympic sailing events being held at Weymouth & Portland Sailing Academy in 2012. An article from the Poole Advertiser on the14th October 2010 gave information on how planning permission has been granted to Poole Harbour Commissioners to invest £800,000 in a new 'mini-marina' at the location of the currently unused Ro-Ro One ferry berth. The aim is that the new marina will have a capacity of 59 12-15 metre long boats on a permanent basis and eight deep-draught superyachts during the summer as well as 20 jet-skis and 15 ribs[21]. Investment could continue and approach £21million as part of the 'port masterplan'.

The Twin Sails development in Hamworthy will include £20 million, 800 berth facility and a marine business park, with an estimated 120 new jobs being created. This is still in the early stages of development.

WEYMOUTH

Weymouth is a popular seaside town at the west of the Dorset Marine Management Area with the harbour playing an important part in making the town an attractive

[21] Source: Poole Advertiser: 14 October 2010

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place to visit. It has a colourful history, dating back to Roman times. The harbour is strongly associated with the Great Plague of 1348 and was also involved with D-Day plans during the Second World War[22]. More recently, the town has played host to the start of large sailing and yacht races – most famously the Tall Ships Race. With the sailing events of the Olympics being hosted in Weymouth Bay and at the Weymouth & Portland Sailing Academy in 2012, the harbour and local/associated industries stand to benefit from the event.

Weymouth Harbour (owned by Weymouth & Portland Borough Council) differs from Poole, providing services predominantly for local businesses and industries. The fishing and tourist sectors are well represented around the harbour area and there is also the cross-channel ferry to the Channel Islands and France operating out of Weymouth. One of the 235 lifeboat stations around the UK and Republic of Ireland is located in Weymouth Harbour, which has both an all-weather lifeboat and an inshore lifeboat.

The Weymouth Harbour Board's Annual Report 2009/2010 showed that the Harbour had an overall turnover for the year of £1,960,000, with a third of this coming from the 'Inner Harbour Pontoons'. The report also states that the number of visiting vessels to the harbour fell in the year by 14%, with visiting nights totalling 6,436. Condor Ferries is said to have had a 'marginally' increased income in the year, which the harbour has benefited from. Spending was cautious in 2009/2010, given the economic recession, with only essential maintenance carried out.

Employment & Businesses

Data received from Weymouth Berthing Office shows that they have a total of 30 people in employment[23]. Ten individuals are employed in the Harbour Office and 20 are employed in the ferry terminal. There are also many people employed in local companies specialising in the marine industry located around the harbour and immediate area.

Using the 2008 data from the Annual Business Inquiry, for Weymouth & Portland[24], lower layer super output areas that surround the ports were investigated for the number of businesses and employees working in marine related industries. The maps

[22] www.ports.org.uk
[23] As at 14 October 2010
[24] Weymouth & Portland statistics have been combined due to small estimates

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below (from NOMIS) shows the areas that were selected and the marine related industries looked at were (using SIC 2007 definitions):

- 0610: Extraction of crude oil
- 0620: Extraction of natural gas
- 0311: Marine fishing
- 0321: Marine Aquaculture
- 3011: Building of ships and floating structures
- 3012: Building of pleasure and sporting boats
- 0910: Support activities for petroleum and natural gas extraction
- 5010: Sea and coastal passenger water transport
- 5020: Construction of water projects
- 4291: Service activities incidental to water transportation
- 5222: Cargo handling
- 2811: Manufacture of engines and turbines, except aircraft, vehicle and cycle engines

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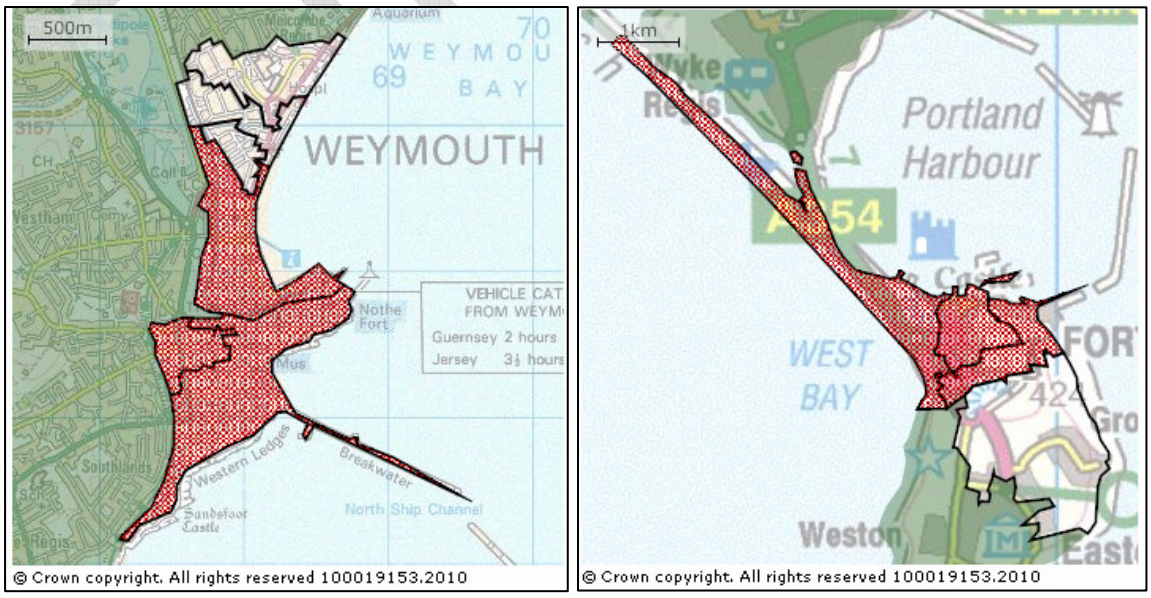
Figures 30a and b

Map showing wards in and around Weymouth / Portland Ports.



