
ABI - BASED EMPLOYMENT REPORT
EMPLOYMENT CHANGE IN TYNE & WEAR 1998-2003

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KEY POINTS

This analysis primarily uses the Annual Business Inquiry (ABI) data from ONS. This estimates employee numbers at workplaces in Tyne & Wear. The self-employed are not covered by the ABI.

As ABI data is not fully reliable, TWRI has taken some measures to validate the data: a) waited for five years' data. The ABI is also assessed in the context of b) job changes reported in the press (recorded in TWRI's own database) and c) broad employment change recorded by the Labour Force Survey (LFS)¹.

The LFS shows **growth of employee numbers at workplaces in Tyne & Wear of 42,000 or 10.1%** in the four years to spring 2004 (see Appendix 1). The LFS also shows that residence-based employee numbers grew 21,000 or 5.2% between 1998 and 2003 in Tyne & Wear.

The ABI found, from 1998-2003, **employee numbers in Tyne & Wear rose by 33,800 or nearly 8%**. This is the biggest employment growth in Tyne & Wear since at least the 1970s. Moreover, the growth is slightly faster than in the NE region (about 7%) and GB (about 5.5%). This is a huge improvement on the period 1991-98 when employment growth (2%) was only a quarter of the GB rate (8%)².

Strong employment growth in 1998-2003, **matching or exceeding the English average** was part of a **broad pattern**. GVA growth 1995-2002 exceeded the England average in all the English Core Cities in the north. This spatial broadening of economic growth out from the South and East under-pinned the greatly improved employment performance³.

Employment growth for the dozen years **1991-2003** was about **10% in Tyne & Wear** (Tyneside 8.5% and Sunderland 14.3%)⁴. This puts Tyne & Wear in the middle of the six Metropolitan cities; above Birmingham (6%) and Liverpool (6%), similar to Sheffield (11%) but below Manchester (14%) and, particularly, Leeds (23%) [Details from ODPM's State of the English Cities Report; see table in Appendix 2]. The under-performance was particularly great in Financial Service employment growth which was about 60% in Manchester, Leeds and Liverpool, but under 8% in Tyneside.

Employment growth has been **fastest in Gateshead (19%)**, but seems over-stated,⁵ and **Newcastle (11%)**, with modest growth in Sunderland (3%) and North Tyneside (4.5%). Employment fell in South Tyneside, where the 3,900 overall fall can be entirely attributed to the reported huge manufacturing fall, down 5,600 or over 50%. This is a sharp change from the 1990s, when Sunderland led employment growth with a rise of about 10% (1991-98).

Tyne & Wear's net employment growth has been **almost entirely (97%) in the public services**. In Great Britain, too, two-thirds (69%) of net employment growth has been in the public services. [In 1991-98, by contrast, the AES recorded a *fall* in Tyne & Wear's Public Service employment.] In 1984-91, Tyne & Wear's public services accounted for about 100% of net employment growth; in GB about 40%. [See table in Appendix 3]

¹ A further approach (not featured in this report) which has the aim of producing more robust (reliable) results would be to compare one adjacent pair of years with another pair of adjacent years (with sufficient interval between) to average out the major fluctuations in ABI. This is an approach which has been adopted by Cambridge County Council.

² Using ONS' Annual Employment Survey (AES). This was reported by TWRI in 2001 as "Employment Change in Tyne & Wear 1991-98".

³ ODPM State of the English Cities Report. GVA is Gross Value Added, the standard measure of total output.

⁴ The State of the Cities Report (SOCR) analyses groups of Local Authorities called Primary Urban Areas (PUAs). The four Tyneside authorities are referred to in SOCR as 'Newcastle' PUA.

⁵ Caution: the rapid reported gain in Gateshead is probably inflated by an error of omission in 1998 from public service employment. This could reduce actual growth in Gateshead to around 12%.

The **employment growth rates in the public services** have been **exceptionally rapid** – around **a quarter in five years**; led by Education (up 31%⁶ or 11,900; GB up 25%). Health & Social employment has also risen by 23%, up 12,500 (GB up 17%). Public Administration employment was up 25%, or 8,300 (GB up only 3%).

Nevertheless, employment growth has been significant in Business Services (up 8,100 or 15.5%), slightly faster than in GB (14%).

Financial Service employment growth has been **almost four times** as fast as in GB, at 15.5% (up 1,900). This is a very positive reversal of the under-performance in the 1990s. It largely reflects the growth of Northern Rock and Barclays Bank's call centre⁷.

The **private sector** has **led employment growth in only one District; North Tyneside**⁸, with Transport & Communication up 2,400 (up 132%)⁹ and Business Services up 1,800 (up 29%). [the relocation of Procter & Gamble from Newcastle to North Tyneside may have been included in this – Ed.]¹⁰

Manufacturing had the **major employment decline** (down **almost 20,000 or 24%**). This is a slightly faster rate of decline than in GB (-20%). Manufacturing in 2003 accounted for just under 13% of jobs in Tyne & Wear – continuing to be similar to GB. Manufacturing falls were more rapid [perhaps due to losses from offshore engineering] in North Tyneside (-34%) and South Tyneside (-51%). [This is a reversal of manufacturing employment *growth* recorded in 1991-98, of the 12,000+, which had been notably in Sunderland – up 6,300.]

The employment growth was only marginally faster for women than overall; by just 0.4 percentage points (up 8.1%; overall 7.7%).

Full-time employment growth (5.5%) has been **twice as fast as in GB** (2.5%). This should have helped to raise household incomes slightly faster than in GB.

Part-time employment grew at much the same rate as in GB (12.5%). This growth rate (2.5%pa) is about 2 ½ times the growth rate of part-time employment in TW in 1991-98. In 1998-2003, part-time employment growth (17,000) accounted for half of the overall employment growth.

Caution: Hotels & Restaurants report an [odd] employment fall, down 2,800 (or -10%) – which appears to be an ABI error; it is not reported in the years up to 2002¹¹. [There has, however, been persistent employment loss from pubs and clubs.]

⁶ *Caution: possibly overstated due to under-count in Gateshead education in 1998.*

⁷ *In Sunderland (at Doxford Park).*

⁸ *This probably reflects development in the A19 corridor.*

⁹ *Includes major BT and Orange call centres.*

¹⁰ *TWRI's Job Change Database (JCD) shows gains of approx. 400 by Procter & Gamble in 1999 (200 of which were created when the company re-located from Newcastle to Cobalt Business Park in North Tyneside).*

¹¹ *TWRI's JCD shows a net gain of 1,987 in 'Hotels & Catering' between 1998 and 2003. This included net gains of 432 in 2002 and 847 in 2003).*

Some Preliminary Lessons

1. Overall net employment growth has **been wholly dependent on the public sector**. This has favoured Newcastle in this period because of its (proportionately) very large base of public sector employment.
2. The **spatial location of [private sector] employment growth has reflected** the availability of
 - a) **Land** to develop, and
 - b) **Incentives offered** [critically, in this period, Enterprise Zone status].

In the 1990s, Sunderland had the best of both (including Doxford, Sunderland Enterprise Park with Enterprise Zone status). After 1998, North Tyneside had extensive land to develop in the A19 corridor, especially at Cobalt Business Park [with Enterprise Zone status to August 2006]. Some of Gateshead's leading employment growth has been due to further development of Team Valley.

3. It has been **possible to grow Financial Service employment** between 1998 and 2003 despite the previous marked under-performance (in 1991-98) [when the fall was driven by bank branch closures]. The growth over the five years 1998-2003 practically returned Finance employment to the level of 1991 (about 14,000). This growth in Finance was in Barclays (2,500 at Doxford Park, Sunderland) and at Northern Rock. This growth appears to have extended beyond 2003 and now looks to be entirely dependent on Northern Rock.¹²
4. Taken in the **context of historical trends over the period 1984-2003**, the public sector dominance of net employment growth between 1998 and 2003 in Tyne & Wear stands in contrast to that of the earlier period 1991-1998 but compares to that of the much earlier period 1984-1991. These fluctuations reflect changing government policy on public spending (see Appendix 3).

Between 1998 and 2003, public service employment growth was 96.5% of total net employment growth compared to almost 69% in Great Britain. Between 1991 and 1998, public service employment actually fell in Tyne & Wear (down by 3,400). This contrasts with moderate public service employment growth in Great Britain over this period of 171,000 or just 9.6% of total employment growth. Between 1984 and 1991, there was considerable public service employment growth, comprising 109% of total employment growth in Tyne & Wear, compared to 41.9% in Great Britain.

¹² TWRI's JCD shows a net gain of 4,741 in 'Banking & Finance' between 1998 and 2003. Major gains included Barclays with 2,500; Northern Rock with 1,292 and Lloyds TSB with 1,500 [The Lloyds TSB call centre closed in 2004].

1 INTRODUCTION

1.1 Introduction to the Annual Business Inquiry (ABI)

This TWRI report provides details of employees in employment at workplaces in Tyne & Wear, and examines changes 1998-2003, using the ABI.¹³ Changes in men's and women's employment and full-time and part-time employment are also presented. The report identifies growth industries and weakness in Tyne & Wear relative to the NE and GB. Data is provided by industrial section and two-digit SIC [using the SIC 2003].

The Annual Business Inquiry (ABI) is a two-part survey of employers in the UK. Part one gathers the employment information presented in this report. Part two collects financial information (which is reported in the TWRI reports on 'Manufacturing & Market Services in Tyne & Wear'). The ABI is conducted annually for a reference date in December. It replaced the Annual Employment Survey (AES) in 1998¹⁴.

