

Employment trends in all sectors related to the sea or using sea resources

United Kingdom



European Commission
DG Fisheries and Maritime Affairs

An exhaustive analysis of employment trends in all sectors related to sea or using sea resources

Country report – United Kingdom

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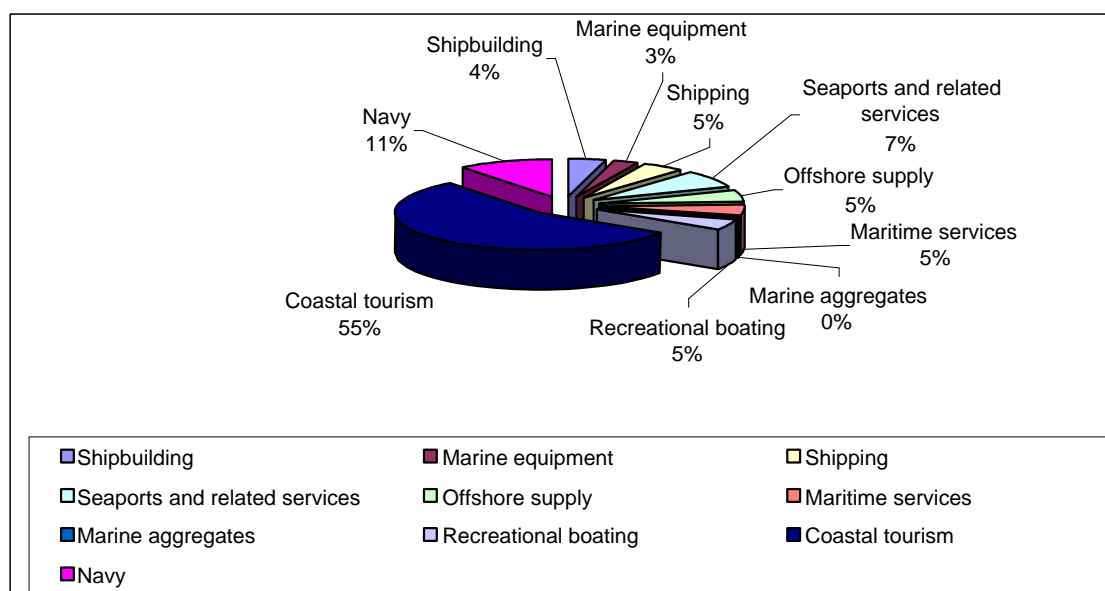
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1.0 Summary^I

Direct employment in the sea related sectors totalled 580,330 in 2004/2005^{II} with coastal tourism employment making up over half of total employment. Employment in the traditional maritime sectors reached 198,971; this figure excludes navy and coastal tourism. SeaVision UK estimates that total employment (indirect and direct) in the maritime sector is 239,118 and total value added was £11.33bn with a total turnover of £ 35.92bn.^{III}

Of the traditional sea related sectors, seaports are the most significant employer with over 42,000 jobs in the British Isles. This is followed by offshore supply, recreational boating, maritime services and shipping industries, each making up 5% of total employment and each sector employing 26,000 to 30,000 individuals.

Figure 1.1 Share (%) of employment in different sea related sectors, 2004/2005



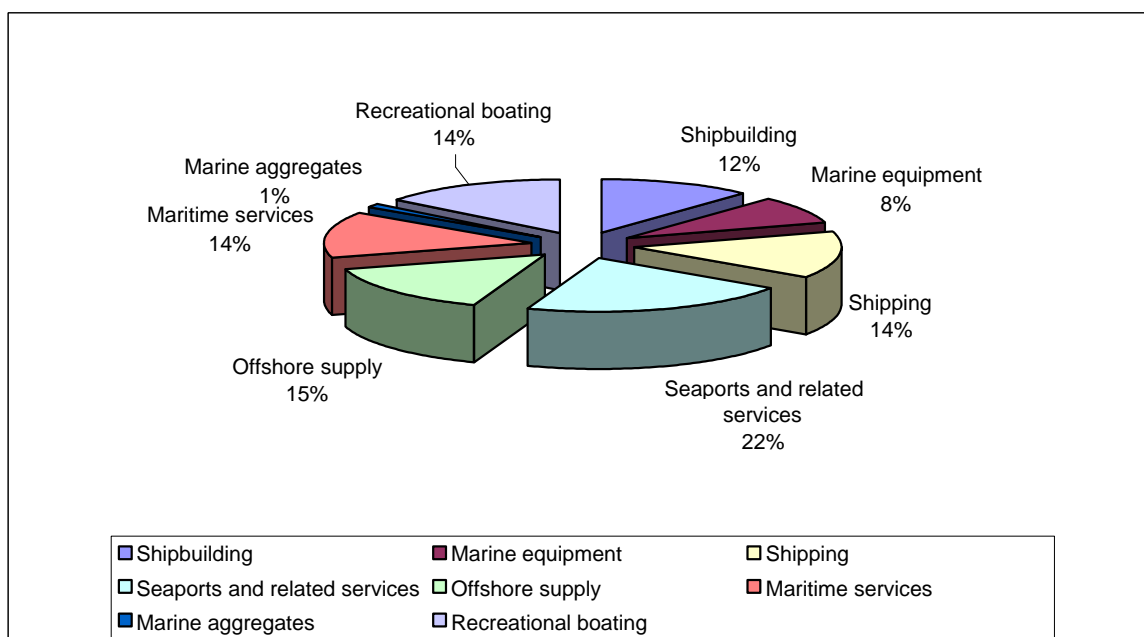
If we look at the share of employment for the traditional maritime sectors, the situation is very different with seaports constituting over a fifth of total employment and marine equipment and shipbuilding together making up 20% of total employment (see Figure 1.2 overleaf).

^I This report excludes employment related to fishing.

^{II} Information on marine equipment sector refers to 2001, and fishing is excluded from this study.

^{III} Seavision UK, Maritime Sector Statistics, 2005

Figure 1.2 Share (%) of employment in traditional maritime sectors, 2004/2005



The shipbuilding industry and seaports have experienced job losses over the past decade whilst coastal tourism employment has increased by 15% between 1998 and 2004. The shipping industry experienced a long term decline up until 2001/2002 when employment in the sector stabilised.

Table 1.1 The number of employees in the maritime sectors, 1998-2005

Sector	1998	1999	2000	2001	2002	2003	2004	2005
Shipbuilding	35,000	-	-	-	-	-	24,000	-
Marine equipment	-	-	-	16,604	-	-	-	-
Shipping	-	-	-	-	25,710	28,340	27,710	26,520
Seaports and related services	-	-	-	-	-	-	-	42,150
Offshore supply	-	-	-	-	-	-	30,000	-
Maritime services	-	-	-	-	-	-	-	27,402
Marine aggregates	-	-	-	-	-	-	2,500	-
Recreational boating ^{IV}	-	-	-	-	-	30,092	28,605	-
Coastal tourism	278,771	270,676	272,641	283,515	300,910	307,960	319,859	-
Navy	-	-	-	-	-	-	-	61,500

^{IV} The figures are from separate studies, consequently differences in employment can, to some extent, be explained by differences in study approaches and cluster definitions.