Data from the 2008 ABI gives an estimate of 20 businesses in the marine related industries, employing roughly 400 people in the area surrounding Weymouth/Portland port. This may be a low estimate compared to the actual number of businesses due to the exclusion of the self employed from the survey. The data suggests that this accounts for around 40% of all businesses and 71% of all employees within the lower layer super output areas selected. These statistics are from a sample survey and should be treated with caution due to low sample sizes in the survey from the Bournemouth, Dorset and Poole area.

The harbour is surrounded by many businesses, predominantly aimed at the tourist industry. Along both sides of the harbour, there are many hotels, guesthouses, restaurants, cafés, bistros, bars, pubs, taverns, fish & chip shops. Many of the restaurants serve dishes made with locally caught fish. The majority of the other businesses found around the harbour are aimed at the local marine industry. These include yacht brokers, chandlers, marine engineers, boat repairs & maintenance, the Weymouth Sailing club and angling centre. Weyfish Ltd is a fish market that sits along the harbour side selling locally caught fish and on the north side of the harbour, there is also the Royal Dorset Yacht Club, Coastguard Station and the Harbour Master. Other businesses consist of a children's play zone, gallery, newsagents, jewellers and a food kiosk. A nine screen cinema and bowling complex is located within the town along with many shops and two large supermarkets are nearby. Brewers Quay sits just to the south of the harbour. This is the old brewery of Weymouth and is now a popular tourist attraction consisting of a small shopping village with many specialist shops, a museum, an interactive science centre and the Timewalk (a journey through the history of Weymouth).

Passenger Ferries

Condor Ferries operates a cross-channel ferry service to Jersey, Guernsey and St. Malo. This is a year-round service that makes daily crossings to each destination between April and October and twice weekly crossings from November to March[25]. The Sea Passenger Statistics 2009[26] give the number of passengers that travelled to these destinations from Weymouth.

Table 18

Passenger Statistics 2009 (000s):								
	2004	**2005**	**2006**	**2007**	**2008**	**2009**	**Change**	**% Change**

[25] Source: Weymouth Berthing Office
[26] Department for Transport (www.dft.gov.uk)

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							04-09	04-09
Weymouth - St Malo	*19.6*	*20.9*	*18.5*	*18.8*	*14.5*	*10.5*	*-9.1*	-46.4%
Weymouth - Jersey/Guernsey	*186.4*	*185.0*	*174.4*	*179.2*	*169.1*	*176.7*	*-9.7*	-5.2%
Poole - Cherbourg	437.1	321.4	416.3	406.6	414.5	332.7	-104.4	-23.9%
Poole – St Malo	83.0	76.5	62.5	61.6	51.9	49.1	-33.9	-40.9%
Poole - Jersey/Guernsey	227.4	146.2	114.6	122.3	104.2	111.7	-115.6	-50.9%

The majority of total passengers in 2009 that travelled from Weymouth sailed to the Channel Islands (94%) and this is approximately 65,000 more people than those passengers travelling from Poole to Jersey and Guernsey. This could be due to the fact that the service from Poole is only seasonal (April – October) and does not run over the winter months like the Weymouth ferry. Passenger numbers for both services have declined since 2004 by around 9-10,000, although the Channel Islands service increased by about 5% in the year from 2008-2009. For the service to St. Malo this is a decline of nearly half (46.4%), in line with the decline in passenger numbers for this service from Poole. The percentage change for the Channel Island service to Jersey and Guernsey is much less severe at just over 5% and this is the crossing that has had the smallest decline in passenger numbers out of all the cross-channel journeys made from Poole and Weymouth.

Freight and Commercial Shipping

Weymouth is equipped to provide some services to commercial shipping, although many are provided in nearby Portland Port. Weymouth Harbour is able to handle 'bulk cargo and utilised commodities' (WPBC)[27]. Other services include storage and pilotage. Weymouth Harbour also benefits from many visiting ships that offer day trips, receptions and events[28].

Fishing

For Weymouth, fishing has historically been an important part of the local community and is still a key industry in the area. According to the vessels lists (as at 1 October 2010), a total of 59 fishing vessels have Weymouth registered as their home port, which accounts for 57% of the total number of fishing vessels with home ports within the C-SCOPE area and nearly a quarter of the total number of fishing vessels along

[27] Weymouth & Portland Borough Council (www.weymouth.gov.uk)
[28] Weymouth Harbour Guide 2010 (www.weymouth.go.uk)

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the Dorset coastline (BDP area). Out of the fishing vessels in Weymouth, 53 (90%) are ten metres long or under.

Table 19

Fishing vessels by home port - as at 1 October 2010			
Home Port	**10m or Under**	**Over 10m**	**Total**
Christchurch	21	1	22
Kimmeridge	1	0	1
Lulworth Cove	3	1	4
Lyme Regis	13	1	14
Poole	83	5	88
Portland	26	1	27
Swanage	11	1	12
West Bay	14	1	15
Weymouth	53	6	59
BDP	**225**	**17**	**242**
C-SCOPE	**94**	**9**	**103**
DCC	142	12	154

Home ports within the C-SCOPE area

Source: Vessel Lists (Oct 2010), Marine Management Organisation (www.marinemanagement.org.uk)

Landings in Weymouth for 2009 had a total of 1,952 tonnes, according to the UK Sea Fisheries Statistics 2009. Of this, the majority was made up of Shellfish, totalling 1,836 tonnes (94%). The amount of demersal fish caught came to 114 tonnes (6% of the total) and pelagic fish made up less than 1% of total landings. The shellfish caught came to a value of £1,526,000 (71% of the total value). 29% of the total value was made up of demersal fish, worth £626,000, while pelagic fish were only worth £1,000 – less than 1% of the total value.

