THE TYNE & WEAR PROFILE

APRIL 2000

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Reference: SR00/1 £30.00

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KEY POINTS

Geography and Communications

- Tyne & Wear is made up of five administrative Local Authorities consisting of the Cities of Newcastle and Sunderland and the Metropolitan Boroughs of Gateshead, North and South Tyneside.
- The county covers little more than one twentieth of the land area in the North East but houses nearly one-half of its population.

The People and Communities

- The population of Tyne & Wear is declining mostly due to the influence of migration trends rather than the effects of births or deaths.
- The number of households in Tyne & Wear is increasing despite an overall decline in the population as residents are choosing to live in smaller households.
- By the next century the number of 'Lone Person' and 'Co-Habiting Couple Households' is expected to increase in line with national trends.

Living Standards

- The North East has the lowest level of household income in the UK in addition to high dependency on Social Security benefits.
- The North has the lowest proportion of owner occupation in England, despite housing prices being the lowest in Britain.
- Tyne & Wear generally performs less well on a range of health indicators than the rest of the country.
- 3 of the 11 Health Action Zones (HAZs) set up nationally are in the North East. Tyne & Wear is the largest in the country.
- Tyne & Wear has three Universities in addition to the Open University which operates courses from offices in Newcastle.
- In 1997/98 86% of children under five years in the North East were in Local Authority schools. This figure is much higher than the UK average of 61%.
- Tyne & Wear contains 2 of the 25 national Education Action Zones (EAZs) which will each be allocated up to £500,000 over a three-year period to raise educational standards.

Leisure and Lifestyle

- The arts provide much employment in the North.
- Tyne & Wear has numerous theatres, museums, festivals, parks and gardens.
- Tyne & Wear has many quality shopping precincts including: Gateshead MetroCentre, Newcastle Eldon Square, Eldon Gardens, Monument Mall and Sunderland Bridges.

Environment

- Measures of atmospheric pollution indicate that the air in Tyne & Wear is cleaner than 10 or 20 years ago.

The Local Economy

- Tyne & Wear has a relatively weak business base.
- In 1996 the average size of manufacturing establishments in Tyne & Wear was significantly larger than the UK average. Between 1993 and 1996 productivity fell below the UK average.
- Average earnings in Tyne & Wear are significantly lower than the GB average. In Spring 1999 the North East had the highest proportion of employees earning below the National Minimum Wage.
- In January 2000 the claimant unemployment rate for Tyne & Wear was higher than the UK, despite a decline in all Tyne & Wear Districts.
- Tyne & Wear accounted for 4% of GB participants on New Deal for Young People and 3.3% on 25+ New Deal. This reflects early participation as a 'Pathfinder' area.
- Tyne & Wear has a significant number of people on Incapacity Benefit (IB).

Land and Property

- In the year to June 1999 the stock of vacant industrial property in Tyne & Wear remained constant, rising in the second half of 1998 only to fall by about the same amount in the first half of 1999.

1.0 INTRODUCTION

The Tyne & Wear Profile aims to give an in-depth picture of Tyne & Wear across a diverse range of topics including; the geography, people, economy, employment and living standards. The document features the database and reports produced and maintained by Tyne & Wear Research and Information (TWRI). Summary statistics on Tyne & Wear, at both district and county level, are available in Fact Cards produced by TWRI. Much of the collected official data spans more than 10 years thereby providing an added historic perspective. The Profile reports the latest available data at Tyne & Wear level but where this is not available we report at the level of the North East or the North.

TWRI provides a statistical information service on behalf of the five metropolitan districts in Tyne & Wear which is comprised of; Gateshead, Newcastle upon Tyne, North Tyneside, South Tyneside and Sunderland. TWRI produces information and undertakes research on a variety of topics of interest to those concerned with the social and economic conditions and the physical structure of the county. The services provided by TWRI are set out in the Appendix.

2.0 GEOGRAPHY AND COMMUNICATIONS

Tyne & Wear is made up of 5 administrative Metropolitan Local Authorities consisting of; the Cities of Newcastle and Sunderland and the Metropolitan Boroughs of Gateshead, North Tyneside and South Tyneside. All the Tyne & Wear Districts fall into the Local Government classification of “Metropolitan Districts” (MD)[1]. This Unitary, or single tier governing status came into effect in 1986 as part of the abolition of Metropolitan County Councils (Tyne & Wear County Council) in England. Tyne & Wear shares this status with 7 other Metropolitan areas in England (including Greater London)[2].

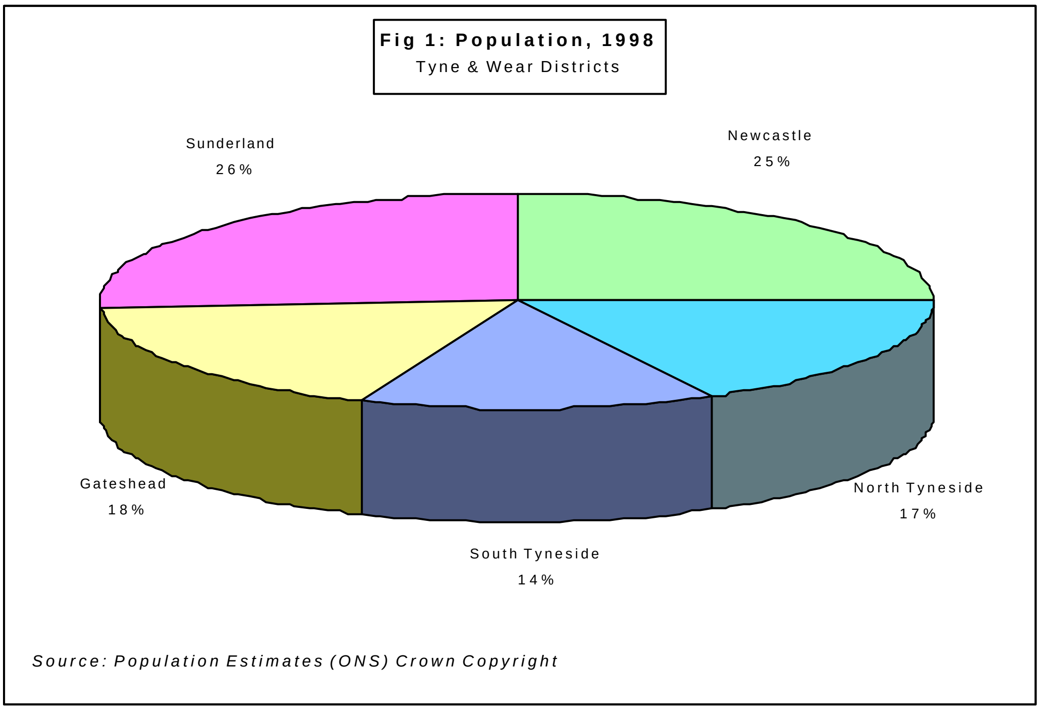
2.1 Location and Population

Tyne & Wear borders with Durham County to the South and Northumberland County to the North. Along with the other urban area of Tees Valley, these four county areas constitute the North East Government Office Region (Government Office for the North East or GO-NE). To the West is the County of Cumbria which, together with the North East Region make up the ‘Northern’ Standard Statistical Region (SSR). By road, Tyne & Wear is around 451 km (280 miles) North from London and 175 km (109 miles) South from Edinburgh.

Over 43% of the North East’s population live in Tyne & Wear which covers only 6% of the land area. The population totals for the individual Districts within Tyne & Wear in 1998 can be seen in Table 1 and the proportions of the Tyne & Wear total are displayed graphically in Figure 1.

1 *Source: Gazetteer for the Statistical Regions and Local Authorities in the United Kingdom - June 1997 - Office for National Statistics (Crown Copyright)*

2 *Greater London, Greater Manchester, Merseyside, South Yorkshire, West Midlands, West Yorkshire*



At 2077 persons per square kilometre, Tyne & Wear's population density is similar to the average for other Metropolitan areas. Densities among these Metropolitan areas range from Inner London with the highest at 7814 per square kilometre to South Yorkshire at only 810 per square kilometre.

Table 1: Population, Density per Km^2 and Average Persons per Ward

District	Mid 1998 Population *	Area km^2 ^	Persons per km^2~ (Density)	Number of Wards ^	Average Persons per Ward ~
Tyne & Wear	1,115,800	540	2066	113	9874
Gateshead	198,900	143	1391	22	9041
Newcastle	276,100	112	2465	26	10619
North Tyneside	194,000	84	2309	20	9700
South Tyneside	154,600	64	2416	20	7730
Sunderland	292,300	138	2116	25	11692

Source: Tyne & Wear Fact Card 2000, TWRI

**Population Estimates Unit, ONS ^ Tyne & Wear Fact Card 2000 ~ TWRI*

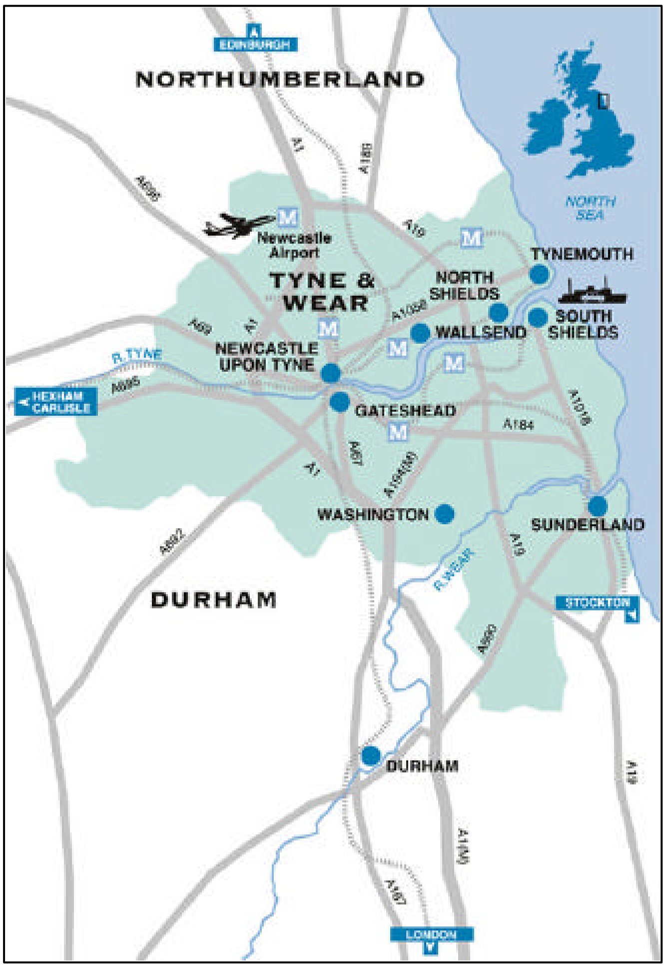
2.2 Communications

Roads: Figure 2 shows the principal road network in and around the Tyne & Wear area. The A1(M) and A19 are the principal routes from the south. The A69 extends to Hexham, Carlisle and the West; while the A1 is the main route to the North and Scotland.

Rail: As well as the focal point of a network of local rail services, Central Station in Newcastle is a major staging point on the Great North Eastern Railway (GNER) and Cross Country network. Currently, fastest journey times from Newcastle Central Station include;

Aberdeen (4h 10m); Birmingham (3h 10m); Edinburgh (1h 30m); Glasgow (2h 30m) and London (3h).

Fig 2: MAP OF TYNE & WEAR



Ferry: The Ferry Terminal at North Tyneside connects England's North East Coast to four countries; **Norway** (Stavanger 20h, Bergen 27h and Haugesund 23h); **Netherlands** (Amsterdam 15h); **Germany** (Hamburg 22h) and **Sweden** (Gothenburg 26h).

Flights: Newcastle International Airport is the eighth busiest airport in the UK. The number of daily scheduled services are as follows:

Table 2: Number and Destinations of Daily Flights from Newcastle International Airport

Aberdeen (5)	Bristol (3)	Gatwick (6)	Stansted (4)
Amsterdam (5)	Brussels (4)	Heathrow (6)	Stavanger (1)
Belfast International (3)	Copenhagen (1)	Oslo (1)	
Belfast City (4)	Dublin (3)	Paris (4)	
Birmingham (3)	Dusseldorf (1)	Southampton (1)	

Source: Tyne & Wear Fact Card 2000, TWRI

3.0 TYNE & WEAR: THE PEOPLE AND COMMUNITIES

3.1 Population Estimates and Projection

The population in all districts of Tyne & Wear has been declining since the early 1960s with the exception of Sunderland where the development of Washington has meant that Sunderland City continued to grow until the late 1970s. From around the mid-1970s Sunderland became the largest Tyne & Wear District with the population stabilising at below the 300,000 mark. Newcastle's population declined rapidly until the early 1980s and currently fluctuates around the 280,000 mark. The populations of the remaining 3 Districts have declined gradually with South Tyneside remaining the smallest District with around 157,000 people. Table 3 shows population change from 1961, and projects the Mid 1997 figure to 2001 and 2011.

Table 3: Population Estimates and Projections 1961 to 2011 - Districts of Tyne & Wear

	1961	1971	1981	1991	2001	2011
Tyne & Wear	1,241,000	1,217,600	1,155,200	1,130,400	1,103,100	1,058,100
Gateshead	223,000	226,000	213,200	203,100	198,300	192,900
Newcastle	336,000	311,700	284,100	278,200	270,200	246,500
North Tyneside	210,000	208,300	198,600	195,500	192,700	191,600
South Tyneside	185,000	178,100	161,900	157,200	154,100	151,600
Sunderland	287,000	293,500	297,300	296,400	287,700	275,600
% change		1961-71	1971-81	1981-91	1991-01	2001-11
Tyne & Wear		-1.9	-5.1	-2.1	-2.4	-4.1
Gateshead		1.3	-5.7	-4.7	-2.4	-2.7
Newcastle		-7.2	-8.9	-2.1	-2.9	-8.8
North Tyneside		-0.8	-4.7	-1.6	-1.4	-0.7
South Tyneside		-3.7	-9.1	-2.9	-2.0	-1.6
Sunderland		2.3	1.3	-0.3	-2.9	-4.2

Source: Population Estimates Unit, Office for National Statistics (Crown Copyright)

TWRI 1997 based Population Projections

Births, deaths and migration (the net effect of people moving in to and out of an area) can influence population change. At the local level (District or County), the change in population is more likely to be influenced by migration. Table 4 shows the births, deaths and net migration for the Districts and for Tyne and Wear as a whole in the year ending 1998. All districts experienced a decrease in population as a result of natural change, the largest loss being in Gateshead. Sunderland had the highest number of births but also the highest number of deaths which resulted in an overall decline of 200. In recent years (since 1994), as the UK economy regained its momentum, out migration from Tyne & Wear began to accelerate. However, the latest mid-year net migration figures which indicate a loss of nearly 4,000 people from the county area over a one-year period, reflect a decrease from the 1997 figure of c. -5,000.

Table 4: Population, Natural Change and Migration – Districts of Tyne & Wear

	Population * Mid 1998	Births ^	Deaths ^	Natural ^ Change	Net ~ Migration
		Year Ending June 1998			
Tyne & Wear	1,115,800	12,200	13,600	-1,400	-3,900
Gateshead	198,900	2,200	2,600	-400	-800
Newcastle	276,100	3,000	3,300	-300	-1,800
North Tyneside	194,000	2,200	2,400	-200	700
South Tyneside	154,600	1,700	2,000	-300	-400
Sunderland	292,300	3,200	3,400	-200	-1,500

*Source: *Population Estimates Unit (ONS) Crown Copyright*

^Vital Statistics Unit (ONS) Crown Copyright ~NHSCR (ONS) Crown Copyright

TWRI Publication: Population of Tyne & Wear 1998

Note: All figures separately rounded to nearest hundred for presentation.

