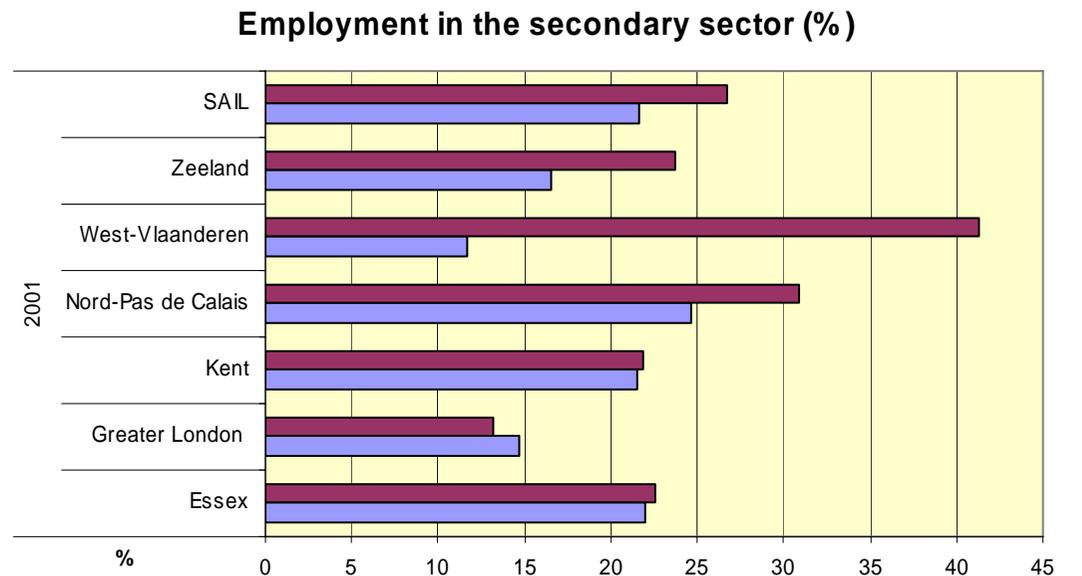
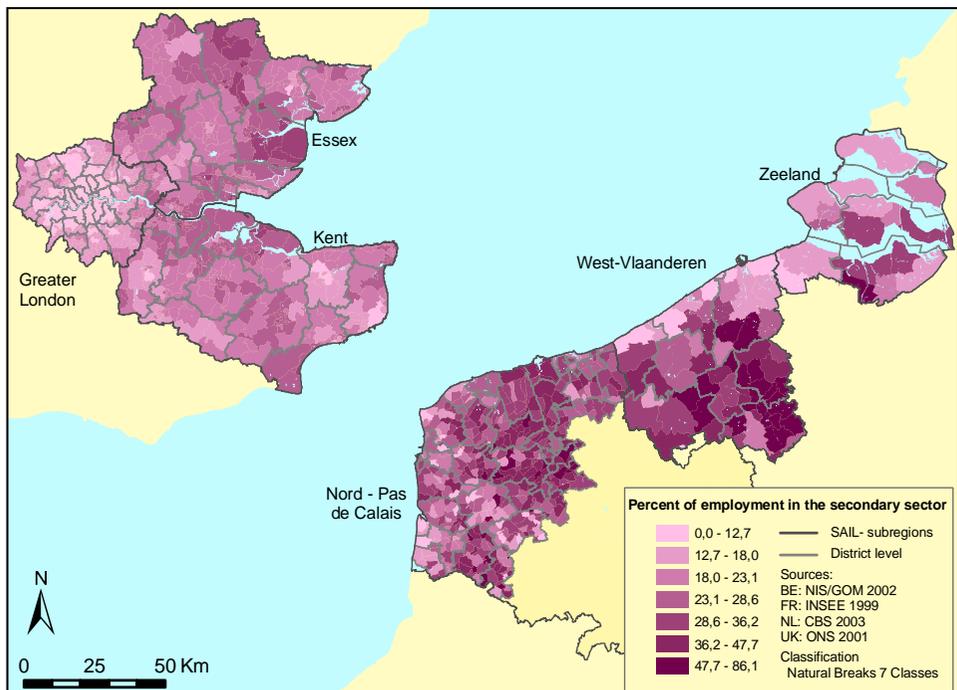