The **sample** for the employment information part of the ABI is, nationally, approximately 78,500 enterprises [and thus perhaps about 1,500 enterprises in Tyne & Wear. This is under 1-in-10 enterprises]. The use of sampling introduces a degree of volatility in the estimates. Information is gathered at the 'reporting unit' level. Using the Inter-departmental Business Register (IDBR) responses are apportioned to 'local units' by modelling. The sample is stratified by industry, using SIC92¹⁵ and by six size bands. The largest size band (250 or more employees) is completely surveyed; enterprises in lower bands are sampled. As the survey is compulsory its response rate is close to 100% for the largest employers (who make up the bulk of the statistical data) and overall the survey achieves a response rate of around 85%.

The main strength of the ABI is its coverage; i) it covers all large enterprises and ii) it covers about 90% of people in employment, iii) the ABI improves on the AES partly by covering the whole of the UK, rather than just Great Britain. Whilst information is gathered for reporting units, local unit apportionment is possible. ONS acknowledges this apportionment is a process that could be improved.

In terms of measuring employment, the ABI is the best source for measuring jobs rather than persons in employment (which is better measured by the LFS) and is also the best source of industrial detail. (N.B. the ABI measures jobs, as some people have multiple jobs the ABI count is higher than the Census count).

The ABI's main exception is the self-employed, but special arrangements apply to agriculture (SIC industry sector A). ABI also excludes (domestic) jobs in private households, jobs in organisations not held on the IDBR, home workers, and jobs in non-UK businesses. The ABI data (here) is an amalgam of data for agriculture collected by DEFRA¹⁶ and data for the rest of the economy collected by the ABI.

Home workers on 'piece rates' should not be included in the ABI because they are neither employees nor 'other workers' but self-employed (more detail in Appendix 4)

¹³ N.B. Many of the points made in this introduction are presented in the ONS document *Review of Employment and Jobs*. This report from the National Statistics Quality Review Series was published in early 2006. It makes useful points about the strengths and weaknesses of the ABI, along with some solutions to weak points.

¹⁴ See TWRI's report *Employment in Tyne & Wear 1998* for a full discussion of the switch to ABI and discontinuity from AES.

¹⁵ From 2003 the ABI uses SIC 2003, this may give rise to discontinuities, although '(SIC) 2003...is quite similar to the 1992 SIC...the main change is that head offices are now classified to Division 74 whereas they used to be classified to the main activity of the business^{15'})

¹⁶ Also by the National Assembly of Wales and the Scottish Executive.

2 Overview of Employment Change in Tyne & Wear 1998-2003

Tyne & Wear's workplace employees numbered 475,100 in 2003 (see Table 1). This is a growth of almost 34,000 in the five years to 2003. This growth is reasonably corroborated by the LFS, which found workplace-based employee growth of 42,000, or 10.1% in the four years to spring 2004 and resident-based employee growth of 21,000, or 5.2% between 1998 and 2003 (see Appendix 1). North East employment grew by 65,400 over the period 1998-2003, with over half (52%) of this growth occurring in Tyne & Wear.

Table 1: Employment Change 1998-2003 GB, NE, T&W and T&W Districts

	1998	1999	2000	2001	2002	2003	Change 1998-03	% Change	Annual Average Growth
Great Britain	24,355,000	24,827,400	25,225,700	25,490,300	25,593,800	25,710,600	1,355,600	5.6%	1.1%
North East	945,700	968,600	961,400	978,100	1,000,400	1,011,100	65,400	6.9%	1.4%
Tyne & Wear	441,300	461,400	458,200	461,300	478,100	475,100	33,800	7.7%	1.5%
Gateshead	80,000	91,700	84,800	83,900	90,800	95,000	15,000	18.8%	3.8%
Newcastle	149,000	155,100	160,700	164,600	171,900	165,700	16,700	11.2%	2.2%
North Tyneside	60,100	58,800	61,000	61,600	64,600	62,800	2,700	4.5%	0.9%
South Tyneside	44,400	44,800	43,700	42,500	40,700	40,500	-3,900	-8.8%	-1.8%
Sunderland	107,600	110,800	107,600	108,400	109,900	110,800	3,200	3.0%	0.6%

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

At 7.7%, Tyne & Wear's employment growth was faster than the North East's (6.9%) and over two percentage points faster than Great Britain's (5.6%). Furthermore, annual average (compound) growth between 1998 and 2003 in Tyne & Wear was 1.5%, compared to 1.4% in the North East and 1.1% in Great Britain.

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

Compared to the three other sub-regions of the North East, employment growth in Tyne & Wear between 1998 and 2003 (7.7%) was greater than that recorded in Northumberland (-1.8%) and County Durham (6.8%). Tees Valley was the only sub-region where employment increased faster than in Tyne & Wear (up 9.4%, from 243,600 in 1998 to 266,500 in 2003).

Within Tyne & Wear itself, employment growth between 1998 and 2003 was led by Gateshead (+15,000, 18.8%)¹⁷ and Newcastle (+16,700, 11.2%) at 2.5 times and 1.5 times the Tyne & Wear rate respectively. Conversely, growth was very modest in North Tyneside (+2,700, 4.5%) and Sunderland (+3,200, 3.0%). South Tyneside was the only district to experience a fall in employee jobs over the period (down -3,900 or -8.8%).

Strong average annual (compound) growth rates in Gateshead (3.8% pa) and Newcastle (2.2% pa), contrast with those in North Tyneside (0.9% pa) and Sunderland (0.6%); all of which compare favourably with that in South Tyneside (-1.8%).

Despite relatively strong growth over the period 1998-2003, [reported]¹⁸ employment 'growth' was negative in 2003, actually falling slightly in Tyne & Wear (-0.5%) mainly due to large falls in Newcastle (down 6,200 or -3.6%). Growth nationally was also relatively weak (+0.5%).

¹⁷ Caution: the rapid reported gain in Gateshead is probably inflated by an error of omission in 1998 from public service employment. This could reduce actual growth in Gateshead to around 12%.

¹⁸ TWRI believes, actually, there was no fall in employment in 2003. There was no corroboration in the press reports (held in TWRI's Job Change Database).

3 EMPLOYMENT CHANGE IN TYNE & WEAR BY BROAD INDUSTRY

3.1 All People

Employment growth in public services¹⁹ accounted for 97% of net employment growth in Tyne & Wear between 1998 and 2003. Of the 34,000 net employee growth, 32,000 were in public services (see Table 2). This means:

- 'Health & Social Work' (up 12,500, +23.4%, or +4.3%p.a.)
- 'Education' (up 11,900, +31.1%, or +5.6%p.a.)
- 'Public Administration and Defence' (up 8,300, +25.2%, or 4.6%p.a.)

In the North East, public service employment (PSE hereafter, defined in the same way) rose by 58,300, accounting for 88% of net employment growth. In Great Britain, PSE rose by over 0.9m between 1998 and 2003, accounting for 69% of the net employment growth. The single largest numerical increases in employment in both Tyne & Wear and the North East were in PSE ('Health and Social Work' in Tyne & Wear and 'Education' in the North East, up 28,600, or 36.0%), significantly, in GB, this was not the case. By contrast, in GB, the largest numerical rise was in 'Business Services'²⁰ (up 495,500, or 14.2%).

Employee growth in the private sector in Tyne & Wear was mainly in 'Business Services' (up 8,100, or 15.5%) and 'Wholesale & Retail' (up 6,300, or 8.6%). Of the 'Wholesale & Retail' employment growth, however, nine-tenths was part-time (see §3.5).

The largest fall in employment in Tyne & Wear recorded between 1998 and 2003 was in 'Manufacturing' (down 19,500 or -24.3%). The greatest falls recorded in employment in both the North East and GB were also in 'Manufacturing', corresponding with the trend in employment change in Tyne & Wear. Manufacturing employment in the North East and Great Britain fell at a similar but slightly slower rate (down 40,300 or -21.6% and down 810,000 or -20.1% respectively). Half of the North East's fall in manufacturing employment occurred in Tyne & Wear. This is consistent with slightly faster re-structuring away from manufacturing than in the rest of the region (possibly partly due to the decline in offshore engineering).

Other industries where employee jobs fell significantly in Tyne & Wear were [oddly] 'Hotels & Restaurants' (down 2,800 or -10.2%) and 'Construction' (down 2,000, or -8.7%).

¹⁹ Technically in Standard Industrial Classification 92's sections L, M and N which are respectively Public Admin., Education, and Health & Social Services.