Migration affects the age profile of an area and thus natural change. Table 5 below shows population estimates for the District of Tyne & Wear as a whole. Although the age groups are very similar, there are some features that are worth highlighting. People aged 15-24 represent 13.0% of Tyne & Wear's population, compared to 12.02% in England & Wales, which shows the effect of large student populations in both Newcastle and Sunderland. The proportion of elderly people (75+) has increased in Tyne & Wear since 1996 but is still lower than the national average of 7.4%. The proportion of retired people has remained about the same at 11.8% which is greater than the national average of 10.8%.

Table 5: 1998 Mid Year Population Estimates* by Age Group

Ages	Tyne & Wear	Gateshead	Newcastle	North Tyneside	South Tyneside	Sunderland
0-4	64,700	11,500	16,100	11,000	8,900	17,200
5-14	145,400	24,600	35,000	24,000	21,300	40,500
15-24	144,600	21,000	47,400	20,300	16,000	39,900
25-44	326,100	61,700	77,800	58,000	45,800	82,800
45-Retirement~	223,200	41,400	50,600	40,400	31,000	59,800
Retirement-74	131,400	24,700	29,100	24,200	19,600	33,800
75+	80,600	14,100	20,100	16,100	12,000	18,200
All Ages	1,115,800	198,900	276,100	194,000	154,600	292,300
0-4	5.8	5.8	5.8	5.7	5.8	5.9
5-14	13.0	12.4	12.7	12.4	13.8	13.9
15-24	13.0	10.5	17.2	10.5	10.3	13.7
25-44	29.2	31.0	28.2	29.9	29.6	28.3
45-Retirement~	20.0	20.8	18.3	20.8	20.0	20.5
Retirement-74	11.8	12.4	10.5	12.5	12.7	11.6
75+	7.2	7.0	7.3	8.3	7.8	6.2
All Ages	100.0	100.0	100.0	100.0	100.0	100.0

Source: Population Estimates Unit (ONS) Crown Copyright

**TWRI Publication: Population of Tyne & Wear 1998*

Note: All figures separately rounded to the nearest hundred for presentation

~ Retirement age: 60 for women and 65 for men.

3.2 Projected Population Age Profile

Table 6 shows the projected age profile for Tyne and Wear up to the year 2017. Significant changes have been projected for the 0-15 age group, which is likely to decline by 49,600 in the 20 years to 2017. An increase of nearly 40,000 is projected in the 45 to retirement age band and a decline of almost 97,000 is expected in the 25-44 age group. An increase in the number of very elderly people in the region is also projected, rising by 10,800 from 79,700 to 90,500.

Table 6: Population Projections 1997 to 2017 (by Age Group)

	1997	2002	2007	2012	2017
0- 4	66,600	60,000	56,400	55,900	56,000
5-15	160,200	153,200	138,400	126,600	121,200
16-17	28,500	30,600	30,700	27,400	24,800
18-24	103,700	110,900	116,300	113,300	102,400
25-44	328,200	300,600	268,700	239,500	231,300
45-Retirement	221,900	234,300	253,800	268,900	261,200
Retirement-74	132,600	125,500	124,300	134,200	147,300
75+	79,700	83,300	86,600	88,300	90,500
All Ages	1,121,400	1,098,400	1,075,200	1,054,100	1,034,700
%					
0- 4	5.9	5.5	5.2	5.3	5.4
5-15	14.3	14	12.9	12	11.7
16-17	2.5	2.8	2.9	2.6	2.4
18-24	9.3	10.1	10.8	10.7	9.9
25-44	29.3	27.4	25	22.7	22.4
45-Retirement	19.8	21.3	23.6	25.5	25.2
Retirement-74	11.8	11.4	11.6	12.7	14.2
75+	7.1	7.6	8.1	8.4	8.7
All Ages	100	100	100	100	100

Source: TWRI Publication: 1997 based Population and Household Projections

3.3 Household Estimates by Household Types

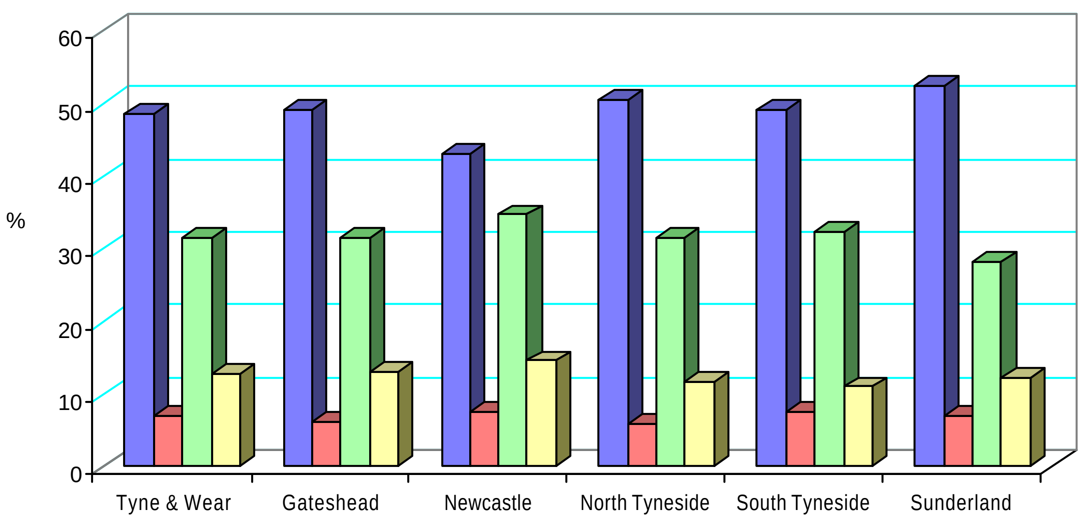
The 1991 Census defined a household as an individual living alone or a group of people (who may or may not be related) living, or staying temporarily, at the same address, with common housekeeping. Agencies involved in the marketing of products or planning of services may be more interested in the number of households than the population. For example, manufacturers of washing machines or water supply companies would be advised to look at household numbers to gauge the number of points of sale or billing points. Table 7 outlines the 1996 based Household Estimates by types of households for each of the Tyne & Wear Districts while Figure 3 illustrates the percentage breakdown of household types for the county.

Table 7: Household Estimates, 1996

	Tyne & Wear	Gateshead	Newcastle	North Tyneside	South Tyneside	Sunderland
Married Couple	231,900	42,100	51,500	42,600	32,600	63,000
Lone Parent	33,000	5,300	9,100	5,100	5,000	8,500
One Person	150,500	27,000	41,600	26,500	21,500	33,900
Other	60,600	11,100	17,500	10,000	7,300	14,800
All Households	476,000	85,600	119,600	84,200	66,400	120,100
%						
Married Couple	48.7	49.2	43.1	50.6	49.1	52.4
Lone Parent	6.9	6.2	7.6	6.0	7.5	7.1
One Person	31.6	31.5	34.7	31.5	32.4	28.2
Other	12.7	13.0	14.6	11.8	11.0	12.3
All Households	100.0	100.0	100.0	100.0	100.0	100.0

Source: TWRI Publication: 1996 based Population and Household Projections – Part 1: Data Report

Fig 3: Household Estimates 1996 (%)



Source: 1996 based Population & Household Projections

3.4 Household Projections by Household Types

While Tyne & Wear's population is projected to fall, households in the region are projected to increase in number (+6.9%) between 1996 and 2016. Table 8 shows projected 'Married Couple' households are to decline by 12.6%. In the 20 years to 2016, significant change is projected in 'One Person' households (+32.7%) and ‘Other’ households (+18.9%). 'Other' households are mostly made up of households with cohabiting couples with or without families.

Table 8 : Projected Household Types, 1996 to 2016

	1996	2001	2006	2011	2016
Married Couple	231,900	218,100	207,700	200,900	202,700
Lone Parent	33,000	35,400	35,900	35,400	34,400
One Person	150,500	167,900	182,500	195,700	199,600
Other	60,600	64,300	67,900	71,300	72,100
All Households	476,000	485,700	494,000	503,300	508,900

Source: TWRI Publication: 1996 based Population and Household Projections – Part 1: Data Report

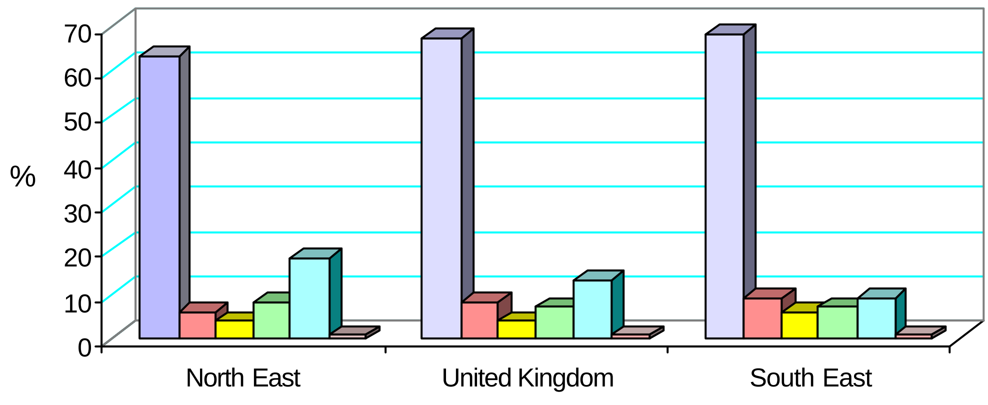
4.0 LIVING STANDARDS

4.1 Income

The North East has the lowest level of household income in the UK. Household income differs from earnings as it may include income from investments, benefits and pensions. In the three-year period between 1996/97 and 1998/99, the average weekly household income in the North East was £357. This was 17% (£73 pw or £3,796 pa) lower than the UK average of £430 and 32% (£166 pw or £8,632 pa) lower than London which had the highest gross weekly income of £523 and 30% lower than the South East at £511.

North East households were significantly more dependent on Social Security Benefits and Pensions (18%) than UK households (13%) and substantially more dependent than London and the South East which showed the lowest level of dependency (9% respectively). The proportion of weekly income from wages or self-employment in the North East (69%) was significantly lower than the UK average (75%), London (79%) and the South East (77%).

Fig 4: Income Source 1996/97-1998/99



Source: Family Expenditure Survey 1998/99, ONS (Crown Copyright)

4.2 Expenditure on Goods and Services

North East households spend less on goods and services than the UK average. This is unsurprising given the comparatively low levels of income in the region. During the three-year period between 1996/97 and 1998/99, households in the North East spent an average of £278.00 per week on goods and services, which was £52.00 or 15% lower than the UK average. Expenditure was marginally higher than the UK in only two categories; alcoholic drink and tobacco[3]. Housing in the North East was, however, relatively cheap at £43.80, compared to the UK average of £52.50[4] and the South East at £69.30.

4.3 Ownership of Consumer Durables

Between 1996/97 and 1998/99 the North East (alongside the Eastern Region) had the highest proportion of households with central heating (93%). This was 5% higher than the UK average. The high percentage of public housing in the North is thought to partly account for this. Telephone ownership in the North East, at 90%, was the lowest in the country and 4% less than the UK average. Car ownership was also the lowest in the country with around 58% of households in the North East owning a car. This was 12% below the UK average.

Car ownership, in Tyne & Wear, was around 18 percentage points lower than in Great Britain (66.6%)[5]. Only 11.3% owned 2 cars or more, compared with 23.1% in Great Britain. North Tyneside had the highest rate of car ownership with 53.3% owning at least one car and 12.3% with two or more. Newcastle had the lowest rate of car ownership at 45.6% with at least one car and 10.5% two or more.

Table 9: Car Ownership in Tyne & Wear

	Households with no car %	Households with 2 or more cars %
Tyne & Wear	51.0	11.3
Gateshead	51.7	11.3
Newcastle	54.4	10.5
Sunderland	48.8	12.2
North Tyneside	46.7	12.3
South Tyneside	53.6	10.1

Source: 1991 Census, ONS Local Base Statistics (Crown Copyright)

3 *Family Expenditure Survey 1998/99, Office for National Statistics (Crown Copyright)*

4 *The total includes the enhanced Northern Ireland dataset for 1998-99 only*

5 *1991 Census of Population, Office for National Statistics (Crown Copyright)*

4.4 Housing

In 1996 owner occupation in Tyne & Wear (56%) was about ten percentage points lower than in the UK, and the lowest in England. Local Authority or Housing Association renting was much higher in Tyne & Wear at 37%, than in the UK (24%). However the current figure represents a sharp decline from 1981 levels of 53% and 31% respectively. In 1998 the South East, excluding greater London, had the highest rate of owner occupation (75%), 12% above the North East at 63%[6].

In 1996, the stock of dwellings in Tyne & Wear was around 486,000. From April 1997 to April 1998 a total of 2,117 new dwellings were completed on private sites of five or more units in Tyne & Wear[7]. Within the districts, North Tyneside had the highest total number of new dwellings built (940 or 35%) and private sites completed (849 or 39%). Newcastle had almost double the number of new housing association dwellings than any other district as shown in Table 10.

Table 10: Housing Completions in Tyne & Wear, 1998

	Local Authority~	Housing Association~	Private Sites (more than 5 dwellings)	Private Sites (less than 5 dwellings)	Total Completions
Tyne & Wear	7	526	2,117	48	2,698
Gateshead	2	59	337	17	415
Newcastle	0	228	335	3	566
North Tyneside	0	91	838	11	940
South Tyneside	5	23	83	7	118
Sunderland	0	125	524	10	659

Source: Private Housing Land Study Group, Review 18, 1999

~ TWRI database

Local Authority assessment of private housing supply in Tyne & Wear estimates around 8,153 - 8,065 dwellings will be built on Category 1 sites[8] over the five-year period 1999 to 2003. Sunderland has the highest number of expected private dwellings in Category 1 sites during this period (32% of the county total). There are expected to be 2,264 completions in North Tyneside (27.8% of county total), 1,943 in Gateshead (24% of county total), 815 in Newcastle (10% of county total) and 525 in South Tyneside which represents 6.4% of the county total.

A total of 18,430 dwellings were vacant in Tyne & Wear at the time of the 1991 Census. This gave an overall vacancy rate in Tyne & Wear of 3.9% which is below the national average of

[6] *Regional Trends 34, 1999, Office for National Statistics (Crown Copyright)*

[7] *Land for Private Housebuilding in Tyne & Wear, Report of the Tyne & Wear Private Housing Land Study Group, Review 18, 1999*

[8] *Category 1 sites have no constraints to prohibit development according to the time scale agreed in the site assessment. (Local Authority Assessment)*

4.6%. Vacancy rates in Tyne & Wear varied from 1.6% for semi-detached houses to 9.2% for converted flats. Converted and purpose-built flats had the highest vacancy rates alongside accommodation which was not self contained.