2.0 Shipbuilding

The shipbuilding sector has been in long-term decline in the UK particularly in terms of merchant shipbuilding orders. The production in the 20 years leading up to 1980 did not fall steadily but fluctuated between 800,000 and 1.5 million gross tons a year. However, this was a period of boom in the industry so the UK share of world shipbuilding fell from over 15% in the early 1960s to under 4% by the beginning of the 1980s.^V

UK yards, like their European counterparts, now tend to concentrate more on niche markets and vessels with high technological content. The biggest yards remain heavily dependent upon naval shipbuilding. The number of firms in shipbuilding and ship-repair has fallen by a third since 1997. There are now 700 firms, but most of these are very small. Disregarding the 13,000-plus employees in the biggest 10 companies, this puts the average number of employees per firm at less than 18.^{VI} The biggest shipbuilders and ship-repairers rely on orders from the Ministry of Defence (MoD). There is a large naval shipbuilding programme expected in future years for the Royal Navy.^{VII} The super yacht sector is also becoming increasingly important to, as it is an expanding, high value added market.^{VIII}

The ship-repair sector has tended to be on a much smaller scale and less vulnerable to the major cyclical changes that affect shipbuilding. According to the Institute of Marine Engineering, Science and Technology, the industry in the UK has been performing well in recent years and is developing a worldwide reputation for repair and conversion work.^{IX}

UK yards build 25-30 vessels a year and along with the ship-repair industry generate an estimated £1.6 billion-£2 billion in turnover.^X Turnover in shipbuilding and ship-repair sectors was just over £1.9 billion in 2004. This is up on the previous three years but below the £2.5 billion figures recorded at the end of the 1990s.^{XI} Seavision estimates that shipbuilding has a turnover of £2.54 billion and a value added of £ 1.27 billion.^{XII}

^V Draft Research by Labour Research Department *'Managing cyclical changes in the European shipbuilding and ship repairing industries: Evidence from the United Kingdom'*[Given by Richard Pond, LRD]

^{VI} Ibid.

^{VII} DTI

^{VIII} DTI

^{IX} Ibid.

^X Draft Research by Labour Research Department *'Managing cyclical changes in the European shipbuilding and ship repairing industries: Evidence from the United Kingdom'*

^{XI} Labour research department

^{XII} Seavision UK, maritime sector statistics, 2005

2.1 Employment trends

The shipbuilding and ship-repair industries in the UK employ around 24,000 workers directly with an estimated 50,000 employees in related industries.^{XIII} The DTI quotes a higher figure of 32,000 people in 2003. The Amicus industry report 2004 reports the same figures as the research carried out by the Labour Research Department that 24,000 people are directly engaged in shipbuilding, ship repair and conversion and 50,000 are employed in subcontract, supplier and support industries.^{XIV}

Employment in the shipbuilding industry has been in long-term decline. The sharpest falls took place in the 1970s and 1980s, there has been a further decline in recent years with total employee numbers falling from 35,000 in 1998 to 24,000 in 2004 (-29%).^{XV} The Labour Research department study argues that the reasons are the long-term decline in the shipbuilding industry, the cuts in defence spending during the 1990s and increased use of agency staff and sub-contractors. Many of the big shipbuilding yards have either closed, or - like Harland and Wolff - have switched to repair and refit work.^{XVI}

Table 2.1 Employment in shipbuilding and repair

	1998	2004
Direct	35,000	24,000
Indirect employment	-	50,000
Total	-	74,000

Source: Draft Research by Labour Research Department

Recruitment problems are also mentioned: in a survey undertaken by the University of Bremen, 75% of UK shipyards reported difficulties in recruiting white-collar workers, and 25% blue-collar workers.^{XVII}

Other important issues affecting employment in the sector are outsourcing and migrant labour. Shipyards are increasing their flexibility through the use of agency staff. This was due to either because core skills were not available from existing workforce or because of a lack of availability of permanent staff. The use of migrant workers is also becoming an issue.

^{XIII} Draft Research by Labour Research Department 'Managing cyclical changes in the European shipbuilding and ship repairing industries: Evidence from the United Kingdom'

^{XIV} AMICUS Shipbuilding Industry Report 2004

^{XV} Draft Research by Labour Research Department 'Managing cyclical changes in the European shipbuilding and ship repairing industries: Evidence from the United Kingdom'

^{XVI} Ibid.

^{XVII} Evaluation of the Quantitative Survey on European Shipbuilding, 2005, Otto Brenner Foundation and the German Centre for Productivity and Innovation.

2.2 Employment projections

The medium term employment forecast for the sector is positive. Indeed, the Labour Research Department study outlines the main challenge facing the industry as the question of how to cope with a forecast boom in demand as the Ministry of Defence is implementing its biggest naval building programme for years. The outlook for employment in the ship-repair sector is more stable as it is less vulnerable to cyclical changes.^I

In a report commissioned by the Ministry of Defence, the Rand Corporation estimates that there are currently around 10,000 shipyards workers (40% of all those in the industry) working on current projects – general refitting, the Astute submarines, the Type-45 destroyer, landing platform docks, the Landing Ship Dock (Auxiliary) vessels and the Offshore Patrol Vessel (Helicopter). By 2009 the number is forecast to rise by 50% to reach 15,000 as new projects come on stream – in particular the CVF Future Aircraft Carrier, the Military Afloat Reach and Sustainability project (MARS), the Joint Casualty Treatment Ship and the Future Surface Combatant (FSC) craft. After the other projects have finished, some construction work on MARS and FSC will continue beyond 2020 but by about 2024 Rand estimates that all construction work will be completed and only around 3,000 workers will be required to cover the normal refit and repair work.^{II}

Two challenges facing the industry in response to these changes are outlined: retaining the numbers of skilled workers now over the next 18-months to two years before all the projects come on stream; and dealing with the sharp fall off in demand once these projects are completed.^{III}

The increase in demand could pose problems due to an ageing workforce with many skilled workers close to retirement and a decline in the number of school leavers. An increasing uptake of apprenticeships is a key challenge for the major defence contractors in expectation of the surge in demand for skilled workers in the coming years.^{IV}

2.3 Skills and training

It has been suggested that lack of capable staff and modern facilities have been the reason for the loss of some contracts, rather than lack of orders and contract work.^V Skills

^I Draft Research by Labour Research Department *'Managing cyclical changes in the European shipbuilding and ship repairing industries: Evidence from the United Kingdom'*

^{II} Draft Research by Labour Research Department *'Managing cyclical changes in the European shipbuilding and ship repairing industries: Evidence from the United Kingdom'*

^{III} Ibid.

^{IV} Ibid.

^V Marine Labour Market Observatory, EMTA

Skills shortages highlighted by the Engineering and Marine Training Authority (EMTA) are the need for communication and project management skills as a result of trends in the sector for increased outsourcing, partnering and liaison with companies in the supply chain; greater practical experience needs for engineering graduates, particularly in the boat building sector; need for updating of IT to keep up with technological advances. Also identified was a need to train specialised technical staff in order to develop the capabilities to win specialised contracts.

