EMPLOYMENT CHANGE IN TYNE & WEAR AND THE CITY REGION 2003-2007

A REPORT BASED ON ABI EMPLOYMENT DATA

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ADDITIONAL TABLES IN WORKBOOK

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KEY MESSAGES

Employment growth has been at just over 1%pa, slightly faster than in GB.

The ABI found, from 2003-2007, employee numbers in Tyne & Wear grew by 20,500 or 4.3%, which is slightly faster than in GB (3.5%) (Table 1). [See Appendix 6, for Table 1 as originally from the ABI.] This was more than twice as fast as in the NE region (about 1.8%). In TW City Region (TWCR), employee numbers grew by 3.9% or 25,500, which is more than three-times as fast as in Leeds CR, where employee numbers grew by 1.3% or 16,600.

Table 1: Employment Change 2003-2007 GB, NE, T&W, TWCR, LCR and T&W Districts

	2003	2004	2005	2006	2007	Change 2003-07	% Change	Annual Average Growth
Great Britain	25,710,600	26,067,500	26,496,600	26,351,600	26,599,200	888,500	3.5%	0.9%
North East	1,011,100	1,009,300	1,063,700	1,045,400	1,029,700	18,600	1.8%	0.5%
Tyne & Wear	471,300	481,600	520,600	500,700	491,800	20,500	4.3%	1.2%
TWCR	661,100	669,200	715,300	698,400	686,600	25,500	3.9%	1.0%
LCR	1,267,400	1,292,000	1,277,800	1,277,700	1,284,000	16,600	1.3%	0.4%
Gateshead#	89,800	96,000	96,400	91,600	90,900	1,100	1.2%	0.3%
Newcastle	165,700	167,700	187,700	181,300	174,900	9,200	5.5%	1.5%
North Tyneside	62,900	63,200	70,200	67,200	67,500	4,600	7.3%	2.0%
South Tyneside	40,500	41,300	43,700	41,600	41,400	900	2.1%	0.6%
Sunderland*	112,300	113,400	122,700	118,900	117,100	4,800	4.2%	1.1%

Source: ABI (data rounded, percentage change figures based on unrounded data)

Note: Figures in this table include TWRI's amendments for Gateshead, Sunderland, TW, and TWCR. Figures for the North East have not been included in this amendment.

Warning [from Nomis]: ABI 2006 'discontinuity'. Due to a change in the survey reference date [from Dec. to Sept.], Nomis suggests that users should avoid directly comparing employment estimates over this discontinuity (between 2005 and 2006)[1].

TWRI cautions: For TW, the estimate of total employment in 2005 is substantially out of alignment with the trend, about 30,000 high[2].

#TWRI's amendment to Gateshead's employment in Public Administration (PA) introduce more realistic estimates and are shown in Appendix 5 of this report[3].

*Sunderland's actual employment in 2003 was about 1,500 higher [in PA] than recorded by the ABI[45] (see Appendix 5).

The rate of employment growth in Tyne & Wear has slowed by a third, from the previous (very rapid) five years (7.7% in the five years 1998-2003).

There are a number of implausible estimates in the ABI. The net effect of amending, or 'correcting', the two largest is that overall TW employment growth was actually faster, by about 3,700 (or about 0.8%). After this amendment, this means that actual employment growth was about 4.3%, over almost four years[6].

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1 More information is available from http://www.nomisweb.co.uk

2 Newcastle could be around 15,000 high and Sunderland 10,000 high.

3 Gateshead's employment in 2003 was about 5,300 lower in PA than recorded by the ABI, according to (reasonable) estimates from Experian (quoted by Gateshead Council). This amendment means that Gateshead's change turns positive (+1,100, +1.2%).

4 If an implausible reported 'growth' is excluded (in 2003/04); the level in 2003 is amended to be similar to 2004.

5 The amendments to Gateshead and Sunderland, above, means that the change in total employment in Gateshead turns positive (+1,100, +1.2%), and Sunderland's growth is reduced to (+4,800, +4.2%). Consequently, TW's employment growth would, therefore, be about 3,700 bigger (at 20,500, +4.3%). TWCR's growth would be 25,500 (+3.9%).

6 Actually 3¾yrs due to the re- timing of ABI from December to September.

Gateshead Public Admin. was estimated (by ONS) 5,300 too high in the 2003 base year, in comparison to reasonable estimates by Experian. Conversely, the ONS ABI estimates for Sunderland Public Admin. (also in 2003) appear about 1,500 too low. The treatment by TWRI of Public Admin. employment in both Gateshead and Sunderland, using an amendment in each case, is set out in the caution note at the end of the Key Messages section.

Employment growth for the prior dozen years, 1991-2003, had amounted to about a cumulative 10% in Tyne & Wear (TW) (Tyneside 8.5% and Sunderland 14.3%)[7]. This puts Tyne & Wear around the middle of the range of six Metropolitan cities; above Birmingham (6%) and Liverpool (6%), similar to Sheffield (11%) but below Manchester (14%) and, particularly, Leeds (23%) [Details from ODPM's State of the English Cities Report (SOCR)[8]; see table in Appendix 2]. TW's under-performance (before 2003) was particularly great in Financial Service employment growth which grew by about 60% in Manchester, Leeds and Liverpool, but under 8% in Tyneside.

As even the estimates (from ABI data) for total employment are not fully reliable, TWRI has taken three steps to validate these ABI estimates used in this report and analysis:

a) waited for five years' estimates from ONS (and made some cross checks with Local Authorities).

   The ABI has also been assessed for consistency[9] with other alternative sources of employment data;

b) reported in the press (recorded in TWRI's own 'Job Change' Database, the JCD) and

c) ONS' own residence-based Annual Population Survey (APS) of households regarding their employment status and numbers (formerly the LFS or Labour Force Survey).

The APS confirms that employment growth was substantial, and even suggests it was somewhat faster than reported by the ABI: APS employee numbers at workplaces in Tyne & Wear grew 27,600 or 5.5%[10] in the four years to 2008 (see Appendix 1). The APS also shows that numbers of people *resident* in Tyne & Wear who had an employee-job as their main job grew 28,000 or 6.1% between 2004 and 2008.
At workplaces located in TWCR, employee numbers grew faster still, by 6.3% or 44,300 according to the APS[11]. In TWCR, residence-based employee numbers grew 48,100 or 6.8%.

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7 The State of the Cities Report (SOCR) analyses groups of Local Authorities called Primary Urban Areas (PUAs). The four Tyneside authorities are referred to, misleadingly, in SOCR as 'Newcastle' PUA.

8 The forthcoming SOCR2 is expected in summer 2010.

9 This 'consistency test' might be called 'tallying'.

10 For those aged 16+.

11 For those aged 16+.

Table of Key Points 1: Employment Growth of residents who were a) employees, b) in employment (inc. self-employment) and c) (not necessarily residents) employment at workplaces

	Tyne & Wear		Tyne & Wear City Region	
	Age 16+	**%**	**Age 16+**	**%**
a) Residents				
i) Employees resident[a] in ...	18,500	4.4	33,700	5.2
ii) Total employment (inc self-employment) resident in …	28,000	6.1	48,100	6.8
b) Workplace-based [b]				
i) Total employment (inc self-employment) resident in …	27,600	5.5	44,300	6.3

[a] APS resident-based, 2004-2008 (Calendar year to calendar year)

[b] APS workplace-based employment, 2004-2008 (Calendar year to calendar year). ONS has not clarified how that (small) part of the self-employed element of this variable have been assigned to areas if their workplace was other than home (their residence).

Source: Annual Population Survey, Nomisweb

Nomis cautioned (on behalf of ONS): Data has been reweighted in line with the latest ONS estimates.
Warning: Data prior to the period Jan - Dec 05 has not been reweighted in line with the latest ONS estimates.
This will be done as soon as possible.

This analysis and report primarily uses the Annual Business Inquiry (ABI) estimates; these employee numbers are at workplaces in Tyne & Wear and in its City Region. The self-employed are not covered by the ABI.

Inside TW, employment growth in 2003-07 was led by North Tyneside, with the Cities of Newcastle and Sunderland

In Tyne & Wear, employment growth was fastest in North Tyneside (7.3%), with Newcastle (5.5%) not far behind. Employment growth in Sunderland was slightly slower (4.2%). South Tyneside (2.1%) and Gateshead (1.2%) were much slower. Employment reportedly fell in Gateshead (-4.3%) (according to the ABI), but this is not credible. Gateshead's reported fall (of 4,100 or about 4%) was entirely due to the reported huge fall in 'Public Administration', down 4,800 or -44.4%. This (ABI) reported fall is not corroborated by either Gateshead Council or by TWRI. TWRI has therefore amended the raw ABI results for Gateshead, upwards and Gateshead then shows total employment growth – although at a slow rate. [Caution and alternative estimates are given in Appendix 5.]

In the Rest of the City Region (RoCR), employment growth was slightly faster in the Durham4 than in Tyne & Wear (at 4.8%, or a rise of 5,100) – helped by a (late) period of Public Service Employment growth. Among the Durham4 districts, growth was particularly fast in Chester-le-Street (up 13.5%, or 1,500).
In the Northumberland4 in aggregate, employment reportedly fell marginally (down 100, or -0.2%). Its fastest growth was in Blyth Valley, at 7.6%, or 1,600.

Tyne & Wear's overall employment growth was predominantly driven, in this period, by 'Business Services'; indeed TW was further boosted by the TW 'Business Services' employment growth rate being 1.7 times as fast as in GB (growing 30.7%, GB 18.1%).

Tyne & Wear's exceptionally rapid employment growth rates in Public Services in the prior 5 years (1998-2003) is, in effect, reported by ONS to have been partially reversed in 2003-07; employment in 'Education' was down 2,200 or -4.4% and 'Health & Social Work' down 1,600 or -2.5%. Employment in 'Public Administration', however, grew by 6,800 or 18.1% (or about 4.8%pa).

Uniquely in Tyne & Wear, 'Financial Intermediation' had the most rapid employment growth (at 41.0%, with 5,700 job gains). This contrasts with a slight fall in GB (of -1.7%). This local growth (late in the UK's long 1993-07 period of un-interrupted economic growth) essentially reflects the growth of Northern Rock. This mortgage bank grew its employment substantially in this period (in both Newcastle and Sunderland) which TWRI estimates at around 4,000. Other gains in Financial Services locally included GE Money (in North Tyneside), Moneygate (in South Tyneside) and Citifinancial and Barclays Bank (in Sunderland)[12]. In TWCR, the rapid growth in Financial Services (32.7%, or 5,300) was entirely growth in Tyne & Wear.

The private sector generated the largest employment gains overall, and in the majority of districts; – In all four Tyneside districts, 'Business Services' were the largest gainers in numerical terms. In the Northumberland4 districts, private sector growth dominated. Exceptions include the Durham4 districts (where growth in the (wider) Public Services dominated).

In GB, the fastest rate of employment decline by industry was in Manufacturing (down 12.7%), but Tyne & Wear manufacturing job losses were only at *half* this rate in (down 6.1%, or -3,700). Tyne & Wear's fastest employment loss was from Other Services (-20.7%, -5,800) [it is not clear why[13]]. This was followed by 'Wholesale and Retail' (down 3,900, or -5.0%) [this is a bit (0.3pp pa) faster than the GB fall of 3.9%].

The private sector dominated employment losses (numbers) in the cities (Newcastle and Sunderland). In contrast, Public Services dominated employment losses in Gateshead, North Tyneside and South Tyneside. Among the RoCR districts, employment losses were greatest in the private sector, in all but two districts; Castle Morpeth and Tynedale. These two districts may well have gained employment (compared with the other parts of RoCR) from their adjacency to Newcastle.

Large English cities might be favouring women's employment growth [perhaps linked to public services]: In Tyne & Wear, women's employment growth was faster than that overall by 1.0 percentage points (up 4.5%; overall 3.5%). In Leeds CR too, women's employment growth was faster than overall, by 1.7 percentage points (up 3.0%; overall 1.3%). This evidence in northern England contrasts with GB, where women's employment growth was slightly slower than overall (up 3.1%; overall 3.5%). In TWCR, women's employment growth was also slower than overall (up 2.5%; overall 3.3%).

Tyne & Wear's full-time employment growth (5.7%) has been 0.9 percentage points (nearly 0.25pp/yr) faster than in GB (4.8%). However, part-time employment *fell* in Tyne & Wear (-1.0%) compared to 0.5% growth in GB. This might be largely a distortion stemming from the re-timing of ABI from December, to September (with its Christmas effect). Although this distortion is the same in TW and GB in terms of months, TW has a larger proportion (weight) of its employment than GB in Retailing. This also contrasts sharply with previous rapid growth in part-time employment in Tyne & Wear in 1998-2003 of 12.7% (or averaging around 2½%pa).

[12] Source: TWRI's JCD.

[13] Across all TW districts.

Factors driving the patterns of employment change

M) Macro

M1: Macro-economic (mainly growth of household borrowing, especially on mortgages)
The years 2003-07 were a period of strong economic growth averaging 3% in real terms, or more, in Tyne & Wear[14]. This was under-pinned by growth of household borrowing, nationally, of up to £100bn annually; (about [a very large] 7% of GDP in 2007). This borrowing by households under-pinned growth of retail sales and other consumer services (notably Hotels & Restaurants). Importantly, the strong overall growth of the local (TW) economy led to strong demand for construction activity (whose employment in TW grew by nearly 14% or 2,900).