Table 11: Vacancy Rates by Accommodation Type, 1991 %

	Tyne & Wear	North	Great Britain
Detached Houses	3.24	4.15	3.94
Semi-detached houses	1.63	2.10	2.72
Terraced houses	3.38	3.97	4.52
Purpose Built flats	8.29	7.90	7.66
Converted flats	9.15	9.45	10.05
Shared dwellings	3.86	3.99	3.27
Not self contained	9.09	10.64	7.32
Total dwellings vacant	18,430	50,271	1,066,508
Total dwelling stock	472,860	1,281,468	23,000,473
Vacancy Rate %	3.90	3.92	4.64

Source: 1991 Census (Small Area Statistics Table 61) Crown Copyright

1991 Housing Census Topic Report , CP95/4 TWRI

House prices in the North are the lowest in Great Britain. In the fourth quarter of 1999 the average price of a dwelling in the North was £62,925[9]. This was significantly lower than the average UK price of £100,061 and almost a third of the average cost of a dwelling in Greater London (£179,949), the most expensive area for housing. The underlying trend in the North indicates moderate growth with prices rising annually by 4.7% (4% in the third quarter).

4.5 Health

People living in Tyne & Wear generally experience poorer levels of health than those living elsewhere in the country. Applying Standardised Mortality Ratios (SMR) provides an indication of how the mortality of a given area compares with the national level, after allowing for differences in age structure. Table 12 indicates that in 1997 SMRs in all Tyne & Wear Districts were poorer than the English equivalent, ranging from 4% above the England and Wales average in North Tyneside to 15% higher in Gateshead. In 1996 7.4% of births in England and Wales were less than 2,500 grams, compared to 8.2% in Tyne & Wear.

[9] *House Prices Index, Fourth Quarter 1999, No 78, The Halifax*

Table 12: Standardised Mortality Ratio (SMR) and % of Births under 2,500g

	SMR*	% births under 2,500g ^
England & Wales	100	7.4
Tyne & Wear	111	8.2
Gateshead	115	7.9
Newcastle	111	9.3
North Tyneside	104	6.8
South Tyneside	116	8.3
Sunderland	110	8.1

Source: Key Population & Vital Statistics (Series VS no. 24, PP1 no. 20) ONS (Crown Copyright)

** Standardised Mortality Ratio during 1997 ^ Conceptions during 1996*

Health Action Zones (HAZs)

In an effort to combat such striking health inequalities the government has embarked on a ten-year modernisation programme of health and social care services. As part of this a number of Health Action Zones (HAZs) have been established across the country. The North has three HAZs in Northumberland, North Cumbria and Tyne & Wear with Tyne & Wear being the largest in the country. Five local health partnerships have been established within the Tyne & Wear HAZ with responsibility for developing;

- a programme of care for people with heart disease
- an integrated system for health and social work mental health teams
- a cancer information toolkit; nicotine replacement therapy
- a smoking cessation programme
- a resource centre for young mothers

This campaign aims to improve health services and tackle health inequalities[10] by forming alliances between a variety of agencies to lead to better and longer life, better care and greater value for people.

4.6 Index of Local Deprivation

The Index of Local Deprivation (ILD) was developed as a measure of general deprivation for all local authority areas in England and Wales and is used to help target regeneration resources. It is specifically used to calculate the regional allocation of Single Regeneration Budget (SRB). It is also widely used for other purposes, such as lottery grants applications to indicate significant deprivation in an area. The index also uses intensity and extent measures based on ward and enumeration district (ED) data to identify pockets of deprivation.

[10] *Briefing, Newcastle City Council, February 1999*

Although a new Index is to be introduced for the analysis of 1999 figures which will enable identification of scores of multiple deprivation, the indicators used in the 1998 Index of Local Deprivation are:

- unemployment
- ratio of male long-term unemployed to total male unemployment
- income support recipients
- children in low earning households
- overcrowded housing
- housing lacking basic amenities
- households with no car
- educational participation at age 17
- low educational attainment
- standardised mortality rates
- derelict land
- house content insurance premiums (as a proxy for crime)

In the 1998 assessment the rankings of four of the five Tyne & Wear districts fell (see table 13).

Table 13: Overall ILD Rankings of Tyne & Wear Districts, 1991 & 1998

	1991	1998	Change in position
Gateshead	32	35	-3
Newcastle	17	19	-2
North Tyneside	51	62	-11
South Tyneside	22	38	-16
Sunderland	33	21	12

Source: 1998 Index of Local Deprivation. A Summary of Results. DETR, June 1998

Note: There are 354 English authorities, 23 in the North East and 5 in Tyne & Wear

4.7 Education

Although qualification levels of school leavers are increasing both nationally and in the North East, young people in the North East still leave school with lower educational qualifications than the national average. In 1997/8 37% of school leavers in the North East had five or more GCSE A-C passes (England = 43.8%). The North East fell below the National Target for Education and Training for 1997 that 80% of young people should be educated to at least NVQ Level 2. Around 69% of young people, aged 19-21 in the North East were qualified to at least this level compared to 71% in the UK. The separate target for 2000 of 50% of young people being qualified to NVQ Level 3 was close to achievement in 1997 at 46% (UK 49%)[11].

[11] *North of England Profile 1999 A Statistical Profile of the North of England, North of England Assembly of Local Authorities, March 1999*

Education Action Zones (EAZs)

Tyne & Wear contains two of twenty five Education Action Zones set up nationally in 1998 to raise educational standards in socially deprived areas. The zones, usually a mix of no more than 20 primary, secondary and special schools are each to be allocated up to £500,000 per year depending on size. Included among the strategies to improve educational standards are the introduction of literacy and numeracy summer schools, homework clubs and pre-school and family literacy projects.

Children under Five

The number of children under 5 years of age in nursery and primary schools in the UK has increased significantly from c.20% in 1970/71 to 61% by 1997/98. In 1997/98 86% of children under 5 years in the North East were in Local Authority schools, the highest proportion in the UK[12]. The Tyne & Wear figure for 1998 of 82% was also significantly higher than the UK average of 61%.

Free School Meals

In Tyne & Wear, more children are eligible and take free school meals than the English average. This was the case at both primary and secondary school level, in each district, in January 1999. Uptake of free school meals was highest at primary school level (18-30%) following the national trend (16%).

Table 14: School Meal Arrangements in Maintained Primary and Secondary Schools, Jan 1999

	Nursery, Primary & Middle		Secondary	
	% taking free school meals	% eligible for free school meals	% taking free school meals	% eligible for free school meals
England	15.3	18.9	11.8	16.9
North East	20.8	24.9	13.5	22.0
Gateshead	19.7	23.9	12.9	22.2
Newcastle	30.5	35.7	17.3	26.8
North Tyneside	18.2	22.4	14.2	20.2
South Tyneside	27.1	31.7	16.9	25.3
Sunderland	22.4	28.9	12.5	28.7

Source: Statistics of Education, Schools in England 1999, DfEE

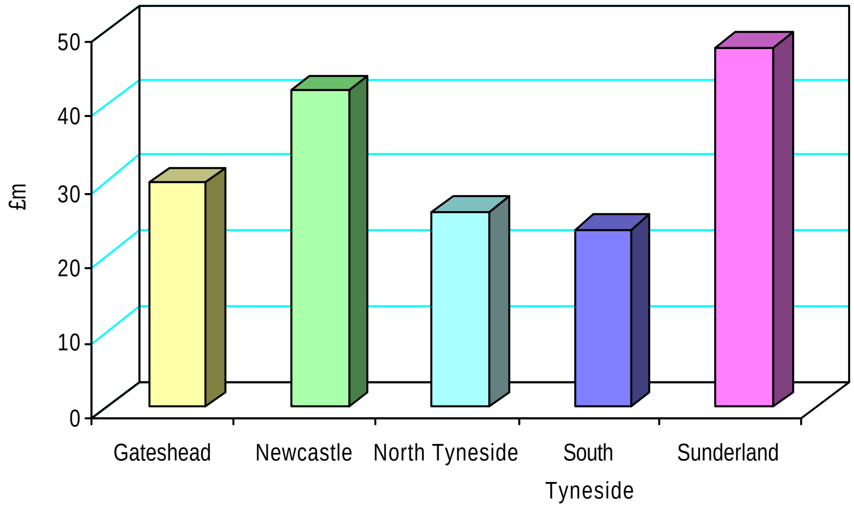
DfEE Special request

[12] *Regional Trends 34, 1999, Office for National Statistics (Crown Copyright)*

Expenditure

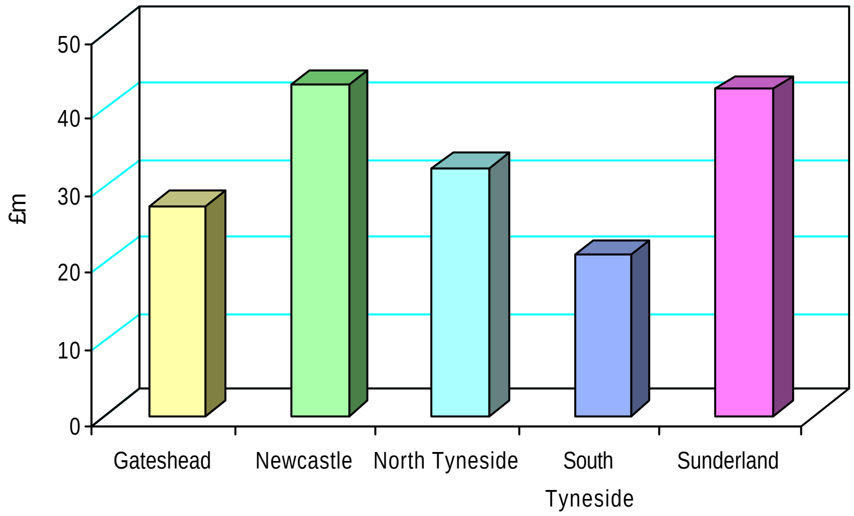
In 1996/97 local authorities in the North East spent £1,123m on education[13]. Within Tyne & Wear, in 1996/97, net institutional funding of primary schools totalled around £170m, and in secondary schools it amounted to £166m[14]. Figures 4 and 5 show the distribution of institutional funding in Tyne & Wear.

Fig 5: Net Institutional Funding in Primary Schools 1997/98



Source: Education Statistics 1997/98, The Chartered Institute of Public Finance Accounting, 1998

Fig 6: Net Institutional Funding in Secondary Schools 1997/98



Source: Education Statistics 1997/98, The Chartered Institute of Public Finance Accounting, 1998

13 *Regional Trends 34, 1999, Office for National Statistics (Crown Copyright)*

14 *Education Statistics 1997-1998 Actuals Incorporating the Handbook of Unit Costs, The Chartered Institute of Public Finance Accounting, September 1999*

Qualifications

Table 15 shows that in 1997/98, 36% of pupils in Tyne & Wear obtained 5 or more grade A*-C at GCSE. This is relatively low compared to the English average of 43.8%. In Tyne & Wear, North Tyneside had the highest percentage of pupils achieving 5 or more passes at 44.5%. Newcastle had the lowest at 31%. Among the remaining districts, 40% in Gateshead, 37% in South Tyneside and 32% in Sunderland, obtained 5 or more passes. Girls did markedly better than boys at GCSE – with 7.5% more girls than boys gaining at least five grade A*- C passes, reflecting the national trend[15].

Table 15: GCSE (A*-C grades) or GNVQ Equivalent Qualifications of Boys & Girls, 1997/98

	Number of 15 year old pupils	Achieved 5 or more GCSE	% Achieved 5 or more GCSE	Achieved 1 or more GCSE	% Achieved 1 or more GCSE
North East GOR	30,433	11,279	37%	19,115	63%
Tyne & Wear MC	12,439	4,478	36%	7,688	62%
Newcastle	2,689	833	31%	1,497	56%
South Tyneside	1,820	672	37%	1,144	63%
Gateshead	2,259	894	40%	1,468	65%
North Tyneside	2,037	907	44%	1,372	67%
Sunderland	3,634	1,172	32%	2,207	61%

Source: Statistics of Education, Public Examination GCSE/GNVQ, and GCE/AGNVQ, 1998, DfEE

Staffing and Provision

Staffing levels in North East schools compare favourably with the average for England, particularly at nursery and secondary levels. In January 1999 overall pupil teacher ratios for both the North East and England were 18.8[16]. Within the Tyne & Wear districts, pupil teacher ratios were lowest in Gateshead (17.5) and highest in Newcastle (23.8). The average primary school class size in 1996/97 in the North East was 27.3, which was similar to GB (also 27.3) and slightly below the average for England (27.7). The North East had fewer primary school classes of more than 30 pupils (25.6%) compared to England (28.6%) and GB (26.9%). At secondary school level, the average class size in the North East of 22.4 was marginally higher than the figure for England (21.9) and the national figure of 21.5.

15 *Statistics of Education, Public Examinations GCSE/GNVQ and GCE/AGNVQ in England, 1998, Department for Education and Employment (Crown Copyright)*

16 *Statistics of Education, Schools in England 1999, Department for Education and Employment (Crown Copyright)*

Students over Sixteen

The number of students remaining in full time education after the age of sixteen has risen sharply since the late 1980s in Tyne & Wear in line with the national trend. In 1985/86 just over half (52%) of pupils in Tyne & Wear remained in full-time education but by 1995/96 this had increased to 68%. Despite this increase, the number of students remaining in education in Tyne & Wear was still below the UK average of 78%.

Further and Higher Education

Tyne & Wear is home to three Universities in addition to the Open University which operates courses from offices in Newcastle. For the academic year 1998/99, 12,300 students were enrolled at the University of Newcastle, 13,900 at the University of Northumbria at Newcastle and 10,200 at the University of Sunderland. The Open University had 2,200 students resident in Tyne & Wear. In addition to these institutions, Tyne & Wear has a number of Further Education Colleges located in Gateshead, Newcastle, North Tyneside, Tynemouth and Sunderland[17]. At the time of the 1991 census, 5,900 Tyne & Wear residents held a higher degree, 34,200 a first degree and 43,200 a diploma. Students in the North East are the most likely, within England, to be home students.

4.8 Crime

The Home Office produces regular bulletins of recorded crime statistics including recorded notifiable offences by police force areas. The latest of these bulletins[18] contains data for England & Wales for the period from October 1998 to September 1999.

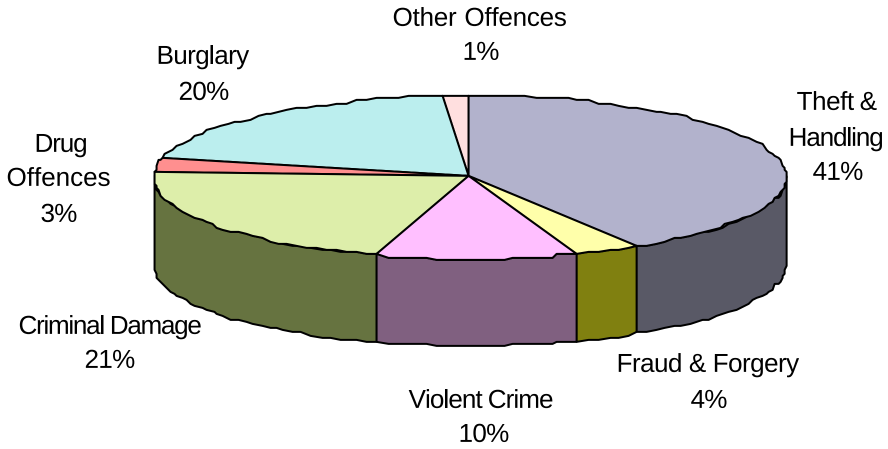
Northumbria Police

There were 145,735 notifiable offences recorded in the Northumbria police area between October 1998 and September 1999. This represents a fall of 5,390 (-3.6%) offences since the previous twelve months between October 1997 and September 1998. Within this period Criminal Damage, including damage to vehicles (21.2% of total offences), Burglary (25.2%) and Theft and Handling (41.0%) accounted for almost 82% of notifiable offences in the Northumbria police area. The categories of Fraud and Forgery (3.5%), Drug Offences (3.0%) and Other Offences (1.4%) constituted the remainder. A total of 29.2% of all offences involved vehicle crime.