It is suggested by EMTA that much of the training undertaken in the marine engineering sector is training required by law. In particular, environmental awareness as well as health and safety were identified, whereas little money was spent on issues such as multi-skilling. Estimates suggest that 90% of employees in this sector are actually in need of training for key activities in their jobs. In total, the UK marine education and training market is estimated at £160m, which equals only 0.5% of the total marine market value and puts the UK behind South America but slightly ahead of Asia, Europe and North America.¹

Two main areas were identified by EMTA for action are funding to increase promotion of the sector and incentive funding to make training more attractive to companies. The funding of training for those in the agency labour pool is also an issue. Companies prefer to buy in skilled labour rather than train, which suits the project-based nature of the industry. As training is generally regarded as a cost, increase in training uptake will have to be encouraged through case studies outlining the benefits of training, namely increases in productivity, profitability and quality. The added fear of poaching can hinder investment in training.

Representative of the National Union of Marine, Aviation and Shipping Transport Officers (NUMAST) argues that the industry is not good at forward planning, and that there is a 'dearth of strategic vision' and a lack of collective action. Decision making into terms of skills is very short term and employment decisions are often made on the basis of cost. For example, the order for LNG tankers has doubled, and the industry is saying it will be short of skills, yet there is no concerted attempt to deal with this. The industry relies on other bodies to do the training.¹¹ The National Employers' Skills Survey reports that barriers to training are mainly due to being too busy or not having time available (16%), not being able to afford staff time off for training (15%) and the cost of training locally (14%). For those that identified cost of training locally there were issues with the cost of courses relating to health and safety (36%) and general engineering skills (27%). To alleviate training barriers marine employers suggested more assistance with funding (20%) and more subsidies/grants from government (15%). Several companies highlighted that

¹ Marine Labour Market Observatory, EMTA

¹¹ Ibid.

managers need better training to understand the return on investment from developing staff.^I

There is evidence that skills are transferable to other sectors, as there is evidence about training welders as electricians. However, no evidence was found about the transfers specifically to other maritime sectors.

Hard-to-fill vacancies in the sector are greatest at craft level and are mainly due to a lack of applicants with the required work experience or qualifications. Craft level engineering skills, electrical/electronic skills, previous work experience, welding skills and fabricating skills are the hardest to find. Companies reported that metal workers, pipe workers and electrical engineers might be in short supply in the next five years. To overcome hard-to-fill vacancies companies are increasing salaries, retraining existing staff and subcontracting.^{II}

The falling number of graduates in naval architecture and in mechanical, electrical and marine engineering is reported to be a problem. Numbers of students accepted on courses in Maritime Technology have fallen by over a half (55%): in 2003 there were 153 students accepted on to degrees courses compared with 340 in 1996, anecdotal, but wide spread evidence of a shortage of electrical engineering graduates also exists.^{III}

3.0 Marine equipment

The annual turnover of the marine equipment sector was £1.70bn, and the GVA £0.80bn in 2002.^{IV} According to DTI the UK share of sales in Western Europe has dropped due to the increase in the value of sterling between 1996 and 2000.^V The British companies are also reported to face difficulties in competing due to the confidence customers have in their design capability and technical resources. The ability to offer technical support and to provide installation services are key to winning sales.^{VI} This suggests that design and technical skills are crucial for marine equipment companies in order to expand its market share.

The UK marine equipment sector companies face intense international competition and in 2001 some equipment manufacturers were losing market share to overseas competitors. The super yacht marine equipment sector is a potential niche market with the prospect of

^I Marine Sector Skills Agreement: Stage 1, July 2005, SEMTA

^{II} Ibid.

^{III} Marine Sector Skills Agreement: Stage 1, July 2005, SEMTA

^{IV} Marine Sector Skills Agreement: Stage 1, July 2005, SEMTA (Figures based on DTI and ABI)

^V Marine Sector Skills Agreement: Stage 1, July 2005, SEMTA

^{VI} Ibid.

higher margins for equipment that has been visually enhanced to meet the owners' exacting standards.^I

3.1 Employment trends

The DTI estimates that employment in the marine equipment sector was 16,604 in 2001.^{II}

4.0 Shipping

The turnover of the shipping sector according to Seavision UK is £5.12 billion, and the value added £2.40 billion. The shipping industry has now returned to its 1998 turnover levels. The gross tonnage of UK owned trading vessels has seen a steady rise since 1999 after a decade of decline. This revival is partly as a result of changes in government policies (e.g. tonnage tax) introduced to halt the decline in the UK shipping industry.^{III}

It is predicted that the decline in the North Sea oil and gas industries will force a change in both shipping and ports, releasing labour back into other maritime industries and ports may need to move away from fuel towards other kinds of freight. Growth in liquid natural gas (LNG) transportation is likely. Although the ports that can take advantage of this growth sector are limited by the size of their harbour as LNG ships will be very large, it is reported that British companies can take advantage of the sophisticated nature of LNG ships, where crews will need to be much more competent, to capture a large slice of the market. The passenger ferry sub-sector is likely to continue to face competition from the Channel Tunnel and low-cost air travel. In contrast the passenger cruise market is expected to continue to grow in response to an ageing population and increased disposable income.^{IV}

4.1 Employment trends

Employment of seafarers in the UK experienced a long-term decline up to 2001 when the introduction of a number of Government initiatives managed to turn this trend around. For example, according to the Department for Transport (DfT) the employment rates of certified officers have fluctuated as follows;

- In 1997 there were 17,026 certified officers, of which 14,302 were active at sea.
- In 1999, there were 15,419 seafarers, of which 12,952 were active at sea.

^I Marine Sector Skills Agreement: Stage 1, July 2005, SEMTA

^{II} Marine Sector Skills Agreement: Stage 1, July 2005, SEMTA

^{III} The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

^{IV} The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

- The corresponding figures for 2004 were 15,514 certified seafarers, of those 13,032 were active at sea.

The following table demonstrates that number of all seafarers has slightly increased between 2002 and 2005. In particular the number of officers has increased, whilst the number of ratings has slightly declined.

Table 4.1 Employment of seafarers, 2002 - 2005

	2002	2003	2004	2005
Certified officers	12,440	13,100	13,150	13,240
Uncertified officers	2,750	3,750	3,260	2,910
Ratings	9,510	10,490	10,270	9,320
Officer Trainees	1,010	1,000	1,030	1,050
Total active at sea	25,710	28,340	27,710	26,520

Source: DfT

The introduction of the tonnage tax was expected to produce an increase in the numbers of ships attracted to the British registry, as well as increased training and employment. The tax has been successful in attracting ship-owners to register their vessels within the scheme, but according to NUMAST it has not delivered the 'unique feature' of increased training and employment.¹ The overall employment has increased but the share of British seafarers has seen a decline. There are difficulties in recruiting young people and the age profile is an ageing one.