M2: (Prior) Public Service expansion
Public Service expansion was the main driver of TW overall employment growth in 1998-2003. This occurred later, after 2003, in the Durham4. Specifically, the latter may have been linked to the new hospital and the expansion of the Passport Office (both in Durham City) etc.

M3: Induced employment growth
Intriguingly, TW's employment growth was private-sector-led in the years 2003-07. This might be interpreted as a 'second-round effect' of the earlier public sector expansion. As overall employment grew (by 40,000 or so 1998-2003), so local consumer demand will have been expanded – and thus more jobs (say about 10,000 or about 2% of total employment) were created in the local economy.

S) Sectoral/Industrial

S1: Growth of Business Services

At the industry-level, growth of 'Other Business Services' (OBS), (up 13,600 in TW, growing 30%) accounted for the *vast majority,* around a huge four-fifths, of overall employment growth (16,900). Growth of OBS is a long-term trend (driven by contracting out, increased sophistication of business etc.).

S2: Manufacturing's greater competitiveness in Tyne & Wear.

Thus speed of its fall in employment is only about half (-6%) that of comparator areas (-12%) including Leeds CR, as well as GB.

This out-performance by TW tallies with partially-earlier analysis by TWRI on the Performance of Manufacturing industry (covering 2001-05) (published in summer 2008)[15]. This analysis showed that TW's 4 most competitive manufacturing industries expanded output faster than the UK and their employment performance was stronger.

Manufacturing employment decline was notably rapid (over 4% annually, on average) in some districts; Derwentside lost 16% (1,200 jobs) and Durham City lost 39% (1,600 jobs).

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[14] Population growth rates at district-level will also be a factor, perhaps most notably in North Tyneside.

[15] TWRI reports; 'Manufacturing Performance in Tyne & Wear and The City Region 2001-2005', and 'Market Services Performance in Tyne & Wear and The City Region 2001-2005'.

S3: The individual large firm or other large development project dominating change in a local industry &/or district

In the period to 2007, the rapid growth of the Northern Rock 'mortgage bank' was so large (about +4,000) that it led to Tyne & Wear Financial Service employment growth of around 40%, when in GB it actually fell slightly. Of course, this growth has been partly reversed since 2007 (by about -1,500) at Northern Rock on its own[16].

Easington had retail employment growth, against the overall declining trend – presumably due to the opening of the Dalton Park retail park.

Conversely, the completion of the Durham Hospital may well explain the fall in construction employment in Durham City in this period.

Sp) Spatial

Sp1: Within the UK: Total employment grew substantially faster in TWCR in 2003-07 than in the Leeds CR; this might have been a spatial "wave effect"; meaning rapid economic growth spreading out from the south. This hypothesis is consistent with the private-sector dominance of employment growth in TW. In the NE as a whole, however, employment growth was much slower (and therefore employment growth must have been very slow in the Rest of NE), so such "a wave" was not contiguous from Leeds CR.

Sp2: Within the TW City Region:

Within TW, employment growth was fastest in North Tyneside, presumably helped by the incentives[17] in the A19 Corridor, essentially at Cobalt Business Park.

Sp3: Within RoCR, Business Services showed some preference for Tynedale (where growth of 1,600 was very rapid indeed at over 50%). Construction employment fell in Newcastle but grew in other TW Districts (although it is not clear whether this reflects a fall in work levels in Newcastle[18], or a preference amongst construction firms to be located outside the city).

Important Note: The numbers in this Key Messages section measure 'actual change' in the current best judgement of TWRI; they incorporate the two amendments of Public Administration employment in Gateshead and Sunderland.

Caution: The employment numbers in the rest of this report have not been amended in the same way. This explains why some aggregate numbers in the main body of the report do not tally with those in the Key Messages section. The aggregates therefore affected include 'total employment' and 'employment growth' in Gateshead, Sunderland, Tyne & Wear and Tyne & Wear City Region.

[16] Based on announcements to the media that 1,500 of its 6,500 jobs were to go (probably mainly leaving in 2008).

[17] These were Enterprise Zone exemption from business rates and 100% capital allowances against corporation tax (until 2006).

[18] Such as completion of the Sage HQ, ONE HQ and, possibly other projects. This is odd, given the huge £300m RVI re-building programme.

1. INTRODUCTION

1.1 Introduction to the Annual Business Inquiry (ABI)

This TWRI report provides details of employees in employment at workplaces in Tyne & Wear and the City Region, and examines changes 2003-2007, using the ABI.[19] Changes in men's and women's employment and full-time and part-time employment are also presented. The report identifies growth industries. It also identifies areas of under-performance in Tyne & Wear and the City Region relative to the NE, Leeds City Region and GB. Information is provided by industrial section and industry, at two-digit SIC [using the Standard Industrial Classification SIC 2003].

The Annual Business Inquiry (ABI) is a two-part survey of employers in the UK. Part One gathers the employment information presented in this report. Part Two (ABI/2) collects financial information (which was reported in 2008 in the TWRI reports on 'Manufacturing & Market Services in Tyne & Wear').

The ABI's month of survey was brought forward by 3 months in this period.[20] It was conducted annually for a reference date of December[21], switching in 2006 to September.

BOX 1: ANNUAL BUSINESS INQUIRY	
SAMPLE	For the part of the ABI covering employment data is, nationally, approximately 78,000 enterprises [and thus perhaps about 1,500 enterprises in Tyne & Wear. This is under 1-in-10 of all enterprises]. The use of sampling introduces a degree of volatility in the estimates. Information is gathered at the 'reporting unit' level which is the enterprise (eg.Marks & Spencer). Using the Inter-departmental Business Register (IDBR), responses are apportioned to 'local units' (the individual workplaces, in this case mainly shops) by modelling. Also, the sample is stratified by industry, using SIC92[22] and by six-size bands. The largest size-band (250 or more employees) is completely surveyed; enterprises in lower bands are sampled. As the survey is compulsory, its response rate is close to 100% for the largest employers (who make up the bulk of the statistical data) and, overall, the survey achieves a response rate of around 85%.
STRENTHS OF ABI	The main strength of the ABI is its coverage; i) it covers all large enterprises and ii) it covers about 90% of people in employment, iii) the ABI has improved from the AES, partly by covering the whole of the UK, rather than just Great Britain. Whilst information is gathered for reporting units, local unit apportionment is possible. ONS acknowledges this apportionment is a process that could be improved.

[19] N.B. Many of the points made in this introduction are presented in the ONS document Review of Employment and Jobs. (in the National Statistics Quality Review Series, published in early 2006). It makes useful points about the strengths and weaknesses of the ABI, along with some solutions to weaknesses.

[20] TWRI estimates this may have reduced the growth of employment in Tyne & Wear by roughly 1,200. 'This [re-timing, ONS cautions] has resulted in lower overall employment estimates when comparing the 2005 and 2006 ABI/1 estimates. The amount varies by industry given the seasonal nature of some activity, with the greatest impact on the retail sector. By comparing the workforce jobs estimates, ONS says GB employment in Sept. 2006 was 66,000 or 0.25% lower than in Dec. 2006. (Source; Discontinuities affecting the 2006 Annual Business Inquiry (ABI/1) employment estimates; from ONS website).

[21] It replaced the Annual Employment Survey (AES) in 1998.

[22] From 2003 the ABI uses SIC 2003, this may give rise to discontinuities, although '(SIC) 2003…is quite similar to the 1992 SIC…the main change is that head offices are now classified to Division 74 whereas they used to be classified to the main activity of the business[22]')

USES	In terms of measuring employment, the ABI is the best source for measuring jobs, rather than persons in employment (which is better measured by the APS). ABI is also the best source of industrial detail. (Caution: the ABI measures jobs, as some people have multiple jobs the ABI count is higher than the Census count of people whose main job is an employee job).
EXCLUSIONS	The ABI's main exception is the self-employed. For agriculture (SIC industry sector A) special arrangements apply. ABI also excludes (domestic) jobs in private households, jobs in those organisations not held on the IDBR, home-workers, and jobs in businesses outside the UK. The ABI data-set (used by TWRI for this analysis) is an amalgam of data from agriculture collected by DEFRA[23] and data for the rest of the economy collected by the ABI.
WEAKNESSES	Home-workers *on 'piece rates'* should not, logically be included in the ABI, because they are neither employees nor 'other workers', but self-employed (more detail in Appendix 4). Unfortunately, this [very small] group, is included in the ABI data-set.

Amendments to take out errors; these were particularly, but by no means exclusively, that the overall Gateshead employment change was nearer +1,000 only once ONS' implausible estimates for Public Administration (PA) have been amended[24] [by TWRI]. Additionally, the overall Sunderland employment change was nearer +5,000 following the amendment to ONS' PA estimate[25] [also by TWRI].

23 Also by the National Assembly of Wales and the Scottish Executive.

24 The ONS estimate of employment in PA in Gateshead is clearly very implausible. TWRI has therefore amended it to become reasonable. This amendment has used an estimate for PA in Gateshead which is from Gateshead Council, and, reportedly from Experian.

25 The ONS estimate of employment in PA in Sunderland is also implausible. TWRI has therefore amended it to become reasonable. This amendment has used an estimate for PA in Sunderland which is from Sunderland Council.

2 OVERVIEW OF EMPLOYMENT CHANGE IN TYNE & WEAR AND THE CITY REGION 2003-2007

Tyne & Wear's employees numbered 491,900 in 2007 at workplace (based on un-amended ABI data, see Appendix 6). [Readers should note that all data presented from this point are original from ABI and not amended. They are slightly different to those presented in the Key Messages section.] This is a growth of almost 17,000 in the four years to 2007[26]. This growth is broadly corroborated by the APS (see Table of Key Points 1); APS found workplace-based employee growth of 28,000, or 5.5% (for 16+) and growth of 25,000, or 5.0%[27] in the four years to 2008. Between 2004 and 2008, APS found resident-based employee growth of 19,000, or 4.4% (for 16+) and growth of 17,000, or 4.0% (for working-age) (see Appendix 1). North East employment grew by 18,600 over the period 2003-2007, with the vast majority (around 90%) of reported NE employment growth occurring in Tyne & Wear. In Tyne & Wear City Region (TWCR) employment grew by 21,800 over the period, or 3.3%.

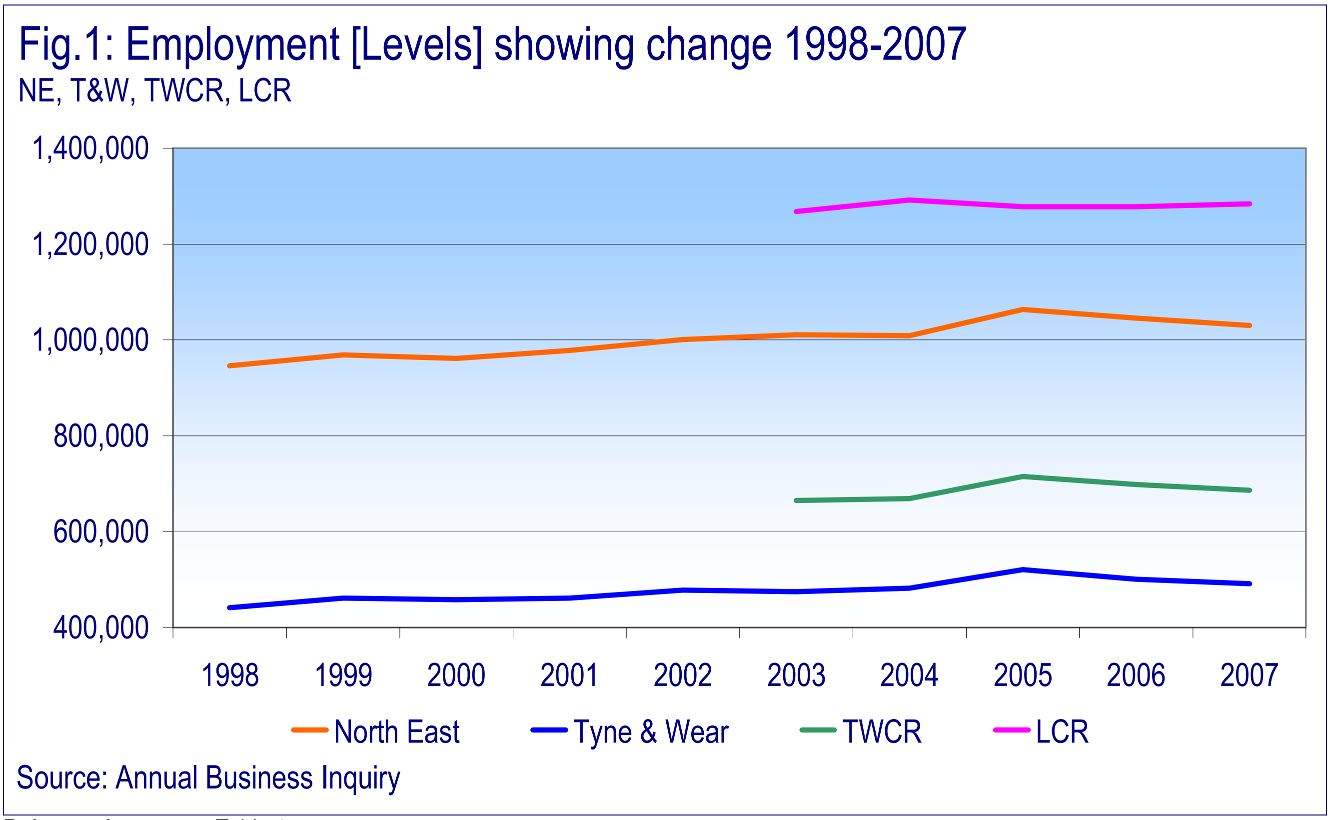
Tyne & Wear's reported employment growth (3.5%), was the same as Great Britain's, and almost twice as fast as the North East's (1.8%). Furthermore, annual average (compound) growth between 2003 and 2007 in Tyne & Wear was 0.9% (the same as in Great Britain), compared to 0.5% in the North East. Employment growth in TWCR, at 3.3%, was slightly slower than in Tyne & Wear but around 2.5 times faster than in Leeds City Region (LCR).