[17] *Tyne & Wear Fact Card 2000, TWRI*

[18] *Home Office Statistical Bulletin: Recorded Crime Statistics, England and Wales, October 1998 to September 1999 (Issue 1/00 Jan 2000)*

Fig 7: Type of Offences 1998-99
Northumbria Police Area



Source: Home Office Statistical Bulletin, January 2000

5.0 LEISURE AND LIFESTYLE

5.1 Sports & Recreation

In 1996 adults in the North were less likely to have taken part in some form of physical activity than the GB average, with only 57% of adults participating in some form of sporting activity compared with 64% nationally[19]. Participation in sport in the North East rose sharply between 1986 and 1990 from approximately 46% to 63%, but remained slightly below the national average of 65%. This downcast figure can be largely explained by low female participation; 55% of women in the North East participated in sport, compared with 57% in GB. Male participation in football, basketball, cycling, darts and fishing was higher than the national average. Relatively few men in the North East, however, played golf, cricket, squash, badminton or tennis. Participation in sport amongst females in the North East was depressed in all sports, with the noticeable exception of darts. Female participation was very low in swimming.

19 *Living in Britain. Results from the 1996 General Household Survey, Office for National Statistics (Crown Copyright), 1998*

The North East is host to Britain's longest road race 'The Great North Run' which had 40,000 participants in 1998. The run covers 13 miles from the Town Moor crossing the Tyne Bridge from Newcastle to Gateshead to finish in South Shields.

Great North Run, Newcastle, Gateshead and South Tyneside

Source: Newcastle City Council

The Economic Value of Sport

The Northern Council for Sport and Recreation's 1994 report showed (1992 figures):

- an overall expenditure of £735.5m across the whole sports industry
- sports' contribution to the Region's total output (value-added) of about 1.5%, slightly lower than the national figure of 1.7%
- total employment in sport of 25,400
- total investment in sport as £26.3m

The average household expenditure on leisure goods and services in the North East over the three-year period 1996/7–1998/9 was £47.20 compared to the UK average of £55.80[20]. However, North East families devote a higher proportion of their household expenditure to leisure goods and services (16.3%) than the UK (14.9%). Main leisure items in the North East include holidays abroad, gambling, TV and cash gifts[21].

The English Sports Council has distributed lottery sports funds since 1994. By the end of 1997, grant value attributable to sport per head of the population in the North East was £15.33. The North East ranked third amongst English regions in terms of grant value per person by 1997.

[20] *The total includes the enhanced Northern Ireland dataset for 1998-99 only*

[21] *Family Expenditure Survey 1998/99, Office for National Statistics (Crown Copyright), 1999*

Leisure Facilities

Some of England's most popular leisure centres are located in Tyne & Wear. These include Newcastle Eldon, Sunderland Crowtree and Temple Park Centre in South Shields. Local Authorities own 90% of the Northern Region's leisure centres. Almost 5,400 (60%) playing pitches are attached to schools and around 900 (18%) are public pitches. Tyne & Wear alone accounts for 383 public sports pitches and 122 playgrounds[22].

In 1996/97 public swimming pools and sports centres in Tyne & Wear attracted over 8 million visitors. Sunderland Crowtree Centre ranked 3rd in a national league table of leisure centres in England, attracting over 2 million visitors and Newcastle Eldon ranked 13th with approximately 1 million visitors.

The region has a variety of specialist facilities, which host international competitions. These include Gateshead International Stadium for athletics, Sunderland's Silksworth Sports Complex for dry slope skiing and the Puma Centre for tennis.

Windsurfer, South Shields Harbour

Source: South Tyneside Metropolitan Borough Council

The main football clubs in the region are Newcastle and Sunderland. Newcastle United have a capacity of 37,000 at St James Park which they intend to increase to 51,000 for the 2000/2001 season in a £43m scheme.

[22] *Local Authority Performance Indicators 1996/97, Audit Commission*

Sunderland's Stadium of Light however, with its 42,000 capacity and potential for further expansion to 64,000 is the largest football stadium constructed in Britain since the Second World War. The stadium has superb facilities and is set to form part of England's bid to stage the 2006 World Cup, alongside Newcastle's St James Park[23].

Sunderland Stadium of Light

Source: City of Sunderland Council

5.2 The Arts

Newcastle is home to seven theatres including the Theatre Royal, which hosts seasons by the Royal Shakespeare Company, Scottish Opera and Scottish Ballet. Northern Stage, the largest professional theatre company between Leeds and Edinburgh, is resident at Newcastle Playhouse. Theatre seat occupancy is higher than any other region with 65.3% of seats sold 1995/6[24]. The Royal Shakespeare Company played to a record 93% capacity during their annual visit to Newcastle. In Sunderland, The Empire, as the largest theatre in Tyne & Wear, offers an impressive array of entertainment, musicals, opera, ballet, jazz, children's shows and one of the finest pantomimes in the country. Its Royalty Theatre also presents plays to suit a range of audiences.

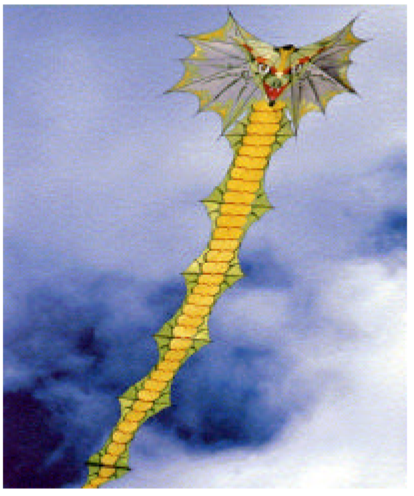
Theatre Royal, Newcastle

Source: Newcastle City Council

[23] *North of England Profile 1999, North of England Assembly of Local Authorities, March 1999*

[24] *Northern Arts Annual Report, 1995/6 (data from the Theatre Managers' Association)*

The contemporary arts calendar in Tyne & Wear includes the Newcastle Jazz Festival and Comedy Festival. The Northern Sinfonia Orchestra has its base in the city, and the Newcastle Arena provides a huge, modern venue for the world's top performers. Sunderland is famous for spectacular events such as the International Airshow, the Kite Festival and Houghton Feast.



Sunderland Kite Festival

Source: City of Sunderland Council

North Tyneside is home to the North Shields Fish Quay Festival, which is one of Europe's largest free festivals. It attracts millions of visitors each May and includes street theatre, dance, folk music and carnival.

Fish Quay, North Shields

Source: North Tyneside Metropolitan Borough Council

In South Tyneside the Cookson Country Festival, held on the waterfront, offers carnival, music and cabaret.

Cookson Festival, South Tyneside

Source: South Tyneside Metropolitan Borough Council

Top visitor attractions in 1997 in the North East include Durham Cathedral with 495,000 visitors, the Laing Art Gallery in Newcastle with 273,397 visitors and South Shields Museum and Art Gallery with 244,809 visitors[25].

The Economic Value of the Arts

The arts are a major contributor to the North East economy, directly employing approximately 5,600 people[26]. A report published by European Economic Development Services calculated total income from live performance admissions in Tyne & Wear to be approximately £12.4m. The value of cinema admissions in Tyne & Wear alone were estimated to be around £4.7m. Retail activities, including catering and drinks at live theatre and cinema performances, were calculated to be £3.4m and £2.38m respectively. The presence of popular arts and cultural venues has a knock on effect in the local economy, with money also being spent outside venues on items such as food and drink, shopping and transport.

5.3 Museums

It is estimated that there were approximately three million visits to museums and art galleries in the region in 1997[27]. The majority of museums in the region are controlled either by local authorities or run by independent bodies. The remaining museums are run by higher education institutions. The most popular museums and galleries in Tyne and Wear include:

South Shields Museum & Art Gallery, Ocean Road, South Shields

Collection includes a wide variety of displays relating to South Tyneside life and history. A gallery is devoted to best selling author Catherine Cookson. The museum also has an annual programme of temporary exhibitions.

The Laing Art Gallery, Higham Place, Newcastle upon Tyne

Collection includes British and European paintings sculpture, prints and drawings. Decorative arts including ceramics, glass, silver, costume and textiles and Oriental arts. The gallery also has special reference to North East arts and crafts.

Sunderland Museum & Art Gallery, Borough Road, Sunderland

Collection includes North East history and geography, Sunderland archaeology, social history, shipbuilding, ceramics and glass, fine art. There is a particular focus on 19^{th} and 20^{th} century drawings and prints.

Discovery Museum, Blandford Square, Newcastle upon Tyne

Collection includes development of science and engineering with special reference to the North East of England. There is also opportunity to see Newcastle's social history, interactive science factory, maritime history, fashion and military displays.

Hancock Museum, Barras Bridge, Newcastle upon Tyne

Collection includes natural history, Egyptology and ethnography, with Bewick collection.

25 *Cumbria and Northumbria Tourist Boards*

26 *Annual Employment Survey, September 1996 (Crown Copyright)*

27 *Northumbria Tourist Board Fact Card, October 1998*

Arbeia Roman Fort and Museum, Baring Street, South Shields

Collection includes finds from fort and surroundings, reconstructed West Gate with displays. There is a continuing excavation programme on an extensive site. Remains date back to Roman and pre-Roman. The site has Timequest and archaeological learning centre.

Shipley Art Gallery, Prince Consort Road, Gateshead

Collection includes old master and Victorian paintings from the Shipley Bequest and other sources. Contemporary crafts, local decorative arts and industrial history.

5.4 Libraries

In 1996/97 there were 85 library service points in Tyne & Wear. The number of items issued per head of population was highest in Gateshead (12.1) followed by North Tyneside (10.9), South Tyneside (10.1), Sunderland (9.9) and Newcastle (9.0). There are also a number of libraries managed by higher education institutions, which offer limited public access. The county has 5 mobile libraries, which extend facilities to remote rural districts and large residential areas[28].

5.5 Tourism

Tourism is a major contributor to the Region's economy. In 1997 tourists spent £926m in the North East, representing c.4% of Regional gross domestic product (GDP). Around 60,000 people in the North East are employed in tourism related industries[29]. Tourism spending in the North East is dominated by UK tourists (£380m or 41%) and day visitors (£341 or 37%).

Tyne & Wear has a flourishing tourist industry. Each district has its own distinctive sights.

Sunderland is home to the £16m National Glass centre which traces the history of glass making in the region and supports indigenous glass-making businesses. The Washington Wildfowl and Wetlands Centre, spread over 100 acres of parkland, is home to 1,200 swans, ducks and geese. Nearby is Washington Hall, the ancestral home of George Washington, first President of the United States of America.

National Glass Centre, Sunderland

Source: City of Sunderland Council

[28] *Local Authority Performance Indicators Council Services Compendium 1996/97, Audit Commission*

[29] *Annual Employment Survey, September 1996 (Crown Copyright)*

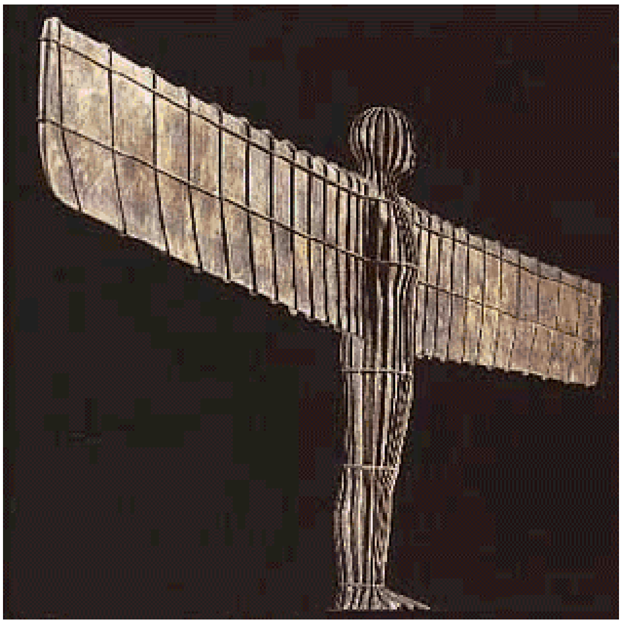
In North Tyneside popular tourist attractions are St Mary's Lighthouse & visitor centre and Tynemouth Priory, which is the ruins of the 11th century Benedictine Priory. North Tyneside is also home to a Sea Life Centre and the old Life Brigade Watch House which displays 19^{th} Century shipwrecks.

St. Mary's Lighthouse, North Tyneside

Source: North Tyneside Metropolitan Borough Council

South Tyneside is home to Bede's World telling the story of the life and times of the Northumbrian scholar Venerable Bede (AD 673-735). The site includes the chancel of St Paul's, the only surviving part of the Anglo-Saxon monastery. The monastery was attacked by Vikings in AD794 but was revived and survived until the Reformation. Outside the monastery in Gyrwe (the Anglo-Saxon name for Jarrow) is an experimental farm which is home to rare breeds of animals and ancient variations of cereals and vegetables. The site also features full-size Northumbrian timber halls and other structures based on excavated examples using traditional tools and techniques.

The latest tourist attraction in Gateshead is The Angel of the North. It is the largest sculpture in Britain, measuring over 20m high and weighing 200 tonnes. Metroland attracted 650,000 visitors in 1997.



Source: Gateshead Metropolitan Borough Council

Angel of the North, Gateshead

Future attractions in Gateshead, supported by National Lottery funds, are the Baltic visual arts centre and a Regional Music Centre, which is to feature two concert halls, a music school and be home to the Northern Sinfonia orchestra.

Regional Music Centre, Gateshead

Source: Gateshead Metropolitan Borough Council, Foster and Partners

Newcastle Quayside was the ancient centre of the city of Newcastle and is one of Britain's most dramatic waterfronts. It hosts buildings of both historic and ultra-modern architectural design. The Quayside has hosted various Maritime Festivals reflecting the city's association with the sea and was last visited by the Cutty Sark Tall Ships' Race in 1993.

Source: Newcastle City Council

Tall Ships, Newcastle quayside

Alongside the many historic buildings on Newcastle quayside lies the famous Tyne Bridge, opened by King George V in 1929.

Tyne Bridge, Newcastle and Gateshead

Source: Newcastle City Council

Tyne & Wear is one of the largest shopping destinations in the UK, with reputable retail facilities such as Gateshead MetroCentre, Newcastle Eldon Square, Eldon Garden, Monument Mall, North Tyneside Royal Quays and Sunderland Bridges.