The main groups of UK seafarers (officers serving on UK registered vessels) who are foreign nationals are from former commonwealth, and the largest numbers come from Asia; mainly from India (4,714), Pakistan (1,102) and Bangladesh (924). The Social Issues Research Centre's research showed that while some 70% of all masters on British-registered ships are UK nationals, the figure falls to 54% for chief engineer officers, 37% for chief officers and just under 33% of second officers. The unions feel that the increasing number of foreign nationals threatens the UK's skills base in the shipping industry.

¹ NUMAST report on UK seafarers, maritime skills and the tonnage tax

4.2 Employment projections

The DfT seafarer statistics 2004 give projections for the numbers of certified seafarers until the year 2020ⁱ. These projections are also divided by deck and engineer positions. By 2015, with the retirement assumption of 62, there will be 9,034 certified officers, of which 4,719 will be working on deck and 4,315 as engineers. By 2020, it is projected that there will be 7,010 certified officers, of which 3,661 will be working on the deck and 3348 will be working as engineers.

Research carried out by the MacKinnon Partnership into the demand of junior officers found that employers expect their demand for junior officers to increase, and to continue to increase over the next 10 years. They also estimate that the number of junior officers they recruit will increase by 19% between 2005 and 2007. The study found that most employers are satisfied with the quality of their junior officer recruits. Most employers are also content with their current overall recruitment and retention arrangements, but one third are 'concerned' or 'very concerned' about whether their approach will meet their needs in five years time.

4.3 Skill needs in the sector

A number of different studies points to skill shortages in the upcoming years; over the last 15 year period the number of British seafarers employed on UK ships has more than halved and both Britain and the world are now facing a rapidly developing and serious shortage of skilled seafarers. The new technologically sophisticated tonnage requires high skills to operate them and therefore generates a need for requires highly skilled people. A need to continue to raise the level of management skills in the workforce has been raised in the ports and shipping industries. A common need is also the management of risk and health and safety requirements.ⁱⁱ

Because of the concern about the availability of engineers in the sector (which competes with other sectors for a limited pool of new and experienced engineers), awareness raising about career options and increasing the attractiveness of the sector are seen as imperative.ⁱⁱⁱ It has been pointed out that there is a need to ensure the sector provides the appropriate opportunities for career progression to quickly to address the impending skills shortage in maritime skills. The need to consider how the movement between parts of the maritime sector can be encouraged more easily is also highlighted.

ⁱ A simple model of officer entry and exit rates has been combined with the detailed age profile information generated by the MCA SDS data on UK certificated officer ages.

ⁱⁱ *The Maritime Sector Labour market Assessment*, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

ⁱⁱⁱ *The Maritime Sector Labour market Assessment*, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

Technology has increased the amount of information that is available and increased communication allowing more accurate information to be available more quickly. Generally all operational level staff are expected to be more familiar with IT systems from common PC skills. Ship management functions are increasingly undertaken onboard ships as opposed to onshore, thereby reducing costs, but impacting on the management skill needs of ship's officers; the development of dynamic positioning systems and their increasing use onboard vessels in the off-shore oil supply sub-sector.¹

4.4 Training

There is a high level of compulsory certification required to work in many roles in the sector. All new entrants to the shipping industry over the past ten years have followed programmes leading to N/SVQ level 2 or 3. The training used by the shipping industry is a combination of onshore training delivered by maritime colleges based around the country and on-the-job sea-based training to prepare employees for particular roles and ensure they have the appropriate certification. For cadets this requires the availability of training berths onboard ship. Many companies provide technical and management training to update the skills of existing employees.

Research carried out by NUMAST identifies that for the past 15 years there have been concerns about availability of trained British officers for merchant ships used in defence as the British officer cadet training reduced dramatically during the 1980s, leaving a huge 'generation gap' in the country's maritime skills base. A total of 2,315 cadets began training in 1975. This fell to 1,274 in 1980 and to an all-time low of 162 in 1987. The intake recovered slightly since then, running between 400-500 throughout the 1990s and when the tonnage tax was still at the discussion stage in 1999, officer trainee recruitment was in the region of 560 cadets per year.

4.5 Transferability of skills to other sectors and further employment projections

Traditionally a significant percentage of employment in the maritime sector and related service industries are filled by ex-seafarers. The DfT study looked at the estimate of the number of land-based jobs in the maritime related sectors where employers would prefer to employ seafarers.

When ex-seafarers are employed by shipping companies, ports or other maritime related businesses in shore-based jobs, it is often because of their expertise they have gained through their previous seafaring employment. Where this is so, they are employed usually

¹ The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

in a technical capacity and relevant seafaring experience is one of the factors considered necessary for employment. This tends to be the case regardless of whether such former seafarers are employed in a maritime related activity such as pilotage or by a City-based firm such as a marine insurance company.

The DfT study found that there has been a reduction in the estimated number of jobs which employers would prefer to fill with ex-seafarers. The jobs where ex-seafaring skills are essential tend to be of a highly technical nature and may require additional training. It is projected that 15,682 jobs in the maritime-related sector are those, which employers currently would prefer to fill with former seafarers. This is lower than in 1996 study when the estimated total number of jobs was calculated as 16,825. Meanwhile, the proportion of non-seafarers filling jobs that previously employed ex-seafarers has substantially increased. In 1996 study only 4.6% of such jobs were filled by non-seafarers. Reasons suggested are adjusting employee requirements to accommodate the decrease in the number of ex-ships' officers and other seafarers available, so non-seafarers are recruited to fill vacancies in jobs where seagoing experience is only considered to be an advantage.

The DfT study points to a mismatch between supply and demand of officers. This is likely to persist in the immediate future with the gap between demand and supply widening. The supply of officers available as a consequence of natural wastage to fill net job vacancies in the essential category in 2004 is estimated to be 201. It is likely that a shortfall in supply occurred in 2004, given that the mean annual demand for such officers has been estimated as either 313 or 266. This predicted shortfall in supply is the consequence of the low level of recruitment of cadets throughout much of the period since 1983 resulting from the decline in the UK shipping industry.

The study also estimates that there should be one cadet for every seven officers or 1.5 trainees per ship to meet UK needs – while BIMCO estimates the current ratio is around one trainee for every 10 officers. Similarly, the last BIMCO update suggested that on current global recruitment trends the shortage of officers is likely to grow to 46,000 or around 12% of the total workforce, by 2010.

As the supply of skilled seafarers has faltered it is likely that companies such as Lloyd's (major recruiter of skilled seafarers) have been recruiting larger numbers of young graduate engineers and naval architects to a four-year training scheme leading to chartered engineer status. The results of these trends could be that UK officers currently employed at sea may be encouraged to move to onshore employment sooner in their career than they otherwise would have done. Market forces can drive up shore-based salaries to attract serving seafarers, creating increased wastage from shipping companies.

The British union representing seafarers warns that if the present trends continue, a shorter career at sea is expected to become the norm, companies currently employing UK junior officers will have less incentive to train them and less incentive to recruit UK officer cadets and be more likely to employ foreign officers. Ultimately the lack of skilled seafarers can present a threat to safety and security of Britain's maritime safety infrastructure.