²⁰ 'Business Services' is the abbreviation used in this report for SIC classification 'K' 'Real Estate, Renting & Business Activities'

Table 2: Changes by Industry 1998-2003 - All People, GB, NE, T&W

		1998	1999	2000	2001	2002	2003	Change 1998-03	% change	Annual Average Growth
Great Britain										
A	Agriculture, hunting & forestry	266,000	251,400	235,400	235,600	230,000	218,900	-47,100	-17.7%	-3.8%
B	Fishing	12,500	10,800	8,500	10,200	6,600	7,000	-5,500	-44.4%	-11.1%
C	Mining & Quarrying	73,200	69,500	71,500	68,100	60,500	57,000	-16,200	-22.1%	-4.9%
D	Manufacturing	4,039,500	3,917,400	3,782,100	3,596,600	3,413,800	3,229,500	-810,000	-20.1%	-4.4%
E	Electricity, gas & water supply	132,300	118,300	130,200	133,800	125,100	114,900	-17,400	-13.1%	-2.8%
F	Construction	1,108,000	1,130,600	1,129,700	1,156,200	1,163,200	1,137,900	29,900	2.7%	0.5%
G	Wholesale, retail	4,343,500	4,363,900	4,460,200	4,545,300	4,597,700	4,595,200	251,700	5.8%	1.1%
H	Hotels and restaurants	1,563,900	1,605,500	1,611,000	1,656,000	1,707,900	1,737,400	173,500	11.1%	2.1%
I	Transport, storage and com.	1,412,300	1,484,500	1,534,200	1,555,300	1,558,800	1,541,500	129,200	9.1%	1.8%
J	Financial intermediation	1,031,600	1,075,600	1,062,600	1,105,100	1,100,800	1,072,500	40,900	4.0%	0.8%
K	Business Services	3,486,500	3,643,200	3,887,300	3,909,800	3,912,400	3,982,000	495,500	14.2%	2.7%
L	Public administration	1,366,000	1,344,500	1,342,500	1,308,600	1,334,200	1,411,900	45,900	3.4%	0.7%
M	Education	1,861,200	2,017,800	2,072,500	2,141,100	2,233,500	2,322,000	460,800	24.8%	4.5%
N	Health and social work	2,519,800	2,563,800	2,634,100	2,741,600	2,803,500	2,946,900	427,100	16.9%	3.2%
O	Other services	1,138,900	1,230,400	1,263,800	1,326,800	1,345,600	1,336,200	197,300	17.3%	3.2%
	Total	24,355,200	24,827,200	25,225,600	25,490,100	25,593,600	25,710,800	1,355,600	5.6%	1.1%
North East										
A	Agriculture, hunting & forestry	5,500	5,200	4,800	5,200	5,200	4,600	-900	-16.3%	-3.5%
B	Fishing	200	500	200	400	100	100	-100	-69.3%	-21.0%
C	Mining & Quarrying	3,300	3,400	3,500	3,500	2,900	3,600	300	8.0%	1.6%
D	Manufacturing	186,700	173,200	169,400	160,200	158,300	146,400	-40,300	-21.6%	-4.7%
E	Electricity, gas & water supply	5,700	6,100	7,400	5,500	7,100	7,300	1,600	27.7%	5.0%
F	Construction	51,700	56,400	55,800	56,800	54,400	53,200	1,500	2.8%	0.5%
G	Wholesale, retail	151,500	158,800	156,300	153,400	163,300	161,500	10,000	6.6%	1.3%
H	Hotels and restaurants	60,300	66,100	58,800	62,600	62,900	63,300	3,000	4.9%	1.0%
I	Transport, storage and com.	45,300	45,500	47,400	53,600	53,600	51,300	6,000	13.3%	2.5%
J	Financial intermediation	20,900	20,200	20,700	23,100	23,100	23,300	2,400	11.4%	2.2%
K	Business Services	98,800	92,300	100,400	107,600	111,800	116,500	17,700	17.9%	3.4%
L	Public administration	68,300	77,800	69,200	68,600	73,300	76,800	8,500	12.3%	2.4%
M	Education	79,300	84,200	87,100	90,700	101,500	107,900	28,600	36.0%	6.3%
N	Health and social work	118,000	126,300	128,100	132,400	129,300	139,200	21,200	18.0%	3.4%
O	Other services	50,200	52,500	52,500	54,600	53,700	56,300	6,100	12.2%	2.3%
	Total	945,700	968,500	961,600	978,200	1,000,500	1,011,300	65,600	6.9%	1.3%
Tyne & Wear										
A, B, C, E	Primary & Utilities	3,400	3,900	4,300	3,200	4,100	4,800	1,300	39.4%	7.9%
D	Manufacturing	80,300	74,100	73,200	67,600	67,300	60,800	-19,500	-24.3%	-5.4%
F	Construction	23,000	24,700	23,600	24,200	24,200	21,000	-2,000	-8.7%	-1.8%
G	Wholesale, retail	72,900	79,200	78,600	75,300	77,900	79,200	6,300	8.6%	1.7%
H	Hotels and restaurants	27,000	28,500	27,100	26,800	26,600	24,200	-2,800	-10.2%	-2.1%
I	Transport, storage and com.	21,700	22,500	23,400	25,500	26,300	25,600	3,900	17.9%	3.3%
J	Financial intermediation	12,000	11,200	12,200	14,000	14,000	13,900	1,900	15.5%	2.9%
K	Business Services	52,300	51,000	53,700	63,100	64,200	60,400	8,100	15.5%	2.9%
L	Public administration	33,100	41,700	37,500	35,900	41,800	41,400	8,300	25.2%	4.6%
M	Education	38,300	39,700	36,900	38,300	45,700	50,200	11,900	31.1%	5.6%
N	Health and social work	53,100	56,100	59,500	62,700	60,300	65,600	12,500	23.4%	4.3%
O	Other services	24,200	28,700	28,100	24,700	25,700	28,100	3,900	16.3%	3.1%
	Total	441,300	461,300	458,100	461,300	478,100	475,200	33,800	7.7%	1.5%

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity, gas & water supply)

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

3.2 Men's Employment

Men's net employment growth in Tyne & Wear was 16,300 or 7.4% between 1998 and 2003, compared with 6.7% growth in the North East and 5.1% growth in GB over the same period (Table 3).

Table 3: Changes by Industry 1998-2003 - Men, GB, NE, T&W

	1998	1999	2000	2001	2002	2003	Change 1998-03	% change	Annual Average Growth	
Great Britain										
A	Agriculture, hunting & forestry	186,800	178,200	165,500	162,400	159,600	151,700	-35,100	-18.8%	-4.1%
B	Fishing	10,100	9,000	6,800	8,700	5,600	5,800	-4,300	-42.6%	-10.5%
C	Mining & Quarrying	64,700	61,200	62,800	58,900	53,000	50,700	-14,000	-21.6%	-4.8%
D	Manufacturing	2,899,000	2,812,200	2,739,700	2,624,400	2,518,400	2,389,000	-510,000	-17.6%	-3.8%
E	Electricity, gas & water supply	89,000	94,100	87,800	100,300	88,500	83,400	-5,600	-6.4%	-1.3%
F	Construction	937,600	967,000	961,400	989,900	1,001,900	974,900	37,300	4.0%	0.8%
G	Wholesale, retail	2,071,300	2,052,400	2,113,200	2,190,000	2,228,500	2,233,900	162,600	7.8%	1.5%
H	Hotels and restaurants	623,800	646,900	654,600	688,300	723,200	750,000	126,200	20.2%	3.8%
I	Transport, storage and com.	1,034,800	1,081,200	1,111,000	1,132,700	1,114,800	1,138,400	103,600	10.0%	1.9%
J	Financial intermediation	499,100	520,900	487,700	523,300	528,900	488,900	-10,200	-2.0%	-0.4%
K	Business Services	1,798,000	1,924,700	2,050,600	2,115,100	2,100,900	2,173,300	375,400	20.9%	3.9%
L	Public administration	586,500	646,200	677,500	658,900	700,900	698,500	112,000	19.1%	3.6%
M	Education	567,000	553,500	610,600	609,900	627,200	650,500	83,500	14.7%	2.8%
N	Health and social work	419,300	459,200	449,200	488,500	488,900	531,600	112,400	26.8%	4.9%
O	Other services	552,200	580,700	623,500	649,200	650,700	651,500	99,300	18.0%	3.4%
	Total	12,339,200	12,587,300	12,801,900	13,000,600	12,990,900	12,972,200	633,000	5.1%	1.0%
North East										
A	Agriculture, hunting & forestry	4,300	4,200	3,700	4,000	4,000	3,500	-800	-17.9%	-3.9%
B	Fishing	100	400	100	200	100	100	-100	-50.0%	-12.9%
C	Mining & Quarrying	3,100	3,100	3,300	3,200	2,700	3,300	200	5.1%	1.0%
D	Manufacturing	137,200	127,300	128,500	121,400	124,200	114,800	-22,400	-16.3%	-3.5%
E	Electricity, gas & water supply	4,000	5,100	5,500	4,400	5,500	5,800	1,800	43.9%	7.6%
F	Construction	44,000	48,400	47,600	50,400	49,000	47,000	3,100	7.0%	1.4%
G	Wholesale, retail	66,700	66,900	65,700	67,400	73,600	74,300	7,600	11.3%	2.2%
H	Hotels and restaurants	21,700	23,700	21,800	22,200	24,100	25,800	4,100	19.0%	3.5%
I	Transport, storage and com.	33,600	34,300	35,000	38,400	36,500	37,700	4,200	12.4%	2.4%
J	Financial intermediation	9,100	8,700	8,300	10,100	10,500	9,500	400	4.5%	0.9%
K	Business Services	53,100	49,700	51,500	63,000	60,500	62,900	9,800	18.4%	3.4%
L	Public administration	28,200	34,400	34,100	33,300	38,900	35,800	7,600	26.9%	4.9%
M	Education	25,400	23,400	24,800	25,800	29,400	32,600	7,100	28.1%	5.1%
N	Health and social work	20,800	22,000	22,500	23,500	23,200	25,100	4,300	20.6%	3.8%
O	Other services	21,300	21,400	26,100	27,700	25,100	26,100	4,800	22.5%	4.1%
	Total	472,600	473,100	478,400	495,000	507,500	504,200	31,600	6.7%	1.3%
Tyne & Wear										
A, B, C, E	Primary & Utilities	2,300	3,000	3,000	2,200	2,800	3,800	1,500	66.4%	10.6%
D	Manufacturing	59,700	55,800	56,500	51,900	53,900	48,200	-11,500	-19.2%	-4.2%
F	Construction	20,200	20,300	19,400	21,100	21,700	18,700	-1,500	-7.5%	-1.5%
G	Wholesale, retail	33,300	33,800	33,600	33,300	35,600	37,500	4,200	12.6%	2.4%
H	Hotels and restaurants	10,800	11,900	11,000	11,300	10,900	12,000	1,100	10.6%	2.0%
I	Transport, storage and com.	15,500	16,200	17,000	17,700	17,600	18,600	3,100	20.2%	3.7%
J	Financial intermediation	5,200	4,800	5,100	6,300	6,600	6,000	700	14.4%	2.7%
K	Business Services	29,100	27,100	26,400	36,500	33,600	31,900	2,800	9.7%	1.9%
L	Public administration	13,000	17,500	16,500	15,700	21,000	17,600	4,700	36.3%	6.4%
M	Education	12,300	12,200	11,800	12,000	14,500	17,000	4,700	38.0%	6.7%
N	Health and social work	9,400	10,200	10,100	11,500	11,200	12,100	2,700	28.8%	5.2%
O	Other services	10,600	11,000	14,800	12,500	13,500	14,300	3,700	34.9%	6.2%
	Total	221,200	223,800	225,300	232,000	242,900	237,500	16,300	7.4%	1.4%

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity, gas & water supply)

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

The largest gains in men's employment in Tyne & Wear were in 'Public Administration & Defence' (up 4,700 or 36.3%) and in 'Education' (up 4,700 or 38.0%). The largest private sector gains in men's employment in Tyne & Wear were in 'Wholesale & Retail' (up 4,200, or 12.6%).

