

# State of the Solent Edition 3:

## 5. Marine Industries Indicators



The marine industry in the Solent is made up of three major activities, ports and shipping, naval and defence, and marine leisure (SEEDA, 2007). Each has its own needs and can be looked at individually but as a whole they are a very important part of the Solent's economy.

Since the publication of the last edition of the State of the Solent report in 2004, there have been a number of major studies which have looked at the importance of marine industries in the Solent:

- Z-Card research project, Marine Policy Task Group, 2010 (Centre for Local and Regional Economic Analysis (CLREA), University of Portsmouth).
- The Solent Waterfront Strategy which was commissioned by SEEDA, [http://www.seeda.org.uk/solent\\_waterfront/](http://www.seeda.org.uk/solent_waterfront/).
- Socio-Economic Impact Assessment of Portsmouth Naval Base (University of Portsmouth, commissioned by SEEDA) [http://www.seeda.co.uk/\\_publications/PortsmouthNavalBaseFullReport\\_Feb07.pdf](http://www.seeda.co.uk/_publications/PortsmouthNavalBaseFullReport_Feb07.pdf).
- Socio-economic indicators of marine-related activities in the UK Economy, the Crown Estate, 2007, <http://www.thecrownestate.co.uk/newscontent/92-socio-economic-marine-activity-indicators.htm>.

The total economic output of the area from Poole to Chichester, which includes the Solent, is estimated to be £4.28 billion, using 2008 data from Association of British Insurers (ABI) statistics. The total employment (full time equivalent) in this region was 22,300, again estimated from the ABI statistics (CLREA, University of Portsmouth, 2010).

All these reports give an analysis of the ongoing importance of the marine industry in the Solent. There is limited Solent wide trend data for marine leisure or naval and defence activities to indicate how these sectors are changing over time. Port and shipping activities are considered in chapter 3 of this publication, and there are a number of indicators 3.1, 3.2 and 3.3 which measure changes in different aspects of this sector over time.

### Naval and Defence Activities

A study carried out for SEEDA on the Socio-Economic Impact Assessment of Portsmouth Naval Base (PNB) calculated that the Base was responsible for nearly 8,000 direct jobs. Fifty one percent of those employed directly by PNB in 'defence dependent' jobs lived in Portsmouth, Gosport, Fareham or Havant. Including indirect impacts, PNB supported just under 35,000 jobs within South Hampshire, consisting of 13,300 service jobs and 21,600 civilian jobs (SEEDA, 2007).