Regardless of this the Maritime Skills Alliance raises the issues of a lack of comparability between the many maritime sector certificates and qualifications and other non-sector specific qualifications. The certification regime can make it difficult to switch careers within the sector. This has implications for individuals' position in the labour market if they leave the sector and makes it more difficult for employers to recruit people without maritime sector experience. Whilst an attempt to make certificates and qualifications compatible has been made, for example through the development of joint fishing and merchant navy NVQs, the anecdotal evidence suggests little movement between industries has occurred.^I

5.0 Seaports and related services

Around 95% of international goods to and from the UK go by sea so ports play a vital role in the UK economy. Seavision UK estimates that the turnover of the British ports is £1.69 billion, value added £1.18 billion.^{II} The ports and cargo handling industries have been growing in turnover despite a fall of 3% in the tonnage passing through the British ports since 2000 when record levels were recorded.^{III}

5.1 Employment trends

Over the last few decades considerable changes have taken place in the British ports industry, particularly in port employment which has declined significantly even though port traffic has been increasing. This decline has mainly been a result of increased mechanisation and containerisation.^{IV} Just over 42,000 workers were employed in British ports in 2005 with a majority of them involved in cargo handling and warehousing duties. Estimations on indirect employment vary from 13,000 to 43,000.

Table 5.1 Employment in seaports, 2005

Port employment	
Cargo handling (includes warehousing)	22,180

^I The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

^{II} Maritime Sector Statistics, Seavision UK

^{III} The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

^{IV} Port employment and accident rates, Transport statistics bulletin,, DfT, 2005

Management and administration of ports (also includes professional engineering and maintenance)	8,680
Marine operations (Dredging, Harbourmasters, assistants, Pilots, VTS staff, Lock operations, Surveying, Tug operations, Vessel mooring, other marine operations)	9,010
Passenger operations (Information officers, Traffic marshals, Baggage handlers, Security staff, Other passenger operations)	2,280
Other operations	8,680
Total	42,150
Indirect employment	13,000-43,000

Source: Department for Transport, DfT

As earlier mentioned, port employment has decreased; port industry employment levels are only about 40% of those some 40 years ago, and the number of dock workers involved in cargo operations are only a third of those employed 40 years ago. Forty years ago around 140,000 people were employed in the port industry in the UK, of which around 65,000 were registered dockworkers engaged in loading and unloading cargoes. However, over the same period, freight traffic through UK ports has increased by three quarters from around 330 million tonnes in 1965 to 573 million tonnes in 2004.¹

Around half of direct employment is on port employment is work in process, plant and machinery operations or in skilled trades, and just less than a third in management and administration. As far as off port employment is concerned, about a third of employees are in process, plant and machinery operations or in skilled trades, about half in management and administration, and 16% in customer services. The higher management and administration and customer services reflect the type of companies in this group, (principally freight forwarders, shipping agents etc). Around 4% of the employees are temporary staff, rising to 9% in busy times.

5.2 Skills and training

A need to continue to raise the level of management skills in the workforce have been raised in the ports and shipping industries. A common skill need is the management of risk and health and safety requirements.¹¹ English language is also raised as a skill issue because of the increased use of foreign nationals in the fishing and ports industries and possible hazardous situations because of lack of language skills. There may be an

¹ Port employment and accident rates, Transport statistics bulletin, DfT, 2005

¹¹ *The Maritime Sector Labour market Assessment*, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

increasing demand from employers and employees to provide ESOL^I courses to such workers.^{II}

Within the ports industry take-up of N/SVQs is relatively low and awarding bodies are concerned that the maintenance of the qualifications is becoming unviable.^{III} The 2003 NESS reports that 39% of employers in the maritime sector (using a wider definition of maritime, including the ports sector) in England had funded or provided training for their employees in the previous 12 months. The survey reports that 75% of maritime companies providing training provided job specific training whilst 69% provided health and safety training.^{IV} Current training activity in the port sector is primarily in-house and there are no training providers with access to government funding.^V

There is concern about the availability of engineers as the ports sector has to compete with other sectors for a limited pool of new and experienced engineers. The ports' industry has difficulty recruiting and retaining engineers in particular locations depending on the local labour market.^{VI}

5.3 Transferability of skills

There is evidence that for example seafaring experience provides possibilities for career development in the port sector. The study commissioned by the DfT 'UK economy's requirements for people with experience of working at sea 2003' defines the shore-based maritime industry to include those industries where there is likely to be a demand for ex-seafarers e.g. classification societies, port services, marine lawyers, marine insurance, ships agents, maritime schools etc. For further information on skills and transferability, please see the UK section on shipping which outlines the issues to do with transferability of skills from seafaring to shore-based activities.

6.0 Offshore supply

The offshore oil and gas sector is the largest single industrial investor in the UK economy. At £25 billion, the Gross Value Added (GVA) of the oil and gas industry accounted for 2.5% of the total GVA in the UK in 2003 and will form an increasing share of the UK

^I English for Speakers of Other Languages

^{II} Ibid.

^{III} The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

^{IV} The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

^V The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

^{VI} The Maritime Sector Labour market Assessment, February 2005, (McKinnon Partnership) for Maritime Skills Alliance

economy in 2004 and 2005 as a result of higher oil and gas prices. In 2004, the UK was the fourth largest gas producer and the 11th largest oil producer.^I

6.1 Employment trends

The industry provides employment for around 260,000 with 30,000 directly employed by E&P companies and 155,000 as contractors to the industry or in the supply chain. An additional 75,000 induced jobs are sustained through the investment and wages from the industry. Employment overseas and export of international goods/services further boosts the total numbers employed through the industry^{II}.

Employment from the upstream oil and gas industry extends across the UK, though it is concentrated in north-eastern Scotland, the Orkney and Shetland Islands, the east coast of England, London and South-East England. Almost two-thirds of the 30,000 jobs directly related to the oil and gas industry, are located in Scotland followed by London and the South East (15% combined).^{III} The oil and gas industry has an aging workforce; less than 6% of the workforce is under 25 (31% 36-45, 29% 46 -55).^{IV}

The oil and gas sector is subject to cyclical employment trends. Thus, the nature of the industry has caused many experienced professionals to leave the industry or country seeking further opportunities or security. This situation is exacerbated by lack of investment in training and development and low recruitment when oil prices are low.

6.2 Skills and Training

It is argued that the industry is characterised by a lack of investment in training and development and low recruitment when oil prices are low. The sector needs to recruit new and better quality entrants. Aspects of globalisation have increased the need for continuous improvement and cost cutting leading to flatter structures. There is a need for high calibre recruits with the right mix of technical and key/core skills at all levels. While the number of employees in the industry continues to decline slightly, there is a continuing need to recruit, train and develop employees at technician and associate professional level

^I Energising Future Generations, Economic Report 2005, UKOOA

^{II} Energising Future Generations, Economic Report 2005, UKOOA

^{III} Energising Future Generations, Economic Report 2005, UKOOA

^{IV} Market Assessment for Sector Skills Council for Chemical, Nuclear, Oil and Gas, Petroleum and Polymer industries, November 2003, Gogent

as skill levels and needs are set to rise. This also means that the existing workforce needs up-skilling to meet the demands of new technology and changing work practices.¹

The sector uses frameworks such as sector focused Modern Apprenticeships as a part of the initial training of new entrants and foundation degrees are being created as part of the continuing development of existing employees.