Table 20

Landings in Weymouth 2009 - UK Sea Fisheries Statistics 2009		
Tonnes	**Number**	**%**
Demersal fish	114	6%
Pelagic fish	1	0%
Shellfish	1836	94%
Total	**1952**	**100%**
£000s	**Value**	**%**
Demersal fish	626	29%
Pelagic fish	1	0%
Shellfish	1526	71%
Total	**2153**	**100%**

Source: Marine Management Organisation (www.marinemanagement.org.uk)

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Leisure and port facilities

Another primary use of the harbour is for leisure and recreation. Boat trips and excursions are popular, which run from Weymouth and take people out and around the local coastline, particularly Portland. There are also companies that run dive trips as many shipwrecks are in the area to explore. Angling is another popular activity to partake in both along the fishing pier and out in Weymouth Bay Many boats often do both angling and diving trips.. Weymouth Pavilion sits at the end of the harbour offering many forms of entertainment throughout the year and Nothe Fort is found on the south side of the harbour, which is a popular visitor attraction.

Facilities in the port include moorings/berthing for privately owned boats and there is a ferry terminal for the passenger ferry, which has a café, check-in services, payphones and facilities for passengers with disabilities. The harbour also has a diesel re-fuelling station, electricity & water supplies and showers & washrooms for visiting vessels. The two marinas at Weymouth hold a total of 750 vessels (Weymouth & Portland Borough Council Marina: 450, Dean & Reddyhoff Marina: 300). There are 80 vessels in total for commercial light fishing, diving and sightseeing[29].

Lifeboat

Weymouth RNLI lifeboat station is home to two lifeboats – the all weather lifeboat (ALB) and an inshore lifeboat (ILB). The statistics for 2009, from Weymouth Lifeboat Station, shows that the ALB had a total of 35 call outs and the ILB had a total of 25 call outs in 2009. Most of the call outs for the ALB were to power boats (12) and the ILB made ten launches to power vessels. For January – September 2010 (inclusive), both the ALB and the ILB have made 32 launches each.

Table 21

Weymouth Lifeboat Launches 2009			
Incident Type	All Weather Lifeboat (ALB)	Inshore Lifeboat (ILB)	**Total**
Power Boats/Vessels	12	10	**22**
Yachts	9	4	**13**
Fishing Vessels	6	2	**8**
Dive Related	3	4	**7**
Sailboards	0	3	**3**
Sail training Ship	1	0	**1**
Passenger Vessel	1	0	**1**
Tender	1	0	**1**
Unexploded Ordinance	1	0	**1**
Sick Person	0	1	**1**

[29] Source: Weymouth Berthing Office

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At Risk on Shore	0	1	**1**
Person Stuck in Mud	1	0	**1**
TOTAL	**35**	**25**	**60**

Future Development/Prospects

Weymouth Berthing Office gives information on the current prospects of Weymouth Harbour. The current economic climate and the effect of the recession has led to a decline in the number of visiting leisure craft and there are vacant permanent berths. However, vehicle and passenger numbers at the ferry port have remained constant and there is currently a waiting list for commercial boats offering fishing, diving and day trips.

With the Olympic sailing events being held in 2012 at Weymouth & Portland Sailing Academy and in Weymouth Bay, there is expected to be an increase in the number of visitors to the area. This includes more passengers and visiting vessels. The number of vacancies for permanent berths is expected to decrease and ferry port operations/visiting leisure craft are expected to increase as the Olympics approach and/or when the economy begins to grow again[30].

A recent article in the Dorset Echo, from the 13th October 2010 announces that the harbour is to receive a £210,000 'boost', approved by councillors at Weymouth & Portland Borough Council. This investment is to go towards enhancing the facilities located in and around the harbour such as additional toilets and improving the ferry terminal. There is 'dedicated additional funding of £171,200' for the harbour walls. These improvements are to be made before the arrival of the Olympic sailing events in 2012[31].

PORTLAND

Following closure of the navy base in 1995, Portland Port's assets were purchased by Langham Industries Ltd in 1996, bringing about the creation a new deep-water commercial Port. Portland Harbour Authority Ltd, owned by Langham Industries Ltd, became the statutory Harbour Authority for Portland Harbour and its surrounds following the adoption of the Portland Harbour Revision Order (HRO) on 1st January 1998. Within the HRO, provision is made for Portland Harbour Authority Limited to make byelaws as considered necessary for the management and regulation of the harbour and harbour premises.

[30] Source: Weymouth Berthing Office
[31] Dorset Echo 13 October 2010

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The Port has the capacity to handle all types of cargo from unit load/containers, general cargo and bulk through to project cargos, heavy lifts and most categories of hazardous goods. A new development in 2009 provided 8,400m2 (approx. 2 acres) of cargo handling hard standing with an adjacent cargo shed, suitable for Ro-Ro and General Cargo operations. Seventeen designated anchorages, bunkering, ship repair and maintenance, vessel replenishment and diving services are all available, and there are numerous berths, piers and jetties serving diverse traffic including cruise ships, cable ships and general cargo vessels. The Port also maintains strong links with the navy, particularly the Royal Fleet Auxiliary.

There are 25 companies based within the Port's estate. These include: Shipbuilders and engineers Manor Marine, Global Marine Systems, the world's largest independent provider of marine cable installation and maintenance, bunkering providers Aegean Oil, and underwater maintenance providers, UMC International.

Employment & Businesses

Using the 2008 data from the Annual Business Inquiry, for Weymouth & Portland[32], lower layer super output areas that surround the ports were investigated for the number of businesses and employees working in marine related industries. The maps below (from NOMIS) shows the areas that were selected and the marine related industries looked at were (using SIC 2007 definitions):

- 0610: Extraction of crude oil
- 0620: Extraction of natural gas
- 0311: Marine fishing
- 0321: Marine Aquaculture
- 3011: Building of ships and floating structures
- 3012: Building of pleasure and sporting boats
- 0910: Support activities for petroleum and natural gas extraction
- 5010: Sea and coastal passenger water transport
- 5020: Construction of water projects
- 4291: Service activities incidental to water transportation
- 5222: Cargo handling
- 2811: Manufacture of engines and turbines, except aircraft, vehicle and cycle engines

Figure 31a and b

Map showing wards in and around Weymouth / Portland Ports.