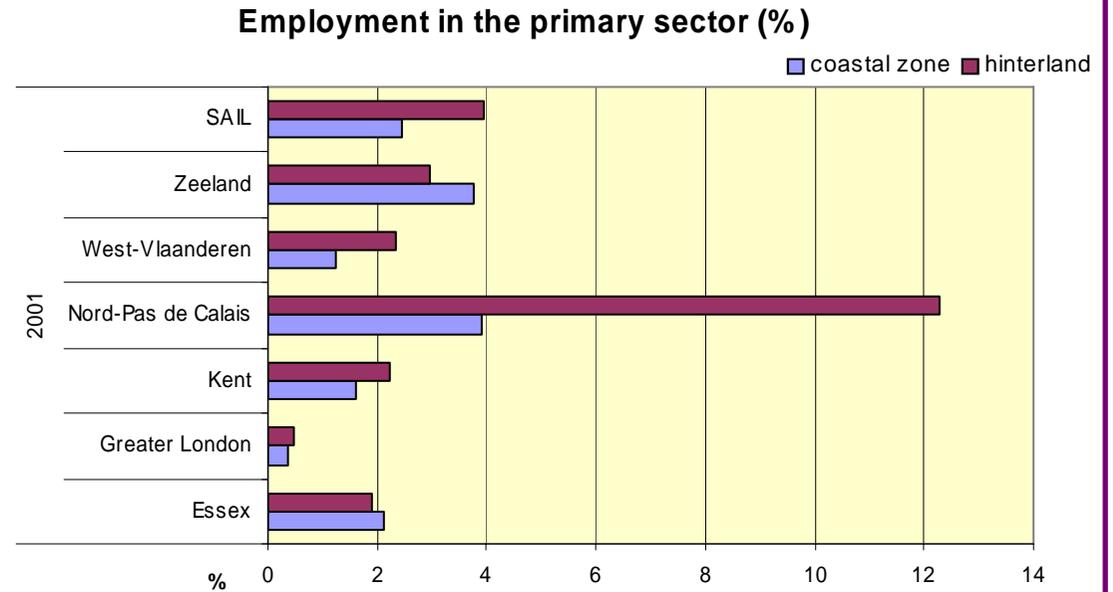
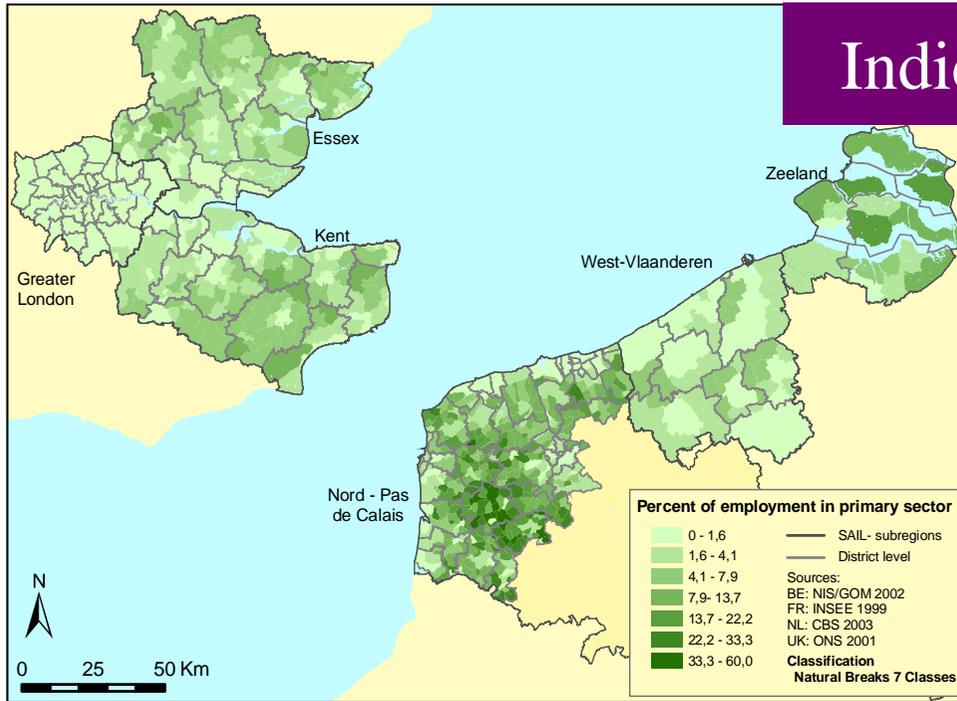


