



Aim

To provide a socio-economic review of marine sectors, coastal activities, people, and communities potentially affected by marine plans to inform the development and monitoring of the new East Marine Plan.

Introduction and methodology

The marine planning system in England is important in contributing strategically to the sustainable development of its marine area, while delivering on the core objectives set out in the UK's Marine Policy Statement (MPS) for a sustainable marine environment, economic development and societal benefits. Eunomia reviewed and delivered a socio-economic baseline of the marine sectors and coastal communities of the east marine plan areas to inform the next iteration of the East Marine Plan (EMP) and manage resources and activities in the area. Additionally, the study describes the social and economic drivers for the east marine plan areas over the next 20 years and analyses people's perceptions of the marine environment and how they benefit from it. The project also assesses current approaches to monitoring how changes in the socio-economic baseline could be attributed to the EMP itself, identifies critical gaps and uncertainties in the available socio-economic baseline data and provides recommendations to address them.

The study included fifteen marine sectors: Marine aggregates, Aquaculture, Commercial fishing, Defence and national security, Dredging and disposal, Ports, Renewable Energy, Carbon Capture Utilisation and Storage (CCUS), Nuclear, Oil and Gas, Marine recreation, Shipping, Subsea telecommunications cabling, Coastal tourism and Wastewater treatment.

The study adopted three principal methods including a literature review, stakeholder interviews and stakeholder surveys to collect and analyse both quantitative and qualitative data. The three major economic metrics used to characterise each marine sector were Gross Value Added (GVA), employment and number of businesses, including data on other indicators collected also to describe each sector. The data sources for the grey literature are Office for National Statistics (ONS), Business Register and Employment Survey (BRES), Government reports and databases, online articles, Industry reports and Local Authority reports.

Results

The key baseline outputs showed that the fifteen selected marine economic sectors in the east marine plan areas were estimated to generate a combined GVA of £27.8bn and employ over 126,000 people. In GVA terms, the renewable energy sector is the largest (£19.5bn) followed by the oil and gas sector (£4.6 bn), whilst marine recreation (£57m), commercial fishing (excluding fish processing) (£24m) and aquaculture (£2.6m) are the smallest. In terms of employment, the renewables sector is again the largest, employing an estimated 59,000 people, whilst the next largest are coastal tourism (~23,700), ports (~13,500), and oil and gas (~11,600). Notably, the number of businesses in each sector was difficult to estimate and was only possible for seven of the sectors. Fishing is central to the cultural heritage and sense of place of many towns along the east



marine plan areas coastline, whilst also contributing to the local tourism sector and acting as an important element of people's livelihood and therefore has a high social value.

Findings recognise the economic importance of sectors included in this study in terms of their indirect impact and contribution toward sectors not included in this study (such as construction and retail).

Drawing from the surveys and reports on people's access to and perceptions of the natural environment, as well as the social benefits they derive from it, the study found that getting fresh air and physical health and exercise were the main reasons for people taking a visit to a blue and natural space. However, real and perceived barriers to visiting coastal locations include feelings of anxiety about unclean and poorly maintained beaches, and inadequate transport provision and facilities on the coast. The east marine plan areas also have a higher proportion of deprived households in one or more dimensions (either education, employment, health or housing) than the rest of England. In terms of social benefits, spending time in the natural environment has clear physical, social and mental health benefits, with people choosing to visit natural spaces for these reasons. People note feeling connected to nature and depend on it for their sense of place and identity.

Conclusions and recommendations

This project provides an understanding of the contribution of the principal marine sectors to the economic and social value of the east marine plan areas. The renewable energy and oil and gas sectors are the two largest sectors in terms of the economic measure of GVA, by a significant margin. The renewables sector is of particular economic importance to the east marine plan areas, contributing 70% of the entire GVA of all sectors included in this study, and employing half of the renewable sector's workforce across the UK. The baseline also provides an overview of the coastal communities relevant to the east marine plan areas, including social and economic indicators used to characterise them.

Overall, the study concludes that the evidence collected is of relevance and can be used to inform the progress of some of the indicators in MMO's approach to monitoring the effectiveness of marine plans in achieving their objectives.

MMO comments

The socio-economic baseline evidence for the east marine plan areas in this report will enhance MMO understanding and inform the next iteration of the EMP itself. Following the variability in the method and quality of economic data sources used, MMO will consider this caveat when applying further the findings in this report.

Further information

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