Qualifications held by workforce in the sector vary. Highly specialised research and technical staff for a wide range of pure applied scientific and engineering roles are likely to have degrees, higher degrees and PhDs. Generalists, usually graduates, for a wide range requiring a level of scientific/technical understanding and numeracy that will allow the individuals concerned to operate effectively in a technology-based environment. Technicians with practical competence in the application of management of science and technology are likely to have HNC's / HND's / Modern Apprenticeships.

7.0 Maritime services

The UK and London in particular is the leading centre in the provision of services to the international maritime community and the commercial maritime services in the UK employ over 14,000 people, largely in London, and generate £1,092m in overseas earnings.¹¹ The owners of about one fifth of the world fleet's tonnage are represented in London, mainly on behalf of ship-owners based in Greece and other major maritime countries. The major contributors to the UK's £1,092m net overseas earnings of maritime services in 2002 were the Baltic Exchange (£322m), insurance brokers (£170m), legal services (£190m) and banks (£150m). The Lloyd's Register of Shipping and publishing also make an important contribution to the UK economy.

Growth in world trade and the world fleet have expanded most parts of the market for maritime services over the long term, as well as the tightening of international regulation, which has resulted in a surge in shipbuilding since 2000 in order that ships meet new design and safety requirements. This has in turn generated heavy demand for additional finance in the UK.

The UK faces the ongoing challenge of serving the shipping market, in which an increasing proportion of seaborne trade is in the Indian and Pacific oceans. It also remains dependent on a flow of people with skills developed from seafaring experience. While recruitment in the UK shipping is now rising following a prolonged period of stagnation, further initiatives

¹ Market Assessment for Sector Skills Council for Chemical, Nuclear, Oil and Gas, Petroleum and Polymer industries, November 2003, Gogent

¹¹ *Maritime Services*, 2003, International Financial Services, London

may be required to secure a sufficient flow in the long term. The client base in London is also vulnerable to the introduction of tax measures which could undermine London's status as a leading international maritime centre.

7.1 Employment trends

Altogether maritime services make an important contribution to the UK economy by employing 27,400 people in 2005. Over half of this, 14,000 are jobs in the commercial maritime sector of which most important are ship-broking, legal services and classification. The number of jobs in the commercial service sector has witnessed a slight decline between 2000 and 2005 but according to the industry representatives this decline is explained by greater efficiency and expertise – rather than decline in service activities.

Table 7.1 Maritime services employment, 2000-2005

Subsector	2000	2003	2005
Research & Development	-	-	8,040
Education and training	-	-	1,100
Safety and salvage	-	-	4,200
Commercial services	14,500	14,200	14,062
- Ship-brokers	1700	1900	2041
- Shipbrokers' support staff	2300	2300	2457
- Banking	400	400	400
- Underwriters	500	200	200
- Insurance brokers	1800	1600	1500
- P&I Clubs	1100	1050	1030
- Average adjusters	300	300	300
- Law firms	2300	2200	2050
- Barristers	200	200	200
- Maritime arbitrators	100	100	100
- Ship classification	1800	1850	1734
- Publishing	800	800	750
- Accountants	500	550	550
- IMO and other international organisations	400	450	450
- Prof. institutions	100	100	100
- Others	200	200	200
Total	-	-	27,402

Source: IFSL surveys, industry estimates and SeaVision UK

7.2 Skills and training

The reputation of London as a maritime centre is based on the depth and range of maritime related skills. University of Wales undertook a study in 1996 which identified some 7,000 jobs in City-related services in which seafaring experience was either essential or at least an advantage, the vast majority of such jobs being filled by former captains or chief engineers. Adequate supply of skills is a long term issue for maritime services in London.

8.0 Recreational boating

The industry plays an important role in the UK economy, with a large manufacturing base and strong export performance. The added value of the leisure boating industry in the UK was approximately £700 million in 2003 (although depending on assumptions made, the benefit may be higher, up to £850 million).ⁱ

The industry makes a significant contribution to the economic development in the South West, with high levels of leisure boating activity and associated industry in South East, the Midlands and the East of England. There is considerable potential to develop the industry elsewhere in the UK, with projects currently being developed in North West and Wales to respond to market interest.ⁱⁱ

The industry faces a number of key challenges. A study on the economic benefits of the UK leisure boating industry highlights that one of the most important challenges to address is the constraint on provision of marinas and moorings, as this is constraining growth in the domestic market for leisure boats and related services. This can limit the growth related tourism, reduce demand for new boats (annual domestic sales of some £200 million) and demand for marinas and moorings, charter companies, inland hire business and sea schools, which together employ 6,000 people and account for an estimated £180 million of value added to the economy. Indeed, constraints on supply can have important knock-on consequences both for manufacturing and the wider economy.

Changes to the UK Planning Regime and the implementation of the Water Framework Directive are also placing more emphasis on understanding the economic contribution of the industry to enable better informed regional spatial planning and river basin management. Against this background, opportunities provided by government initiatives to support sporting excellence, tourism and competitiveness will become increasingly important.

ⁱ Economic Benefits of the UK leisure Boating Industry, 2005, GHK for British Marine

ⁱⁱ Economic Benefits of the UK leisure Boating Industry, 2005, GHK for British Marine

8.1 Employment trends

The British Marine Federation commissioned a study in 2003/2004 on employment in and economic impact of recreational boating industry. The study concluded that the sector contributed to the creation of just over 30,000 jobs in the UK. The following table summarises employment by different sub-sectors and further down below it is possible to find more information on each sub-sector.

Table 8.1 Employment in the recreational boating industry in 2003

Sector	Employment
Manufacturing of Boats & Boating Equipment	15,162
Distribution of Boats & Boating Equipment	1,814
Retail of Boats & Boating Equipment	2,358
Marinas, Moorings & Boatyard Services	3,538
Charters & Sea Schools	4,715
Other Services (Insurance, Financial and Legal)	2,505
Total	30,092
Indirect	57,000 - 68,000

Source: BMF Industry Bulletin 2003/2004 – based on apportionment of total employment reported by BMF members according to turnover share in sector, stratified to the total industry based on an accepted model

- Manufacturing is the largest sector in the industry and accounts for 50% to 60% of the economic benefits of the industry. The sector generates £340 million of value added pa, approximately 15,000 jobs in 1,300 businesses and provides £133 million in tax contributions per year. Three quarters of sales are exports, worth £700m per year.
- Distribution generates approximately £37 million in value added, 1,800 jobs in 360 businesses and £10 million in tax contributions per year.
- Retail and brokerage generates approximately £70 million in value added. It employs around 2,400 people in 780 businesses and contributes £29 million in taxes per year.
- The Marina, moorings and boatyard Services sector is the second largest sector and accounts for around 15% of economic benefits. It contributes about £113 million of value added to the national economy, with approximately 3,500 people employed in 1,000 businesses and provides £31 million in tax contributions per year.