Indicator 9 Patterns of sectoral employment



- *Percentage of employment by economic sector*
- *Percentage of part-time and full-time employment*
- *Employment in fisheries, ports and tourism*

Key Message

- Services and commerce ('tertiary' sector) account for between 40-50% of employment in the coastal zones of the SAIL region.
- Tourism is an important employer at the coast, and can provide up to 30% of the share of local employment. A large proportion of the jobs in this sector are part-time. Tourism generates additional jobs in banking, financial administration, real estate and renting, retailing, etc.
- As is the case for densely populated areas, the so-called non-profit sector (governmental services, health and education) is better represented in the coastal areas of the SAIL sub-regions, compared to the hinterland (30% versus 24%).

Why monitor patterns of sectoral employment?

Planning a dynamic and sustainable economy for coastal communities is a priority in regional strategies. Coastal economies around Europe have seen major changes over the last several decades. In the Southern North Sea, the expansion of shipping and major ports, the proliferation of second homes, pensioner immigration and the seasonal character of tourism are some of the important drivers that act upon the local economy in coastal zones. By following changes in employment in the economic sectors, trends and developing patterns can be detected. Employment in tourism and ports also shows the socio-economic importance of these sectors to the population.

Where do the data come from?

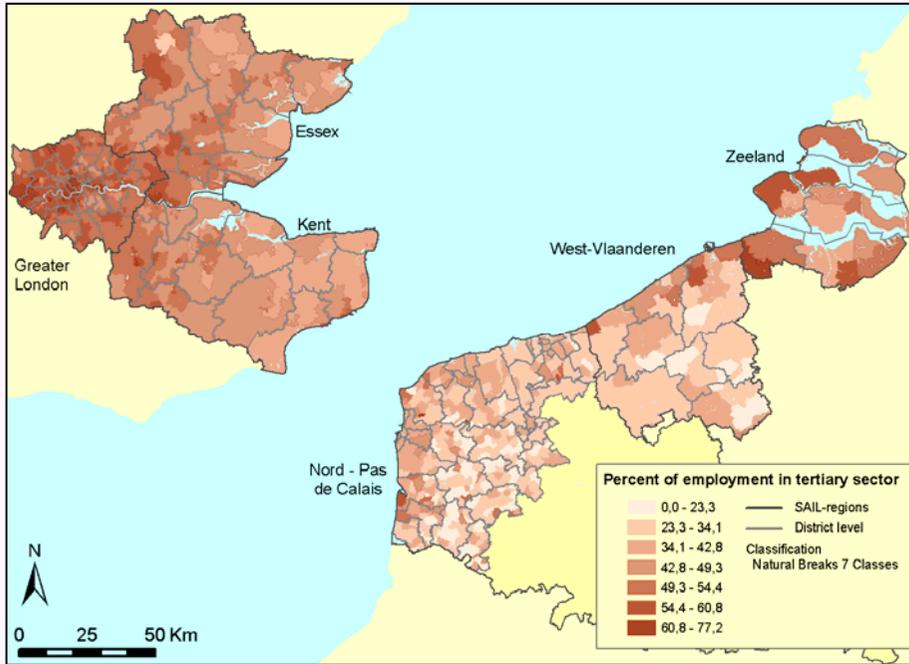
The main sources for sectoral, full-time and part-time employment are the National Census data providers. All countries in the Southern North Sea conduct decennial Census that yield reliable data at the municipality level. In addition, all four countries carry out quarterly labour force surveys which provide figures at the local level. Additional sources for employment in ports were consulted: Nationale Bank van België (B), Nationale Havenraad (NL), DTR and Port of London Authority (UK)). Data for the fisheries sector are collected by RIBIZ (Zeeland), NIS/GOM (B), OFIMER (F) and available for the UK from the ONS and Fisheries Statistics Unit (DEFRA). Data for the tourism sector at municipality level are often scarce and dispersed, as provided by RIBIZ (Zeeland); NIS/GOM (B); Comité Régional de Tourisme/INSEE (F) and Tourism South East, Kent and Essex County Council (UK).

What does the indicator show?