Men's employment change in Tyne & Wear contrasts with trends in the North East and GB, where the largest gains between 1998 and 2003 were in 'Business Services' (up 9,800, or 18.4% in the North East and up 375,400, or 20.9% in GB). [Hence Tyne & Wear men's 'Business Services' rate of growth was about half that of the NE and GB (at 9.7%; NE and GB 18-20%)].

The biggest losses in men's employment in Tyne & Wear were in 'Manufacturing' (down 11,500, or -19.2%). This corresponds with changes taking place at a regional and national level. In both the North East and GB, men's employment decline was greatest in manufacturing (down 22,400 or -16.3% and 510,000 or -17.6% respectively).

3.3 Women's Employment

Women's net employment growth in Tyne & Wear was 17,600 or 8.1% between 1998 and 2003 (Table 4). Women's employment growth in Tyne & Wear was over 0.7pp greater than men's employment growth over the same period. Furthermore, Tyne & Wear compares favourably with both North East and GB women's employment growth rates (7.2% and 6.2% respectively). [This may reflect the public sector's dominance of Tyne & Wear employment growth].

Table 4: Changes by Industry 1998-2003 - Women, GB, NE, T&W

	1998	1999	2000	2001	2002	2003	Change 1998-03	% change	Annual Average Growth	
Great Britain										
A	Agriculture, hunting & forestry	79,200	73,200	69,800	73,100	70,400	67,100	-12,100	-15.2%	-3.3%
B	Fishing	2,400	1,700	1,700	1,600	1,000	1,200	-1,300	-51.7%	-13.5%
C	Mining & Quarrying	8,500	8,200	8,700	9,200	7,500	6,300	-2,200	-25.5%	-5.7%
D	Manufacturing	1,140,500	1,105,200	1,042,500	972,200	895,400	840,500	-300,000	-26.3%	-5.9%
E	Electricity, gas & water supply	43,200	24,200	42,400	33,500	36,700	31,500	-11,700	-27.1%	-6.1%
F	Construction	170,400	163,600	168,300	166,400	161,300	163,000	-7,400	-4.3%	-0.9%
G	Wholesale, retail	2,272,100	2,311,600	2,347,000	2,355,300	2,369,300	2,361,300	89,100	3.9%	0.8%
H	Hotels and restaurants	940,100	958,700	956,300	967,700	984,700	987,400	47,300	5.0%	1.0%
I	Transport, storage and com.	377,400	403,400	423,100	422,600	444,000	403,000	25,600	6.8%	1.3%
J	Financial intermediation	532,500	554,800	574,900	581,800	572,000	583,500	51,100	9.6%	1.8%
K	Business Services	1,688,500	1,718,500	1,836,700	1,794,700	1,811,600	1,808,700	120,200	7.1%	1.4%
L	Public administration	779,500	698,400	665,000	649,800	633,300	713,300	-66,200	-8.5%	-1.8%
M	Education	1,294,100	1,464,300	1,462,000	1,531,200	1,606,300	1,671,600	377,400	29.2%	5.3%
N	Health and social work	2,100,500	2,104,600	2,184,900	2,253,100	2,314,600	2,415,200	314,700	15.0%	2.8%
O	Other services	586,700	649,700	640,200	677,600	694,900	684,700	98,100	16.7%	3.1%
	Total	11,936,500	12,166,900	12,353,900	12,416,600	12,532,500	12,671,300	734,800	6.2%	1.2%
North East										
A	Agriculture, hunting & forestry	1,200	1,000	1,000	1,200	1,200	1,100	-100	-10.9%	-2.3%
B	Fishing	100	100	100	200	0	0	-100	-100.0%	-100.0%
C	Mining & Quarrying	200	400	200	300	200	300	100	61.0%	10.0%
D	Manufacturing	49,600	45,900	40,800	38,800	34,100	31,700	-17,900	-36.1%	-8.6%
E	Electricity, gas & water supply	1,700	900	2,000	1,100	1,600	1,600	-200	-9.9%	-2.1%
F	Construction	7,800	8,000	8,200	6,400	5,400	6,100	-1,600	-21.0%	-4.6%
G	Wholesale, retail	84,800	91,900	90,600	86,000	89,700	87,200	2,400	2.9%	0.6%
H	Hotels and restaurants	38,600	42,400	37,000	40,400	38,800	37,500	-1,100	-2.9%	-0.6%
I	Transport, storage and com.	11,700	11,200	12,400	15,200	17,100	13,600	1,900	16.1%	3.0%
J	Financial intermediation	11,800	11,500	12,400	13,000	12,600	13,800	2,000	16.8%	3.2%
K	Business Services	45,700	42,600	48,800	44,600	51,200	53,600	7,900	17.4%	3.3%
L	Public administration	40,100	43,400	35,100	35,200	34,400	41,000	800	2.1%	0.4%
M	Education	53,900	60,800	62,300	64,900	72,000	75,300	21,400	39.8%	6.9%
N	Health and social work	97,200	104,200	105,700	108,900	106,200	114,100	16,900	17.4%	3.3%
O	Other services	28,900	31,100	26,400	26,900	28,500	30,200	1,300	4.5%	0.9%
	Total	472,000	494,500	482,000	482,000	491,800	505,900	33,900	7.2%	1.4%
Tyne & Wear										
A, B, C, E	Primary & Utilities	800	600	1,000	600	900	900	100	14.2%	2.4%
D	Manufacturing	20,700	18,300	16,700	15,700	13,400	12,600	-8,100	-39.1%	-9.4%
F	Construction	2,800	4,400	4,100	3,100	2,500	2,300	-500	-17.4%	-3.8%
G	Wholesale, retail	39,600	45,400	44,900	42,000	42,300	41,700	2,100	5.3%	1.0%
H	Hotels and restaurants	16,100	16,600	16,100	15,500	15,700	12,200	-3,900	-24.2%	-5.4%
I	Transport, storage and com.	6,200	6,300	6,400	7,800	8,700	7,000	800	12.1%	2.3%
J	Financial intermediation	6,800	6,400	7,100	7,700	7,400	7,900	1,100	16.3%	3.1%
K	Business Services	23,200	24,000	27,200	26,600	30,600	28,500	5,300	22.8%	4.2%
L	Public administration	20,100	24,200	21,100	20,200	20,800	23,800	3,600	18.1%	3.4%
M	Education	26,000	27,500	25,200	26,300	31,200	33,200	7,200	27.8%	5.0%
N	Health and social work	43,700	45,900	49,400	51,200	49,200	53,500	9,700	22.2%	4.1%
O	Other services	13,600	17,700	13,300	12,200	12,200	13,900	300	1.9%	0.4%
	Total	218,900	236,700	231,600	228,300	233,900	236,500	17,600	8.1%	1.6%

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity, gas & water supply)

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

The biggest gains in women's employment in Tyne & Wear between 1998 and 2003 were in 'Health & Social Care' (up 9,700 or 22.2%) and in 'Education' (up 7,200 or 27.8%). This corresponds with trends at a national and regional level, where both 'Education' and 'Health & Social Care' dominate employment growth ('Education' up 29.2% in GB and 39.8% in NE and 'Health' up 15.0% in GB and 17.4% in NE).

In Business Services, employment taken by women rose twice as fast (up 22.8%) as for men (up 9.7%). This is the almost perfect opposite of GB, where men increased employment by 20.9% and women 7.1%. (Note: some of the reported rise in Business Services may be due to the re-classification of HQs to SIC 74.)

The biggest losses in women's employment in Tyne & Wear between 1998 and 2003 were in 'Manufacturing' (down 8,100 or -39.1%) followed by 'Hotels & Restaurants' (down 3,900 or -24.2%). The dominance of manufacturing in women's employment decline in Tyne & Wear is replicated in the

North East (down 17,900, or -36.1%) and in GB (down 300,000, or -26.3%) and corresponds with changes in men's employment also.

3.4 Full-time employment

Full-time employment increased by 5.5% over the period 1998-2003 (see Table 5). This is nearly double the rate of increase in Great Britain (2.6%). Full-time employment grew in all industries in Tyne & Wear apart from 'Manufacturing' (down 24.2%), 'Construction' (down 6.8%) and 'Hotels & Restaurants' (down 4.3%).