Tyne & Wear's employment growth from 1991-2002 was, cumulative, about 10%. Taken in context, this puts it in the middle of the range for the major cities of England; above Birmingham, Liverpool and Nottingham, but also below Leeds, Manchester and London (in the ODPM's State of the English Cities Report [SOCR], 2006, table 3.11, p.60) (see Appendix 2 for details).

Employment growth in Tyne & Wear between 2003-07 (3.5%) was much faster than in the Northumberland4 (-0.2%) (see Table 18 in workbook) but slower than recorded in the Durham4 (4.8%) (see Table 17 in workbook).

[26] Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a timing change in the survey reference date from Dec. to Sept.. As a consequence, users should avoid directly comparing employment estimates over this [2005/06] 'discontinuity'. Nationally, between 2005 and 2006, this [change in timing] reduced employment figures by around 0.5%.

[27] for working-age



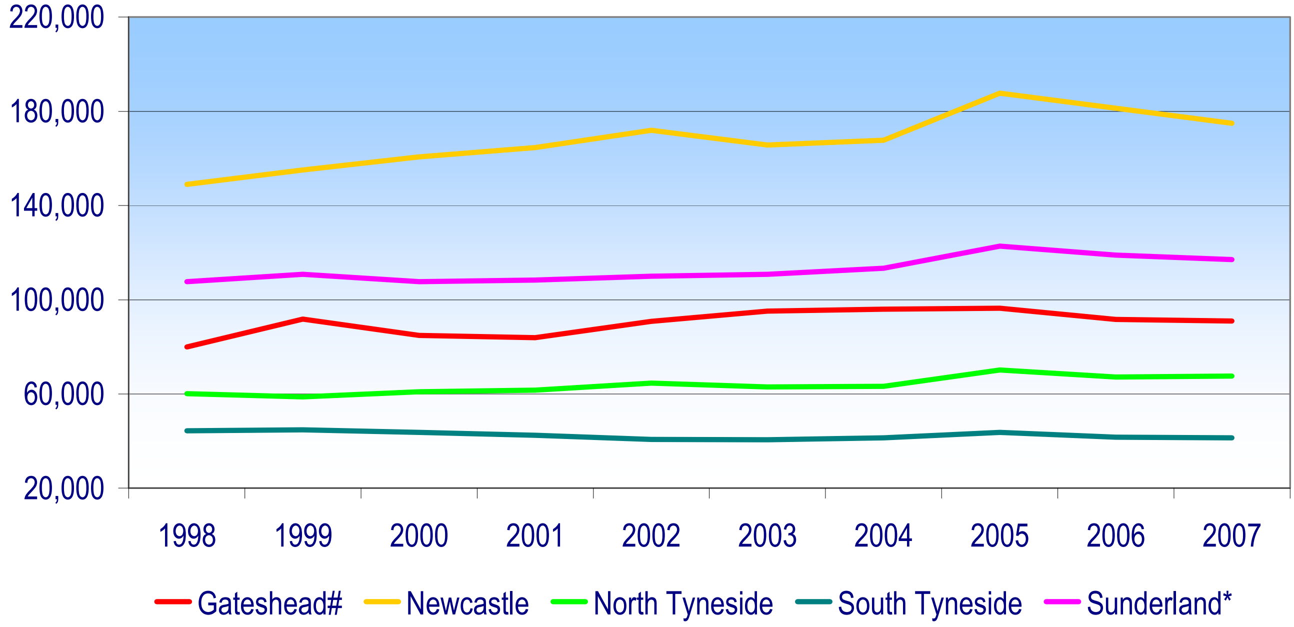
Refer to references to Table 1.

Inside Tyne & Wear, employment growth (rates of growth) in 2003-07 were led by North Tyneside (+4,600, 7.3%) and closely followed by the cities of Sunderland (+6,300, 5.7%) and Newcastle (+9,200, 5.5%). Conversely, growth was very modest in South Tyneside (+900, 2.1%). Gateshead was the only district to have a *reported* fall in employee jobs over the period (down -4,100 or -4.3%), but TWRI's judgement is that it *actually* rose, by at least +1,000 (or +1.0%). (More explanation is given in Appendix 5.)

Faster average annual (compound) growth rates in North Tyneside (2.0% pa), Sunderland (1.5%pa) and Newcastle (1.5%pa), contrast with those in South Tyneside (0.6%pa); all of these growth rates compare favourably with that [reported by ONS] in Gateshead (-1.1%pa)[28].

[28] In 2006/07, reported employment change in Tyne & Wear was negative, falling 8,800 (or -1.8%), mainly due to [oddly] large falls in Newcastle (down 6,400 or -3.5%). North Tyneside was the only district to show slight growth in 2006/07 (up 300 or +0.4%). Growth nationally was also relatively weak (+0.9%). Employment change in TWCR was also negative in 2006/07, at -1.7% (similar to [and largely composed of] Tyne & Wear) compared to slight growth in LCR, of +0.5%.

Fig.2: Employment [Levels] showing change 1998-2007
Tyne & Wear Districts



Source: Annual Business Inquiry

Refer to references to Table 1.

3 EMPLOYMENT CHANGE IN TYNE & WEAR AND THE CITY REGION BY BROAD INDUSTRY

3.1 All People

Growth of Public Service Employment (PSE) in Tyne & Wear was a smaller part of overall employment growth in 2003-07, at around 17%[29] than in TWCR where PSE growth was around 30% of TWCR's overall employment growth (also after the Gateshead and Sunderland PSE is amended up, by TWRI). PSE employment in both the North East (41%)[30] and GB (54%)[31] represented a considerably larger part of overall employment growth. Strikingly, TWCR's direct dependence on PSE (30%, as amended) was around a quarter of that in Leeds CR (PSE growth was 105% in Leeds CR or *all* of net employment growth).

Employment in Public Services[32] reportedly fell on the raw ONS estimates in Tyne & Wear between 2003-07 (down 800, or -4.8% of net employment change during the same period) (see Table 2). Of the 16,800 net employee growth, the decline in public services of -800 was the result of;

Table 2: Change in Public Service Employment (PSE) 2003-2007; Tyne and Wear

		Change 2003-07	% change	Annual Average Growth
L	Public administration	+3,000	+7.3%	+1.9%
	(Gateshead and Sunderland amendments)	(+6,800)	(+18.1%)	(+4.8%)
M	Education	-2,200	-4.4%	-1.2%
N	Health and social work	-1,600	-2.5%	-0.7%
	Total Public Service Employment ('PSE')	-800	-0.5%	-0.1%
		(+2,900)	(+1.9%)	(+0.5%)

Source: ABI (data rounded, percentage change figures based on unrounded data)

In TWCR, PSE rose by 2,800, accounting for 12.8% of net employment growth. This compared to a rise of 17,400 in LCR, which accounted for 104.8% (i.e. all) of overall net employment growth. In the North East, PSE rose by 7,600, accounting for 41% of net employment growth. In Great Britain, PSE rose by 482,500, accounting for 54% of the net employment growth.

Employee growth in the private sector in Tyne & Wear, TWCR, the North East, Leeds CR and Great Britain was mainly in 'Business Services' with growth rates generally over 20% except in GB and LCR (up 18,600, or 30.7% in Tyne & Wear, up 23,100, or 29.4% in TWCR, up 25,200, or 21.6% in the North East, up 26,700, or 15.9% in LCR, and up 722,400, or 18.1% in Great Britain). Of the 'Business Services' employment growth, around one-third was part-time (see §3.5).

29 after Gateshead and Sunderland PSE adjusted

30 or 7,600

31 or 482,500

32 Technically in Standard Industrial Classification 2003's sections L, M and N which are respectively Public Admin., Education, and Health & Social Services. Not all of these are public sector as some are provided by private firms.

Table 3: Change in Business Services 2003-2007; TW, TWCR, Leeds CR, NE, GB

	Change 2003-07	% change	Annual Average Growth
Tyne & Wear	18,600	30.7%	8.2%
Tyne & Wear City Region	23,100	29.4%	7.8%
North East	25,200	21.6%	5.8%
Leeds City Region	26,700	15.9%	4.2%
Great Britain	722,400	18.1%	4.8%

Source: ABI (data rounded, percentage change figures based on unrounded data)

The single largest numerical rises in employment in all five geographical areas (GB, NE, TW, TWCR, and Leeds CR) were in 'Business Services'.

In Tyne & Wear and TWCR, the *fastest* growth was in 'Financial Intermediation', (up 5,700, or 41.0% in TW and up 5,300, or 32.7% in TWCR). This compares to a fall of 18,400, or -1.7% in GB.

In Tyne & Wear and TWCR, 'Manufacturing' fell much more slowly, at around half the rate of other areas (down 3,700, or -6.1% in Tyne & Wear, down 6,600, or -7.4% in TWCR. The greatest falls recorded were in 'Manufacturing' employment in Leeds CR, the North East and GB. Manufacturing employment in the North East and Great Britain fell at a similar rate (down 17,700 or -12.1% and down 408,700 or -12.7% respectively). In LCR, manufacturing employment fell by 21,200, or -11.2%. Around only one-fifth of the North East's fall in manufacturing employment occurred in Tyne & Wear.

Table 4: Change in Manufacturing 2003-2007; TW, TWCR, Leeds CR, NE, GB

	Change 2003-07	% change	Annual Average Growth
Tyne & Wear	-3,700	-6.1%	-1.6%
Tyne & Wear City Region	-6,600	-7.4%	-2.0%
North East	-17,700	-12.1%	-3.2%
Leeds City Region	-21,200	-11.2%	-3.0%
Great Britain	-408,700	-12.7%	-3.4%

Source: ABI (data rounded, percentage change figures based on unrounded data)

The largest numerical fall recorded in employment in both Tyne & Wear and TWCR between 2003-07 was in 'Other Services' (down 5,800 or -20.7% in Tyne & Wear, and down -7,700 or -20.0% in TWCR).

Other industries where employment fell substantially in Tyne & Wear were 'Wholesale & Retail' (down 3,900 or -5.0%)[33] and 'Primary & Utilities' (down 900, or -19.5%). Other substantial falls in TWCR include; [oddly] 'Education' (down 5,000, or -6.8%) and 'Wholesale & Retail' (down 2,900, or -2.7%). In Leeds CR, other significant falls include; 'Wholesale & Retail' (down 12,500, or -5.3%) and 'Transport, Storage & Communications' (down 12,000, or [a big percentage drop at] -15.2%).

33 This retail fall is slightly exaggerated, say by up to about 1,000 due to the reference month coming forward from December to September.

3.2 Employment of Men

Men's net employment growth in Tyne & Wear[34], at 6,100 or 2.6% between 2003 and 2007, was some what slower than the 2.9% growth in the North East and 3.8% growth in GB over the same period (see Table 2B in workbook). Growth in TWCR at 4.1% was faster than in the NE and GB. Leeds CR was the only area in which men's employment change was negative over the period, at -0.3%.

'Business Services' rate of employment growth of men in Tyne & Wear was almost double that in GB and around 1.4 times as fast as in the NE. Also, the largest gains in men's employment in Tyne & Wear were dominated by 'Business Services' (up 12,000 or a huge growth rate at 37.8%). In TW, after 'Business Services, men's employment growth was no more than 3,000 in an industry with 'Construction' up 2,600, (or 13.8%) and in 'Public Administration' up 2,300 (or 12.8%). 'Business Services' also showed the largest gains in TWCR (up 14,900, or 35.0%), LCR (up 15,100, or 16.8%), the North East (up 17,100, or 27.1%) and in GB (up 426,000, or 19.6%).

The biggest losses in men's employment in Tyne & Wear were, unusually in 'Other Services' (down 4,800, or a huge -33.4%), 'Manufacturing' (down 3,600, or -7.4%), and 'Wholesale & Retail' (down 3,000, or -8.1%). Elsewhere employment losses from Manufacturing were generally around 12% (average nearly -3%pa). In both TWCR and LCR, losses were biggest in 'Manufacturing', (down 6,000, or -8.5% in TWCR and down 17,500, or -12.3% in LCR). Similarly, in both the North East and GB, men's employment decline was also greatest in 'Manufacturing' (down 13,800 or -12.0% and 284,900 or -11.9% respectively).

3.3 Employment of Women

Women's net employment growth in Tyne & Wear[35] was 10,700 or 4.5% between 2003 and 2007 (see Table 2C in workbook). Women's employment growth in Tyne & Wear was over 1.9pp faster than men's employment growth over the same period. Furthermore, Tyne & Wear compared favourably with women's employment growth rates in all other comparator areas (GB 3.1%, NE 0.8%, TWCR 2.5% and LCR 3.0%).

The biggest gains in women's employment in Tyne & Wear between 2003 and 2007 were in 'Business Services' (up 6,500 or 22.9%) followed by 'Hotels & Restaurants' (up 4,200 or 34.4%). In the period, in Tyne & Wear 'Financial Intermediation' grew hugely (up 4,000, or an extremely rapid growth of 51.0%). 'Business Services' also dominated women's employment growth in all comparator areas.