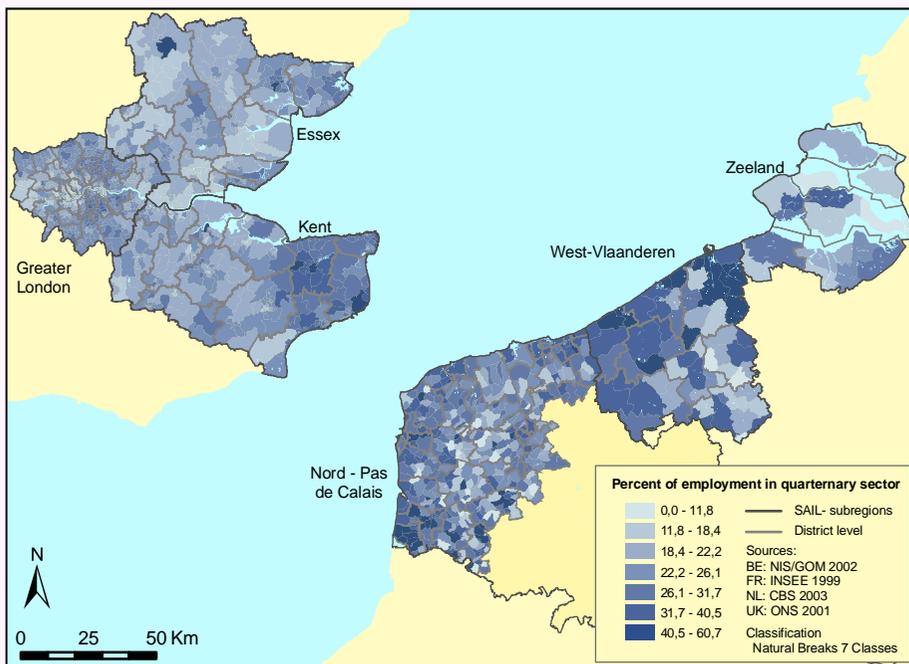
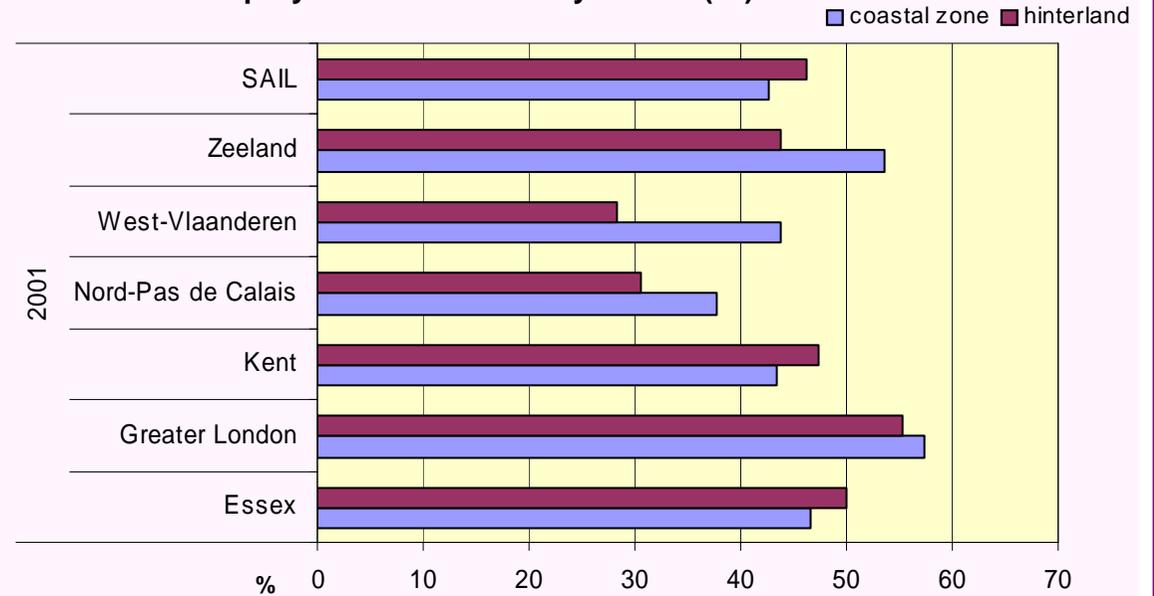
In the Southern North Sea region, employment in the primary sector (agriculture, fishing, forestry and mining) is of less importance in the coastal zone than in the hinterland. However, the average figure for the region is distorted somewhat by the larger percentage of people employed in primary occupations in the hinterland (12%) compared to the coastal zone (4%) of Nord-Pas de Calais.

Percentages differ greatly among regions: in Zeeland and Essex primary sector employment is higher in the coastal zone than in the hinterland. In Zeeland these jobs are to a large extent 'coastal' (ports, aquaculture and fisheries), whereas in Essex the jobs in the primary sector are in agriculture. Employment in the primary sector does not exceed 4% of the total working population in any of the coastal zones of the SAIL sub-regions