Table 5: Changes in Full-Time employment by Industry in Tyne & Wear, 1998-2003

		1998	2003	Change 1998-03	T&W % change	GB % change
A, B, C & E	Primary & Utilities	3,000	4,500	1,500	50.5	-17.3
D	Manufacturing	75,900	57,500	-18,400	-24.2	-20.4
F	Construction	21,800	20,300	-1,500	-6.8	5.5
G	Wholesale, retail	42,000	42,600	600	1.6	0.0
H	Hotels and restaurants	10,400	9,900	-500	-4.3	17.1
I	Transport, storage and communication	19,200	22,400	3,200	17.0	8.0
J	Financial intermediation	10,100	10,800	700	6.6	-2.5
K	Real estate, renting and business activities	38,600	44,400	5,800	15.0	15.8
L	Public administration	24,300	31,900	7,600	31.5	9.4
M	Education	21,400	30,000	8,600	40.0	16.9
N	Health and social work	27,400	34,900	7,500	27.5	21.3
O	Other services	13,400	15,000	1,600	12.0	14.4
	Total	307,300	324,300	17,000	5.5	2.6

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity, gas and water supply)

Source: ABI on Nomisweb (figures rounded for T&W for 1998-03, percentage change figures unrounded, columns may not sum due to rounding)

There was rapid growth in full-time employment in the public sector in Tyne & Wear, almost double that recorded in GB. Employment increased by 40.0% in 'Education', by 31.5% in 'Public Administration' and by 27.5% in 'Health & Social Work'.

The strongest private sector growth in full-time employment was recorded in 'Business Services' (SIC K) where employees rose by 5,800 or 15.0%. This rate of increase was almost exactly the same as that recorded for GB (15.8%).

Full-time employment in the 'Primary & Utilities' rose by 50.5% (1,500) in Tyne & Wear [perhaps due to call centres]²¹. This contrasts with trends in GB, where employment in these sectors fell by 17.3%. Conversely, where full-time employment fell 4.3% in Tyne & Wear in 'Hotels & Restaurants', it rose in GB (up 17.1%).

²¹ TWRI's JCD recorded two sizeable gains in call centre/customer service employment logged as 'Production/distribution of energy'. This included the creation of 120 jobs by London Electricity Customer Services at Doxford Park in Sunderland and the creation of 200 jobs by Northern Electric at its call centre in Team Valley, Gateshead.

3.5 Part-time employment

Part-time employment increased by 12.7% over the period 1998-2003 in Tyne & Wear (see Table 6). This was slightly higher than the rate of growth in GB (12.5%) and twice the rate of growth in full-time employment in Tyne & Wear.

Table 6: Changes in Part-Time employment by Industry in Tyne & Wear, 1998-2003

		1998	2003	Change 1998-03	T&W % change	GB % change
A, B, C & E	Primary & Utilities	100	200	100	88.3	-21.2
D	Manufacturing	4,400	3,200	-1,200	-27.4	-15.3
F	Construction	1,300	700	-600	-42.0	-23.2
G	Wholesale, retail	30,900	36,600	5,700	18.2	14.5
H	Hotels and restaurants	16,600	14,300	-2,300	-13.9	7.0
I	Transport, storage and communication	2,500	3,100	600	24.3	16.6
J	Financial intermediation	1,900	3,100	1,200	63.2	51.5
K	Real estate, renting and business activities	13,600	15,900	2,300	16.8	9.9
L	Public administration	8,800	9,500	700	7.9	-15.3
M	Education	16,900	20,200	3,300	19.9	34.1
N	Health and social work	25,800	30,700	4,900	19.0	12.6
O	Other services	10,800	13,100	2,300	21.6	21.9
	Total	133,600	150,600	17,000	12.7	12.5

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity, gas and water supply)

Source: ABI on Nomisweb (figures rounded for T&W for 1998-03, percentage change figures unrounded, columns may not sum due to rounding)

As was the trend with full-time employment, part-time employment grew in all industries except for 'Manufacturing' (down 27.4%), 'Construction' (down 42.0%) and 'Hotels & Restaurants' [oddly] (down 13.9%).

Part-time PSE grew overall by 8,900 or 17.3% between 1998 and 2003. In particular, there were large increases in part-time employment in 'Education' (up 3,300 or 19.9%) and 'Health & Social Work' (up 4,900 or 19.0%). While part-time employment growth in 'Education' in Tyne & Wear was 14.2 percentage points below the change recorded in GB; growth in 'Health & Social Work' was actually 6.4pp higher in Tyne & Wear than in GB.

Part-time employment growth in the private sector was particularly strong in Tyne & Wear compared to GB. Employment in 'Wholesale & Retail' increased by 5,700 or 18.2%, compared to 14.5% in GB. Employment also rose in 'Business Services' (up 2,300 or 16.8%) and 'Financial Intermediation' (up 1,200 or 63.2%). This was 6.9 and 11.7 percentage points higher than the increase recorded in GB.

Part-time employment also rose in 'Primary & Utilities' in Tyne & Wear, up 100 or 88.3%. This contrasts with changes taking place at a national level, where part-time employment in this sector fell by 21.2%.

4 EMPLOYMENT CHANGE IN TYNE & WEAR BY SIC DIVISION (2-DIGIT)

The top three employment gains in Tyne & Wear by SIC division were all in the public services (see Table 7):

- SIC 85 'Health & Social Work' (up 12,400 or 23.4%)
- SIC 80 'Education' (up 11,900 or 31.1%)
- SIC 75 'Public Administration and defence' (up 8,300 or 25.2%)²²

Similarly, in the North East (Table 8) and GB (Table 9), both 'Education' and 'Health & Social Work' also formed the two highest employment gains:

- NE: 'Education' (up 28,600 or 36.0%) and 'Health & Social Work' (up 21,200 or 18.0%)
- GB: 'Education' (up 460,900 or 24.8%) and 'Health & Social Work' (up 427,100 or 16.9%)

Unlike in Tyne & Wear however, the gains in both the NE and GB in 'Public Administration and defence' were slower. Instead, the next largest numerical gains in employment were in the private sector, most notably, 'Other business activities' in the NE (up 11,300 or 15.0%) and in 'Retail trade' in GB (up 320,100 or 12.2%).

In Tyne & Wear the largest private sector employment gains in Tyne & Wear were in the following four SIC divisions:

- SIC 74 'Other business activities' (up 5,400 or 13.9%)
- SIC 52 'Retail trade' (up 5,300 or 10.5%)
- SIC 64 'Post and Telecommunications' (up 3,700 or 48.5%)
- SIC 92 'Recreational, Cultural and Sporting activities' (up 3,500 or 33.5%)

Notable percentage gains in employment in Tyne & Wear were in the following SIC divisions:

- SIC 41 'Collection, purification & distribution of water' (up 21850.0%) [unreliable].
- SIC 73 'Research and Development' (up over 100%)²³
- SIC 62 'Air transport' (up over 100%)

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

- SIC 18 'Manufacture of apparel' (down 3,900 or -83.6%) [This confirms the collapse of the clothing industry which occurred particularly in 1998/99. Barbour, in South Tyneside, is probably the main firm left.]²⁴
- SIC 32 'Manufacture of radio, t.v and communications equip.' (down 3,600 or -74.6%) [includes the loss of Onwa and LG Philips.]²⁵
- SIC 55 'Hotels & Restaurants' (down 2,800 or -10.2%) [possibly pubs or clubs]
- SIC 31 'Manufacture of other electrical machinery' (down 2,800 or -41.3%)

²² Caution: This figure is possibly too high as it includes a possible error in the ABI overstating Public Administration employment growth in Gateshead.

²³ Gains in R&D employment as logged in TWRI's JCD include Procter & Gamble (200 jobs created at Cobalt Business Park in 2000); XCellsyz (20 jobs in 2003 at the Centre for Life); NA Consultancy (15 jobs in 2003) and Onyx Scientific (120 jobs in 2003).

²⁴ TWRI's JCD recorded over 1,900 job losses in the 'Textile Industry' and 'Footwear/clothing industries' between 1998 and 2003. Some of the major losses were Courtaulds Textiles in Newcastle and North Tyneside, Textilion in North Tyneside and Berghaus in Washington. Worst hit was Sunderland, where over 1,300 job losses were recorded including Berghaus (200), JPS (200), Courtaulds Textiles (220), William Baird (268) and Dewhirst (770). The only significant gains were Berghaus and Barbour in South Tyneside, where over 40 job gains were recorded for each firm between 1998 and 2003.

²⁵ TWRI's JCD logged major losses for LG Electronics/LG Philips in Washington (514 between 1998 and 2003) and for Onwa in South Shields (95 between 1998 and 2003).