[32] Weymouth & Portland statistics have been combined due to small estimates

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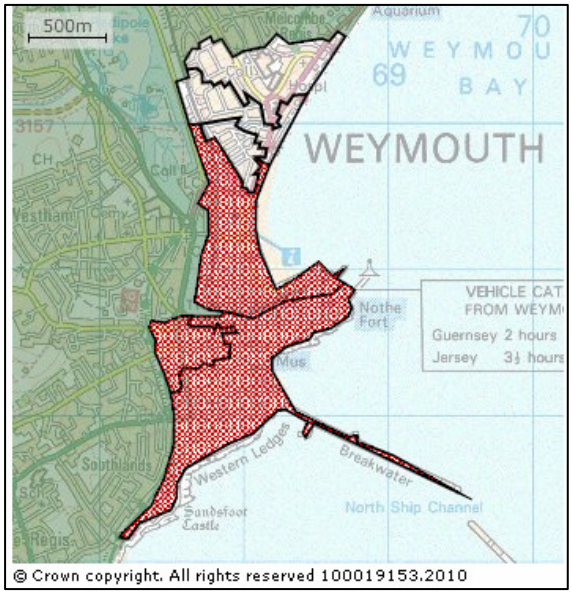

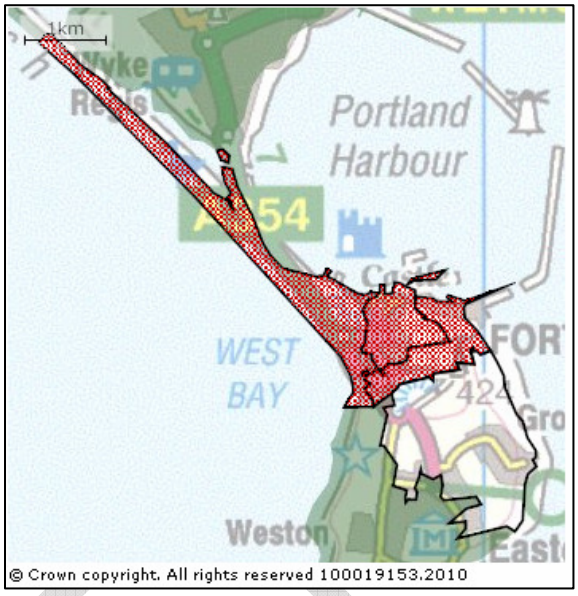

Data from the 2008 ABI gives an estimate of 20 businesses in the marine related industries, employing roughly 400 people in the area surrounding Weymouth/Portland ports. This may be a low estimate compared to the actual number of businesses due to the exclusion of the self employed from the inquiry. The data suggests that this accounts for around 40% of all businesses and 71% of all employees within the lower layer super output areas selected. These statistics are from a sample survey and should be treated with caution due to low sample sizes in the survey from the Bournemouth, Dorset and Poole area.

The sailing academy forms part of Osprey Quay, which is a newly developed area for a variety of uses. One of the four Maritime and Coastguard Agency (MCA) Search and Rescue (SAR) helicopters is located on the site, which provides vital assistance in marine and coastal incidents alongside the local RNLI lifeboats and cliff rescue teams. Other businesses located in Osprey Quay include the Royal Yachting Association (RYA), O'Three (Dry/Wet suit manufacturer), Sunseeker (luxury boat designers and builders) and Portland Marina (operated by Dean and Reddyhoff) amongst others.

Portland Port sits in Castletown, which has many small businesses that support and take advantage of the port's location and services. These include hotels/pubs/cafés, chandlers, marine engineers, diving centres/school, a swimming and leisure centre and ship/boat supply companies amongst others. Within the port is Portland Port Business Centre, which is the location for companies such as Manor Marine, Portland Shellfish, Portland Bunkers and The Harbour Café.

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Ferries

Portland Port does not operate any passenger ferry services and people travel to nearby Weymouth for the cross channel ferry service. This is operated by Condor Ferries and travels to Jersey, Guernsey and St. Malo. However, the port does often receive visits from cruise ships and has facilities for this.

Freight and Commercial Shipping[33]

Many of the ships that visit and use the services of Portland Port are commercial ships. The port is well-equipped for handling freight and some of the services it provides include: pilotage, towage, mobile cranes & plant, personnel transfers as well as being HM Customs inventory linked. There is also a bunking and fuelling service operated by Portland Bunkers International Ltd and Aegean Oil. Portland Port is able to process many varieties of cargo from containers to hazardous goods and is also licensed to handle explosives. There are a number of ships' agents that operate within Portland Port including: Cory Brothers, Denholm Barwill, Graypen Ltd, Inchcape Shipping Services, OBC (GAC) and Wainwright Bros. & Co. Ltd. Manor Marine provides an on-site repair and maintenance service with underwater and diving services supplied by UMC International Plc.

Fishing

According to the Vessel Lists (as at 1 October 2010), 27 fishing vessels are registered to Portland Port. This accounts for just over a quarter of all the fishing vessels registered to harbours and ports within the C-SCOPE area and 11% of all fishing vessels along the Dorset coastline (BDP area). All but one of the vessels is ten metres in length or under.

Table 22

Fishing vessels by home port 2009			
Home Port	**10m or Under**	**Over 10m**	**Total**
Christchurch	21	1	22
Kimmeridge	1	0	1
Lulworth Cove	3	1	4
Lyme Regis	13	1	14
Poole	83	5	88
Portland	26	1	27
Swanage	10	1	11

[33] Source: www.portland-port.co.uk

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West Bay	14	1	15
Weymouth	51	6	57
BDP	**222**	**17**	**239**
C-SCOPE	**91**	**9**	**100**
DCC	139	12	151

Home ports within the C-SCOPE area

Source: UK Sea Fisheries Statistics 2009, http://marinemanagement.org.uk

Leisure & Port facilities[34]

Since the announcement that Weymouth and Portland would host the sailing events for the Olympics in 2012, there has been much development in the harbour to facilitate this and promote the area as a prime venue for sailing events. The new Weymouth and Portland National Sailing Academy opened in 2000 and has since been expanded. This includes a marina of 300 annual berths(with plans double this in time for the Olympics), breakwaters and hoist docks, a number of units for business, retail and commercial use, storage, fuel/water supplies and internet access. With this new investment, facilities have also been added to accommodate the increased number of service users to the site. A new restaurant has opened and there are washrooms, changing and laundry facilities on-site. There is plenty of parking and storage, both inside and outside, for a variety of waterborne craft. In preparation for the 2012 Olympics, the venue has already hosted some large international sailing regattas and races.