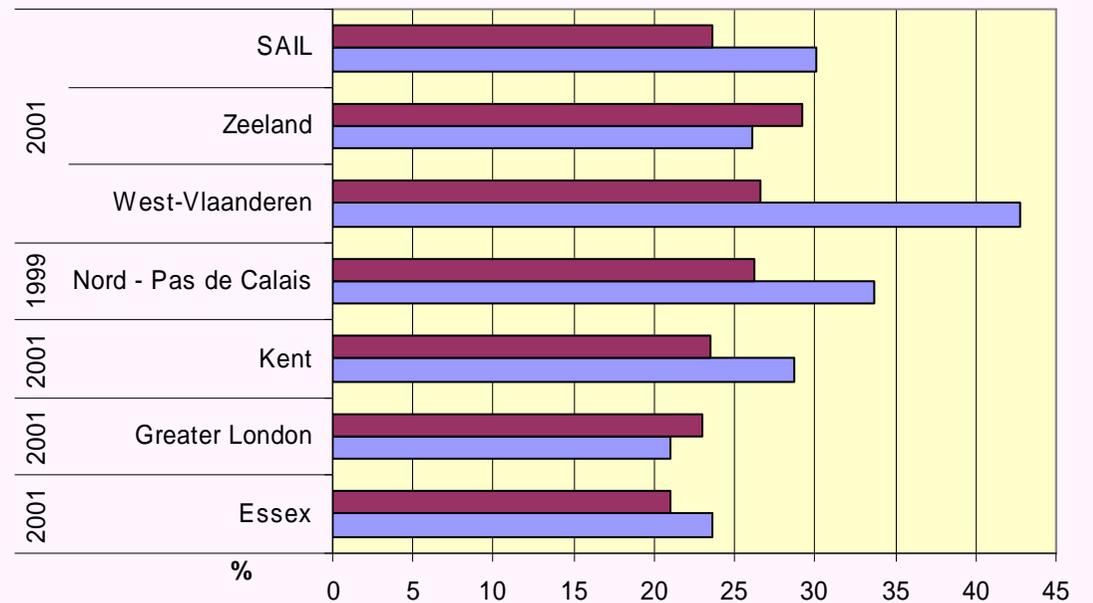
With less than 0.4% of the active population working in the primary sector, the Thames area accounts for the lowest value observed in the SAIL area. Employment in fisheries does not exceed 1% of the working population in any of the coastal wards in the UK (West Mersea having the highest value of 0.64%). Boulogne-sur-mer, the number one fishing port in France, is home to the largest part of the 1,175 fishermen (2002) of Nord-Pas de Calais.



Employment in the tertiary sector (%)



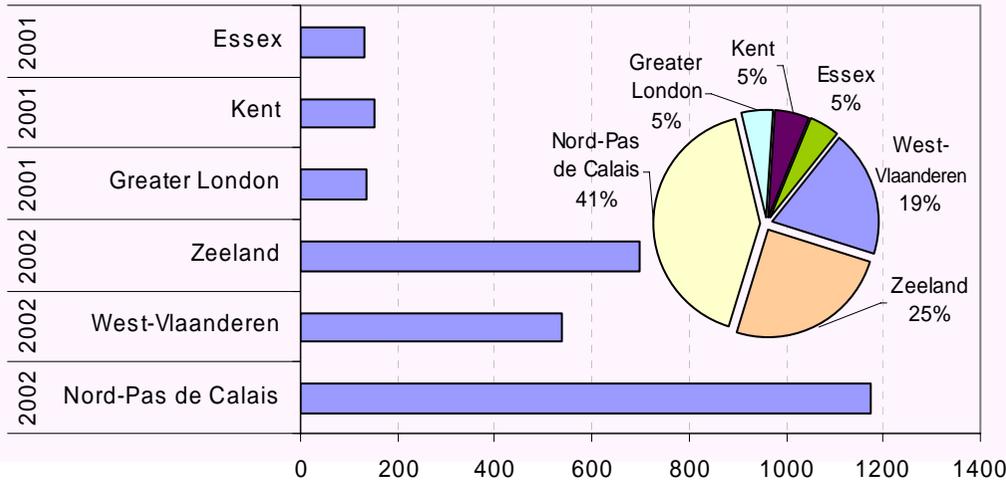
Employment in the quaternary sector (%)



Districts with the highest number of fishermen in Kent and Essex are Tendring, Shepway, Colchester and Thanet (38 fishermen in 2001 Census).

In Zeeland, employment in fisheries remained between 600-700 over the period 1995-2004. In West-Vlaanderen, the number of fishermen dropped from 1000 in 1996 to nearly 500 in 2002.

Number of people employed in fisheries and share of the SAIL subregions in the southern North Sea



In all sub-regions except for Greater London and the Thames area, the share of employment in the secondary sector (construction and manufacturing industries) is higher in the hinterland. Especially in West-Vlaanderen there is a substantial difference in the importance of the secondary sector in terms of employment (12% vs 40%). This provides an indication of the importance of the coast for tourism and recreation uses.

Services and commerce (tertiary sector) account for between 40-50% of employment in all sub-regions' coastal zones. In all except Kent and Essex, the tertiary sector is a more important employer at the coast than in the hinterland. In this sense, most of the coastal zones follow a pattern observed in more urbanized areas.