¹ Economic Benefits of the UK leisure Boating Industry, 2005, GHK for British Marine

- Charters and sea schools generate approximately £73 million of value added, employ 4,700 people in 860 businesses, and contribute about £17 million in taxes per year.
- Other Services (insurance, financial and legal) generate about £36 million of value added, 2,500 jobs in 700 businesses and £10 million in tax contributions per year.
- The leisure boating industry also contributes to tourism, through associated spend and employment. The total spending associated with leisure boating supports between 57,000 and 68,000 tourism jobs in the UK, of which approximately 10% or 6,000 are supported from expenditure from overseas visitors (these jobs are additional to those employed by industry businesses).¹

A more recent study by the British Marine Federation estimates that total employment in the marine leisure sector as a whole was 28,605 in 2004.

Table 8.2 Employment by different sub-sectors, recreational boating, 2004

Sector	Employment
Boatbuilding	8,140
Power and propulsion (mnfr.)	411
Electronics	1,075
Equipment	4,743
Inland Hire & Charter	1,864
Wholesale Distribution	1,872
Insurance	416
Finance	1 86
Professional Services	1,968
Moorings/Berthing/Storage	2,024
Boatyard Services/Repairs	1,467
New Boat sales (Dealer sales)	958
Brokerage	372
Retail	1,170
Coastal Charter	1,102
Sea school	806
Waterside electronics dealer	131
Total	28,605

Source: British Marine UK leisure Marine Industry Bulletin 2004/2005

¹ Economic Benefits of the UK leisure Boating Industry, 2005, GHK for British Marine

9.0 Marine aggregates

The marine aggregates industry contributes to the creation of 2,500 jobs on British-registered vessels and on land^I.

10.0 Coastal tourism

The hospitality, leisure, travel and tourism is a large and diverse sector employing a workforce of over 1.9m in the UK.^{II} The sector is characterised by low barriers to entry, with many new businesses setting up without the necessary skills required. Employment in the sector is growing at a faster rate than overall employment in the UK; the sector has experienced growth in employment by 7% over a five year period, compared to 4% across the economy.

Growth has varied; industries such as restaurants have grown as much as 16% and holiday parks and travel and tourism services dropping by 6%^{III}. Hospitality services (20%), gambling (11%) and contract food service provision (8%) have also seen substantial growth. However, industries such as holiday parks, travel and tourism services and pubs, bar and nightclubs have all witnessed a drop in employment, whilst a number of industries have remained relatively static^{IV}.

In 2002 the recent slow-down in the UK economy and more widely in the world economy, has reduced consumer spending on travel, eating out, culture and entertainment. The terrorist attacks on 11th September 2001 further accelerated the slow-down in visitors to the UK (as have the terrorist incidents in London in July 2005).

10.1 Economic impact of coastal tourism

Coastal tourism is a difficult sector to estimate, as the distinction between coastal and other holidays difficult to define. The seaside is still an important bank holiday destination in the UK. Despite this, between 1973 and 1998 the share of UK generated tourist nights spent at the seaside fell from 27% to 13%, as people are taking longer main holidays abroad. However, there is a continuing change in favour of short breaks, which helps to

^I BMAPA, 2006

^{II} Hospitality, Leisure, Travel and Tourism, Skills and Labour Market Profile, 2005 (People 1st)

^{III} Hospitality, Leisure, Travel and Tourism, Skills and Labour Market Profile, 2005 (People 1st) p.6

^{IV} Hospitality, Leisure, Travel and Tourism, Skills and Labour Market Profile, 2005 (People 1st)

maintain the income levels.^I Pugh and Skinner estimate that the turnover of coastal tourism is £17bn and the value added £10.7.^{II}

The main sub-sectors of coastal tourism are cruising and leisure craft services. These, however, are discussed in the leisure boating section. The total turnover for leisure and recreation was £19.29bn and the value added £11.77bn^{III}.

10.2 Employment trends

According to People 1st, the hospitality, travel and tourism sector currently employs 1.9 million people in the UK^{IV}. The Visit Britain report 'Employment generated by Tourism in Britain' estimates that in 2000, the UK workforce stood at 29.4m full time equivalents^V. They estimate that tourism expenditure supports approximately 6.1% of the UK's total workforce. The restaurant industry employs the largest proportion of the workforce with 518,700 employees, followed by hospitality services and pubs, bars and nightclubs^{VI}.

Using calculations from the Annual Business Enquiry and selecting relevant districts to assess the extent of tourism employment in the coastal regions of Britain, the following figures in the table below have been arrived at. Although the regions selected for the data extraction were coastal regions, it must be borne in mind that not all the tourism employment data relate to coastal activities^{VII}. This is caused by the mere size of the regions. The total figures for coastal tourism employment, using this method of calculation

^I *The Travel and Tourist Service Industries*, 2005, People 1st

^{II} Pugh and Skinner A new analysis of maritime related activities in the UK economy with supporting science and technology, 2002, IACMST

^{III} Pugh and Skinner A new analysis of maritime related activities in the UK economy with supporting science and technology, 2002, IACMST

^{IV} Hospitality, Leisure, Travel and Tourism, A Skills and Labour Market profile, February 2005, People 1st

^V Employment Generated by Tourism in Britain, Visit Britain

^{VI} Hospitality, Leisure, Travel and Tourism, A Skills and Labour Market profile, February 2005, People

^{VII} Bristol, North Somerset, South Gloucestershire, Plymouth, Bournemouth, Poole, Caradon, Carrick, Kerrier, North Cornwall, Penwith, Restormel, East Devon, North Devon, South Hams, Teignbridge, Torridge, East Dorset, Purbeck, West Dorset, Forest of Dean, Sedgemoor, West Somerset, Medway Towns, Brighton and Hove, Portsmouth, Isle of Wight, Eastbourne, Hastings, Lewes, Rother, Wealden, Eastleigh, Fareham, Gosport, Havant, New Forest, Test Valley, Canterbury, Dover, Gravesham, Shepway, Swale, Thanet, Adur, Arun, Chichester, Worthing, Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire, Ceredigion, Pembrokeshire, Carmarthenshire, Swansea, Neath Port Talbot, Bridgend, Vale of Glamorgan, Monmouthshire, Newport, Cardiff, Aberdeenshire, Angus, Argyll & Bute, Scottish Borders, Dumfries & Galloway, East Lothian, Edinburgh, City of, Fife, Highland, Moray, North Ayrshire, Orkney Islands, South Ayrshire, Eilean Siar, North Tyneside, South Tyneside, Sunderland, Hartlepool, Redcar and Cleveland, Easington, Alnwick, Berwick-upon-Tweed, Blyth Valley, Castle Morpeth, Wansbeck, Liverpool, Sefton, Wirral, Blackpool, Ellesmere Port and Neston, Allerdale, Barrow-in-Furness, Copeland, South Lakeland, Fylde, Lancaster, West Lancashire, Wyre, Kingston upon Hull, East Riding of Yorkshire, North East Lincolnshire, North Lincolnshire, Scarborough, Boston, East Lindsey, South Holland, Southend-on-Sea, Thurrock, Basildon, Castle Point, Colchester, Maldon, Rochford, Tendring, Great Yarmouth, King's Lynn and West Norfolk, North Norfolk, Suffolk Coastal, Waveney,

was 388,702 in 2004.¹ The largest number of employees works in the restaurant sector at 151,450 followed by hotels at 110,554.