Eldon Square, Newcastle

Source: Newcastle City Council

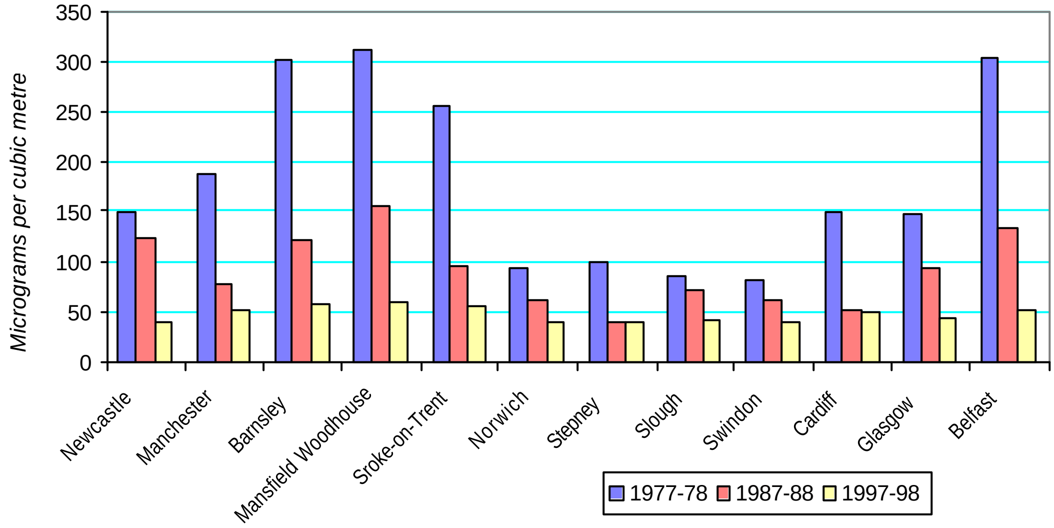
6.0 ENVIRONMENT

Concern about the environment has been reflected in the growing awareness and public interest in environmental issues. A variety of measures may be used to determine levels of environmental quality. The two indicators below measure black smoke and sulphur dioxide, both of which reflect levels of atmospheric pollution.

6.1 Atmospheric Pollution

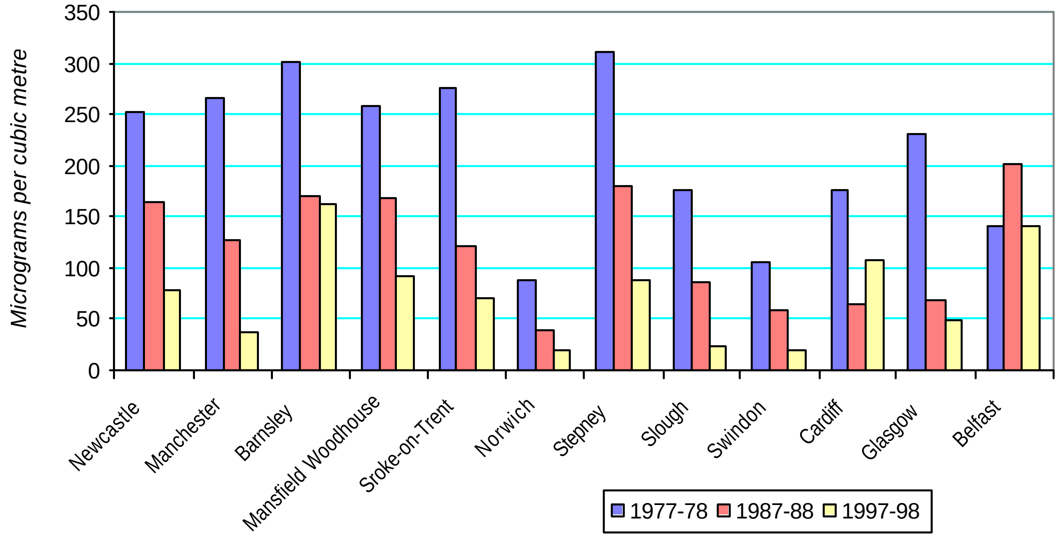
Black smoke and sulphur dioxide concentrations have reduced greatly in Newcastle and most of the country since the 1970s. In the 21 years between 1977-78 to 1997-98, levels of both pollutants in Newcastle have significantly reduced; black smoke from 149 micrograms per cubic metre to around 41 and sulphur dioxide from 252 to 79 micrograms per cubic metre. The decline in these indicators reflects a percentage change of –72% and –69% respectively.

FIG 8: ATMOSPHERIC POLLUTION
Black Smoke



Source: Regional Trends 34, ONS (Crown Copyright)

FIG 9: ATMOSPHERIC POLLUTION
Sulphur Dioxide



Source: Regional Trends 34, ONS (Crown Copyright)

6.2 Public Transport

The total number of public transport boardings in Tyne & Wear has declined by 45.5% since de-regulation in 1986, from 370 million in 1985/86 to 201 million in 1998/99. Buses and Metros showed the most significant decline, down 47% and 38% respectively.

Table 16: Tyne & Wear Public Transport Boardings (millions)

	Total	(%)	Bus	(%)	Metro	(%)	Rail	(%)	Ferry	(%)
1985/86	370.4	100.0	312.9	84.5	54.6	14.7	2.4	0.6	0.5	0.1
1990/91	275.2	100.0	229.6	83.4	42.7	15.5	2.2	0.8	0.7	0.3
1995/96	220.7	100.0	182.2	82.6	35.8	16.2	2.1	1.0	0.6	0.3
1997/98	210.0	100.0	172.6	82.2	36.0	17.1	2.4	1.1	0.6	0.3
1998/99	201.8	100.0	165.0	81.8	34.0	16.9	2.4	1.1	0.6	0.3

Source: Trends and Statistics Report - January 2000 (NEXUS).

Tyne & Wear has a modern public transport system - a necessity given that car ownership is the lowest in the country. The Tyne & Wear Metro system, opened in 1980, provides frequent rail links from residential areas through Newcastle to North Tyneside, South Tyneside and Gateshead. The Metro also connects to bus services throughout the region and Newcastle Central Station and International Airport. An extension of the Metro system to Sunderland, which is planned to be in operation from 2001, is expected to carry around 1,150 passengers an hour at peak travel time.

7.0 THE LOCAL ECONOMY

7.1 Gross Domestic Product

Gross Domestic Product (GDP) is the widest measure of economic activity (output) as it covers the whole monetary economy including manufacturing, primary production and services including public services. In 1995 the Tyne & Wear economy had a GDP of just over £10,000m. GDP estimates are largely workplace-based and thus substantial net in-commuting makes it overstate the prosperity of residents. Approximately 7% of people (30,000) working in Tyne & Wear are net in-commuters who probably, on average, are more highly paid than residents. Thus, although Tyne & Wear's 1995 per capita GDP index may be 87.4% of the UK the prosperity of residents may be more like 80% of the UK average[30].

7.2 Firms in Tyne & Wear

[30] *Economic Trends in Tyne & Wear. Ten Year Review, TWRI, EP 98/2*

Table 17 shows the top ten companies with headquarters in Tyne & Wear ranked by turnover. It displays a large gap in turnover between the top five companies and the remaining firms in the top ten ranking. Nationality of ownership of these companies includes; USA (Procter & Gamble and Northern Electric), Japan (Nissan in which Renault now have a 37% share), UK (Associated Co-op creameries, Arriva, Northern Rock, Barratt Developments, Reg Vardy, North-East/Cumbria Co-op and Bellway).

Table 17: Top Companies in Tyne & Wear (by turnover), 1999

Rank	Company	District	Activity	Turnover (£m)
1 (1)	Procter & Gamble	Newcastle	Detergents/personal care	1,826
2 (7)	Associated Co-op Creameries	Gateshead	Milk/food	1,800
3 (3)	Nissan Motor Manufacturing UK	Sunderland	Car manufacture	1,700
4 (2)	Arriva plc	Sunderland	Transport operator	1,600
5 (-)	Northern Rock plc	Newcastle	Mortgage bank	1,408
6 (4)	Northern Electric	Newcastle	Electricity & Gas	980
7 (6)	Barratt Developments plc	Newcastle	Housebuilding	891
8 (5)	Reg Vardy plc	Sunderland	Motor dealing	824
9 (9)	North-East/Cumbria Co-op	Gateshead	Retail	534
10 (10)	Bellway plc	Newcastle	Housebuilding	445

Source: Journal May 20 1999

Structure of the Business Base

At the end of 1998 Tyne & Wear had 16,050 businesses registered for VAT. This is a remarkably small business base of 179 businesses for every 10,000 adults (the UK is almost twice this figure, at 352).

During 1998 Tyne & Wear's business base rose by 0.2% or 30 firms. This figure under-performs that of the UK by 1.7 percentage points and represents Tyne & Wear's worst relative performance since 1988. The modest growth in 1998 did not offset the fall in the preceding year when the business base shrank by 0.3% or 50 firms. Tyne & Wear's performance was half that of the North East Region where the business base increased by 0.4% or 180 firms. Both Tyne & Wear and the North East under-performed in relation to the UK which grew by 1.9%[31].

At district level all districts except Newcastle recorded growth in their business base; Gateshead (1.2%), North Tyneside (1.1%), South Tyneside (3.3%) and Sunderland (at 1.9% which is just below the UK figure). Newcastle experienced a decline of 3.7% or 175 firms. Excluding Newcastle, growth in Tyne & Wear's districts averaged 1.7%.

Tyne & Wear's business base remains strongly focused on Retailing & Wholesale (31%; NE 27%; UK 24%), despite a fall of almost 2% during 1998. Tyne & Wear also had a high proportion of businesses in Hotels & Catering (9%; NE 9%; UK 6%). These two industries accounted for 40% of businesses which is far more than in the UK (30%) and the region as a

31 *Businesses Registered for VAT, 1998 TWRI, EB 00/1*

whole (NE 36%). Manufacturing was also marginally over-represented in Tyne & Wear (11%; NE 10%; UK 10%). A particular strength of Tyne & Wear relative to the North East is Business Services (22%, NE 19%).

Table 18: VAT Registered Businesses by Industry, 1998

SIC 92	Industry	Tyne & Wear (Total)	Tyne & Wear (%)	UK (%)
A,B	Agriculture	200	1.2%	9.3%
C,E	Mines & Utilities	0	0.0%	0.1%
D	Manufacturing	1,755	10.9%	9.6%
F	Construction	1,565	9.8%	10.5%
G	Retailing & Wholesale	4,925	30.7%	23.7%
H	Hotels & Catering	1,460	9.1%	6.4%
I	Transport	730	4.5%	4.5%
J	Finance	95	0.6%	0.9%
K	Business Services	3,525	22.0%	24.8%
L,O	Public Admin. & Other Services	1,570	9.8%	9.0%
M,N	Education & Health	225	1.4%	1.2%

Source: Department of Trade & Industry, Extract from Businesses Registered for VAT, 1998, TWRI

In 1998 business numbers grew in only three industries in Tyne & Wear; Transport, Business Services and Public Administration & Other Services. Business Services grew by 215, or 6.5%, marginally higher than the regional average (up 6.1%) but below national growth of 8.6%, Public Administration & Other Services showed more modest growth of 45 or 3.0% while growth in Transport of 0.3% was very small.

Tyne & Wear's business base is also very small in relation to employment. It has only about 1.0% of all UK businesses registered for VAT, but about 2.0% of employees. Tyne & Wear is also under-represented in the North East Region with 38% of the business base compared with roughly 43% of the region's employees[32].

Business Conditions in 1998 and 1999

Following the rapid decline in both domestic sales and export orders during the first three quarters of 1998, Tyne & Wear businesses have experienced a partial recovery. At the end of 1999 business indicators for Tyne & Wear were more positive than for a year or more with the exceptions of exports and change in employment levels. Capacity utilisation fell slightly to 20% of firms operating above 90% of capacity.

Business failures in the North of England rose by more than 20% in the first half of 1999, compared with the same period a year before (Dun & Bradstreet). This figure reflects a greater concentration of manufacturers in the North who have been hit harder by weak export demand and the strength of sterling (FT). Company failures in the North East are growing at a slower rate than during the recession of the early 1990s, according to DTI figures.

[32] *Businesses Registered for VAT, 1997, TWRI, EB98/2*

Membership of the Association of North East Small Businesses has soared to 4,800 within a few months of its launch. The Association promotes firms with 10 or fewer employees and already represents more than 35,000 people (J 17/07). This Association is a splinter group from the North East Chamber of Commerce.

7.3 Manufacturing in Tyne & Wear

Manufacturing has traditionally been the bedrock of the North East economy. The latest Census of Production figures for 1995 and 1996 show that Tyne & Wear's manufacturing performance has deteriorated markedly, in contrast to the great improvements between 1987 and 1993.

Manufacturing Establishment Size

In 1996 manufacturing establishments in Tyne & Wear, on average, employed 39 people, which was 50% bigger than the UK average of 26 employees[33]. In 1996 nine of Tyne & Wear's top ten industries had an establishment size greater than the national average. The differential between Tyne & Wear and the UK remained steady between 1993 and 1996 at 1.48 to 1.49, despite establishment size in the county falling marginally from 42 employees to 39.

Table 19: Establishment size (by employees) 1996

SIC 92	Industry	Tyne & Wear (per business)	UK (per business)	Tyne & Wear/ UK (Ratio)
DL	Electrical &Optical	55.3	34.5	1.60
DM	Transport & Equipment	139.7	78.6	1.78
DA	Food & Drink	61.2	60.0	1.02
DK	Machinery & Equipment	50.6	28.9	1.75
DE	Paper & Printing	24.3	15.1	1.60
DJ	Basic Metals	21.3	17.6	1.21
DG	Chemicals	53.0	63.6	0.83
DB	Textiles & Clothing	50.7	24.2	2.10
DH	Rubber & Plastics	37.9	35.4	1.07
DN	Other Manufacturing	20.0	11.5	1.74
	All Manufacturing	38.5	25.8	1.49

Source: Census of Production, 1996

Extract from Manufacturing in Tyne & Wear 1993-1996, TWRI

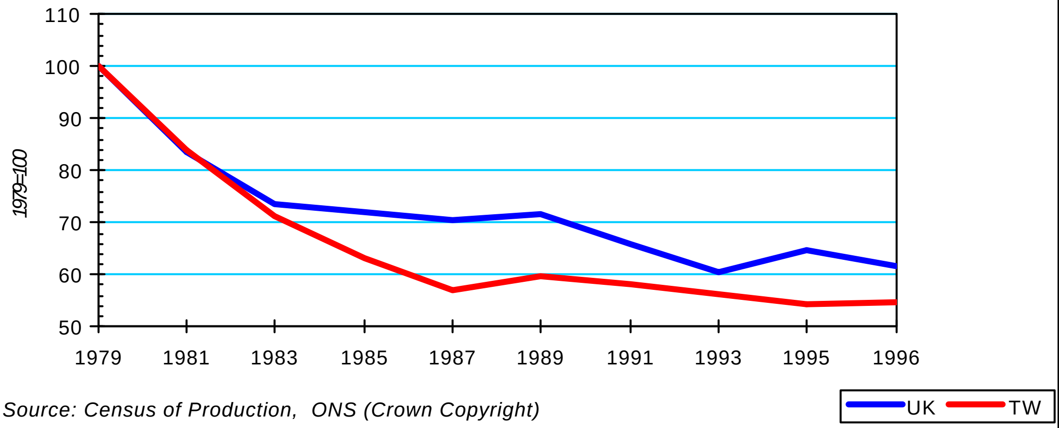
Manufacturing Employment

Between 1979 and 1996 overall manufacturing employment fell hugely in both Tyne & Wear and the UK (see Figure 10). Tyne & Wear employment almost halved. There was a dramatic

[33] *Manufacturing in Tyne & Wear 1993-1996, TWRI EP99/2*

fall between 1979 and 1987 followed by relative stability since. During 1993 and 1996 there was a slight decline (-3%) in Tyne & Wear but in the UK there was a modest rise of 2%.