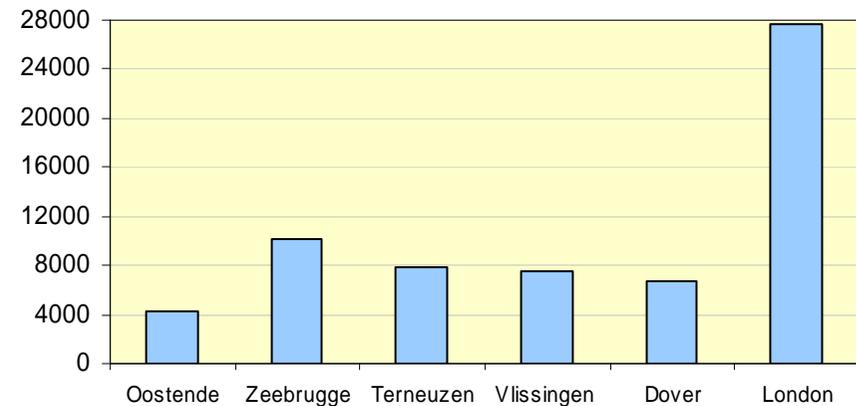
Provided that Thames and Greater London are excluded from analysis,

employment in the tertiary sector in coastal zones is on average slightly more important than in the hinterland (43% versus 40%).

Employment in ports declined in Zeeland from 17,300 in 1996 to 15,300 in 2002. In the Belgian seaports of Oostende and Zeebrugge, the number of people directly employed fluctuates around 14,000 (1995-2003).

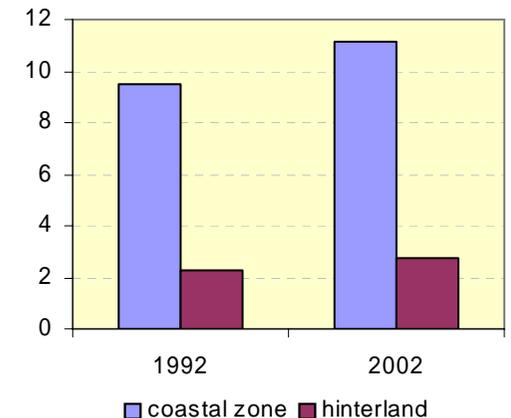
Port of London is one of the most important employers in the SAIL ports. The indirect impact of port employment (service providers to ports) in the third sector is insufficiently documented but may be substantial.

Direct employment in ports

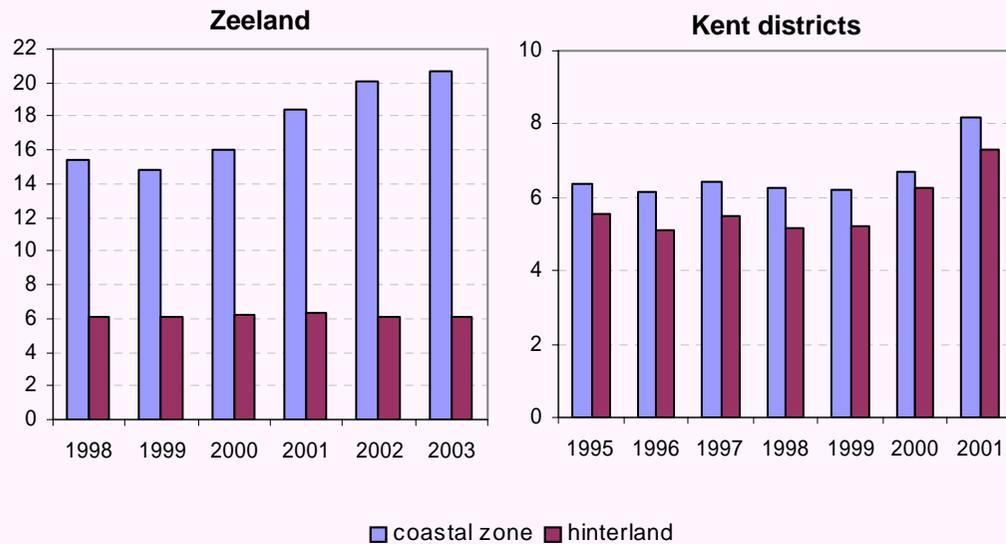


More information and comparable datasets are also needed to evaluate the importance of tourism in the service industry. Datasets refer to employees only or do not take into account seasonal or part-time employment. Estimates from surveys provide only snapshots of this complex industry.