In Business Services, employment taken by men rose about 1.65 times as fast for women; men's employment in Business Services rose 14.9pp faster (up 37.8%) than for women (up 22.9%). In TWCR, the difference was only slightly narrower, at 12.2pp. Nationally, however, the difference was much narrower, at only 3.2pp.

The biggest losses in women's employment in Tyne & Wear between 2003 and 2007 were both in public services; 'Health & Social Work' (down 2,200 or -4.1%) followed by 'Education' (down 1,900 or -5.8%). Note: regionally, the 10,400 (or -13.9%) fall in women's employment in Education looks implausible, especially in the context of a UK rise of 6%. This reported

34 The amendment to Gateshead and Sunderland's employment in 'Public Administration' results in +9,500 or +4% for Tyne & Wear men.

35 The amendment to Gateshead and Sunderland's employment in 'Public Administration' results in +14,100 or +6% for Tyne & Wear women.

drop in the North East could be due to omissions in 2007. The decline in Manufacturing's employment of women decline both regionally (down 12.3%) and in GB (down 14.7%) is not found in Tyne & Wear (down just 1.1%).

In TWCR, the biggest losses in women's employment were in 'Education' (oddly reportedly down 8,000, or -15.9%) and in 'Other Services' (down 2,300, or -11.4%). In contrast, in LCR, major losses were in 'Wholesale & Retail' (down 9,000, or -7.6%) and 'Manufacturing' (down 3,700, or -7.8%).

3.4 Full-time employment

Full-time employment in Tyne & Wear grew by 5.7% over the period 2003-2007 (see Table 5). This is 0.9pp faster than the rate of growth in Great Britain (4.8%), 0.8pp faster than in TWCR (4.9%) and a huge 4.7pp faster than in LCR (1.0%).

Growth in full-time employment was strongest in Business Services at nearly 28% up 12,300, or 27.6% in Tyne & Wear (see Table 5, where Business Services are called 'Real Estate, Renting & Business Activities'). TW had faster growth than in all comparator areas; up 18,300, or 15.3% in LCR, and up 567,300, or 19.3% in GB, and lifted TWCR up 15,200, or 26.6%.

Growth in full-time employment in 'Financial Intermediation' in Tyne & Wear was exceptionally rapid at over 40% up 4,400, or 41.0%. This was much higher than in any of the comparator areas, particularly reportedly 100 times as fast in GB, up just 3,100, or 0.4%.

Full-time employment in public services in Tyne & Wear grew by 8.5% over the period 2003-2007. This is 2.2pp faster than in TWCR (up 6.3%), TW's full-time employment in public services was, however, 0.2pp slower than in LCR (up 8.7%) and 0.7pp slower than in GB (up 9.2%).

Full-time employment in 'Manufacturing' had the greatest numerical loss in all areas all (with rates of loss over 8%); but around 9% in Tyne & Wear, (down 5,000, or 8.7%) and in TWCR (down 8,200, or 9.6%), rather than around 13% in LCR (down 24,400, or 14.1%) and in GB (down 382,963, or 12.9%).

Table 5: Changes in Full-Time Employment by Industry, 2003-2007

		2003	2007	Change 2003-07	T&W % change	GB % change
Tyne & Wear						
A, B, C & E	Primary & Utilities	4,500	3,400	-1,100	-23.9%	1.9%
D	Manufacturing	57,500	52,500	-5,000	-8.7%	-12.9%
F	Construction	20,300	22,500	2,200	11.0%	12.4%
G	Wholesale, retail	42,600	41,700	-1,000	-2.2%	0.7%
H	Hotels and restaurants	9,900	11,700	1,700	17.2%	15.0%
I	Transport, storage and communication	22,400	22,300	-100	-0.4%	0.5%
J	Financial intermediation	10,800	15,200	4,400	41.0%	0.4%
K	Real estate, renting and business activities	44,400	56,700	12,300	27.6%	19.3%
L	Public administration	31,900	35,800	3,900	12.2%	1.8%
M	Education	30,000	30,400	400	1.3%	7.4%
N	Health and social work	34,900	38,800	3,900	11.3%	16.0%
O	Other services	15,000	11,700	-3,300	-22.0%	4.1%
	Total	**324,300**	**342,800**	**18,400**	**5.7%**	**4.8%**
Tyne & Wear City Region						
A, B, C & E	Primary & Utilities	6,000	5,100	-1,000	-15.8%	1.9%
D	Manufacturing	85,000	76,800	-8,200	-9.6%	-12.9%
F	Construction	30,400	32,000	1,500	5.1%	12.4%
G	Wholesale, retail	56,300	57,500	1,200	2.1%	0.7%
H	Hotels and restaurants	14,600	19,000	4,400	29.8%	15.0%
I	Transport, storage and communication	29,300	29,400	0	0.1%	0.5%
J	Financial intermediation	12,400	16,600	4,300	34.4%	0.4%
K	Real estate, renting and business activities	57,200	72,500	15,200	26.6%	19.3%
L	Public administration	45,500	50,800	5,200	11.4%	1.8%
M	Education	42,700	40,200	-2,500	-5.9%	7.4%
N	Health and social work	49,100	55,000	6,000	12.1%	16.0%
O	Other services	20,100	16,100	-4,000	-20.0%	4.1%
	Total	**448,700**	**470,800**	**22,100**	**4.9%**	**4.8%**
Leeds City Region						
A, B, C & E	Primary & Utilities	12,700	11,300	-1,500	-11.6%	1.9%
D	Manufacturing	173,400	149,000	-24,400	-14.1%	-12.9%
F	Construction	53,700	58,600	5,000	9.3%	12.4%
G	Wholesale, retail	137,700	133,900	-3,700	-2.7%	0.7%
H	Hotels and restaurants	25,000	31,200	6,200	24.8%	15.0%
I	Transport, storage and communication	67,700	56,500	-11,100	-16.4%	0.5%
J	Financial intermediation	48,500	53,800	5,300	11.0%	0.4%
K	Real estate, renting and business activities	119,200	137,500	18,300	15.3%	19.3%
L	Public administration	48,900	51,800	2,900	5.8%	1.8%
M	Education	58,400	65,800	7,400	12.7%	7.4%
N	Health and social work	77,200	83,000	5,800	7.6%	16.0%
O	Other services	32,400	30,400	-2,000	-6.1%	4.1%
	Total	**854,700**	**862,800**	**8,200**	**1.0%**	**4.8%**

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity,
Source: ABI (data rounded, percentage change figures based on unrounded data)

Warning: ABI 2006 discontinuity. Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date. Users should avoid directly comparing employment estimates over the discontinuity.
More information is available from: https://www.nomisweb.co.uk

3.5 Part-time employment

Part-time employment fell by 1.0% over the period 2003-2007 in Tyne & Wear (see Table 6). This helped TWCR to a negligible fall of -0.1%, but elsewhere part-time employment grew very modestly, up 0.5% in GB and 2.0% growth in LCR.

Part-time employment growth in 'market services'[36] was strong between 2003 and 2007 in Tyne & Wear.

In particular, there were large rises in part-time employment in four of them;

- 'Business Services' (up 6,300, or a huge 39.5%).
- 'Hotels and Restaurants' (up 2,500, or 17.6%).
- 'Financial Intermediation' (up 1,300, or another huge 41.0%).
- 'Transport, Storage and Communication' (up 800, or 25.2%).

The pattern in TWCR was very similar. In contrast, in LCR, part-time employment fell in 'Transport, Storage and Communications' (down 900, or -7.8%). In GB, there were falls in 'Hotels and Restaurants' (down 65,100, -6.5%), and in 'Financial Intermediation' [presumably from branch staff in banks etc.] (down 21,500, or -11.5%).

In contrast to the strong growth in market services in Tyne & Wear, part-time Public Services Employment (PSE) fell overall, by 9,100 or 15.1% between 2003 and 2007. There were large falls in part-time employment in:

- 'Health and Social Work' (down 5,600 or 18.2%).
- 'Education' (down 2,600 or 12.9%).
- 'Public Administration' (down 900, or 9.1%).

Falls in PSE were also evident in TWCR, with the exception of 'Public Administration' which grew 20.3%. In LCR, PSE grew in:

- 'Education' (up 2,600, or 4.1%)
- 'Public Administration' (up 1,400, or 9.9%)
- but fell in 'Health and Social Work' (down 2,700, or -3.8%).

In GB, part-time PSE grew in all sections, with the biggest numerical growth in 'Public Administration', (up 52,900, or 18.7%).

Part-time employment in 'Manufacturing' in Tyne & Wear was perhaps oddly[37] strong, (up 1,300, or 40.3%) [helped by the Tyne & Wear manufacturing overall employment fall being around half the rate elsewhere], compared to a fall of 25,700, or -10% in GB. This rapid growth in TW might reflect moves by (some) Manufacturers to more flexible working by production employees.

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[36] 'Market services' include: 'Hotels and Restaurants', 'Transport, Storage and Communications', 'Financial Intermediation', and 'Real Estate, Renting and Business Activities'.

[37] From a small base of only around 3,000.

Table 6: Changes in Part-Time Employment by Industry, 2003-2007

		2003	2007	Change 2003-07	T&W % change	GB % change
Tyne & Wear						
A, B, C & E	Primary & Utilities	200	400	200	81.0%	31.8%
D	Manufacturing	3,200	4,500	1,300	40.3%	-10.0%
F	Construction	700	1,400	700	95.8%	27.4%
G	Wholesale, retail	36,600	33,600	-3,000	-8.2%	-9.9%
H	Hotels and restaurants	14,300	16,800	2,500	17.6%	-6.5%
I	Transport, storage and communication	3,100	3,900	800	25.2%	4.5%
J	Financial intermediation	3,100	4,300	1,300	41.0%	-11.5%
K	Real estate, renting and business activities	15,900	22,200	6,300	39.5%	15.0%
L	Public administration	9,500	8,600	-900	-9.1%	18.7%
M	Education	20,200	17,600	-2,600	-12.9%	3.4%
N	Health and social work	30,700	25,100	-5,600	-18.2%	2.7%
O	Other services	13,100	10,600	-2,500	-19.3%	3.2%
	Total	**150,700**	**149,100**	**-1,600**	**-1.0%**	**0.5%**
Tyne & Wear City Region						
A, B, C & E	Primary & Utilities	300	500	200	67.2%	31.8%
D	Manufacturing	4,700	6,200	1,500	32.8%	-10.0%
F	Construction	1,400	2,300	900	69.8%	27.4%
G	Wholesale, retail	50,100	46,000	-4,100	-8.2%	-9.9%
H	Hotels and restaurants	24,000	24,900	900	3.5%	-6.5%
I	Transport, storage and communication	4,300	5,100	900	20.5%	4.5%
J	Financial intermediation	3,800	4,800	1,000	27.1%	-11.5%
K	Real estate, renting and business activities	21,500	29,400	7,900	36.8%	15.0%
L	Public administration	12,500	15,000	2,500	20.3%	18.7%
M	Education	30,800	28,300	-2,500	-8.1%	3.4%
N	Health and social work	42,500	36,600	-5,900	-13.9%	2.7%
O	Other services	18,200	14,500	-3,700	-20.1%	3.2%
	Total	**214,100**	**213,800**	**-300**	**-0.1%**	**0.5%**
Leeds City Region						
A, B, C & E	Primary & Utilities	1,300	1,800	500	42.0%	31.8%
D	Manufacturing	16,500	19,700	3,200	19.4%	-10.0%
F	Construction	3,600	5,900	2,300	65.1%	27.4%
G	Wholesale, retail	99,100	90,400	-8,800	-8.8%	-9.9%
H	Hotels and restaurants	43,800	45,300	1,400	3.3%	-6.5%
I	Transport, storage and communication	11,400	10,500	-900	-7.8%	4.5%
J	Financial intermediation	12,800	13,800	1,000	7.6%	-11.5%
K	Real estate, renting and business activities	48,400	56,800	8,400	17.4%	15.0%
L	Public administration	14,700	16,100	1,400	9.9%	18.7%
M	Education	63,200	65,800	2,600	4.1%	3.4%
N	Health and social work	71,500	68,800	-2,700	-3.8%	2.7%
O	Other services	26,300	26,200	-100	-0.4%	3.2%
	Total	**412,700**	**421,200**	**8,500**	**2.0%**	**0.5%**

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity,
Source: ABI (data rounded, percentage change figures based on unrounded data)

Warning: ABI 2006 discontinuity. Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date. Users should avoid directly comparing employment estimates over the discontinuity.
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4 EMPLOYMENT CHANGE IN TYNE & WEAR BY INDUSTRY (SIC DIVISION 2-DIGIT)

The top three employment gains by industry (SIC division) were (see Tables 7A-7E in workbook):

Table 7: Three Top Employment Gains, 2003-2007 by 2-Digit SIC

Tyne & Wear	SIC 74 'Other Business Activities'[1]	(up 13,600, or 30.5%)
	SIC 65 'Financial Intermediation'[2]	(up 4,600, or 46.1%)
	SIC 55 'Hotels & Restaurants'[3]	(up 4,200, or 17.4%)
Tyne & Wear City Region	SIC 74 'Other Business Activities'	(up 17,000, or 29.4%)
	SIC 75 'Public Administration & Defence'	(up 7,700, or 13.3%)
	SIC 55 Hotels & Restaurants'	(up 5,200, or 13.5%)
Leeds City Region	SIC 74 'Other Business Activities'	(up 26,900, or 21.5%)
	SIC 80 'Education'	(up 10,000, or 8.2%)
	SIC 55 'Hotels & Restaurants'	(up 7,600, or 11.1%)
North East	SIC 74 'Other Business Activities'	(up 17,900, or 20.8%)
	SIC 75 'Public Administrtion & Defence'	(up 9,100, or 11.9%)
	SIC 45 'Construction'	(up 5,700, or 10.7%)
Great Britain	SIC 74 'Other Business Activities'	(up 585,900 or 20.4%)
	SIC 85 'Health & Social Work'	(up 283,300 or 9.6%)
	SIC 45 'Construction'	(up 153,400 or 13.5%)

Source: ABI (data rounded, percentage change figures based on unrounded data)
[1] TWRI's JCD recorded a net gain of 8,940 jobs in 'Business Services' over the period 2003-2007 in T&W.
[2] TWRI's JCD recorded a net gain of 5,058 jobs in 'Banking/Finance' over the period 2003-2007 in T&W.
[3] TWRI's JCD recorded a net gain of 2,148 jobs in 'Hotels and Catering' over the period 2003-2007 in T&W.