Other than sailing, many other sporting activities are available around the port. Diving trips take place on the numerous ship wrecks around Portland and wind/kite surfing is popular inside the harbour. Canoeing/kayaking can also be enjoyed in the harbour. As well as hosting sailing events, the academy offers sailing coaching, windsurfing lessons, physiotherapy and has spaces for meetings, conferences and private functions such as weddings[35].

Portland Port is able to accommodate cruise liners in the port up to a length of 250 metres. For this, the port has a passenger terminal especially for cruise passengers. The port is a member of the Atlantic Alliance and Destination South West, with visits in 2010 from cruise operators: Spirit of Adventure, Phoenix Reinsen, Oceania Cruises, Majestic International Cruises, Holland America Line, Crystal Cruises, Peter Deilmann,

[34] Source: www.portland-port.co.uk
[35] Weymouth and Portland National Sailing Academy (www.wpnsa.org.uk)

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Cruise & Maritime Voyages and Fred Olsen Cruises[36]. Portland Port also has its own police force.

Businesses

The sailing academy forms part of Osprey Quay, which is a newly developed area for a variety of uses. One of the four Maritime and Coastguard Agency (MCA) Search and Rescue (SAR) helicopters is located on the site, which provides vital assistance in marine and coastal incidents alongside the local RNLI lifeboats and cliff rescue teams. Other businesses located in Osprey Quay include the Royal Yachting Association (RYA), O'Three (Dry/Wet suit manufacturer), Sunseeker (luxury boat designers and builders) and Portland Marina (operated by Dean and Reddyhoff) amongst others.

Portland Port sits in Castletown, which has many small businesses that support and take advantage of the port's location and services. These include hotels/pubs/cafés, chandlers, marine engineers, diving centres/school, a swimming and leisure centre and ship/boat supply companies amongst others. Within the port is Portland Port Business Centre, which is the location for companies such as Manor Marine, Portland Shellfish, Portland Bunkers and The Harbour Café.

Future Development

There is continued promotion of the sailing academy/Osprey Quay in preparation for the Olympic sailing events in 2012. This includes hosting various sailing races, regattas amongst other events in the run up to summer 2012 when the Olympics will take place. The area is also working to attract firms/businesses to the location, which will create jobs in the local economy[37].

Portland Port applied in 2007 to expand to cope with extra demand on the services that it offers. The Portland Harbour Revision Order 2010 granted the port permission to expand the facilities at the port, allowing the construction of new berthing faces, quay walls, a floating dry dock, improvements to current facilities like the passenger terminal and the reclamation of land, along with work that will assist with this[38]. The West of Wight offshore wind site will also provide significant opportunities for the Port to offer both construction and service facilities.

[36] Source: www.portland-port.co.uk/passenger_information/cruise_calls_at_portland.htm
[37] Osprey Quay (www.ospreyquay.com)
[38] Source: www.statutelaw.gov.uk

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Drilling is expected to start in 2011 by Portland Gas for the construction and development of storage facilities for gas, which will have a capacity of 100 million cubic metres. The plan is that 14 caverns will be created to contain the gas around 2,400 metres under Portland, with the main site being in Upper Osprey. Once completed, it is expected that 25 jobs will be created[39].

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[39] www.portland-gas.com

SWANAGE

Swanage Pier lies to the east of the Dorset Marine Management Area and is owned by The Swanage Pier Trust. Initially built in the 1850s to allow locally quarried stone to be loaded onto boats that would transport the stone around the country, the Pier now acts as a landing base for local boats and is popular for fishing[40]. Although not situated at the Pier itself, there is a Jetty nearby for the local ferry that transports people to Bournemouth and Brownsea Island. There is also a lifeboat in Swanage.

Ferries

Purbeck does not run large passenger carrying ships like the ports of Poole and Weymouth although there are small, independent companies located in Swanage, Poole and Bournemouth, such as Marsh's Boats, that run ferry trips to transport passengers to Bournemouth, Poole, the Isle of Wight and Brownsea Island[41].

Fishing

Swanage is one of the smaller ports along the Dorset coast to have registered fishing vessels and is located in the C-SCOPE area along with Kimmeridge (1) Lulworth Cove (4), Portland (27) and Weymouth (57)*. A total of 11 fishing vessels have Swanage registered as their home port, which accounts for 11% of fishing vessels in the C-SCOPE area and approximately 5% of the fishing vessels registered to ports along the Dorset coastline (BDP area).

Table 23

Fishing vessels by home port 2009			
Home Port	**10m or Under**	**Over 10m**	**Total**
Christchurch	21	1	22
Kimmeridge	1	0	1
Lulworth Cove	3	1	4
Lyme Regis	13	1	14
Poole	83	5	88
Portland	26	1	27
Swanage	10	1	11
West Bay	14	1	15
Weymouth	51	6	57
BDP	**222**	**17**	**239**
C-SCOPE	**91**	**9**	**100**
DCC	139	12	151

Home ports within the C-SCOPE area

Source: UK Sea Fisheries Statistics 2009, http://marinemanagement.org.uk

[40] www.ports.org.uk

[41] Source: http://www.swanagepiertrust.com

* Numbers in brackets represents the number of fishing vessels registered to each home port

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Leisure facilities

Other than the local ferry trips to Brownsea Island, Poole, the Isle of Wight and Bournemouth, Swanage offers other recreational activities. Swanage Pier is popular for angling and scuba diving around the pier, two dive boats run boats to the popular wrecks in the area and there is a diver training zone that sits adjacent to the pier[42].