Similarly, in both the North East and GB, the two greatest numerical falls in employment were both in manufacturing:

- NE: 'Manufacture of apparel' (down 9,300 or -81.5%) and 'Manufacture of other machinery' (down 5,300 or -26.4%)
- GB: 'Manufacture of other machinery' (down 101,800 or -26.6%) and 'Manufacture of apparel.' (down 88,100 or -64.4%)

Table 7: Employment Structure in Tyne & Wear, 1998-2003, by 2-digit SIC

Division Description	1998	1999	2000	2001	2002	2003	Change 1998-03	% change
01 : Agriculture, hunting etc	300	300	400	400	400	300	0	0.3%
02 : Forestry, logging etc								
05 : Fishing, operation of fish hatcheries/farms	0	100	0	100	0	0	0	-67.4%
10 : Mining of coal/lignite, extraction of peat								
11 : Extraction of crude petroleum and natural gas								
12 : Mining of uranium and thorium ores	0	0	0	0	0	0	0	0.0%
13 : Mining of metal ores	0	0	0	0	0	0	0	0.0%
14 : Other mining and quarry				200	100		300	191.4%
15 : Manuf. of food and beverages	7,500	7,000	7,200	7,000	6,500	6,100	-1,300	-17.5%
16 : Manuf. of tobacco products	0	0	0	0	0		0	0.0%
17 : Manuf. of textiles	800	700	700	1,000	900	700	-100	-12.4%
18 : Manuf. apparel; dressing/dyeing of fur	4,600	2,600	2,400	2,200	1,500	800	-3,900	-83.6%
19 : Tanning/dressing of leather etc								
20 : Manuf. of wood and products of wood/cork	1,200	1,100	1,100	1,400	900	700	-400	-37.0%
21 : Manuf. of pulp, paper and paper products	2,900	2,800	2,600	2,500	2,400	2,400	-500	-18.2%
22 : Publishing, printing, reprod. of recorded media	5,200	4,900	5,000	6,100	5,600	4,800	-400	-8.2%
23 : Manuf. of coke, refined petroleum products								
24 : Manuf. of chemicals and chemical products	3,300	2,600	3,000	2,800	3,200	3,600	300	7.8%
25 : Manuf. of rubber and plastic products	4,500	4,800	4,600	3,800	4,700	3,900	-600	-12.6%
26 : Manuf. of other non-metallic mineral products	2,600	2,600	2,500	2,300	2,400	2,000	-500	-20.4%
27 : Manuf. basic metals	2,000	1,600	1,800	1,400	1,600	1,500	-500	-25.7%
28 : Manuf. of fabricated metal products	6,800	7,900	7,700	6,000	7,000	6,800	0	0.1%
29 : Manuf. of other machinery and equipment	9,800	7,700	8,700	7,700	8,200	7,300	-2,500	-25.3%
30 : Manuf. of office machinery and computers	300	400	200	100	100	100	-100	-44.8%
31 : Manuf. of other electrical machinery	6,700	6,400	5,400	4,400	4,300	3,900	-2,800	-41.3%
32 : Manuf. of radio, t.v. and communic. equip.	4,800	4,500	3,600	1,000	1,500	1,200	-3,600	-74.6%
33 : Manuf. of medical instruments	1,600	1,700	1,400	1,100	1,100	1,000	-600	-37.9%
34 : Manuf. of motor vehicles, trailers etc	7,400	8,400	8,300	9,100	8,800	8,000	600	8.0%
35 : Manuf. of transport equipment	3,700	2,100	1,700	2,100	2,000	2,000	-1,800	-47.2%
36 : Manuf. of furniture; other	4,300	4,100	4,700	5,400	4,000	3,400	-900	-21.9%
37 : Recycling	200			300	300	300	100	67.2%
40 : Electricity, gas, steam and hot water supply								
41 : Collection, purification and distribution of water								
45 : Construction	23,000	24,700	23,600	24,200	24,200	21,000	-2,000	-8.7%
50 : Sale, maintenance and repair of motor vehicles	9,800	9,100	8,000	8,400	8,100	9,800	0	0.3%
51 : Wholesale and commission trade	12,700	16,400	16,600	15,400	15,500	13,600	900	7.4%
52 : Retail trade, except of motor vehicles	50,500	53,700	54,000	51,500	54,300	55,800	5,300	10.5%
55 : Hotels and restaurants	27,000	28,500	27,100	26,800	26,600	24,200	-2,800	-10.2%
60 : Land transport; transport via pipelines	6,900	7,000	7,200	7,000	6,100	7,800	900	13.2%
61 : Water transport								
62 : Air transport								
63 : Supporting transport activities; travel agencies	6,600	5,000	4,800	4,700	4,900	5,300	-1,300	-19.9%
64 : Post and telecommunications	7,600	9,000	10,000	12,100	13,700	11,300	3,700	48.5%
65 : Financial intermediation	7,500	7,100	7,400	9,400	10,100	9,900	2,400	31.7%
66 : Insurance and pension funding, etc	2,800	2,400	3,100	3,100	2,200	2,300	-400	-15.8%
67 : Activities auxiliary to financial intermediation	1,600	1,700	1,700	1,500	1,600	1,500	-100	-6.1%
70 : Real estate activities	5,400	4,700	5,100	6,700	6,900	6,100	700	12.6%
71 : Renting of machinery and equipment	2,400	2,600	2,600	2,800	2,300	2,000	-400	-15.4%
72 : Computer and related activities	4,800	4,500	5,300	7,200	7,300	6,400	1,600	32.6%
73 : Research and development								
74 : Other business activities	39,100	38,500	39,700	45,700	46,200	44,500	5,400	13.9%
75 : Public administration and defence etc	33,100	41,700	37,500	35,900	41,800	41,400	8,300	25.2%
80 : Education	38,300	39,700	36,900	38,300	45,700	50,200	11,900	31.1%
85 : Health and social work	53,100	56,100	59,500	62,700	60,300	65,600	12,400	23.4%
90 : Sewage/refuse disposal, sanitation etc	1,800	1,800	2,900	3,300	1,900	2,200	400	24.9%
91 : Other membership organisations	6,800	8,300	7,200	5,400	6,200	6,300	-400	-6.1%
92 : Recreational, cultural and sporting activities	10,300	11,800	12,100	11,300	12,900	13,800	3,500	33.5%
93 : Other service activities	5,400	6,700	5,900	4,800	4,700	5,800	500	8.6%
TOTAL	441,300	461,400	458,200	461,300	478,100	475,100	33,800	7.7%

Source: ABI (data rounded, percentage change based on unrounded figures. Where data is flagged, cells have been left blank to avoid disclosure)

Table 8: Employment Structure in NE, 1998-2003, by 2-digit SIC

Division Description	1998	1999	2000	2001	2002	2003	Change	
							1998-03	% change
01 : Agriculture, hunting etc	5,400	5,100	4,600	4,800	4,600	4,400	-1,000	-19.1%
02 : Forestry, logging etc	100	100	200	400	600	200	100	118.9%
05 : Fishing, operation of fish hatcheries/farms	200	500	200	400	100	100	-100	-69.3%
10 : Mining of coal/lignite, extraction of peat	1,400	1,100	1,000	1,000	800			
11 : Extraction of crude petroleum and natural gas								
12 : Mining of uranium and thorium ores	0	0	0	0	0	0	0	0.0%
13 : Mining of metal ores	0	0	0	0	0	0	0	0.0%
14 : Other mining and quarry	1,600	1,600	1,700	2,100	1,700	1,900	300	18.2%
15 : Manuf. of food and beverages	18,500	18,200	18,800	17,500	17,300	16,600	-1,800	-9.8%
16 : Manuf. of tobacco products								-75.8%
17 : Manuf. of textiles	3,200	3,700	3,200	3,200	2,600	2,500	-700	-22.1%
18 : Manuf.apparel; dressing/dyeing of fur	11,500	8,400	5,500	4,700	3,600	2,100	-9,300	-81.5%
19 : Tanning/dressing of leather etc	700	400						
20 : Manuf. of wood and products of wood/cork	3,600	4,100	3,900	4,000	3,700	3,800	100	4.0%
21 : Manuf. of pulp, paper and paper products	4,600	3,800	4,000	3,900	3,900	4,500	-200	-3.2%
22 : Publishing, printing, reprod. of recorded media	7,700	7,800	7,400	8,600	8,100	7,600	-100	-1.9%
23 : Manuf. of coke, refined petroleum products				600	700			
24 : Manuf. of chemicals and chemical products	18,400	16,100	16,200	16,000	16,400	14,100	-4,200	-23.0%
25 : Manuf. of rubber and plastic products	14,000	12,900	13,100	11,900	12,200	11,600	-2,400	-17.3%
26 : Manuf. of other non-metallic mineral products	5,100	4,700	4,900	4,600	4,700	4,400	-700	-13.5%
27 : Manuf. basic metals	9,800	8,900	9,000	7,300	8,600	7,900	-1,900	-19.1%
28 : Manuf. of fabricated metal products	18,800	19,600	18,800	15,100	16,800	16,300	-2,600	-13.7%
29 : Manuf. of other machinery and equipment	20,100	15,900	18,000	18,600	16,300	14,800	-5,300	-26.4%
30 : Manuf. of office machinery and computers	1,400	1,500	1,200	1,000	1,200	800	-700	-47.6%
31 : Manuf. of other electrical machinery	10,700	9,900	8,800	8,000	7,400	6,600	-4,200	-38.9%
32 : Manuf. of radio, t.v. and communic. equip.	7,200	6,700	6,100	3,100	3,800	3,100	-4,100	-56.7%
33 : Manuf. of medical instruments	3,400	2,900	3,100	3,000	3,400	2,900	-600	-16.3%
34 : Manuf. of motor vehicles, trailers etc	12,900	13,600	13,200	14,200	14,100	13,100	200	1.4%
35 : Manuf. of transport equipment	4,700	3,900	3,400	4,000	4,000	3,900	-800	-17.7%
36 : Manuf. of furniture; other	8,700	8,700	8,800	9,100	8,100	8,300	-400	-4.8%
37 : Recycling	400	600	600	800	800	900	600	150.4%
40 : Electricity, gas, steam and hot water supply	5,100	5,200	6,700	4,600	5,800	5,600	600	11.0%
41 : Collection, purification and distribution of water		900	700	800	1,200	1,700		
45 : Construction	51,700	56,400	55,800	56,800	54,400	53,200	1,400	2.8%
50 : Sale, maintenance and repair of motor vehicles	20,000	18,600	17,900	19,000	18,300	22,100	2,100	10.7%
51 : Wholesale and commission trade	26,600	30,500	28,100	27,400	29,800	27,500	900	3.3%
52 : Retail trade, except of motor vehicles	104,900	109,800	110,300	106,900	115,300	111,900	7,000	6.7%
55 : Hotels and restaurants	60,300	66,100	58,800	62,600	62,900	63,300	3,000	4.9%
60 : Land transport; transport via pipelines	20,000	19,200	19,300	19,200	16,700	18,900	-1,100	-5.4%
61 : Water transport	300	200	200	300	200	200	-100	-37.7%
62 : Air transport	500	1,500	1,500	1,700	1,500	1,200	700	145.3%
63 : Supporting transport activities; travel agencies	9,300	8,500	9,000	8,900	9,200	9,400	100	0.5%
64 : Post and telecommunications	15,200	16,000	17,400	23,500	25,900	21,600	6,500	42.6%
65 : Financial intermediation	13,800	13,400	13,000	15,400	16,300	16,300	2,600	18.7%
66 : Insurance and pension funding, etc	4,300	3,900	4,600	4,400	3,800	3,600	-700	-16.8%
67 : Activities auxiliary to financial intermediation	2,800	2,900	3,100	3,400	3,000	3,400	500	18.8%
70 : Real estate activities	9,600	7,800	9,200	10,700	11,800	11,900	2,200	23.2%
71 : Renting of machinery and equipment	5,200	5,200	5,500	5,600	4,900	4,900	-300	-6.0%
72 : Computer and related activities	7,700	7,300	9,800	12,000	12,300	11,500	3,800	49.9%
73 : Research and development	1,300	1,400	1,600	1,500	2,300	2,000	700	52.1%
74 : Other business activities	75,000	70,500	74,300	77,700	80,500	86,300	11,300	15.0%
75 : Public administration and defence etc	68,300	77,800	69,200	68,600	73,300	76,800	8,400	12.3%
80 : Education	79,300	84,200	87,100	90,700	101,500	107,900	28,600	36.0%
85 : Health and social work	118,000	126,300	128,100	132,400	129,300	139,200	21,200	18.0%
90 : Sewage/refuse disposal, sanitation etc	4,200	3,900	6,100	12,100	4,200	5,200	1,000	23.5%
91 : Other membership organisations	13,600	14,100	13,000	10,800	12,700	12,400	-1,200	-8.9%
92 : Recreational, cultural and sporting activities	20,900	22,300	22,100	21,500	25,300	26,400	5,500	26.3%
93 : Other service activities	11,500	12,100	11,300	10,100	11,400	12,300	800	7.2%
TOTAL	945,700	968,600	961,400	978,100	1,000,400	1,011,100	65,400	6.9%