Fig 10: MANUFACTURING EMPLOYMENT 1979-96



Source: Census of Production, ONS (Crown Copyright)

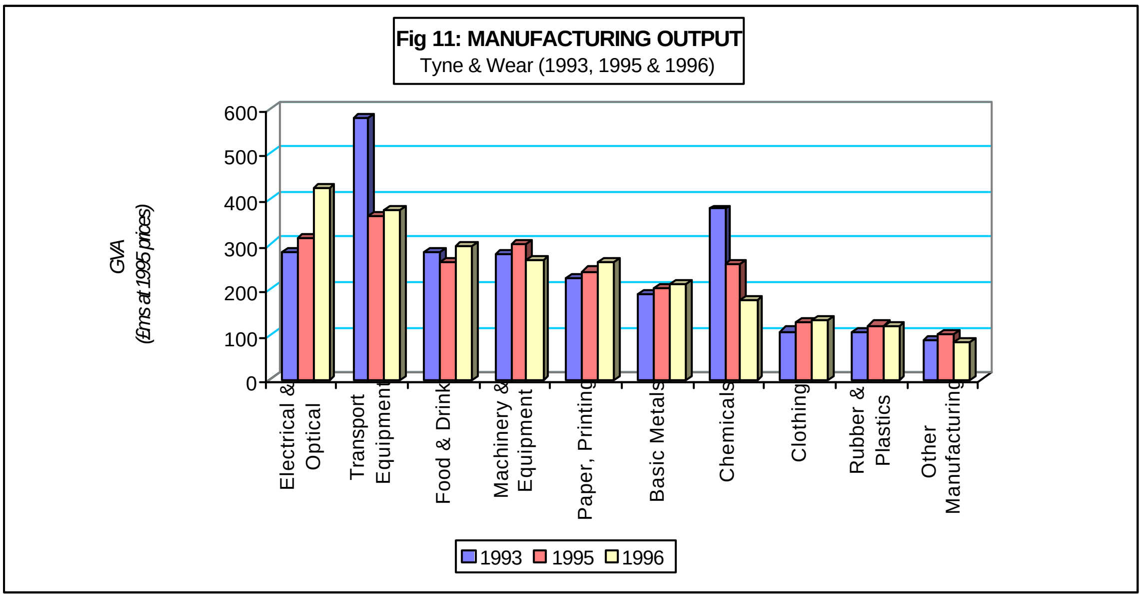
In 1996 employment was high in the Electrical & Optical (12,500), Machinery & Equipment (10,800) and Transport Equipment (10,000) industries in Tyne & Wear.

Manufacturing Output

In 1996 the value of the output of Tyne & Wear's manufacturing industries was £2,577m (at current prices). The top ten industries accounted for over 94% of this output. In 1996 Electrical & Optical and Machinery & Equipment had a combined share of total manufacturing output of 28% as compared to the North East (23%) and the UK (16%). This reflects a significant rise from 22% in 1993 and 24% in 1995. These industries, embracing mechanical engineering and electrical engineering, represent the traditional 'core' of manufacturing plus the newer electronics industry in Tyne & Wear.

In contrast the Transport Equipment industry now represents the second-largest share of total manufacturing output reflecting a decline from 22% in 1993 to 15% in 1995 and 1996. The strength of the industry in 1993 is largely a reflection of strong growth in the motor vehicle industry in Tyne & Wear.

Output changes 1993-96 covered a very wide range between manufacturing industries. Output rose significantly in the Electrical & Optical industry (+50%), a rise of well over £100m and also in the Clothing industry (+24%). There were also noticeable rises in the Paper and Printing (+15%) and Basic Metals (+12%) industries. There were very steep declines in the Chemicals (-53%) and Transport Equipment (-35%) industries (see Figure 11).



Output location quotient* figures for the Electrical & Optical industry at 1.89 and the Transport Equipment industry at 1.88 indicate that these industries were considerably over-represented in Tyne & Wear, holding almost twice the UK share of manufacturing output. The Chemicals industry (0.84) was the only major industry in Tyne & Wear to be under-represented. Prior to 1993 this industry had very high output figures. For example in 1993 the Chemicals industry was over represented with an output location quotient of 1.29[34].

Table 20: Largest Manufacturing Industries in Tyne & Wear Measured by Output, 1996

SIC 92	1993 Rank	Industry	Output (Gross Value Added) Tyne & Wear (£m)	Tyne & Wear	UK	Output Location Quotient
DL	2	Electrical & Optical	439	17%	9%	1.89
DM	1	Transport Equipment	391	15%	8%	1.88
DA	4	Food & Drink	308	12%	11%	1.12
DK	3	Machinery & Equipment	275	11%	7%	1.58
DE	6	Paper & Printing	268	10%	9%	1.15
DJ	7	Basic Metals	220	9%	8%	1.03
DG	5	Chemicals	183	7%	8%	0.84
DB	8	Textiles & Clothing	138	5%	4%	1.45
DH	9	Rubber & Plastics	123	5%	4%	1.24
DN	10	Other Manufacturing	88	3%	3%	1.23

Source: ONS Census of Production, 1993

Extract from Manufacturing in Tyne & wear 1993-1996, TWRI

[34] *Manufacturing in Tyne & Wear 1993-1996, TWRI EP99/2*

**The output location quotient is the percentage share of Tyne & Wear manufacturing output from this industry divided by the percentage share of the UK manufacturing output from the same industry.*

Manufacturing Productivity

Between 1993 and 1996 Tyne & Wear's manufacturing productivity* fell by 3% (at constant 1995 prices) compared to a 14% rise in the UK. This ends an out-performing trend between 1991 and 1993 when productivity rose by almost 15% (more than double the UK rise of 7% and the strongest performance since 1979).

Manufacturing productivity in Tyne & Wear in 1996 was 10% below the North East and 5% below the UK. This represents a sharp deterioration from 1993 when productivity was 8% above the UK average. High productivity was achieved by the two biggest industries with Electrical & Optical at 20% above the North East average and 9% above the UK and Transport Equipment at 8% above the UK average. Rubber & Plastics and Textiles & Clothing also had productivity levels slightly above the regional and national averages. Six of Tyne & Wear's top ten industries had productivity levels below the regional and national averages. The most notable are Chemicals, Other Manufacturing and Machinery & Equipment.

Table 21: Productivity Levels in Major Tyne & Wear Industries with UK Comparison, 1996

SIC92	Industry	Tyne & Wear (Current Prices)	Index of North East (North East=100)	Index of UK (UK =100)
DL	Electrical & Optical	£35,200	119.5	109.0
DM	Transport Equipment	£38,800	*	107.8
DA	Food & Drink	£35,200	84.9	90.9
DK	Machinery & Equipment	£25,500	89.5	83.3
DE	Paper & Printing	£34,100	94.4	97.2
DJ	Basic Metals	£25,000	76.4	92.0
DG	Chemicals	£44,800	63.8	78.4
DB	Textiles & Clothing	£18,900	102.9	100.9
DH	Rubber & Plastics	£29,000	102.7	103.8
DN	Other Manufacturing	£19,300	88.5	81.7
	All Manufacturing	£30,900	90.2	94.6

Source: ONS Census of Production, 1993

Extract from Manufacturing in Tyne & Wear 1993-1996, TWRI

**Productivity defined as Gross Value Added (Output) divided by employment.*

Manufacturing Profitability

In 1996 estimated operating profit was just over £930m in current prices. Between 1993 and 1996 estimated operating profits in Tyne & Wear fell by 16% from £1,072m to £901m (in 1995 prices). This decline came from a 5% fall in output combined with a 2% rise in the labour costs. Operating profits in the UK, in contrast, rose 36% from around £41bn in 1993 to £55bn in 1996 (in 1995 prices). This came from a 16% rise in output and a 5% rise in labour costs.

Inward Investment

Between April and December 1998 the UK won 383 inward investment projects, putting it at the top of the European league (Ernst & Young's European Investment Monitor). The requirement for big greenfield investment has declined with most investment now by companies acquiring existing capacity, extending older plants or establishing research and headquarter sites. A third of projects and almost half the jobs came from take-overs of UK companies (FT 14/07/99). Marketing now focuses on follow-on investment, either by existing companies or their suppliers. The focus of investment is shifting to Europe and North America as Japan, Korea and Australia decline as a proportion of the total. Software, telecommunications and the automotive industry are key sectors for investment. The flow of foreign direct investment into the UK almost doubled in 1998 to £38.6bn (or over 5% of GDP). From 1994 to 1997 foreign companies invested more in the North East than any other part of the UK according to the government's Regional Competitiveness Indicators (RCIs). Figures from One NE indicate that in 1999 c.2,081 new jobs were created in Tyne & Wear by foreign investors. (This figure includes 1,000 jobs created by Orange Telecommunications which, since February 2000, has been owned by UK based Vodafone Airtouch.)

One NE

One NE (the North East Development Agency), which came into being on 1st April 1999, is to be the lead body at regional-level for co-ordinating inward investment, raising skills, improving business competitiveness and boosting the region's competitiveness. One NE, with a budget of c.£132.4m for the year beginning in April 2000, receives a proportionately larger sum than other regional agencies.

One NE's regional economic strategy, 'Unlocking Our Potential', was presented to government in October 1999 and includes six key aims.

1. Creating wealth by building a diversified, knowledge-driven economy
2. Establishing a new entrepreneurial culture
3. Building an adaptable and highly skilled workforce
4. Placing universities and colleges at the heart of the region's economy
5. Meeting 21st century transport, communication and property needs
6. Accelerating the renaissance of the North East

The Regional Development Agency also proposes to encourage businesses to exploit e-commerce, urging all companies and public organisations to commit to electronic trade by 2001 and proposing measures to help small and medium-sized enterprises to trade electronically by 2003. One NE has established a skills development fund and initially awarded £1.7m to 17 projects.

7.4 Industries and Firms News

In 1999 the UK economy grew by under 2% reflecting the slowdown at the start of the year. UK growth has since accelerated to faster than trend rate. In the North East unemployment fell by just 1,000 in the year to the autumn, whereas it fell 76,000 in the UK (estimates from Labour Force Survey measure). The North East economy has been severely affected by four particular factors. Firstly, a high manufacturing and export content which was hit by the strong £; secondly, strong links with east Asia (as investor, market or competitor) which ultimately became a weakness; thirdly, a severe decline in the clothing industry and fourthly, the influence of low oil prices on the off-shore industry.

Major job gains in the Region came from the telecommunications industry with Orange Telecommunications plc doubling its North East workforce to at least 4,000. In addition to 1,000 call centre staff at a new start up in North Tyneside, the company intends to recruit (outside Tyne & Wear) a further 460 staff at Darlington and 540 at its Peterlee site. The company is to invest £20m in the new service centres in the region. Orange was acquired by Mannesmann in autumn 1999 which in turn was acquired by Vodafone Air Touch. It is likely that Vodafone will need to sell off at least one of the companies within its control.

British Airways plc, with five call centres employing c.2,000 people, are currently restructuring operations following a first quarter drop in operating profits of 45.6% to £94m. The telesales centre at Newcastle Business Park is the largest of the company's operations, employing 800 people. The company would not predict job losses at Newcastle as part of the restructuring but did admit to pressure on new job creation (17/08).

It is estimated that call centres will employ c.480,000 people in the UK by the end of 2002 which represents a 38% increase compared to the end of 1998. Annual growth is expected to slow from 32% in 1997 to 6% in 2002. The UK lags behind Germany in call centres linked to the Internet. The UK has fewer than 30 'web-enabled' call centres but this is likely to grow to nearly 950 by 2003 (FT 13/07).

A notable development at Tyne & Wear's largest private sector employer, Nissan, is Renault's £3.3bn investment in the company giving it a controlling 37% stake. The three-year restructuring plan announced by Nissan in October, following difficulties at the parent company, is to include measures to halve the number of its suppliers and close five of its factories in Japan. Nissan Motor lost nearly £2bn in the six months to September. This includes provision for the restructuring. It expects to lose £4bn in the year to March (FT 23/11).

For the third consecutive year, Nissan's Sunderland plant has been named as Europe's most efficient (Economist Intelligence Unit) (J27/08). The Sunderland plant, which is the UK's largest car manufacturer, is to produce the new Almera model for which 800 new staff have been recruited. Production of the Almera started in early 2000.

Within the Business Services industry the software group, Sage plc, is the first North East company to enter the FTSE-100 index. Begun in 1981 with the assistance of a £40,000 Government-backed loan and floated on the stock market in 1989 at £20m (J 10/09 & 08/09), the market capitalisation of the company doubled in autumn 1999 to £9bn. Over the 1990s its value has risen 280-fold. In 1999 Sage had the second fastest rise of any FTSE 100 company (FT 23/12). In the six months to September its turnover rose 60% to £307m and profits rose 56% to £74m (J 9/12).

Cammell Laird plc's profits more than doubled to £10.4m in the year to April following a number of acquisitions. Turnover, including Tyne Dock Engineering, was up 247% to £110m. The company intend to continue with a series of acquisitions with the aim of developing the group as a 'one-stop shop' for ship repair and conversions (J 09/07).

The Retail industry in Tyne & Wear has performed well throughout 1999. In the first half of the year both Eldon Square and the Metro Centre averaged 6% sales growth. Newcastle is among the top 10 best performing retail centres for growth in rental income (Donaldsons) with rental income growth over a three-year period at 9% (National average 5.8%) (J 05/07).

Huge fluctuations in oil prices have depressed orders for the offshore industry. Oil prices have risen to c.$30/barrel in early 2000, up from about $9 since March 1999 (using the benchmark Brent Crude). It had been depressed at around $10 in 1998. The closure of the Offshore industry on Tyneside is imminent since AMEC completed work on the Shearwater module. The yard is to run down to a skeleton staff of c.20 by June 2000.

In the Electronics & Electrical Engineering industry, Tyne & Wear has experienced a loss from the closure of the Hong Kong-based television manufacturer, Onwa Electronics, in South Tyneside. The plant, established in 1993, employed 240 workers.

The already hard-hit clothing industry in Tyne & Wear has experienced yet further problems in 1999. A number of North East clothing companies closed in 1998 including JPS, Claremont and Textilion. Berghaus announced in late 1999 it is to close its Washington factory following the decision to move operations abroad. This will result in 150 job losses. The continued depressed market share held by Marks & Spencers continues to create problems for Tyne & Wear supply firms. Profits at Dewhirst Group fell 22% to £10.1m in the six months to July with sales falling 3% to £184.5m (FT 08/09). As a result of the problems at Marks & Spencer and other retailers, William Baird intend to close four or five of its 16 UK M&S factories in the next six months (FT 09/09). Marks & Spencer has now ended its contract with Baird. Courtaulds, which has 40% of sales to M&S, is expected to return to profit in the second half of 1999. (J 10/09 & FT 10/09).