Businesses

Swanage has many local shops, visitor accommodation and eateries that provide for visitors & tourists. On the pier itself is the Isle of Purbeck sub-aqua club, a dive shop (Divers Down), which supplies equipment and offers training, and Marine Villas, which contains a shop and various visitor attractions[43]. Durlston Country Park is another attraction that is situated nearby, where visitors can go to see the local wildlife.

Lifeboat:

Statistics gathered by Swanage lifeboat station[44] supplies data on the number of call-outs the lifeboat made in 2009 along with a breakdown of incident by type and assistance given. There was a total of 40 rescues in 2009 – 12 (30%) requiring the ILB (D Class), 21 (52.5%) requiring the ALB (Mersey) and 7 (17.5%) requiring the assistance of both lifeboats. Of these rescues, 27.5% were made to yachts in difficulty and a fifth was made to motor boats. In 2009 the lifeboats made no launches to ramblers/walkers or windsurfers. Up to 29th September 2010, there have been 43 rescues made by the lifeboats in the year.

Table 24

Swanage Lifeboat Launches 2009

Both boats	7
D Class (ILB)	12
Mersey (ALB)	21

Launches to casualty types	
Animal	1
Canoe/Kayak	1
Climber	1
Commercial Vessel	3
Dinghy	4
Diver/Dive boat	2
Jet Ski	1
Medivac	2

[42] Source: http://www.swanagepiertrust.com
[43] Source: http://www.swanagepiertrust.com
[44] Source: www.swanagelifeboat.org.uk

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Miscellaneous	1
Missing person	3
Motor boat	8
Rambler/Walker	0
Swimmer	2
Windsurfer	0
Yacht	11

Source: www.swanagelifeboat.org.uk

Marine Incidents in the C-SCOPE area

The Maritime & Coastguard Agency (MCA) is able to call upon the use of RNLI lifeboats, its own coast rescue teams and Search And Rescue (SAR) helicopters as well as other vessels around the United Kingdom to assist with maritime incidents. They also have a close working relationship with other agencies and emergency services like the Fire, Police and Ambulance Service. Along the coast, within the C-SCOPE area, there are two lifeboat stations based at Weymouth and Swanage, a SAR helicopter based at Portland Port, a Maritime Rescue Co-ordination Centre in Weymouth[45] and two coast watch stations at Portland Bill and St. Alban's Head[46].

Data provided by the MCA gives approximate numbers of the marine incidents within the C-SCOPE area. Information gathered from Weymouth and Swanage Lifeboat stations give an indication of the various types of incidents that may occur in the area. This includes animals/climbers on the coast and cliffs, and yachts/fishing vessels out at sea. There were a total of approximately 228 incidents in 2009 within the C-SCOPE area. The majority of these incidents (209 – 91%) were within one nautical mile of the coast. Between one and five nautical miles there were 12 (5%) incidents and the remaining incidents, seven (3%), were between five and 12 nautical miles from the coast. There were a further 33 incidents that were over 12 nautical miles from the coast between Portland Bill and Durlston Head[47].

[45] Source: Maritime & Coastguard Agency (www.mcga.gov.uk)
[46] Source: National Coastwatch Institution (www.nci.org.uk)
[47] Source: Maritime & Coastguard Agency (www.mcga.gov.uk)

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VALUE OF MARINE INDUSTRY TO THE ECONOMY

In 2008 in the DCC Dorset area, marine industries[48] accounted for about £134 million in gross value added (GVA)[49]. This is about 2.1% of total GVA in the county indicating that DCC Dorset is much in line with the Great Britain average of 2.3% of GVA and above the South West regional average of 0.8%. In neighbouring Poole, marine industries are more significant, accounting for 4.2% of total GVA.

Of the £134 million GVA generated through marine industries in 2008 in DCC Dorset £106.6 million was produced by the oil and gas extraction industry. Again, this is much in line with the national average.

14% of GVA in marine industries was accounted for by the marine engineering sector (£18.4 million) – above the national average of ten per cent. This sector was far more significant to other parts of the South West region accounting for about three-quarters of total GVA in the region as a whole.

Fishing was marginally more important to DCC Dorset than to GB, contributing three per cent of marine industries' GVA (£3.6 million) compared to two per cent of GVA nationally. Fishing was more significant in the South West region as a whole accounting for seven per cent of marine industries' GVA.

The water transport sector was less significant to DCC Dorset than nationally contributing two per cent of marine industries' GVA (£3.3 million) compared with seven per cent nationally. This was more in line with the South West average of three per cent.

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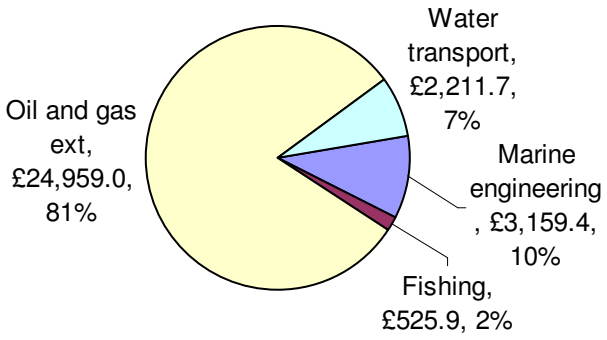
[48] Using the Regional Accounts, marine industries defined as: Marine engineering (shipbuilding/repair and part of Manufacture of engines and turbines, except aircraft, vehicle and cycle engines – RDA definition) plus Fishing; Oil & gas extraction; and Water transport.

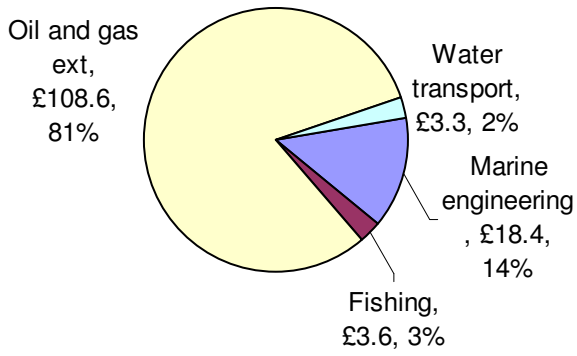
[49] Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry or sector in the UK by estimating the value of its outputs (goods and services), less purchases and less net spending taxes.