In Tyne & Wear, the only growth in PSE was in 'Public Administration Defence' (up 3,000, or 7.3%). In the CR, PSE grew, except in 'Education' (down 5,000, or 6.8%). In LCR, PSE grew in all three SIC divisions.

The three greatest numerical *falls* in employee jobs in Tyne & Wear were all in the private sector:

- SIC 52 'Retail Trade, (down 4,300 or -7.6%)*
- SIC 93 'Other Service Activities' (down 2,500 or -42.5%)*
- SIC 64 'Post & Telecommunications' (down 2,300 or -20.7%)*

However, large numerical falls in PSE in Tyne & Wear were:

- SIC 80 'Education' (down 2,200 or -4.4%)#
- SIC 85 'Health & Social Work' (down 1,600, or -2.5%)#

* TWRI's JCD, however recorded net gains in Tyne & Wear for 'Retail Distribution',[known but systematic, under-reporting of losses].The TWRI JCD also recorded net gains in 'Other Services to the Public' and 'Personal Services', and 'Post and Telecommunications' over the period 2003-2007.

TWRI's JCD recorded much smaller net losses for 'Education' (net loss 273) and 'Medical / Other health services' (net loss 265) over the period 2003-2007 in Tyne & Wear.

In TWCR, the largest fall was a public service, followed by large falls in the private sector:

- SIC 80 'Education' (down 5,000 or -6.8%)
- SIC 52 'Retail Trade, (down 4,100, or -5.5%)
- SIC 93 'Other Service Activities' (down 3,600 or a huge -43.4%)
- SIC 64 'Post & Telecommunications' (down 2,900 or -20.5%)

In the North East, the largest falls in employment were similar to those in Tyne & Wear, both areas [oddly] led by falls in education:

- SIC 80 'Education[38]' (down 6,200, or -5.7%), followed by
- SIC 93 'Other Service Activities' (down 4,700 or -38.1%)
- SIC 52 'Retail Trade, (down 4,300, or -3.8%)

In Leeds City Region, the greatest losses were all in the private sector:

- SIC 52 'Retail Trade, (down 9,900, or -6.7%)
- SIC 60 'Land Transport, (down 6,200 or -19.9%)
- SIC 17 'Manufacture of Textiles' (down 4,100 or -28.5%)

In GB, the greatest losses were also in the private sector:

- SIC 52 'Retail Trade, (down 193,000, or -6.5%)
- SIC 64 'Post & Telecommunications' (down 47,500 or -9.2%)
- SIC 34 'Manufacture of Motor Vehicles,' (down 40,700, or -20.9%) [spanning the closure of Rover Group, in 2005, and other moves].

38 The North East fall in employment in Education, particularly women's employment, seems implausible, especially in the context of a UK rise. This could be due to omissions.

5 TOP (LARGEST) INDUSTRIES AND GROWTH INDUSTRIES, 2003-2007

5.1 Top (Largest) Industries

The top six (largest) six industries in Tyne & Wear in 2003 accounted for three-quarters of all jobs. (see Table 8). Of these jobs in Top six industries, 42% were in the private sector, with 'Wholesale and Retail', 'Manufacturing', and 'Business Services' occupying first, third and fourth position amongst Top six industries.

Table 8: Top Industries for All People, 2003 and 2007

	2003			2007	
		Proportion of total jobs (%)			Proportion of total jobs (%)
Tyne & Wear					
Wholesale, Retail	79,200	16.7%	Business Services	78,900	16.0%
Health & Social Work	65,600	13.8%	Wholesale, Retail	75,200	15.3%
Manufacturing	60,800	12.8%	Health & Social Work	63,900	13.0%
Business Services	60,300	12.7%	Manufacturing	57,100	11.6%
Education	50,200	10.6%	Education	48,000	9.8%
Public Administration	41,400	8.7%	Public Administration	44,500	9.0%
Top Six	357,500	75.2%	Top Six	367,600	74.7%
Tyne & Wear City Region					
Wholesale, retail	106,400	16.0%	Wholesale, retail	103,500	15.1%
Health and social work	91,600	13.8%	Business Services	101,900	14.8%
Manufacturing	89,700	13.5%	Health and social work	91,700	13.4%
Business Services	78,700	11.8%	Manufacturing	83,100	12.1%
Education	73,500	11.1%	Education	68,500	10.0%
Public Administration	58,100	8.7%	Public Administration	65,800	9.6%
Top Six	498,000	74.9%	Top Six	514,500	74.9%
Leeds City Region					
Wholesale, retail	236,800	18.7	Wholesale, retail	224,300	17.5
Manufacturing	189,800	15.0	Business Services	194,300	15.1
Business Services	167,600	13.2	Manufacturing	168,600	13.1
Health and social work	148,700	11.7	Health and social work	151,800	11.8
Education	121,600	9.6	Education	131,600	10.2
Transport, storage and com.	79,000	6.2	Hotels and restaurants	76,500	6.0
Top Six	943,500	74.4	Top Six	947,100	73.8

Source: ABI (number of employees rounded, as a proportion of total jobs, unrounded)
Warning: ABI 2006 discontinuity. Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date. Users should avoid directly comparing employment estimates over the discontinuity.
More information is available from: https://www.nomisweb.co.uk

By 2007, 'Business Service' jobs grew by almost one-third, making this the largest industry in Tyne & Wear. The small contraction of PSE, led to a dip from 33.1% to 31.8% (of total jobs). This left the private sector accounting for a slightly larger proportion (in 2007 than in 2003) of all jobs in the Top 6, at 43%.

The *trend* in TWCR is slightly different from that in Tyne & Wear, in respect of 'Wholesale and Retail' which accounted for the largest proportion of TWCR's jobs in its Top six in 2007. [This top position presumably also reflects Business Services' slightly higher concentration in Tyne & Wear (by 1.2pp).Despite the opening of Dalton Park[39], TWCR's 'Wholesale and Retail' employment fell by nearly 3,000 (about 3%) over the four years[40].

In Leeds CR, in 2003, about a 10pp higher proportion of jobs in the Top six were in the private sector, at 53%. By 2007, the proportion of private sector employment had fallen, but only slightly to 52%. 'Public Administration' employment did not feature in Leeds CR's Top six in either 2003 or 2007.

5.2 Growth Industries

In terms of numerical employment growth in Tyne & Wear between 2003 and 2007, the private sector dominates, taking all three top places (see Table 9). 'Business Services' had easily the largest numerical employment growth (up 18,600). 'Financial Intermediation', ranked second, had the *fastest growth* (up 41.0%, or 5,700) and 'Hotels and Restaurants' came third for numerical growth (up 4,200 or 17.4%).

In TWCR, numerical growth between 2003 and 2007 was also largest in 'Business Services', at 23,100. Although private sector employment dominates, taking five of the six top places, in TWCR 'Public Administration' ranked second (up 7,700). 'Financial Intermediation', ranked third, had the *fastest* growth (up 32.7%, or 5,300), but this was entirely attributable to growth in Tyne & Wear; in the rest of the City region 'Financial intermediation' fell by 400.

In Leeds CR, public services featured more strongly in Leeds CR, with 'Education' (up 10,000, or 8.2%) ranking second and 'Public Administration' (up 4,300, or 6.8%) ranking sixth. However, private sector employment dominates, with by far the largest numerical growth in 'Business Services' (up 26,700, or 15.9%).

[39] The Dalton Retail Park is in Easington district, just south of Sunderland, and is adjacent to the A19.
[40] Table 12 shows TWCR's 'Wholesale and Retail' employment fell from 106,400 to 103,500.

Table 9: Growth Industries for All People, 2003-2007

	Growth	% Growth	Annual % Growth
Tyne & Wear			
Business Services	18,600	30.7%	8.2%
Financial intermediation	5,700	41.0%	10.9%
Hotels and restaurants	4,200	17.4%	4.6%
Public Administration	3,000	7.3%	1.9%
Construction	2,900	13.9%	3.7%
Transport, storage and com.	700	2.8%	0.7%
Tyne & Wear City Region			
Business Services	23,100	29.4%	7.8%
Public administration	7,700	13.3%	3.6%
Financial intermediation	5,300	32.7%	8.7%
Hotels and restaurants	5,200	13.5%	3.6%
Construction	2,500	7.9%	2.1%
Transport, storage and com.	900	2.7%	0.7%
Leeds City Region			
Business Services	26,700	15.9%	4.2%
Education	10,000	8.2%	2.2%
Hotels and restaurants	7,600	11.1%	3.0%
Construction	7,300	12.8%	3.4%
Financial intermediation	6,300	10.3%	2.7%
Public administration	4,300	6.8%	1.8%

Source: ABI (Increase rounded, percentage increase unrounded)
Warning: ABI 2006 discontinuity. Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date. Users should avoid directly comparing employment estimates over the discontinuity.
More information is available from: https://www.nomisweb.co.uk

6 DECLINING INDUSTRIES, 2003-2007

Between 2003 and 2007, six industries had employment falls (declines) in Tyne & Wear, four of them private sector industries (see Table 10). The largest numerical fall in employment was in ‘Other Services’ (down 5,800 or -20.7%). This also had the largest percentage fall in employment, followed closely by ‘Primary and Utilities’ (down 19.5%, or -900). In the public services, ‘Education’ and ‘Health and Social Work’ (down 2,200, or -4.4%) (down 1,600, or -2.5%) both fell modestly.

Employment fell in one fewer industries in TWCR (5 industries) than in Tyne & Wear. Four of the five industries with recorded falls were in the private sector. The largest numerical fall in employment was in ‘Other Services’ (-7,700, or -20.0%). The only fall in TWCR Public Services Employment (PSE) was in ‘Education’ (down 5,000, or -6.8%). The fall in ‘Manufacturing’ (-7.4%) in TWCR was faster than in Tyne & Wear (-6.1%). TWCR’s ‘Wholesale and Retail’ employment, however, fell only about half as fast (-2.7%) as in Tyne & Wear (-5.0%)[41]. [TWRI notes that population growth was twice as fast in TWCR as in Tyne & Wear between 2003 and 2007. This will have helped the employment performance of retailing in TWCR relative to Tyne & Wear].

In Leeds CR, all of the top six falls in employment were in the private sector. ‘Manufacturing’ had the largest numerical fall over 20,000 (down 21,200, or -11.2%). The largest percentage fall was in ‘Transport, Storage and Communications’ (down 12,000, or -15.2%).

Table 10: Declining Industries for All People, 2003-2007

	Fall	% Fall	Annual % Fall
Tyne & Wear			
Other services	-5,800	-20.7%	-5.5%
Wholesale, retail	-3,900	-5.0%	-1.3%
Manufacturing	-3,700	-6.1%	-1.6%
Education	-2,200	-4.4%	-1.2%
Health and social work	-1,600	-2.5%	-0.7%
Primary & Utilities	-900	-19.5%	-5.2%
Tyne & Wear City Region			
Other services	-7,700	-20.0%	-5.3%
Manufacturing	-6,600	-7.4%	-2.0%
Education	-5,000	-6.8%	-1.8%
Wholesale, retail	-2,900	-2.7%	-0.7%
Primary & Utilities	-800	-9.7%	-2.6%
Leeds City Region			
Manufacturing	-21,200	-11.2%	-3.0%
Wholesale, retail	-12,500	-5.3%	-1.4%
Transport, storage and com.	-12,000	-15.2%	-4.1%
Other services	-2,100	-3.6%	-0.9%
Primary & Utilities	-900	-6.8%	-1.8%

Source: ABI (fall rounded, percentage fall unrounded)
Warning: ABI 2006 discontinuity. Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date. Users should avoid directly comparing employment estimates over the discontinuity.
More information is available from: https://www.nomisweb.co.uk

[41] Helped by out-of-town developments, notably Dalton Park (in Easington District).

7 EMPLOYMENT CHANGE WITHIN THE TYNE & WEAR CITY REGION DISTRICTS

7.1 By broad Industry

7.1.1 All People; Tyne & Wear Districts

Among the Tyne & Wear districts, employment growth was largest in Newcastle (up 9,200, or 5.5%), followed by Sunderland (up 6,300, or 5.7%) and North Tyneside (up 4,600, or 7.3%). South Tyneside had some employment growth (up 900, or 2.1%) (see Table 11A in workbook). In Gateshead, employment change was positive (up 1,000 or +1.0%). (Note: after adjustments for error in Public Admin; details Appx.5).