7.5 Job Gains and Losses (as reported in the press) [35]

[This list presents only the bigger announcements, over 100 jobs each]

Job Gains	Company	Industry (Sic 1980)	Source
+1,000*	**Orange Telecommunications**, Silverlink, North Tyneside Call centre staff for new start up	Postal services / telecoms	(J 25/08)
+600	**Aker McNulty**, South Shields, South Tyneside +200 immediately plus 400 next year	Other transp eqpt	(J 06/01)

35 *Economic Review, Spring 1999 - Winter 1999, TWRI, EC99/2 - EC00/1*

+534	**Airtours UK Leisure Group**, Royal Quays, North Tyneside 639 employee call centre. 105 jobs as consolidation from existing sites. 428 full time posts to be created over next 3years.	Air transport	(J 19/03)
+350	**Morrison**, Byker, Newcastle Staff for 68,000sqft store	Retail distribution	(J 19/03)
+350	**BT**, Balliol Business Park, Longbenton, North Tyneside Part-time staff for call centre	Postal services / telecoms	(J 08/04)
+350	**Tesco**, Kingston Park, Newcastle Temporary and permanent staff at new Tesco Extra store	Retail distribution	(J 30/07)
+300	**Northern Rock plc,** Regent Centre, Gosforth, Newcastle Extra staff to develop business over the Internet	Banking / finance	(J 17/11)
+300	**One 2 One**, Doxford Park, Sunderland Staff for call centre	Postal services / telecoms	(J 05/05)
+212	**B&Q**, Wallsend, North Tyneside New jobs created as part of transfer to new store	Retail distribution	(J 28/05)
+200*	**Procter & Gamble,** Cobalt Business Park, North Tyneside New business services centre & possibly new European HQ	Business services	(J 11 & 17/11)
+200	**MB&G Insurance**, North Shields, North Tyneside Staff for 24 hour financial services call centre	Insurance services	(J 14/07)
+150	**Asda**, Benton, Newcastle Staff for new hypermarket (at former Co-op store)	Retail distribution	(J 24/09)
+130*	**Collectibles**, Northumberland Street, Newcastle Staff for new glass and china store	Retail distribution	(J15/09)
+115	**Gill Airways**, Newcastle International Airport Pilot and cabin crew for new services [The airline went into administration in early 2000]	Air transport	(J 27/01)
+107	**TRW**, Houghton-le-Spring, Sunderland New staff for expansion of plant to develop new car steering system	Elect & electronic engineering	(J 12/01)
+100	**NHS Direct**, Balliol Business Park, North Tyneside Staff for new 24 hour medical advice service	Medical services	(J 10/02)
+80* (+20)	**Reed Print and Design**, North Tyne Ind. Estate, North Tyneside 50 staff for new factory plus 30 more over 2 years. 20 at existing site	Other manu. industries	(J 15/07)
+100	**Leighton**, Doxford International, Sunderland Design and production staff for internet and multi-media HQs	Business services	(J 11/08)
+100	**Going Places Direct**, Royal Quays, North Tyneside New part-time posts for call centre	Misc.transp	(J 06/09)
+100*	**Northern Rock plc**, Doxford International Business Park, Sunderland New mortgage 'Decision Call' centre'	Banking / Finance	(J 17/11)

** = New openings*

Job Losses		**Industry**	**Source**
706*	**AMEC Process & Energy,** Wallsend, North Tyneside Closure of offshore yard	Construction	(J 9/10)
-220*	**Courtaulds Textiles** Closure of Courtaulds Underwear, Sunderland	Footwear / clothing	(J 19/02)
-214*	**Courtaulds Textiles** Closure of Claremont Garments, Wallsend	Footwear / clothing	(J 19/02)
-420*	**Vaux Brewery**, Sunderland Closure of brewery	Food & drink	(J 30/04)
-280	**Siemens**, Heaton, Newcastle Losses within power generation division	Elect & electronic engineering	(FT 19/03)

-270*	**A'DIA Direct Mail**, Bentall Business Park, Sunderland Company gone into liquidation	Postal services / telecoms	(J 16/01)
Est -200	**Northern Electric,** all districts Job losses follow a 16% price cut imposed by Ofgem	Prod. / distribution energy	(J 15 & 22/12
-160	**Northumbria Water** Assumed Tyne & Wear share of regional total Influenced by; £80m windfall tax bill, pressure to reduce water bills from Ofwat and a change in capital allowances which reduced the firm's tax allowance	Water supply	(J 28/01)
-150	**Cammell Laird**, Hebburn, South Tyneside Loss attributed to a need for new labour requirements at various stages of a contract	Other transport eqpt.	(J 04/03)
-150*	**Berghaus,** Washington, Sunderland Closure of outdoor clothing factory. Production to be transferred abroad	Footwear & clothing	(J 13/10)
-149*	**Marks & Spencer**, Tyne Tunnel Trading Est., North Tyneside Closure of distribution centre	Retail distribution	(J 16/06)
-120	**Barclays Bank**, Tyne & Wear Job losses as bank aims to cut running costs	Banking / finance	(FT 21/05)
-110*	**Siebe Appliance Controls**, Dubmire Ind Est., Sunderland Losses follow international restructuring	Elect. & electronic engineering	(J 08/04)
-103	**MTK Containers**, Sunderland Enterprise Park Loss of over one third of workforce	Mechanical engineering	(J 01/03)
-100	**Crabtree**, Team Valley, Gateshead Workforce down to 220	Mechanical engineering	(J 25/03 & J 06/01)
-100	**Clarke Chapman**, Gateshead Estimated share of 200 job losses in Rolls Royce crane making division	Mechanical engineering	(J 16/04)
Est -100	**Swallow Group**, Washington, Sunderland and other districts Job losses and closure of HQ following acquisition by Whitbread	Hotel / catering	(J 8/12)

* = *closure*

7.6 Future Economic Prospects

The Chancellor's March 2000 Budget raised the forecast for UK economic growth to between 2.75 and 3.25% for 2000, compared with under 2% achieved in 1999. The forecast for economic growth in 2001 and 2002 is 2.25-2.75%. There are also considerable improvements from the gloomy independent forecasts over the last year. In June 1999 the average independent forecast for 1999 economic growth was 0.8% (and in March only 0.6%) after 2.6% in 1998. Monetary policy (cutting interest rates by 2.5%) has been used successfully to offset the economic shocks of summer and autumn 1998[36]. Between autumn 1999 and March 2000 interest rates were raised by 1 percentage point to 6%.

New migration data for the year to mid-1998 show continuing out-migration from Tyne & Wear. Over the period 1982 to 1995 migration was strongly correlated with Tyne & Wear's economic performance relative to the UK (measured by per capita GDP). Thus, judging from

[36] *Economic Review, Winter 2000, TWRI EC00/1*

the net migration series, Tyne & Wear's economy is likely to have under-performed UK growth of GDP per capita since 1994[37].

8.0 LABOUR MARKET

8.1 Employment Structure

In 1996, total employees in Tyne & Wear numbered c.426,000[38]. Women now represent the majority amongst employees in Tyne & Wear at 51.5% . However, it should be noted that men predominate in the self-employed category which is excluded from these figures. Part-time employment was estimated to be a substantial 15.8% higher at (139,800) than previously published for 1995 (112,100). The largest employers of part-time staff include Retailing, Health & Social, Hotels & restaurants, Education and Other Business. Other Business is 38% higher than previously published which may partly reflect a growth of call centres.

Tyne & Wear remains more dependent on manufacturing (20.2%) than GB (18.2%) but less than the North East (22.4%), however this varies dramatically between the Tyne & Wear districts as shown in Table 22. Conversely, Tyne & Wear is slightly less dependent on Service sector jobs (73.4%) than GB (75.6%) but more than the North East (70.3%). Tyne & Wear continues to have a significantly lower proportion of employees in Finance & Business services (12.6%) than GB (17.7%) but a much higher proportion (30.0%) in Public Services than GB (25.0%). (Most of this 5 percentage point difference is accounted for by the huge DSS Longbenton complex and its satellite sites – about 3% of all Tyne & Wear employees.)

Table 22: Employment Structure by Area, 1996

	Manufacturing	Services	Full-time	Part-time	Men	Women	Total
Great Britain	18.2%	75.6%	71.0%	29.0%	50.3%	49.8%	22,258,166
North East	22.4%	70.3%	69.8%	30.3%	49.5%	50.5%	902,578
Tyne & Wear	20.2%	73.4%	69.5%	30.5%	48.9%	51.2%	426,000
Gateshead	23.6%	70.3%					77,500
Newcastle	11.6%	83.4%					149,800
North Tyneside	23.3%	68.7%					57,500
South Tyneside	22.1%	66.5%					42,100
Sunderland	28.0%	61.6%					98,800

Source: ONS (AES 1996 and Results for Great Britain), NOMIS

Annual Employment Survey 1996 in Tyne & Wear, TWRI, EM 99/1

Note: District employment structure is not presented because it is likely to be very unreliable

8.2 Earnings

Average earnings in Tyne & Wear are significantly lower than the GB average. In 1999 the Tyne & Wear average earnings for men & women were £352.6 per week (or £18,300 pa). This was around 12% less than the GB average. Male earnings at £384.3 per week (or £20,000 pa) were around 13.1% below Great Britain. Female earnings were slightly closer to

37 *Economic Review, Autumn 1999 TWRI EC99/4*

38 *Annual Employment Survey 1996 in Tyne & Wear, TWRI, EM 99/1*

the national average; at £299.5 per week (or £15,300 pa) these were 8.3% less than the GB average.

In 1999 in Tyne & Wear, women's hourly earnings were 85% of men's hourly earnings (GB 81%). In 1974 this figure was c. 67% but following the Equal Pay Act it rose sharply to 75% in 1976. Women's hourly earnings fluctuated around this level from 1976 to 1987 but since 1987 have risen steadily by approximately 9% relative to men's hourly earnings. Women's hourly earnings in Tyne & Wear remain closer to men's than in GB as a whole. This is mainly due to the comparative weakness in men's earnings in the county.

In the year to April 1999 the RPI rose to 1.6%. This implies that in 1998/99 men's earnings in Tyne & Wear stayed at the same level in real terms whereas in Great Britain real earnings rose by 2.0%. Women's real earnings continued the strong upward trend apparent since 1990, rising in 1998/99 by over 4% in real terms.

Table 23: Increases in Earnings in the Metropolitan Counties 1997-99

Men	1999	1997	% change	Women	1999	1997	% change
London GOR	£584.4	£541.3	8.0	London GOR	£422.8	£386.3	9.4
West Midlands MC	£427.3	£386.5	10.6	West Midlands MC	£312.1	£275.5	13.3
Merseyside GOR	£416.7	£381.7	9.2	Merseyside GOR	£304.0	£284.4	6.9
Greater Manchester MC	£420.0	£387.4	8.4	Greater Manchester MC	£304.9	£281.1	8.5
West Yorkshire MC	£402.4	£358.9	12.1	West Yorkshire MC	£309.3	£279.6	10.6
Tyne & Wear MC	**£384.3**	**£354.4**	**8.4**	**Tyne & Wear MC**	**£299.5**	**£278.9**	**7.4**
South Yorkshire MC	£380.9	£363.9	4.7	South Yorkshire MC	£297.8	£263.6	13.0

Source: New Earnings Survey 1999 (Crown Copyright)

Extract from TWRI Publication: Earnings in Tyne & Wear 1999, EB00/2

Low Pay

The Council of Europe defines its 'decency threshold' on pay as 68% of average earnings or around £270 per week. In Tyne & Wear around one third of men and women, one quarter of men and almost one half of women earned less than £250 per week. Low pay is more prevalent in Tyne & Wear than Great Britain.

- Almost one quarter of all full-time men (23%) earn below £250 per week (GB 19%)
- Almost one half of all full-time women (48%) earn below £250 per week (GB 39%)
- Over one fifth (21%) of women earn below £190 per week (GB 17%)

The National Minimum Wage (NMW)

The statutory NMW was introduced on 1st April 1999 at £3.60 per hour for people aged over 21. A lower rate of £3.00 per hour applies to those aged 18-21. There is no minimum wage for those aged under 18. In spring 1999 the North East region had the highest proportion of employees earning below the NMW.

Table 24: Employees* Earnings below the NMW Spring 1998 & 1999#

	Spring 1998		Spring 1999	
	%	Thousands	%	Thousands
North East	11.5	100	7.1	100
UK	8.1	1,900	5.0	1,200

Source: ONS special request – using LFS and NES

*Notes: # using 'adjusted LFS and NES' data. *Proportions (%) are of employees, including second jobs. The NE figure is rounded to the nearest 100,000 obscuring the fall which the percentages reveal.*

8.3 Unemployment

In Tyne & Wear in January 2000, 36,734 people, or 7.4% of the labour force, claimed unemployment benefits (Job Seekers' Allowance – JSA or National Insurance Credits. See Table 25). The Tyne & Wear total was a significant drop on the previous year (-8.8%) but the rate remained significantly higher than the UK average (4.3%). Claimant unemployment declined in all Tyne & Wear districts with the largest reduction in unemployment evident in North Tyneside (-14.8%) [39].

Table 25: National, Regional and Local Claimant Unemployment, Unadjusted: January 2000

	Total		Change since previous month		Change since previous year	
	No	%	No.	%	No.	%
Gateshead	5,244	5.7	545	11.6	-489	-8.5
Newcastle	9,451	7.7	713	8.2	-726	-7.1
North Tyneside	5,979	6.7	474	8.6	-1,038	-14.8
South Tyneside	6,524	9.8	489	8.1	-526	-7.5
Sunderland	9,536	7.5	876	10.1	-765	-7.4
Tyne & Wear	36,734	7.4	3,097	9.2	-3,544	-8.8
North East Region	81,766	7.4 (w)	7,832	10.6	-6,831	-7.7
Great Britain	1,191,982	4.3 (w)	93,863	8.5	-138,452	-10.4
United Kingdom	1,236,382	4.3 (w)	95,798	8.4	-150,029	-10.8

Source: Office for National Statistics

TWRI: Unemployment, Training and Vacancies, January 2000

Note: (w) = workforce rates. Other unemployment rates are residence rates.

Tyne & Wear's ILO[40] unemployment rate was 9.8% in autumn 1999 or 50,000 people (Table 26). For people to be ILO unemployed they do not have to claim or obtain any benefit. They

39 *Unemployment, Training and Vacancies, January 2000, TWRI, EU00/2*

40 *The ILO measure of unemployment, adopted by the government in Spring 1998, refers to people without a job who were available to start work in the two weeks following a Labour Force Survey (LFS) interview. They had either looked for*

simply have to be looking for work and be available to work. The gap between the ILO unemployment rate for Tyne & Wear and the claimant count has progressively widened over recent years.

It should be noted that the LFS is not reliable for areas smaller than counties or the larger Local Authority Districts, because of its sample size. In addition, changes to the benefit system are likely to affect the labour market behaviour of respondents to the LFS.