Table 10.1 Employment in coastal tourism, 1998-2004

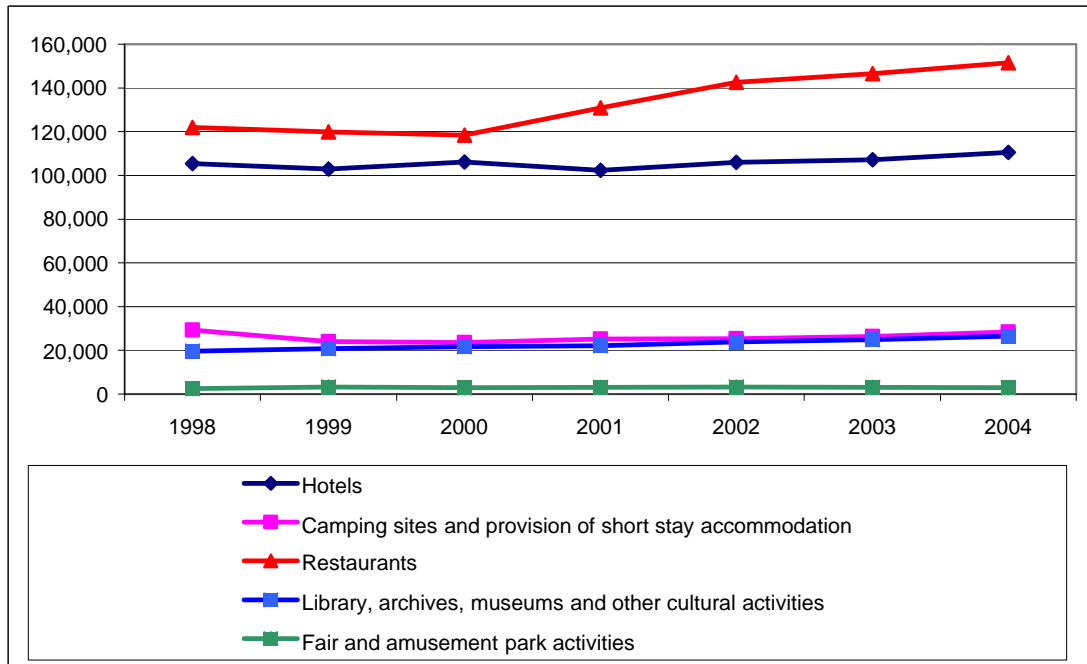
Coastal tourism	1998	1999	2000	2001	2002	2003	2004
Hotels	105,398	102,852	106,175	102,282	105,970	107,179	110,554
Camping sites and provision of short stay accommodation	29,344	23,959	23,543	25,160	25,292	26,303	28,376
Restaurants	121,912	119,843	118,422	130,939	142,604	146,466	151,450
Library, archives, museums and other cultural activities	19,685	20,852	21,639	22,039	23,829	24,903	26,544
Fair and amusement park activities	2,432	3,170	2,862	3,095	3,215	3,109	2,935
Total	278,771	270,676	272,641	283,515	300,910	307,960	319,859

Source: ABI, 2005

Employment in this sector has increased substantially both in absolute and relative terms, although experienced a small decline between 1998 and 2000. Growth in employment has been particularly strong in 2003 and 2004. In total the sector employs now just over 41,000 people more than in 1998, representing a growth of nearly 15%. Employment in the restaurant sector has seen the most significant growth – a growth of approximately 30,000 employees.

¹ Annual Business Enquiry www.nomisweb.co.uk

Figure 10.1 Employment trends by sub-sectors, 1998-2004



10.3 Employment projections

The IER and Cambridge Econometrics predict that between 2002 and 2012, the tourism sector as a whole will generate an additional 15,000 new jobs. An additional 846,000 employees are to be required to maintain the current size of the workforce between 2002 and 2012. This masks wide occupational fluctuations, which predict a fall of 83,000 in the number of ‘elementary occupations’, such as waiting and bar staff, and an increase of 17,000 managers.ⁱ

However, looking to the near future, the London 2012 Olympics can have a huge positive impact on the sector - years before and after the Games. The University of Nottingham estimate that for the whole of the UK the expected impact on tourism overall (2005-2016) would be £518million gross value added.ⁱⁱ

On the other hand, the Tourism Satellite Accounting of the WTTC provides a much more gloom projection of employment for the British tourism industry. According to this data employment in the travel and tourism industry is to decline by 6% (61,000 workers) between 2006 and 2016, and employment in the wider tourism economy by 1%.

ⁱ Hospitality, Leisure, Travel and Tourism, Skills and Labour Market Profile, 2005 (People 1st) p.6

ⁱⁱ Olympic Games Impact Study, Final Report, 2005, (PriceWaterhouseCoopers),p.7.

10.4 Skills and training

There are currently 98 accredited qualifications related to the travel, tourism and leisure sector in England. The majority of which are Level 3 qualifications. In addition, there are 6 Scottish Vocational Qualifications (SVQs) in Tourist Information Services, Travel Services and Travel Services (Tour Operations)^I.

According to the National Employers Skill Survey (NESS), 24% of all establishments in the sector had vacancies; 11% had hard-to-fill vacancies and 5% were facing a skill shortage vacancy^{II}. This is higher than the average for the whole economy. Of all vacancies, 42% were hard to fill. In the hospitality sub sector 26% of employers reported vacancies and 11% had hard to fill vacancies, and as much as 13% of hospitality employers.

Across the People 1st area, vacancies form 5.5% of all employment, higher than the rate for England as a whole (3.1%). Hard-to-fill vacancies form 2.3% of all employment^{III}. As for the reasons for the vacancies, nearly half of employers reported that not enough people were interested in doing this type of job, followed by 40% reporting a low number of applicants generally^{IV}. Skills related reasons only came fourth, in comparison to acquiring a first place for sectors like construction and financial services. It is suggested that the hospitality, travel, leisure and tourism sector, like retail, are finding it harder to attract new entrants in the first place, whether or not they have the necessary skills. Another major reason was the shift work/unsociable hours associated with the work.

Hard-to-fill vacancies are having a damaging impact on business performance. NESS identifies that an increase in the workload of staff is the main impact of vacancies that employers report (86% of sector employers)^V. In terms of this affecting performance, almost half reported difficulties meeting customer service objectives and 39% difficulties meeting required quality standards. Under a third suggested that they had suffered a loss of business or orders to competitors.

11.0 Navy and Defence

Total employment in the sector is 61,500^{VI}.

^I People 1st

^{II} National Employers Skills Survey 2003, 2004 (People 1st and SSDA)

^{III} National Employers Skills Survey 2003, 2004 (People 1st and SSDA)

^{IV} National Employers Skills Survey 2003, 2004 (People 1st and SSDA)

^V National Employers Skills Survey 2003, 2004 (People 1st and SSDA)

^{VI} Seavision UK, maritime sector statistics, 2005