Within Tyne & Wear, the pattern of growth varied between the five districts, with more prominent private sector growth in Newcastle and North Tyneside. Sunderland, North Tyneside and Newcastle were the only districts with overall PSE growth:

Table 11: Tyne & Wear Districts with Overall Growth in Public Service Employment

Sunderland	'Public Administration & Defence'[1]	(up 4,000, or 68.3%)
	'Education'	(up 800, or 7.2%)
	'Health & Social Work'	(down 500, or -3.6%)
North Tyneside	'Public Administration & Defence'	(up 2,200, or 90.3%)
	'Education'	(down 1,400, or -21.3%)
	'Health & Social Work'	(up 500, or 5.3%)
Newcastle	'Public Administration & Defence'	(up 2,700, or 13.7%)
	'Education'	(down 700, or -3.4%)
	'Health & Social Work'	(down 900, or -3.8%)

Source: ABI (data rounded, percentage change figures based on unrounded data)
[1] Caution: Possible error in ABI concerning employment growth in 'Public Administration' in Sunderland. The estimate for 2003 appears too low.

'Business Services' had the top numerical employment gain in each district[42], except Sunderland where it ranked second after 'Public Administration'. 'Construction' ranked in the top three in Gateshead (up 1,300, or 25.0%), South Tyneside (up 700, or 38.6%) and Sunderland (up 1,800, or 44.7%). The fastest percentage employment growths (over 50%) were; 'Business Services' in Gateshead (up 51.2%) and South Tyneside (up 53.5%), 'Financial Intermediation' in Newcastle (up 70.1%)[43], and 'Public Administration' in North Tyneside (up 90.3%) and Sunderland (up 68.3%). Newcastle, North Tyneside and Sunderland were the only districts with any PSE to feature in the top three numerical gains.

Of Tyne & Wear's 18,600 growth in 'Business Services'[44] around 28% was in Newcastle (up 5,100 or by 19.3%), 24% in Gateshead (up 4,400, or by 51.2%) and 20% in Sunderland (up 3,700 or by 27.9%). North Tyneside and South Tyneside had slightly lower proportions at 18% and 11% respectively.

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[42] This period corresponds to major gains in 'Business Services' including Garlands in South Tyneside (+1,000 in 2007), EDS (+1,000 in 2005), EMAX Consulting (+600 in 2006) and Client Logic (+400 in 2004) all in North Tyneside, and Convergys in Newcastle (+400 in 2005). Source: TWRI's JCD.

[43] Newcastle gained 1,000 jobs at Northern Rock in 2005. Source: TWRI's JCD.

[44] TWRI's JCD shows net gains in 'Business Services' of +1,726 in Gateshead, +3,622 in Newcastle, +2,010 in North Tyneside, +1,353 in South Tyneside and +229 in Sunderland.

Sunderland was the only district in which there was a growth of employment in 'Primary & Utilities' (up 300 or 13.0%) [presumably in call centres]. Employment in this industry was down in Gateshead (down 400, or -72.9%), Newcastle (down 0, or -5.2%), North Tyneside (down 600 or -52.5%) and South Tyneside (down 100 or -30.1%).

Employment losses across the districts were split between private and public services. Public services dominated losses in North Tyneside ('Education' down 1,400, or -21.3%) and South Tyneside ('Public Administration' down 1,000, or -38.8%)[45], mainly losses from the Inland Revenue. Gateshead's reported losses from Public Administration are incredible; it probably grew slightly[46].

Private sector losses were largest in Newcastle ('Other Services' down 1,900, or -16.9%) and in Sunderland ('Manufacturing' down 2,700, or -13.6%)[47]. [This is a reversal from Sunderland's manufacturing employment growth in the 1990s.] The fastest falls (all over about 20%) were in 'Primary and Utilities' in Gateshead (-72.9%) and North Tyneside (-52.5%); 'Construction' in Newcastle (-19.8%); 'Public Administration' in South Tyneside (-38.8%) and 'Other Services' in Sunderland (-22.7%).

In 'Wholesale & Retail' in Tyne & Wear employment fell over the period 2003 to 2007 (down 3,900, or -5.0%). (Caution: this fall is inflated by the shift of reference month from December to September.) Employment rose in only two districts, Gateshead (up 100, or 0.4%) and North Tyneside (up 200, or 1.8%). Employment fell in the other three districts; Newcastle (down 1,700, or -7.5%), South Tyneside (down 200, or -3.1%) and Sunderland (down 2,300, or -11.9%). (Sunderland's retail losses include the closure of the Joplings department store in John Street). These data suggest very limited employment growth, all at out-of-town shopping centres. Importantly, around *three-quarters* of the net employment loss in Wholesale & Retail was part-time (in TW down 3,000, whereas full-timers were down 1,000) but this is inflated as Christmas staff are included in the base year only.

Other significant losses (over 1,000) were in 'Other Services' in both Gateshead and Sunderland (down 1,700, or -29.7% and 1,100, or -22.7%), in 'Construction' in Newcastle (down 1,100, or -19.8%) and in 'Manufacturing' in Gateshead (down 1,000 or -6.5%).[48]

7.1.2 All People; Rest of TWCR Districts[49]

Among the Rest of the City Region (RoCR) districts, there was overall employment growth in only four of the eight districts; Blyth Valley (up 1,600, or 7.6%) in the Northumberland4, and 3 of the Durham4; Chester-le-Street (up 1,500, or 13.5%), Durham City (up 3,300, or 7.4%) and Easington (up 1,000, or 3.6%). Employment fell (by hundreds) in Castle Morpeth (down 100, or -0.5%), Tynedale (down 800, or -3.6%) and Wansbeck (down 800, or -5.2%) in the Northumberland4, and Derwentside (down 600, or -2.6%) in the Durham4 (see Table 11B in workbook).

The very broad pattern was of private sector employment growth in the Northumberland4 but PSE employment growth in the Durham4 (see Table 11B in workbook).

45 South Tyneside lost 600 jobs in 'Public Administration' in 2005 from the Inland Revenue at Hebburn. Source: TWRI's JCD.

46 Gateshead ('Public Administration down an uncorroborated 4,800, or -44.4%)

47 TWRI's JCD shows a similar loss of -3,162 jobs in 'Manufacturing' in Sunderland over the period 2003-2007. The major losses were: Dunlop 585 (Rubber Tyres) Stag 550 (Furniture) Dewhirst 530 (Clothing) Corning 100 [Newells](Glass).

48 This Gateshead manufacturing rate of loss, however, is little different from the TW average of -6.1%.

49 The Rest of the City Region (RoCR) districts include; Blyth Valley, Castle Morpeth, Tynedale, and Wansbeck in Northumberland; and Chester-le-Street, Derwentside, Durham City, and Easington in County Durham.

In the Northumberland4, private sector employment growth dominated in Blyth Valley ('Manufacturing' up 700, or 15.9%) [helped by some relocation from TW], Tynedale ('Business Services' up 1,600, or a remarkable 57.6%) and Wansbeck ('Construction' up 400, or 68.9%. In the private sector in Wansbeck, 'Business Services' was also up 400 or 86.1%).

In the Durham4, private sector employment growth dominated only in Easington ('Business Services' up 1,000, or 25.7%).

Public service employment growth dominated among the Durham4 districts with 'Health and Social Work' up 600, or 44.4% in Chester-le-Street and up 800, or 37.1% in Derwentside, and 'Public Administration' up 2,200, or a remarkable 36.2% in Durham City [presumably expansion by National Savings, the Passport Office and County Hall].

In the Northumberland4, public service employment growth dominated only in Castle Morpeth ('Public Administration' up 2,400, or a remarkable 55.2%) [presumably at County Hall, but uncorroborated and looks inflated].

Other notable employment gains occurred in Durham City with 'Health & Social Work' up 2,100, or 32.5% [presumably linked to the new hospital] and 'Business Services' up 1,000, or 19.6%.

The *fastest* employment gains were all in the private sector, except for Durham City, where 'Public Administration' grew by 36.2%. 'Business Services' showed the fastest growth in Tynedale (up 57.6%), Wansbeck (up 86.1%), Derwentside (up 39.7%) and Easington (25.7%).

Employment losses across the RoCR districts were greatest in the private sector in all but two districts; Castle Morpeth (Education down 1,100, or -32.4%) and Tynedale ('Health & Social Work' down 800, or -20.5%) in the Northumberland4. PSE losses featured in the top three losses in six districts.
The largest numerical private sector losses were in;

- 'Manufacturing' down 1,600, or -39.2% in Durham City
  down 1,200, or -16.0% in Derwentside
  down 500, or -19.0% in Wansbeck

- 'Construction' down 400, -36.2% in Easington
  down 300, or -27.3% in Chester-le-Street

- 'Other Services' down 300, or -27.9% in Blyth Valley

7.1.3 Men's Employment; Tyne & Wear Districts

Between 2003 and 2007, men's employment growth was particularly strong in Sunderland (up 4,500 or 7.9%), and more moderate in Newcastle (up 1,500, or 1.9%) and North Tyneside (up 1,300 or 4.1%) (see Table 11C in workbook). In contrast to growth in the other districts, men's employment fell 300 in South Tyneside (-1.5%). (The reported fall of 1,000 in Gateshead (-1.9%) is not reliable[50]; employment of men in Gateshead probably rose, perhaps by around 1,080.)

[50] Due to the errors which wrongly imply a 4,800 fall.

Business Services provided the biggest gains in men's employment between 2003 and 2007 in the Tyne & Wear districts:

- 'Business Services' provided the largest gains (generally 2,000+) in men's employment in all the Tyneside districts; Gateshead (up 3,300, or 77.8%), Newcastle (up 3,500, or 24.9% - slow), North Tyneside (up 2,300, or 48.8%) and South Tyneside (up 1,000, or 60.3%). 'Business Services' ranked third in Sunderland (up 1,900, or 26.9%).
- 'Education' provided the largest gain in Sunderland (up 2,100, or [an oddly huge] 59.0%)
- 'Construction' featured in the top three men's gains (500+) in the three districts outside the cities; Gateshead (up 1,100 or 25.1%), North Tyneside (up 500, or 13.6%) and South Tyneside (up 500 or 30.8%). It ranked fourth in Sunderland, where men's construction job gains were actually larger and faster than in other districts (up 1,600, or 44.5%).
- 'Financial Intermediation' provided a significant gain in Newcastle (up 1,700, or 57.5%), reflecting the rapid growth of Northern Rock in this period.

Public Service Employment losses featured strongly across the districts;

- 'Public Administration' down 500, or -41.3% in South Tyneside[51]
- 'Education' down 500, or -22.1% in Gateshead
down 1,200, or -14.8% in Newcastle
down 700, or -39.3% in North Tyneside
down 0, or -0.1% in South Tyneside
- 'Health and Social Work' down 0, or -1.9% in Gateshead
down 200, or -4.6% in Newcastle

Private sector employment losses for men were biggest (generally 1,000+) in 'Other Services' in Newcastle (down 1,800, or -31.0%), Gateshead (down 1,200 or -41.5%) and Sunderland (down 900, or -35.5%).

The job losses of men from 'Wholesale and Retail', at over 11% in 3 districts are very likely to be particularly inflated by the shift from December to September as the reference month (removal of Christmas temps); in Newcastle (down 1,200, or -11.9%), Sunderland (down 1,100, or -12.2%) and South Tyneside (down 400, or -11.4%).

7.1.4 Men's Employment; Rest of TWCR Districts

Men's employment grew in six of the eight RoCR districts between 2003 and 2007 (see Table 11D in workbook). Castle Morpeth and Wansbeck, both in the Northumberland4, were the two exceptions, with an overall fall in men's employment over the period.

Men's employment growth was particularly strong in public services in;

- Castle Morpeth; 'Public Administration' (up 400, or 16.0%)
- Chester-le-Street; 'Education'*(up 600, or 214.5%)

51 Reportedly down 2,000, or -44.3% in Gateshead, but not believable, Appendix 5.

- Derwentside; 'Education* (up an extraordinary 1,100, or 202.2%); 'Health and Social Work' (up 400, or 127.4%)
- Durham City; 'Public Administration' (up 1,200, or 34.7%); 'Education' (up 1,000, or 43.0%), 'Health and Social Work' (up 1,000, or 76.2%)
- Easington; 'Education'* (up 1,200, or 159.3%)

* Caution: County Durham has a series of oddly very large reported rises in Education jobs taken by men. The apportionment has shifted from women to men between 2003 and 2007; this looks like an error[52].

In the private sector, men's employment growth was particularly strong (up about 30% or more) in 'Business Services' in four districts; Tynedale (up 1,200, or 65.9%), Easington (up 700, or 33.7%), Blyth Valley (up 400, or 29.3%) and Wansbeck (up 300, or 105.3%).

'Manufacturing' also featured moderately for men's employment growth in Blyth Valley (up 700, or 21.7%), and Castle Morpeth (up 300, or 74.5%). Similarly, 'Construction' showed strong growth (generally up over 20%) in the Northumberland4 districts led by Wansbeck (up 300, or 68.1%), but also Tynedale (up 200, or 24.3%), Blyth Valley (up 200, or 21.5%) and Castle Morpeth (up 200, or 17.5%).

Major losses in men's employment occurred in 'Manufacturing', particularly in the Durham4 districts. Losses were large (1,000+) in Durham City (down 1,400, or -43.3%)[53] and Derwentside (down 1,000, or -17.0%). Other significant 'Manufacturing' losses (200+) occurred in Wansbeck (down 400, or -17.4%), Easington (down 300, or -5.0%), and Chester-le-Street (down 200, or -28.4%).