Table 26: Claimant Count and ILO Unemployment, Unadjusted: Autumn 1999

	Unemployed Claimants	Rate %	ILO Unemployed	Rate %
Great Britain	1,132,000	4.0	1,676,000	5.9
North East	75,000	6.8	103,000	8.7
Tyne & Wear	34,000	6.7	50,000	9.8

Source: Labour Force Survey, Office for National Statistics

Extract from: Unemployment Training and Vacancies, January 2000, TWRI

New Deal

Claimant unemployment is affected by changes to the benefit system from which it is derived. As such it is a seriously distorted measure. Its coverage has changed significantly with the introduction of New Deal in "pathfinder" areas in January 1998 and its nationwide launch in April 1998. New Deal, initially aimed at people aged up to 24 who had been unemployed for at least six months, was offered to very long-term unemployed people (those aged 25 years and over and unemployed for two years or more) in June 1998 and to lone parents in October 1998. Participants on New Deal are removed from official claimant unemployment statistics once they leave the Gateway. Gateway is a period of intensive job search, help and advice which lasts normally for 16 weeks. Following the Gateway, four options are available:

- work in a subsidised job with an employer
- full-time education and training (to obtain a recognised qualification)
- work in the Voluntary sector
- work with the environmental taskforce

"Follow through" consists of support while on a New Deal option and provision of further services and "additional advice and counselling" for those who, after completing a New Deal option, return to JSA.

New Deal for Young People (NDYP)

work in the four weeks prior to interview or were waiting to take up a job they had already obtained. The internationally accepted ILO unemployment measure includes some people who are not eligible to claim unemployment benefits but excludes claimants who have not "looked for work".

In September 1999 there were 5,365 people in Tyne & Wear on New Deal for Young People (NDYP). Throughout the previous twelve months the number on NDYP averaged 5,400 (GB 139,900). NDYP appears to have stopped growing in size. Tyne & Wear accounts for c.4% of the GB total which reflects above average unemployment in the county. The proportion of male New Deal participants in Tyne & Wear (78%) was higher than in Great Britain (72%)[41].

Table 27: Number on New Deal for Young People by Option at end of September 1999

	Tyne & Wear Totals				Great Britain Totals			
	Total	On Gateway	On Option	Follow-Through	Total	On Gateway	On Option	Follow-Through
Male	4,159	1,735	1,525	899	98,340	47,400	32,660	18,280
Female	1,163	526	445	192	35,680	17,000	12,700	5,980
Total	5,365	2,278	1,989	1,098	136,150	65,500	45,990	24,660

Source: Employment Service

Note: Totals include those for whom gender is not recorded. GB figures are rounded

New Deal for Long-Term Unemployed People aged 25+ (ND25+)

In September 1999 82% of participants were still in the Advisory Interview Process (AIP) reflecting the recent origin of the programme (GB 83%). The overwhelming majority of participants were male at c.88% for Tyne & Wear and 84% for Great Britain.

Table 28: Number on 25+ New Deal by Option at end of September 1999

	Tyne & Wear Totals			Great Britain Totals		
	Total	Advisory Interview Process	Follow-Through	Total	Advisory Interview Process	Follow-Through
Male	2,376	1,928	29	68,200	56,600	840
Female	302	258	4	12,400	10,400	110
Total	2,688	2,195	33	81,300	67,600	960

Source: Employment Service

Note: Totals include those for whom gender is not recorded. GB figures are rounded.

[41] *New Deal in Tyne and Wear September 1999, TWRI, EN00/1*

8.4 Economic Inactivity

Both the claimant unemployment and ILO unemployment measures exclude those who suffer from long-term illness or are incapable of working (substantial groups within the economically inactive). The numbers of people on Incapacity Benefit (IB) are very substantial, at over 75,000 in Tyne & Wear and vary considerably between districts. North Tyneside has the least number of people on Incapacity Benefit (10,515) while Sunderland has more than double this at 22,094.

Table 29: Numbers on Incapacity Benefit 100% (GMS)* December 1998

	Total
Gateshead	14,915
Newcastle	17,126
North Tyneside	10,515
South Tyneside	10,720
Sunderland	22,094
Tyne & Wear	75,370

Source: DSS Analytical Services Division 1 (Special request), Crown Copyright

**Figures taken from 100% scans obtained via the Generalised Matching Service of the Benefits Agency*

9.0 LAND & PROPERTY

In the first half of 1999 available industrial floorspace fell by 8%. In June 1999 there were 429,000m^2 of vacant industrial property in Tyne & Wear. Gateshead, Newcastle and Sunderland each increased their share of vacant industrial property by 3 percentage points to 33%, 17% and 24% respectively. North Tyneside's share fell eight percentage points to 15% and South Tyneside accounts for 10% reflecting a decrease from 12%[42]. The distribution of vacant industrial premises in June 1999 varied widely between districts. Total units ranged from 78 in North Tyneside to 186 in Gateshead. Total area ranged from 42,523m^2 in South Tyneside to 142,205m^2 in Gateshead.

[42] *Vacant Industrial Properties in Tyne & Wear, January to June 1999, TWRI, EV99/2*

Table 30: Vacant Industrial Premises in Tyne & Wear, Summary at 30th June 1999

District	Total Units	%	Total Area (m^2)	%
Gateshead	186	28	142 ,205	33
Newcastle	126	19	74,868	17
North Tyneside	78	12	65,434	15
South Tyneside	100	15	42,523	10
Sunderland	165	25	104,522	24
Tyne & Wear	655	100	429, 552	100

Source: TWRI: Vacant Industrial Properties in Tyne & Wear Analyses: January to June 1999

9.1 The Tyne & Wear Urban Development Area (UDA)

The Tyne & Wear Urban Development Area was designated by central government as the area of operation of the Tyne & Wear Development Corporation (TWDC)[43] until it wound up in March 1998. The Urban Development Area comprises two separate areas along the banks of the Tyne and the Wear. The UDA includes parts of the Cities of Newcastle and Sunderland and the Metropolitan Boroughs of North Tyneside and South Tyneside. The TWDC was established under the provisions of the 1980 Local Government Planning and Land Act with the object of securing the regeneration of its area.

Following the demise of the Tyne & Wear Development Corporation, English Partnerships (EP) took over responsibility for completing four flagship projects. The projects are at Newcastle's East Quayside, the Royal Quays in North Shields and two sites at South Shields Riverside. The four sites are to receive more than £12m from EP (Planning 21/11/97), which has now been subsumed into the new North East Development Agency.

[43] *Tyne & Wear Urban Development Area 1998/99, EP99/1 TWRI*

Table 31: Land Use - Tyne & Wear UDA

	Hectares				% of		Change in Hectares			
	1988	**1997**	**1998**	**1999**	**1998**	**1999**	**1997/98**	**1998/99**	**1988-98**	**1988-99**
Residential - private	17	85	84	90	4.0	4.3	-1.0	6.5	67.0	73.5
- public	21	36	39	40	1.8	1.9	2.8	0.8	17.9	18.7
- total	39	121	123	130	5.8	6.1	1.8	7.3	83.9	91.2
Industrial	863	823	823	827	38.8	39.0	0.3	3.6	-39.8	-36.2
Commercial & Leisure	89	191	197	204	9.3	9.6	6.1	6.9	107.7	114.6
Transport & Other	460	486	489	490	23.1	23.1	2.6	**1.4**	28.7	**30.1**
TOTAL DEVELOPED LAND	1,451	1,621	1631	1,651	77.0	77.9	10.8	19.3	180.5	199.8
Agriculture	30	30	30	30	1.4	1.4	0.0	0.0	0.0	0.0
Vacant	268	216	194	180	9.1	8.5	-22.0	-14.3	-74.2	-88.5
Derelict	224	111	107	95	5.1	4.5	-4.0	-12.2	-117.0	-129.2
Open Space & Leisure	141	143	157	164	7.4	7.8	14.0	7.2	16.1	23.3
TOTAL OPEN LAND	663	500	488	469	23.0	22.1	-11.9	-19.3	-175.0	-194.4
TOTAL LAND AREA REPORTED	2,114	2,121	2119	2119	100.0	100.0	-1.2	0.0	5.4	5.4

Source: Cities of Newcastle and Sunderland, Metropolitan Boroughs of North and South Tyneside

Extract from TWRI Publication: Tyne & Wear Urban Development Area 1998/99

Note: Figures may not sum to totals due to rounding. All data refer to end of March.

The total area reported excludes water and varies due to new surveys/remeasuring.

Between 1988 and 1999 derelict land has more than halved within the UDA. It fell from 11% to 4% of the UDA total, a net fall of 129ha (to 95ha). The amount of derelict land rose during 1993/94 and 1994/95, arising from a reclassification of vacant land in North Tyneside. The majority of derelict land lies within North Tyneside (68ha), whilst Sunderland (25ha) and South Tyneside (2ha) make up the remainder.

Between 1988-99 the majority of floorspace within the UDA has been completed for commercial and industrial uses (510,000m^2). In addition just over 94,000 m^2 of leisure space have been completed and more than 3,000 dwellings have been built. (Dwelling completions exclude flats in Sunderland for student accommodation). In 1997/98 the main category of completions was industrial (26,000m^2) or just over half of the commercial completions. Industrial completions were concentrated in South Tyneside (15,000m^2) and Sunderland (11,000m^2). Other completions in 1997/98 were offices (15,000m^2), B1 use (7,000m^2), retail (2,000m^2) and 203 dwellings.

9.2 Infrastructure developments

Work is due to start in the spring on the £100m Metro extension to Sunderland which is due to open in early 2002. The project involves the construction of a 4.5km Metro-only railway west from Sunderland city centre to South Hylton, a major bus/Metro interchange in Sunderland city centre, electrification and signalling between Pelaw and Sunderland to permit joint use by metro and 'heavy trains', eight new stations and improvement to four existing stations.

Preliminary work has begun on the £18.6m Baltic Millennium Bridge which will form a pedestrian link between Newcastle Quayside and a planned £100m arts and music complex on the South bank of the Tyne. Gateshead firm Harbour & General will build the 600-tonne steel bridge, starting this summer with the completion expected by autumn 2000.

Newcastle Airport has produced a new masterplan to 2016. It aims to add 2,000 to its existing 3,000 jobs by 2006 (J 10/11). At Newcastle Airport, freight village work has started on phase 2 adding about half to the existing 4.500m^2 floorspace. The transit sheds and warehousing should be ready by June. Freight traffic rose in the year to November by 18% to 16,731 tonnes. It has doubled since the freight village opened in 1994 (J 16/12).

Newcastle's West Central Route Phase 2 (Barrack Road) is due to be completed late this year. The government awarded £4m for it in the £9.4m local transport settlement for Newcastle.

Nexus is to table plans for the 'Stephenson Link' in the A19 corridor in North Tyneside. This is a £10m guided bus route from a new Metro station at Shiremoor 6km south to the Royal Quays via the Silverlink and Cobalt business parks (J10/11 & 23/12).

The County Durham Local Transport Plan includes a proposal for the re-opening of the Leamside railway line from Heworth in Gateshead via Washington in Sunderland to the East Coast mainline at Ferryhill. The 21-mile project would cost £7m and allow trains to run between Newcastle and Middlesbrough via the new stations (J 5/11).

Development of the £60m+ Regional Music Centre on Gateshead quayside can progress following the award of £43.8m from the National Lottery Arts Fund. The building which is due to open in 2002 has two concert halls, a rehearsal hall, a music school and a music information centre (FT 16/12).

OneNE began work in January at Newburn Haugh, Newcastle, on land reclamation for the industrial park. The contract is worth c.£24m. Work on infrastructure will take approximately two years and includes a £10m dual carriageway link-road to the A1. OneNE has secured £5.2m towards this cost via a capital challenge grant.

APPENDIX A

TYNE & WEAR RESEARCH AND INFORMATION (TWRI)

Outline of TWRI

Tyne & Wear Research and Information (TWRI) provide a statistical information service on behalf of the five metropolitan districts in Tyne & Wear. These are: Gateshead, Newcastle Upon Tyne, North Tyneside, South Tyneside and Sunderland.

TWRI produces information and undertakes research on a wide variety of topics of interest to those concerned with the social and economic conditions and the physical structure of the county. To obtain a full list of publications telephone TWRI on 0191 2328520 ext. 5061. The services provided by TWRI are set out below.

TWRI's establishment consists of ten professional and technical staff and a clerical assistant. TWRI has been based in the Civic Centre in Newcastle since it was established in 1986. The City Council provides general administrative facilities to TWRI on behalf of the supporting authorities and officers of TWRI are employees of the City Council.

Management of TWRI

For general operational matters such as routine staff issues and administration the Head of TWRI reports to the Assistant Head of Policy & Research Services of the City of Newcastle. However, the Head of TWRI is responsible to the Officer Steering Group for the discharge of the TWRI's work programme. This group consists of two officer representatives from each of the supporting authorities - ten officers in all. It meets on a regular cycle to monitor the work of TWRI and to determine matters of policy. A report is made each year to the Tyne & Wear Co-ordinating Committee which is responsible for agreeing budget targets for all joint units operating in the county. This committee consists of the leaders and deputy leaders of each Council.

TWRI also operates a series of officer working groups covering aspects of its work programme. These permit liaison between TWRI officers and those in the supporting authorities on technical issues and facilitate the effective completion of projects within the work programme.

Projects within the Work Programme

The work programme of TWRI consists of a number of projects grouped under broad headings. Responsibilities for discharging these projects are divided between the Head of TWRI and the two Senior Officers who operate under the general guidance of the Head of TWRI. Each Senior Officer has responsibility for developing and maintaining research and information resources of their own work areas. They are supported by four Research Officers, two technical support staff and a clerical assistant.

TWRI's interests include:

Business Data

Development, maintenance and marketing of the Countywide Business Information System (COBIS) which amalgamates over 20,000 records from district business databases. Contact with private sector clients advising on use of the database, production of special listings from the business file, identification and exploration of new market opportunities, and production of analyses from the data file. Currently, TWRI is helping Business Link Tyneside to maintain its own company database using the information already held by partner organisations.

Geographic Data
Co-ordination of a property database in conjunction with officers in the five district councils and maintenance of a countywide file. Development of output and analysis of this data. Databases include the Geo-coded Property Gazetteer and associated changes file and the Street Index file. Liaison with and co-ordination of districts and joint boards in Tyne & Wear with interests in Geographic Information Systems in the county. A Retail Database is also maintained on planning applications over 2,500m^2 for Tyne & Wear, Durham and Northumberland in accordance with Planning Policy Guidance note 6 (PPG6). Assessment and development of TWRI's GIS capabilities.

Economic Research & Information
Production of regular reports providing information about the local economy including employment estimates and projections, small areas unemployment analyses, redundancies and job growth, vacant industrial property listings and general economic background data. Research using various data sources including Census of Employment, Census of Production, Labour Force Survey, VAT Registrations.

Social Research & Information
Development of data series concentrating on the social condition of the population in the county including crime, poverty, education, health, employment and housing. Provision of information and analysis in support of annual discussions with central government on Standard Spending Assessments. Provision of an analysis service from the Census of Population. Co-ordination and liaison activities associated with the 1991 Census of Population and involvement in planning for the 2001 Census.

Demographic Research & Information
Maintenance of an annual series of demographic estimates and projections covering populations, households and labour force for Tyne and Wear and its constituent wards. Production of occasional reports based on research of demographic data for Tyne and Wear including migration, births and deaths.

Housing Land Services
Administration and co-ordination of the annual monitoring exercise that assesses the availability of land for private housing in the county.

Special Research Projects
Provision of data and analysis in support of a number of district activities including Unitary Development Plan work, bids for central government finance and ad hoc projects. Input to regional and European information activities requested by the Assembly of North of England Councils. This currently involved the production of a regional report identifying how the North performs in relation to other parts of the country on a large number of indicators. Liaison with national bodies and central government departments on a variety of data issues affecting local authorities in Tyne and Wear

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