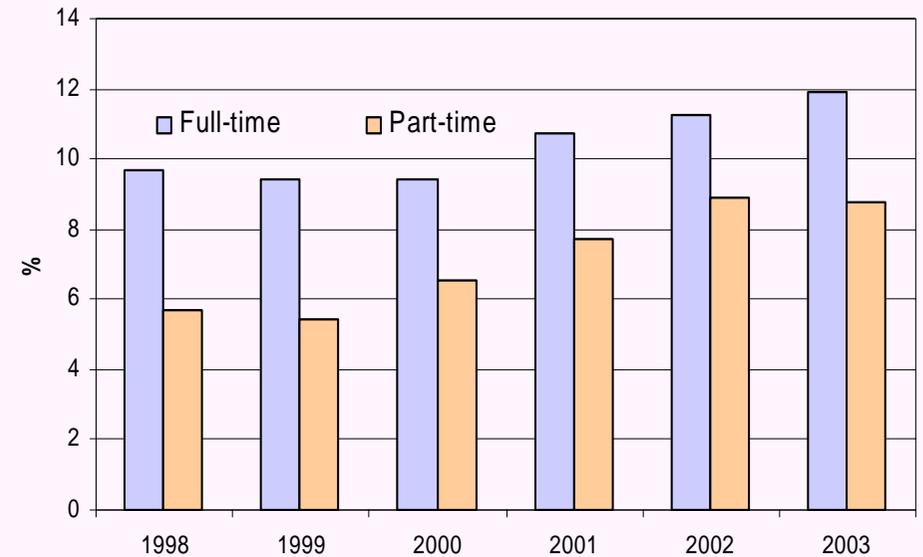
Employment in tourism (%) West-Vlaanderen



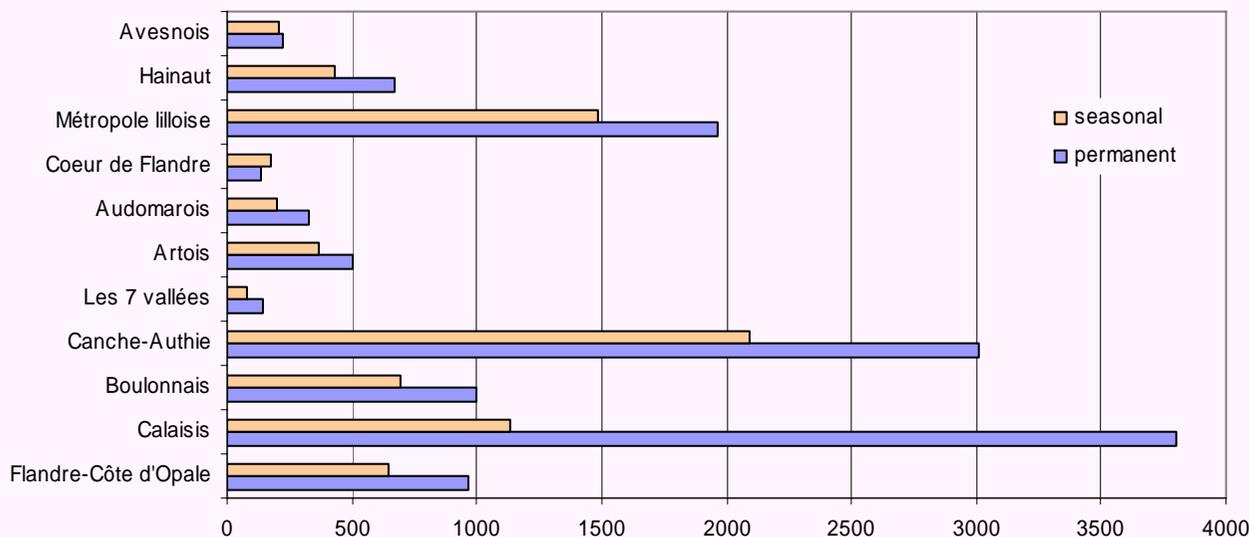
Employment in tourism (%)



Full-time and part-time employment in tourism at the coast - Zeeland (CBS/KvKZ)



Permanent and seasonal employment (numbers) by tourist zone - Nord-Pas de Calais 1999 (CRT / INSEE)



In Nord-Pas de Calais, employment in tourism is highly concentrated at the coast, and to a lesser extent in the regional capital of Lille. The coastal tourist zones of Calais and Canche-Authie accounted for 50% of total regional employment in tourism; 40% of these jobs are seasonal (1999). In 2001, the communes of Le Touquet, Coquelles, Lille and Berck accounted for 42% of total employment in the tourist sector of the region (INSEE/CRT).