Figures 32a and b

Value and contribution of marine industries: GB



Value and contribution of marine industries: DCC Dorset



Figures in £ millions

Source: Regional Accounts (Econ-i), South West Observatory

CHANGE IN VALUE ADDED

In 2008, GVA in marine industries fell relative to 2003, in contrast to the increases seen nationally (54%) and in Poole (more than doubled). Marine industries made a lower contribution to total GVA in DCC Dorset than in 2003 (2.1% compared with 3.4% five years ago). Nationally, the contribution of marine sectors rose, (from 1.9% to 2.3%) and neighbouring Poole also saw an increase in marine industries' contribution to total GVA (up from 2.4% to 4.2%).

Poole's improvement was largely due to increased GVA in the marine engineering sector. The decrease in marine industries GVA in DCC Dorset arises from lower GVA in the oil and gas extraction sector and a more modest decline in fishing and water transport. Marine engineering is becoming more significant to the county and GVA more than doubled in this sector from 2003-2008 – much the same scale of growth as that seen in Poole and higher than the increase seen nationally.

Over the same period, GVA in fishing fell in DCC Dorset – contrary to the trend in Poole and GB as a whole. GVA in oil and gas extraction and water transport also fell, again contrary to the national trend.

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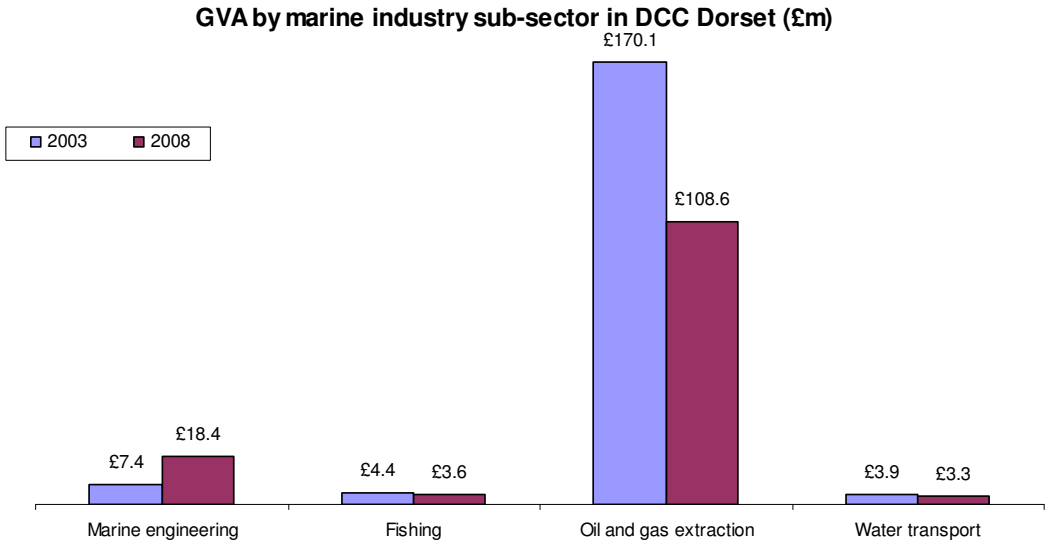
Figure 33



Source: Regional Accounts (Econ-i), South West Observatory

GVA PER FULL TIME EQUIVALENT WORKER

GVA per FTE worker is highest in the oil and gas extraction sector at £702,544 per FTE. However, this is below the GB average: DCC Dorset=91.3 where GB=100. Relative to GB, GVA per FTE worker in this sector has improved.

Marine engineering had the next highest level of GVA per FTE worker at £39,198. This is much in line with the all-industry average of £39,326 but below the GB average for the sector: DCC Dorset=66.5 where GB=100. Relative to GB, GVA per FTE worker in this sector has improved a little.

The fishing sector had GVA per FTE worker of £31457, again below the national average: DCC Dorset=62.4 where GB=100. Relative to GB, GVA per FTE worker in this sector has declined.

The water transport sector was considerably below average with GVA per FTE worker at £12,880: DCC Dorset=9.6 where GB=100. Relative to GB, GVA per FTE worker in this sector has declined.

GVA in all industries in DCC Dorset is below the average for GB: DCC Dorset=79.0 where GB=100.

Source: Regional Accounts (Econ-i), South West Observatory

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THE MULTIPLIER EFFECT

Any change made in the marine industries or one of its sectors[50] will have a ripple effect through the economy as supply chain businesses are affected. There will be an additional 'household effect' as employees in the marine industries change their spending behaviour as a result of any change.

Impact of increased employment in marine industries:

Employment:

For every 100 full time equivalent employee (FTE) increase/decrease in the marine industries, the multiplier is approximately 1.38 ie an additional **38 FTE positions** are created or lost in the Dorset economy. This is slightly lower than the all industry average of 1.41.

Therefore, if 100 new FTE jobs are created in marine industries, an additional 38 will be supported in the economy. **14** of these would be created through the impact on immediate suppliers in the marine industries as they meet the change in demand created by the initial impact: this is the first round effect. The direct effect consists of the initial change plus the first round effect. The net direct effect therefore would be **114** FTEs.

Further to this, the indirect effect is that experienced by other local industries as they accommodate the change in purchases in other sectors. For every 100 FTEs created in the marine industries, the indirect effect would be a further **five** FTEs.

The induced effect is the change in demand arising through changes in household expenditure on local goods and services. These occur through changes in net employment and self-employment income caused by the changes in demand between local industries. For every 100 FTEs created in the marine industries, the induced effect would be a further **19** FTEs.

Table 25

	Initial	First Round	Indirect	Induced	Total
FTEs	**100.0**	**13.6**	**5.3**	**19.2**	**138.1**

[50] These estimates assume that the impact is felt across the marine sectors of fishing; oil & gas extraction; shipbuilding and repairs; water transport. For the FTE effect, increased employment was apportioned in line with FTE percentages by sector. For the investment effect, apportionment was in line with GVA percentages by sector.