Source: ABI (data rounded, percentage change based on unrounded figures. Where data is flagged, cells have been left blank to avoid disclosure)

Table 9: Employment Structure in GB, 1998-2003, by 2-digit SIC

Division Description	1998	1999	2000	2001	2002	2003	Change 1998-03	% change
01: Agriculture, hunting etc	258,800	245,400	225,300	225,400	219,300	209,300	-49,500	-19.1%
02: Forestry, logging etc	7,200	6,000	10,100	10,100	10,700	9,600	-2,300	-31.9%
05: Fishing, operation of fish hatcheries/farms	12,500	10,800	8,500	10,200	6,600	7,000	-5,500	-44.4%
10: Mining of coal/lignite, extraction of peat	14,800	12,400	12,700	12,400	10,300	9,400	-5,400	-36.5%
11: Extraction of crude petroleum and natural gas	31,800	30,100	29,900	29,100	26,600	25,600	-6,200	-19.5%
12: Mining of uranium and thorium ores	0	0	0	0	0	0	0	0.0%
13: Mining of metal ores	400	100	100	100				
14: Other mining and quarry	26,200	26,900	28,800	26,500	23,500	22,000	-4,200	-16.0%
15: Manuf. of food and beverages	478,800	484,000	476,500	454,200	439,700	433,700	-45,100	-9.4%
16: Manuf. of tobacco products	4,800	4,300	3,600	3,600	3,400	3,100	-1,700	-35.9%
17: Manuf. of textiles	162,200	147,700	133,600	117,300	106,700	96,100	-66,100	-40.8%
18: Manuf. apparel; dressing/dyeing of fur	136,900	114,800	93,800	76,800	58,700	48,800	-88,100	-64.4%
19: Tanning/dressing of leather etc	32,700	27,300	21,800	18,800	17,100	12,900	-19,800	-60.6%
20: Manuf. of wood and products of wood/cork	82,800	78,700	78,900	78,900	78,800	78,600	-4,200	-5.1%
21: Manuf. of pulp, paper and paper products	105,400	100,000	95,300	89,200	86,800	83,200	-22,200	-21.1%
22: Publishing, printing, reprod. of recorded media	357,400	363,500	352,900	350,600	340,500	331,700	-25,700	-7.2%
23: Manuf. of coke, refined petroleum products	26,700	25,700	26,500	26,100	25,400	24,000	-2,700	-10.2%
24: Manuf. of chemicals and chemical products	254,500	239,500	231,300	226,600	229,700	213,600	-40,800	-16.1%
25: Manuf. of rubber and plastic products	245,100	233,000	224,600	219,200	210,200	204,700	-40,500	-16.5%
26: Manuf. of other non-metallic mineral products	137,500	134,500	129,600	125,000	117,500	112,500	-25,000	-18.2%
27: Manuf. basic metals	128,400	120,600	112,700	101,500	93,900	86,600	-41,800	-32.5%
28: Manuf. of fabricated metal products	402,600	402,900	383,200	363,400	352,400	332,900	-69,800	-17.3%
29: Manuf. of other machinery and equipment	382,400	357,700	348,700	331,400	304,600	280,600	-101,800	-26.6%
30: Manuf. of office machinery and computers	48,800	51,100	50,500	42,900	38,400	31,200	-17,700	-36.2%
31: Manuf. of other electrical machinery	182,300	178,800	168,500	156,900	143,400	127,400	-54,900	-30.1%
32: Manuf. of radio, t.v. and communic. equip.	124,800	121,000	125,100	109,100	83,800	72,800	-52,000	-41.7%
33: Manuf. of medical instruments	139,100	133,700	131,800	131,800	126,400	119,100	-20,000	-14.4%
34: Manuf. of motor vehicles, trailers etc	231,000	219,400	215,800	205,200	204,700	195,200	-35,900	-15.5%
35: Manuf. of transport equipment	162,200	166,800	166,000	162,100	150,300	141,500	-20,700	-12.8%
36: Manuf. of furniture; other	203,600	200,700	198,500	192,000	187,500	184,800	-18,800	-9.2%
37: Recycling	9,300	11,700	13,100	14,000	13,900	14,900	5,600	59.4%
40: Electricity, gas, steam and hot water supply	99,600	90,600	98,200	99,800	90,900	88,800	-10,800	-10.8%
41: Collection, purification and distribution of water	32,700	27,700	32,000	34,000	34,200	26,100	-6,600	-20.2%
45: Construction	1,108,000	1,130,600	1,129,700	1,156,200	1,163,200	1,137,900	30,000	2.7%
50: Sale, maintenance and repair of motor vehicles	566,100	558,300	541,600	553,700	552,300	544,400	-21,700	-3.8%
51: Wholesale and commission trade	1,148,900	1,169,700	1,158,600	1,119,700	1,118,600	1,102,200	-46,700	-4.1%
52: Retail trade, except of motor vehicles	2,628,500	2,635,900	2,760,000	2,871,900	2,926,800	2,948,600	320,100	12.2%
55: Hotels and restaurants	1,563,900	1,605,500	1,611,000	1,656,000	1,707,900	1,737,400	173,500	11.1%
60: Land transport; transport via pipelines	509,700	515,900	502,800	522,300	494,500	512,600	3,000	0.6%
61: Water transport	17,600	17,100	15,200	15,800	16,700	15,300	-2,300	-13.2%
62: Air transport	82,400	88,700	93,700	90,200	87,000	85,700	3,300	4.0%
63: Supporting transport activities; travel agencies	328,500	365,100	390,400	392,400	409,700	412,800	84,300	25.7%
64: Post and telecommunications	474,000	497,800	532,200	534,600	551,000	515,000	41,000	8.7%
65: Financial intermediation	593,300	609,500	596,200	632,300	636,200	619,200	26,000	4.4%
66: Insurance and pension funding, etc	232,000	229,500	228,400	227,300	215,000	205,100	-26,900	-11.6%
67: Activities auxiliary to financial intermediation	206,300	236,600	238,000	245,600	249,700	248,100	41,800	20.2%
70: Real estate activities	304,500	329,600	353,200	351,200	373,000	389,600	85,100	28.0%
71: Renting of machinery and equipment	142,200	151,300	154,200	154,200	147,100	143,700	1,500	1.1%
72: Computer and related activities	374,900	431,200	490,000	501,700	484,700	481,100	106,100	28.3%
73: Research and development	96,000	95,600	96,200	106,700	107,000	98,000	2,100	2.2%
74: Other business activities	2,568,900	2,635,500	2,793,700	2,796,100	2,800,700	2,869,600	300,700	11.7%
75: Public administration and defence etc	1,366,000	1,344,500	1,342,500	1,308,600	1,334,200	1,411,900	45,900	3.4%
80: Education	1,861,200	2,017,800	2,072,500	2,141,100	2,233,500	2,322,000	460,900	24.8%
85: Health and social work	2,519,800	2,563,800	2,634,100	2,741,600	2,803,500	2,946,800	427,100	16.9%
90: Sewage/refuse disposal, sanitation etc	104,600	98,600	99,200	112,200	93,900	99,200	-5,400	-5.2%
91: Other membership organisations	199,800	209,900	209,400	209,400	221,000	215,000	15,300	7.6%
92: Recreational, cultural and sporting activities	561,200	622,200	644,800	687,400	709,800	702,400	141,200	25.2%
93: Other service activities	273,300	299,800	310,300	317,900	321,000	319,600	46,300	16.9%
TOTAL	24,355,000	24,827,400	25,225,700	25,490,300	25,593,800	25,710,600	1,355,700	5.6%

Source: ABI (data rounded, percentage change based on unrounded figures. Where data is flagged, cells have been left blank to avoid disclosure)

5 GROWTH INDUSTRIES, 1998-2003

The top (largest) six industries in Tyne & Wear in 1998 accounted for three-quarters of all jobs. Of these Top 6 industry jobs, 62% were in the private sector, with Manufacturing, Retail and Business Services occupying first, second and fourth position (Table 10).