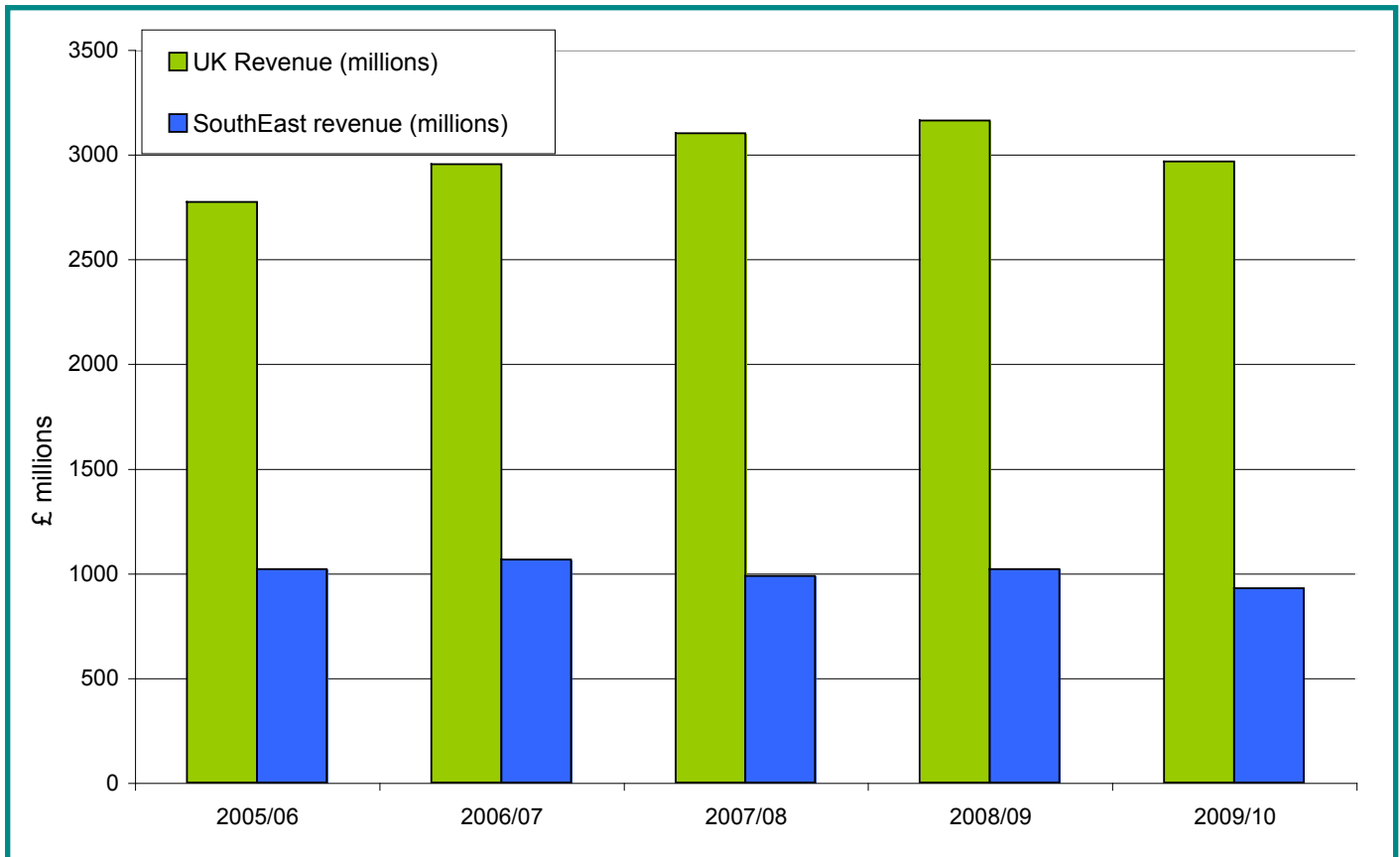
### Marine Leisure Activities

Marine Leisure Activities are strong in the southeast with it having the largest percentage share of the UK revenue (31%) closely followed by the southwest. From a mapping exercise carried out by British Marine Federation in 2009 it was found that there was £280 million of revenue for just over 300 companies in the Solent area. In terms of percentages, in 2009/10 this is 30% of the total of the southeast in the Solent area and 9% of the total UK.

The Solent Waterfront Strategy report (2007) estimated that output demand for marine products and services in the Solent sub-region amounted to between £3.4bn and £4.0bn with a median of £3.6bn; 17.8% of the total GDP in the Solent sub-region.

## Supplementary Information: Total Revenue Generated by the UK Marine Leisure Industry

The British Marine Federation records a number of annual performance indicators, one of which is the total revenue generated by the UK leisure, superyacht and small commercial marine industry.



Source: British Marine Federation

### What does the data show

The decrease seen in 2007/8 was not a trend for businesses in the southeast overall, but was due to one major company going into administration. Similar to the ports and shipping industry, the most recent figures reflect the downturn in the economy. Both revenue and employment have decreased in 2009/10 from 2008/9. Revenue for the industry nationally is now back to levels reported in 2006/7; however the southeast has still not recovered to 2006/7 levels.

### Future Work

Research is needed on how to obtain figures which represent the Solent area rather than the whole of the southeast. A methodology needs designing which is easily repeatable and fits with the data already collected at the regional level.

### Links

- BMF: <http://www.britishmarine.co.uk/>.
- SEEDA: <http://www.seeda.co.uk/>.
- Portsmouth Naval Base: <http://www.royalnavy.mod.uk/operations-and-support/establishments/naval-bases-and-air-stations/hmnb-portsmouth/index.htm>.
- Solent Local Enterprise Partnership: <http://www.solentlep.org.uk/>.
- Marine South East: <http://www.marinesoutheast.co.uk/>.