Men's employment in 'Wholesale and Retail' performed better among the Durham4 districts, with employment gains in each of the four districts. In the Northumberland4, only Blyth Valley gained jobs in 'Wholesale & Retail'. This dependent employment has lifted the overall faster employment growth in the Durham4 districts, which will have raised consumer demand in these areas.

7.1.5 Women's Employment; Tyne & Wear Districts

Between 2003 and 2007, women's employment growth was particularly strong (over 8%, and thus over twice as fast as TW's overall employment growth) in Newcastle (up 7,700 or 8.8%) and North Tyneside (up 3,300, or 10.8%) (see Table 11E in workbook). Moderate employment growth was experienced in Sunderland (up 1,800 or 3.3%) and South Tyneside (up 1,200, or 5.3%). In Sunderland, however, women's employment growth was slower than overall employment growth. Gateshead reported the only district fall in women's employment (down 3,100 or -6.9%), but this will have been a result of the error in Public Admin.

'Business Services' featured strongly (gains of 1,000 or more) in women's employment growth in all districts.

- Gateshead: 'Business Services' ranked top[54] (up 1,100, or 24.8%)
- Newcastle: 'Business Services' ranked second (up 1,600, or 13.0%)

52 Durham County Council acknowledged that the raw results are odd, but TWRI has no further explanation at the time of completion of this report.
53 Durham City was hit by the closure of the Philips electronics factory.
54 Meaning the largest growth in employment for women by industry in the district.

- North Tyneside: 'Business Services' ranked second (up 1,100, or 30.4%)
- South Tyneside: 'Business Services' ranked top (up 1,000, or 48.1%)
- Sunderland: 'Business Services' ranked second (up 1,800, or 29.2%)

'Financial Intermediation' easily led women's gains in Newcastle (up 2,800, or an extra-ordinary 80.6%) - clearly a Northern Rock effect (which will have been largely reversed in 2008 and 2009). 'Public Administration' ranked top in North Tyneside (up 1,300, or 100.3%) and Sunderland (up 1,900, or 60.8%).

'Hotels and Restaurants' featured in the top four women's employment gains across all districts.

Women's employment in public services suffered the biggest losses in each district, particularly in Sunderland:

- Gateshead: 'Health and Social Work' (down 800, or -9.6%), and 'Education' (down 400, or -7.8%)[55]
- Newcastle: 'Health and Social Work' (down 700, -3.6%)
- North Tyneside: 'Education' (down 600, or -13.8%)
- South Tyneside: 'Public Administration' (down 500, or -36.5%), 'Education' (down 100, or -3.4%)
- Sunderland: 'Education' (down 1,300, -16.1%), 'Health and Social Work' (down 1,100, or -9.4%)

The shift from December to September survey pushed retailing employment down. Thus, women's employment in 'Wholesale and Retail' fell in Newcastle (down 500, or -3.9%) and more markedly in Sunderland (down 1,200, or -11.7%). Women's employment in 'Wholesale and Retail' rose, however, in the other three districts apparently gaining more from growth of out-of-town shopping than they lost from the change of survey month.

7.1.6 Women's Employment; Rest of TWCR Districts

In contrast to Tyne & Wear, women's employment fell in five of the eight districts in the RoCR (see Table 11F in workbook). Women's employment fell in Tynedale and Wansbeck (in the Northumberland4 districts). The reported women's employment falls in Co.Durham are partly a distortion due to an incredibly large switch in Education from women to men. Women's overall employment reportedly fell in the Durham4 districts, except Durham City.

Among the districts, 'Business Services' featured strongly in women's employment gains (generally up 300+) in the RoCR districts, ranking top in four;

- Tynedale (up 500, or 44.3%)
- Wansbeck (up 100, or 62.4%)
- Derwentside (up 400, or 73.4%)
- Easington (up 300, or 15.4%)

[55] Gateshead: ['Public Administration' (down an uncorroborated 2,800, or -44.4%].

Women's employment in 'Business Services' was also up in Chester-le-Street (up 100, or 26.0%) and Durham City (up 700, or 34.7%). There was a slight gain in Blyth Valley (at 0, or up 2.1%). Oddly, in Castle Morpeth women's employment in 'Business Services' fell (down 300, or an extraordinary -37.1%).

Growth in employment by women featured one PSE in the top three industries (generally up 300+) in all RoCR districts, except Tynedale. Women's job growth in PSE was led by the county towns:

- Durham City; 'Health and Social Work' (up 1,100, or 21.5%), 'Public Administration' (up 1,000, or 37.9%)
- Castle Morpeth; 'Public Administration' (up 2,000, or 107.9%)
- Blyth Valley; 'Health and Social Work' (up 100, or 4.1%)
- Wansbeck; 'Public Administration' (up 100, or 22.6%)
- Chester-le-Street; 'Health and Social Work' (up 300, 27.0%)
- Derwentside; 'Health and Social Work' (up 400, or 21.5%)
- Easington; 'Public Administration' (up 300, or 34.2%)

Women had moderate employment gains (200+) in 'Wholesale and Retail' (despite the shift from December to September survey) in Blyth Valley (up 500, or 21.8%), and Easington (up 200, or 7.4%), and weakly in Castle Morpeth (up 100, or 6.1%)

Oddly, a PSE suffered the biggest loss in three Northumberland districts;

- Castle Morpeth; 'Education' (down 700, -28.4%), 'Health and Social Work' (down 500, -21.7%)
- Tynedale; 'Health and Social Work' (down 500, or -17.2%), 'Public Administration' (down 200, or -39.2%), and 'Education' (down 200, or -9.9%)
- Wansbeck; 'Health and Social Work' (down 300, or -8.2%)
- The Durham4 universally report that Education jobs held by women fell hugely, by 40-70% which is not credible. In effect the Co. Durham Local Education Authority seems to have radically cut the proportion of its employees who are women, and raised the proportion who are men. The 67-70% reported reductions in women in Education were partially ameliorated in Durham City, presumably by growth at the university.
- Chester-le-Street; 'Education' (down 700, or -70.0%)
- Derwentside; 'Education' (down 1,300, or -67.1%), 'Public Administration' (down 100, or -32.2%)
- Durham City; 'Education' (down 1,800, or -41.7%)
- Easington; 'Education' (down 1,400, or an extra-ordinary -70.1%), 'Health and Social Work' (down 100, or -5.0%)

In Blyth Valley, 'Education' ranked joint top faller (down 100, or -3.6%), albeit with a marginal (100) fall, alongside 'Financial Intermediation' (down 100, or -25.7%) and 'Other Services' (down 100, or -11.0%).

In 'Manufacturing' overall employment fell by around 12%, and women suffered moderate numeric losses (generally down 200 with rates of loss over -12%) in five of the districts;

- Tynedale; (down 100, or -19.1%)
- Wansbeck; (down 200, or -24.4%)
- Derwentside; (down 200, or -12.3%)
- Durham City; (down 200, or -21.6%)
- Easington; (down 100, or -3.8%)

Other significant losses (100 to 400) include;

- ‘Hotels and Restaurants’ and ‘Business Services’, both down 300 in Castle Morpeth
- ‘Hotels and Restaurants’ and ‘Wholesale and Retail’, both down 200 in Tynedale
- ‘Wholesale and Retail’ down 200 in both Wansbeck and Derwentside
- ‘Other Services’ down 400 each in Derwentside and Durham City, and down 100 each in Blyth Valley, Tynedale, Chester-le-Street and Easington
- ‘Transport and Storage’ down 400 in Easington and down 100 in Durham City
- ‘Financial Intermediation’ down 100 in Durham City

7.2 By Industry (at 2-digit SIC)

At 2-digit SIC classification level, the major themes in employment change in Tyne & Wear continued as discussed above (see Tables 12-16 in workbook).

‘Public Administration’ (SIC 75) was the only PSE to feature in the top three gains in the following three districts;

- Newcastle (up 2,700, or 13.7%) (see Table 13)
- North Tyneside (up 2,200, or 90.3%) (see Table 14)
- Sunderland (up 4,000, or 68.3%) (see Table 16)

‘Other Business Activities’ (OBA) (SIC 74) normally led (up 2,000+ in all five) private sector employment gains in the five districts. OBA grew by 3,000 or more in both cities, Sunderland (up 32%) and Newcastle (up 16%) but is ‘migrating’ to the other 3 districts (up 45 %+) with Gateshead (up 3,000) matching Sunderland’s growth.

- Gateshead: SIC 74 ‘Other Business Activities’ (up 3,000, or 48.3%) (see Table 12)
- Newcastle: SIC 65 ‘Financial Intermediation’ (up 4,600, or 115.1%)
- North Tyneside: SIC 74 ‘Other Business Activities’ (up 2,400, or 45.3%)
- South Tyneside: SIC 74 ‘Other Business Activities’ (up 2,000, or 67.6%) (see Table 15)
- Sunderland: SIC 74 ‘Other Business Activities’ (up 3,000, or 32.2%)

‘Other Business Activities’ ranked second in Newcastle’s private sector employment growth, (up 3,300, or 15.6%).

‘Construction’ (SIC 45) featured in the top three gains only south of the Tyne; Gateshead (up 1,300, or 25.0%), South Tyneside (up 700, 38.6%) and Sunderland (up 1,800, or 44.7%).

This spatial separation may reflect higher costs north of the river, and displacement by higher-value activities.

The overall employment growth will have lifted consumption; 'Hotels and Restaurants' SIC 55 employment grew by at least 15% (i.e. averaged a rapid 5%pa +) in all districts; it was among the top three gains in the two most 'residential' districts[56]; North Tyneside (up 600, or 18.1%) and South Tyneside (up 500, or 19.1%). However, it also ranked fourth (i.e. high) in districts with higher employment densities; Gateshead (up 600, or 15.5%) and Newcastle (up 1,400, or 16.4%) and Sunderland (up 1,100, or 19.4%).

Sectorally, major numerical employment losses by industry (usually -500+) across the five Tyne & Wear districts were mixed, led by the private sector in the cities and mostly mixed (public/private) in the other 3 districts.

- Gateshead's losses were [oddly and uniquely] dominated by PSE: SIC 80 'Education' (down 900 or -11.7%) and SIC 85 'Health and Social Work' (down 800, or -8.3%).[57]
- Newcastle's losses were dominated by the private sector: SIC 45 'Construction' (down 1,100 or -19.8%), [perhaps 'migrating' south of the Tyne, for lower-cost locations] SIC 52 'Retail Trade' (down 1,100 or -6.6%), [depressed by the shift of survey month to September, but also by out-of-town 'migrating' to adjacent districts], and SIC 66 'Insurance and Pension Funding' (down 900, or -63.1%) [closures by Zurich, possibly retrenchment by AA Insurance].
- North Tyneside's losses were mixed: SIC 80 'Education' (down 1,400 or -21.3%), SIC 64 'Post & Telecommunications' (down 600, or -18.5%), [where Orange lost 900 in 2006] and SIC 93 'Other Service Activities' (down 400 or -43.5%).
- South Tyneside's losses were also mixed: SIC 75 'Public Administration and Defence' (down 1,000, or -38.8%) [Mainly the Inland Revenue closure], SIC 52 'Retail Trade, (down 500, or -8.5%), and SIC 60 'Land Transport', (down 400, or -47.4%) [presumably mainly haulage; haulage employment is, historically linked to manufacturing, which shed 6% of its jobs in TW].
- Sunderland's losses were dominated by the private sector: SIC 52 'Retail Trade,' (down by 2,500 or -17.6%), SIC 64 'Post & Telecommunications' (down 1,100, or -45.4%), and SIC 36 'Manufacture of Furniture; other' (down 800, or -43.9%). [Losses of -550 Stag Furniture, -70 Silentnight and -40 from Sheraton's of Pollitura.]

Within Tyne & Wear City Region, major employment gains and losses included;

Durham4 (see Table 17 in workbook):

Gains: SIC 85 'Health and Social Work' (up 3,700, or 29.8%) [Perhaps connected to the new Durham Hospital.]
SIC 75 'Public Administration' (up 2,600, or 28.5%)
SIC 55 'Hotels and Restaurants' (up 1,800, or 22.7%)
SIC 74 'Other Business Activities' (up 1,700, or 21.8%)

Losses: SIC 45 'Construction' (down 1,400, or -20.3%) [perhaps connected to the completion of the hospital.]
SIC 80 'Education' (down 1,200, or -9.2%)

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[56] North Tyneside and South Tyneside have the lowest employment densities

[57] SIC 75 'Public Administration & Defence' down 4,800 or -44.4%

SIC 29 ‘Manufacture of Other Machinery and Equipment’ (down 800, or -29.4%)

Northumberland4 (see Table 18 in workbook):

Gains: SIC 75 ‘Public Administration’ (up 2,100, or 28.3%)

SIC 74 ‘Other Business Activities’ (up 1,700, or 30.4%)

SIC 45 ‘Construction’ (up 900, or 23.5%)

Losses: SIC 85 ‘Health and Social Work’ (down 2,000, or -14.8%)

SIC 80 ‘Education’ (down 1,600, or -15.4%)

SIC 50 ‘Sale, Maintenance and Repair of Motor Vehicles’ (down 900, or -34.5%) [This will be partly petrol station/garage closures, which may have disproportionally hit Northumberland.]

8. APPENDICES

Appendix 1: Comparison of employee data for Tyne & Wear and TWCR, 2004-2008 from APS (residence-based and workplace-based)

(See Appendix 1 in workbook for Tyne & Wear district tables.)