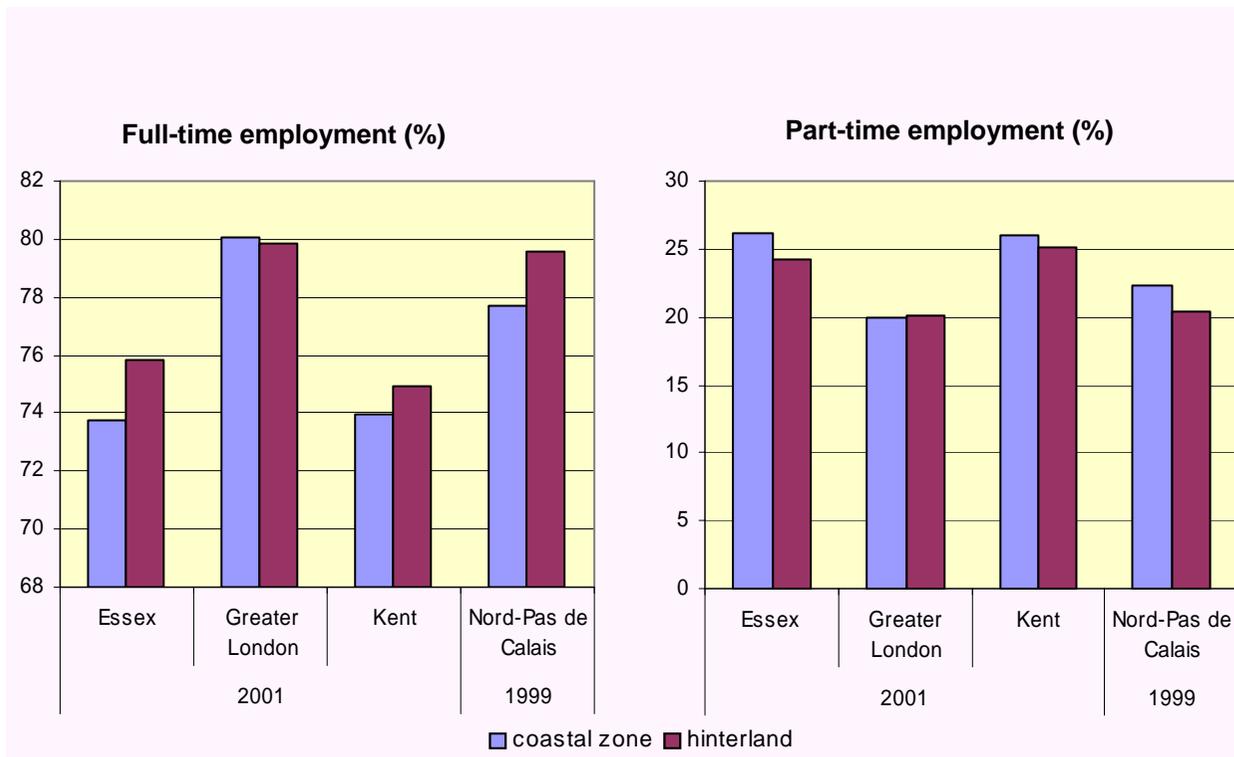
The quaternary sector or so-called non-profit sector (governmental services, health and education) is on average better represented in the coastal areas of the SAIL sub-regions. This is characteristic of more densely populated areas. In West-Vlaanderen (43% versus 27%) and Nord-Pas de Calais (34% versus 26%) the non-profit sector is a particularly important employer in the coastal zone.

Part-time employment is slightly more common in the coastal zones of Nord-Pas de Calais, Kent and Essex, when compared to the hinterland. More detailed datasets are needed to study the relevance of seasonal and part-time employment per economic sector in coastal zones. In Belgium these data are collected by type of industry and cannot be obtained at the municipality level. In the coastal municipalities of Zeeland, 42% of the 5,840 jobs in tourism were part-time (2003).

What are the implications for planning and managing the coast?

The availability of employment in coastal zones increases the life chances of people living and working in the region. Developing sustainable coastal economies requires a stable economic structure and provides the necessary environment for long-term investment.

Tourism is an important provider of employment in coastal zones. For this sector, as for other sectors in general, sustainability is translated into policy making by safeguarding its position within the economy. Important steps are being taken towards improving the quality of services, and spreading of the tourism season. The creation of more permanent jobs, with favourable working conditions and salaries is a crucial aspect in this endeavour.



How reliable is the indicator?

Census data are generally considered relevant and reliable sources. Reliability and accuracy of the additional data vary according to sources and methodologies. The subcategories of economic activities and the weight factor assigned to each branch for estimating employment in tourism for example, are variable. European nomenclature for economic activities NACE (Classification of Economic Activities in the European Community) facilitates the international comparison of socio-economic statistics. Employment in fisheries does not include the processing industry. Full-time and part-time employment are centralized datasets and are not available at municipality level for Belgium. Information on employment in ports is generally provided by the port authorities and refers to the number of employees and/or the number of people working in the industry.