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Excluding the initial impact (ie the FTEs created in the marine industries), the greatest impact would be felt in the construction and finance sectors.

Output:

For every 100 full time equivalent employee (FTE) increase in the marine industries, there is also an impact on output. Gross output is the broadest measure of economic activity, roughly corresponding to the value of sales less the cost of any goods or services purchased for resale. The multiplier effect shows that for every initial £1 million increase in output arising from the additional 100 FTEs, a further £0.27 million of demand for goods and services is generated within the Dorset economy. The initial impact of the additional FTEs is to increase the demand for goods and services in Dorset firms by about £19 million. Together with the first round effect on immediate suppliers, this gives a direct impact of about £21 million and a total impact of £24 million.

The multiplier of 1.27 is below the all industry average of 1.49 in Dorset.

Table 26

	Initial	**First Round**	**Indirect**	**Induced**	**Total**
Output (£m)	**19.0**	**2.0**	**0.7**	**2.4**	**24.1**

Excluding the initial impact, the greatest impact would be felt in the business services and distribution & retail sectors.

Gross Value Added

The increased net output of £24 million in Dorset equates to a total of almost £13 million GVA which is added to the local economy. With the multiplier effect, every initial £1 million increase in GVA arising from the additional 100 FTEs adds a further £0.10 million to total GVA in the Dorset economy. The net direct impact on GVA is about £12 million.

The multiplier of 1.10 is below the all industry average of 1.25 in Dorset.

Table 27

	Initial	**First Round**	**Indirect**	**Induced**	**Total**
GVA (£m)	**11.5**	**0.4**	**0.1**	**0.7**	**12.6**

Excluding the initial impact, the greatest impact is again evident in the business services and distribution & retail sectors.

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Impact of increased investment in marine industries:

Employment:

For every £10 million increase/decrease in investment in the marine industries, 35 FTE positions would be gained or lost as an initial impact. In addition, with a multiplier of approximately 1.42 ie an additional **15 FTE positions** are created or lost in the Dorset economy giving a total impact of 49 FTE jobs. This multiplier is lower than the all industry average of 1.65 in Dorset.

Six of these would be created (with an injection of funding) through the impact on immediate suppliers in the marine industries as they meet the change in demand created by the initial impact: this is the first round effect. The direct effect consists of the initial change plus the first round effect. The net direct effect therefore would be **41** FTEs.

Further to this, the indirect effect is that experienced by other local industries as they accommodate the change in purchases in other sectors. For every £10 million invested in the marine industries, the indirect effect would be a further **two** FTEs.

The induced effect is the change in demand arising through changes in household expenditure on local goods and services. These occur through changes in net employment and self-employment income caused by the changes in demand between local industries. For every £10 million invested in the marine industries, the induced effect would be a further **seven** FTEs.

Table 28

	Initial	First Round	Indirect	Induced	Total
FTEs	**34.6**	**6.3**	**1.8**	**6.6**	**49.3**

Excluding the initial impact (ie the FTEs created in the marine industries), the greatest impact would be felt in the distribution & retail and business services sectors.

Output:

For every increase/decrease in investment in the marine industries, there is also an impact on output. The multiplier effect shows that for every initial £1 million increase in output arising from the additional investment, a further £0.21 million of demand for goods and services is generated within the Dorset economy. The initial impact of an additional £10 million investment would to increase the demand for goods and

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services in Dorset firms by about £11.1 million (including the £10 million investment). Together with the first round effect on immediate suppliers, this gives a direct impact of about £12.1 million and a total impact of about £13 million.

This 1.21 multiplier is lower than the all industry average of 1.41 in Dorset.

Table 29

	Initial	First Round	Indirect	Induced	Total
Output (£m)	**11.1**	**1.0**	**0.3**	**1.0**	**13.4**

Excluding the initial impact, the greatest impact would be felt in the business services, distribution & retail and construction sectors.

Gross Value Added

The increased net output of £13.4 million in Dorset equates to a total of £8.2 million GVA which is added to the local economy. With the multiplier effect, every initial £1 million increase in GVA arising from the additional investment adds a further £0.07 million to total GVA in the Dorset economy. The net direct impact on GVA is £8 million.

This 1.07 multiplier is lower than the all industry average of 1.38 in Dorset.

Table 30

	Initial	First Round	Indirect	Induced	Total
GVA (£m)	**7.7**	**0.2**	**0.1**	**0.3**	**8.2**

Excluding the initial impact, the greatest impact is again evident in the business services and distribution & retail sectors.

Source: Regional Accounts (Econ-i), South West Observatory

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APPENDIX 1

Summary of Data Sources and Update frequencies required for future monitoring.

Data	latest available	next updated	Update frequency
Mid-Year Population Estimates	2009 MYEs	Jul-11	Annual
Ethnicity	2001 Census	2011 Census (2012/13)	10 years
ACORN	2009	Jan-11	Annual
Council Tax Benefits	2010	Jul-11	Annual
Index of Deprivation	2007	Mar-11	Every 3 years
Life Expectancy	2006-08	Nov-10	Annual
Disability & Long term illness	2001 Census	2011 Census (2012/13)	10 years
	AA/DLA 2010	Feb-11	Annual
Teenage Conceptions	2006-2008	Apr-11	Annual
Accommodation Type	2001 Census	2011 Census (2012/13)	10 years
Tenure	2001 Census	2011 Census (2012/13)	10 years
House Prices	April-June 2010	Oct-10	Quarterly
2nd Homes	2010	Apr-11	Annual
Employment	2008	December 2010 (replaced with BRES)	Annual
Unemployment	Jul-10	Monthly	Monthly
Vacancies	2008	Monthly	Monthly
Earnings	2009	Nov-10	Annual
Industry/Sectors	2008	No longer available	alternative would need to purchased
Skills levels	2009	Jun-11	Annual
Ports & Shipping	as requested		

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