Tyne & Wear

All People aged 16+ (grew by estimated 32,600, including self-employed, or 6.5% 2004-07, at workplaces)

Table A1.1: Comparison of employee data (16+) for Tyne & Wear, 2004-2008 from APS (residence-based and workplace-based)

	2004	2005	2006	2007	2008
Residence-based [a] (employees)	424,600	439,300	441,400	445,400	443,100
Residence-based (total employment inc self-employment)	460,700	480,400	480,000	489,000	488,700
Workplace-based [b] (total employment inc self-employment)	503,200	500,400	522,500	535,800	530,800

[a] APS resident-based, 2004-2008 (Jan-Dec employees aged 16+)
[b] APS workplace-based employment, 2004-2008 (Jan-Dec employees 16+)
Source: Annual Population Survey, Nomisweb
Data has been reweighted in line with the latest ONS estimates.
WARNING: Data prior to the period Jan - Dec 05 has not been reweighted in line with the latest ONS estimates.
This will be done as soon as possible.

All People Working-Age (WA) (grew by estimated 30,300*, including self-employed, or 6.2% 2004-07, at workplaces)

Table A1.2: Comparison of employee data (WA) for Tyne & Wear, 2004-2008 from APS (residence-based and workplace-based)

	2004	2005	2006	2007	2008
Residence-based [a] (employees)	414,300	430,600	431,400	434,800	431,000
Residence-based (total employment inc self-employment)	448,900	470,300	468,100	476,800	474,400
Workplace-based [b] (total employment inc self-employment)	491,400	490,000	509,800	521,700	515,900

[a] APS resident-based, 2004-2008 (Jan-Dec employees all working age)
[b] APS workplace-based employment, 2004-2008 (Jan_Dec, all working age)
Source: Annual Population Survey, Nomisweb
Data has been reweighted in line with the latest ONS estimates.
WARNING: Data prior to the period Jan - Dec 05 has not been reweighted in line with the latest ONS estimates.
This will be done as soon as possible.

*For residents of TW, employees (of WA) grew by 20,500 or 4.9%. The difference from the change estimated for workplaces implies that net in–commuting to TW grew by an estimated 9,800 or nearly 3,300pa [from RoCR or potentially elsewhere such as from Tees Valley.]

Tyne & Wear City Region

All People 16+ (grew estimate 51,500 or 7.3% 2004-07, at workplace)

Table A1.3: Comparison of employee data (16+) for Tyne & Wear City Region, 2004-2008 from APS (residence-based and workplace-based)

	2004	2005	2006	2007	2008
Residence-based [a] (employees)	651,800	677,100	682,100	694,800	685,500
Residence-based (total employment inc self-employment)	711,100	742,900	748,800	765,000	759,200
Workplace-based [b] (total employment inc self-employment)	701,700	710,700	735,500	753,200	746,000

[a] APS resident-based, 2004-2008 (Jan-Dec employees aged 16+)
[b] APS workplace-based employment, 2004-2008 (Jan-Dec employees 16+)
Source: Annual Population Survey, Nomisweb
Data has been reweighted in line with the latest ONS estimates.
WARNING: Data prior to the period Jan - Dec 05 has not been reweighted in line with the latest ONS estimates.
This will be done as soon as possible.

All People Working-Age (WA) (grew estimate 47,500 * or 7.0% 2004-07, at workplaces)

Table A1.4: Comparison of employee data (WA) for Tyne & Wear City Region, 2004-2008 from APS (residence-based and workplace-based)

	2004	2005	2006	2007	2008
Residence-based [a] (employees)	636,700	662,300	665,300	675,900	665,900
Residence-based (total employment inc self-employment)	692,800	725,900	728,400	743,200	735,200
Workplace-based [b] (total employment inc self-employment)	683,300	694,000	715,800	730,800	723,000

[a] APS resident-based, 2004-2008 (Jan-Dec employees all working age)
[b] APS workplace-based employment, 2004-2008 (Jan Dec, all working age)
Source: Annual Population Survey, Nomisweb
Data has been reweighted in line with the latest ONS estimates.
WARNING: Data prior to the period Jan - Dec 05 has not been reweighted in line with the latest ONS estimates.
This will be done as soon as possible.

* For residents of TWCR, employees (of WA) grew by 39,200 or 6.2%. The difference from the change estimated for workplaces implies that net in-commuting to TWCR grew by an estimated 8,300 [presumably mainly from southern districts of Co.Durham plus Alnwick or Berwick and Tees Valley].

Appendix 2: Employment Growth in Major English Cities, 1991-2003 (%)

Table A2: Employment Growth in Major English Cities, 1991-2003 (%)

City by type	Total Emp. (excl farming)	Manufacturing jobs	Public services jobs	Financial services jobs	Other jobs (excl farming)
England	15.7	-20.8	18.2	43.2	21
London (type 1)	16.9	-32	6.8	41.6	20.7
Mets (type 2)					
Birmingham	6.1	-27.5	23.2	33.3	10.7
Leeds	22.9	-19.6	33.8	61.3	19.8
Liverpool	5.8	-34.8	25.8	62.9	-4.4
Manchester	14.1	-30.9	12.8	59.5	20.3
Newcastle	8.5	-14.9	23.1	7.5	5.3
Sheffield	11.2	-16.9	27.6	42.2	7.1
S & E Large City (type 3)					
Bournemouth	23.2	-12.5	23.4	39.7	28.2
Brighton	28.1	-9.6	25.4	42.7	30.8
Bristol	20	-19.8	32.6	21.1	29.4
Leicester	-2.2	-33.4	5.7	47.5	-1.7
Nottingham	4.6	-30.1	15.6	32.7	6.6
Portsmouth	14.4	-25.1	25.1	7.9	30.7
Reading	38.1	-24.9	53.5	91.1	23.4
Southampton	10.3	-27.5	8.6	22.9	19.1
N & W Large City (type 4)					
Birkenhead	-1.6	-28.3	10.3	9	4.7
Bradford	3.1	-20	17	16.6	3.6
Coventry	3.8	-30.9	4.3	27.7	26.2
Huddersfield	10.3	-22	21.2	49.6	25.6
Hull	7	5.9	11.7	27.7	-1
Middlesbrough	8.8	-36.9	27.7	38.4	19.5
Stoke	-7.1	-38	38.1	-15.9	-3.9
Sunderland	14.3	-4.1	20.9	49.5	10.4
Wigan	10.4	-19.2	9.5	71.6	16.5

Source: 'Estimated employment change, 1991-2003, for London, Mets and large cities, (%)' (taken from 'State of the English Cities Report' ODPM, 2006, Table 3.11, p.60)

Appendix 3: Public Service Employment in Tyne & Wear and Great Britain, 1984-2003

Table A3: Public Service Employment Change 1984-2007, Tyne & Wear and Great Britain

		Tyne & Wear					Great Britain				
		Public Admin.	Education	Health & Social Work [a]	PSE Sub-total	Total Employment	Public Admin.	Education	Health & Social Work [a]	PSE Sub-total	Total Employment
Census of Employment	1984	33,600	40,100	25,800	99,500	418,700	1,522,600	1,513,800	1,269,600	4,306,000	20,845,900
	1991	37,300	39,400	31,000	107,700	426,200	1,361,900	1,736,900	1,509,900	4,608,700	21,569,000
	Change	3,700	-700	5,200	8,200	7,500	-160,700	223,100	240,300	302,700	723,100
	% of total net emp. growth	49.3	-9.3	69.3	109.3		-22.2	30.9	33.2	41.9	
Annual Employment Survey	1991	38,800	38,100	49,600	126,500	426,000	1,400,400	1,699,200	2,306,500	5,406,100	21,575,900
	1998	33,100	34,400	55,600	123,100	434,200	1,368,200	1,783,700	2,425,300	5,577,200	23,360,700
	Change	-5,700	-3,700	6,000	-3,400	8,200	-32,200	84,500	118,800	171,100	1,784,800
	% of total net emp. growth	-69.5	-45.1	73.2	-41.5		-1.8	4.7	6.7	9.6	
Annual Business Inquiry	1998	33,100	38,300	53,100	124,500	441,300	1,366,000	1,861,200	2,519,800	5,747,000	24,355,200
	2003	41,400	50,200	65,600	157,200	475,100	1,411,900	2,322,000	2,946,800	6,680,700	25,710,600
	Change	8,300	11,900	12,500	32,700	33,800	45,900	460,800	427,000	933,700	1,355,400
	% of total net emp. growth	24.6	35.2	37.0	96.7		3.4	34.0	31.5	68.9	
Annual Business Inquiry	2003	41,400	50,200	65,600	157,200	475,100	1,411,900	2,322,000	2,946,800	6,680,700	25,710,600
	2007	44,500	48,000	63,900	156,400	491,900	1,485,200	2,447,800	3,230,200	7,163,200	26,599,200
	Change	3,100	-2,200	-1,700	-800	16,800	73,300	125,800	283,400	482,500	888,600
	% of total net emp. growth	9.0	9.8	13.0	31.8		5.6	9.2	12.1	26.9	

[a] Before 1991, 'Health & Social Work' did not exist as an SIC group. Data from the CES for the period 1984-1991 is based on SIC 1980, which refers to 'Medical Services' (SIC 95) only. This does not include Social Work, which is listed instead as SIC '96' 'Other services'. This has not been included in this table and the figures for the period 1984-91 refer to 'Medical Services' only.
Sources: CES, AES and ABI from NOMISweb (all data rounded)
Warning: ABI 2006 discontinuity. Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date.
Users should avoid directly comparing employment estimates over the discontinuity. More information is available from: https://www.nomisweb.co.uk

In the quarter century since 1984, Public Service Employment (PSE) contributed high proportions of overall employee growth [due to the public policy of public service expansion] in the five years 1998-2003 (69% of overall growth in GB, 97% in TW).

In the period 1991-98, which included big cuts in the budget deficit from 1993 onwards, but started with looseness in 1991-93, PSE also contributed high proportions of overall employee growth (42% in GB and an extra-ordinary 109% in TW). This salience is, however, more a reflection of slow overall employee growth, averaging only about 0.5%pa in GB and 0.3%pa in TW.

Appendix 4: Home Workers

Recent follow-up surveys of ABI contributors found that six of the 549 respondents (just over 1%) to the survey said that they had included home workers *on piece rates*: the ABI is therefore slightly overstated. Homeworkers who are *employees* should be included in the ABI. Again, the follow-up survey sought to establish that they are being included.

Appendix 5: Public Administration Employment in Tyne & Wear, 2003 and 2007

TWRI proposes that more realistic estimates of employment change in Public Administration are:

Table A5: Public Administration Employment in Tyne & Wear, 2003 and 2007

	2003	2007	Change
Tyne & Wear	41,400	44,500	3,100
Gateshead[a]	5,520	5,860	340
	(not 10,800)	(not 6,000)	(not -4,800)
Newcastle	19,700	22,400	2,700
North Tyneside	2,400	4,600	2,200
South Tyneside	2,700	1,600	-1,100
Sunderland	7,300	9,800	2,500
	(not 5,800)		(not 4,000)

Source: Annual Business Inquiry (data rounded)
[a] Source: Experian Business Strategies Limited ©.
Gateshead attach more credibility to the Experian figures.
Warning: ABI 2006 discontinuity. Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date.
Users should avoid directly comparing employment estimates over the discontinuity.
More information is available from: https://www.nomisweb.co.uk

Appendix 5.1: Public Administration Employment in Sunderland

At Waterview Park, evidence from DWP indicates that employment rose. It is not clear whether the expansion of the workforce at Waterview Park (presumably connected with tax credits, but this is still not clear), was essentially transferred within Sunderland or whether this involved net gains for Sunderland [TWRI estimates net gains to be around 1,500].

Although Waterview Park, in Washington, was in operation in 2003, its presence had not yet been recorded by the ABI of that year. At least 1500 of the employees now known to have been working there at the time had transferred three years earlier after the closure of Emerson House, also in Washington. The balance, about 500, seems likely to have been recorded by the ABI in 2003 at other public administration workplaces, but whether these were in Sunderland (which would produce no further increase in the District figure) or elsewhere cannot now be established.

Appendix 6: Employment Change 2003-2007; (Un-amended ABI Figures)

Employment Change 2003-2007 GB, NE, T&W, TWCR, LCR and T&W Districts (Un-adjusted ABI Data)

	2003	2004	2005	2006	2007	Change 2003-07	% Change	Annual Average Growth
Great Britain	25,710,600	26,067,500	26,496,600	26,351,600	26,599,200	888,500	3.5%	0.9%
North East	1,011,100	1,009,300	1,063,700	1,045,400	1,029,700	18,600	1.8%	0.5%
Tyne & Wear	475,100	481,600	520,600	500,700	491,900	16,800	3.5%	0.9%
TWCR	664,900	669,200	715,300	698,400	686,700	21,800	3.3%	0.9%
LCR	1,267,400	1,292,000	1,277,800	1,277,700	1,284,000	16,600	1.3%	0.4%
Gateshead	95,100	96,000	96,400	91,600	91,000	-4,100	-4.3%	-1.1%
Newcastle	165,700	167,700	187,700	181,300	174,900	9,200	5.5%	1.5%
North Tyneside	62,900	63,200	70,200	67,200	67,500	4,600	7.3%	2.0%
South Tyneside	40,500	41,300	43,700	41,600	41,400	900	2.1%	0.6%
Sunderland	110,800	113,400	122,700	118,900	117,100	6,300	5.7%	1.5%

Source: ABI (data rounded, percentage change figures based on unrounded data)
Warning: ABI 2006 discontinuity. Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date. Users should avoid directly comparing employment estimates over the discontinuity.
More information is available from: https://www.nomisweb.co.uk