By 2003, Wholesale & Retail jobs increased, making this the largest employer in Tyne & Wear. The expansion of PSE employment took 'Health & Social Work' to second largest employer. Manufacturing jobs had fallen by over a fifth, toppling this industry down to the rank of third. Indeed private sector employment, as a share of employment in the Top 6, slipped from 62% to 56%.

Table 10: Top Industries for All People in Tyne & Wear, 1998 and 2003

	1998		2003	
	Number of jobs	Proportion of total jobs (%)	Number of jobs	Proportion of total jobs (%)
Manufacturing	80,300	18.2%	Wholesale, Retail	79,200 16.7%
Wholesale, Retail	72,900	16.5%	Health & Social Work	65,600 13.8%
Health & Social Work	53,100	12.0%	Manufacturing	60,800 12.8%
Business Services	52,300	11.8%	Business Services	60,400 12.7%
Education	38,300	8.7%	Education	50,200 10.6%
Public Administration	33,100	7.5%	Public Admin.	41,400 8.7%
Top Six	330,000	75.0%	Top Six	357,500 75.3%

Source: ABI (number of employees rounded, as a proportion of total jobs, unrounded)

In terms of numerical growth in Tyne & Wear between 1998 and 2003, public sector employment dominates, taking all three top places (Table 11). 'Health & Social Work' had the largest numerical employment increase (up 12,400). 'Education', ranked second, had the *fastest increase* (up 31.1% or 11,900) and 'Public Administration' came third for numerical growth (up 8,300 or 25.2%).

Table 11: Growth Industries for All People in Tyne & Wear, 1998-2003

	Increase	% Increase	Annual % Increase
Health & Social Work	12,400	23.4%	4.3%
Education	11,900	31.1%	5.6%
Public Administration	8,300	25.2%	4.6%
Business Services	8,100	15.5%	2.9%
Wholesale & Retail	6,300	8.6%	1.7%
Other Services	3,900	16.3%	3.1%

Source: ABI (Increase rounded, percentage increase unrounded)

6 DECLINING INDUSTRIES, 1998-2003

Between, 1998 and 2003, only four sectors had employment falls in Tyne & Wear (Table 12). These were all private sector industries. The largest numerical fall in employment was in ‘Manufacturing’ (down 19,500 or -24.3%). ‘Fishing’ had the largest percentage decrease in employment (down 67.4% over the period or 20.1% annually)²⁶.

Table 12: Declining Industries for All People in Tyne & Wear, 1998-2003

	Decrease	% Decrease	Annual % Decrease
Manufacturing	-19,500	-24.3%	-5.4%
Hotels & Restaurants	-2,800	-10.2%	-2.1%
Construction	-2,000	-8.7%	-1.8%
Fishing	0	-67.4%	-20.1%

Source: ABI (decrease rounded, percentage decrease unrounded)

The reported fall in Hotels & Restaurants is counter-intuitive [see Key Points section at the beginning of this report].

Caution: estimates of construction employment are particularly volatile because of employees moving from site to site on big projects. It is also possibly complicated by movement between self-employment and employee status.

²⁶ *The decline of Fishing will most likely be confined to North Tyneside.*

7 Employment change within the Tyne & Wear Districts

7.1 By broad Industry

7.1.1 All People

Within Tyne & Wear, the pattern of growth varied between the five districts, with more prominent private sector growth in Sunderland and North Tyneside (see Table 13). In Gateshead, Newcastle and South Tyneside the largest numerical gains were in the public services but the mix varied:

- Gateshead: 'Public Administration & Defence' (up 7,900 or 271.3%)²⁷ and 'Education' (up 2,700, or 55.8%)
- Newcastle: 'Health & Social Work' (up 6,600, or 36.4%) and 'Education' (up 4,500, or 29.0%)
- South Tyneside: 'Health & Social Work' (up 1,200, or 18.8%) and 'Education' (up 1,100, or 29.3%)

The private sector featured in the top two numerical gains in Sunderland and North Tyneside. In Sunderland, the largest employment gain was also in 'Education' (up 2,300, or 24.7%) but the second largest was in 'Financial Intermediation' (up 2,100, or 93.1%) [this will include Royal & Sun Alliance (More Than), Barclays Bank and Northern Rock].

North Tyneside was the only district where the two largest employment gains were in the private sector. Employment growth in North Tyneside was dominated by 'Transport & Communications' (up 2,400, or 132.9%) [including BT and Sitel call centres at Balliol Business Park²⁸ and an Orange call centre at Cobalt Business Park] and 'Business Services' (up 1,800, or 29.2%). [This includes Procter & Gamble's relocation of its HQ to Cobalt Business Park in 2000 and Equinox Business Services, also at Cobalt Business Park].

Of Tyne & Wear's growth in 'Business Services' around 41% was in Newcastle (up 3,300 or 14.3%; virtually the same as the TW average 15.5%). The fastest growth was in North Tyneside (29.2%), possibly reflecting the relocation of the Procter & Gamble HQ (from Newcastle).

Growth in 'Wholesale & Retail trade' was largest outside Newcastle; particularly in Gateshead (up 2,400 or 14.1%) and Sunderland (up 1,900 or 10.5%) but also North Tyneside (up 1,400 or 14.4%) [presumably largely at Silverlink, but perhaps also ASDA] - whereas Newcastle was up only 800 (or 3.5%) and South Tyneside experienced employment decline (down 100 or -1.6%)²⁹. These data suggest continued substantial employment growth at out-of-town shopping centres, even after 1998. Importantly, *nine-tenths* of the net employment growth in Wholesale & Retail was part-time (in TW up 5,700, whereas full-timers were up 600 only).

Employment growth in the 'Primary & Utilities' industries was spread across Sunderland (up 900 or 92.0%)³⁰, North Tyneside (up 800 or 196.9%) and South Tyneside (up 200 or 252.3%). Increases of particular note within this category include 'Electricity, Gas & Water Supply' in North Tyneside and Sunderland³¹ (average annual growth rates of 27.6% p.a. and 16.5% p.a. respectively).

²⁷ Caution: Possible error in ABI concerning employment growth in 'Public Administration' in Gateshead for which TWRI proposes more realistic estimates (see Appendix 5)

²⁸ Other call centres at Balliol Business Park include NHS Direct (Health) and the Inland Revenue (Public Admin.) [Source: TWRI's JCD]

²⁹ TWRI's JCD showed net gains in 'Wholesale distribution' and 'Retail distribution' of 1,921 in Gateshead, 1,533 in Newcastle, 1,740 in Sunderland, 686 in North Tyneside and 563 in South Tyneside between 1998 and 2003.

³⁰ Possibly including growth at London Electricity.

³¹ The increase in Sunderland could be due to major employment gains by Energy production/distribution companies at Doxford Park. TWRI's JCD recorded gains by London Electricity in customer services (120 gains in 1998) and Transco (150 in 2000).

All five districts' major employment losses were dominated by 'Manufacturing'. The falls were largest in Sunderland (-6,800), South Tyneside (-5,800) and North Tyneside (-4,200). Falls were fastest in North Tyneside and South Tyneside (-34.1% and -50.8% respectively)[perhaps reflecting the decline of the Offshore Engineering industry³²].

Other significant losses were experienced in 'Construction' in both North Tyneside and South Tyneside (down 1,400 or -23.7% and 1,000 or -37.1% respectively). [This loss for South Tyneside is very large. Possibly some Offshore Engineering losses included in Construction]³³

³² *Between 1998 and 2003, TWRI's JCD shows over 1,300 reported job losses were recorded in the offshore engineering industry, principally AMEC Process & Energy at Wallsend (in North Tyneside).*

³³ *Note: TWRI's JCD logged an entry of over 700 losses at AMEC Process and Energy in 2000 and categorised these as being in the 'Construction' industry.*

Table 13: Changes by Industry 1998-2003 - All People, T&W Districts

	1998	1999	2000	2001	2002	2003	Change 1998-03	% change	Annual Average Growth	
Gateshead										
A, B, C, E	Primary & Utilities	500	100	400	200	200	500	0	-2.0%	-0.4%
D	Manufacturing	16,900	16,200	17,400	15,900	16,000	15,700	-1,200	-6.9%	-1.4%
F	Construction	4,700	5,400	5,400	6,600	6,200	5,000	400	7.7%	1.5%
G	Wholesale, retail	17,200	18,400	17,700	18,200	19,400	19,600	2,400	14.1%	2.7%
H	Hotels and restaurants	5,000	5,700	5,200	4,900	4,900	4,100	-900	-17.6%	-3.8%
I	Transport, storage and com.	5,500	6,000	6,000	5,000	6,100	5,600	100	1.6%	0.3%
J	Financial intermediation	1,900	1,600	1,700	2,100	2,000	1,900	100	4.3%	0.8%
K	Business Services	7,500	8,500	8,400	9,200	9,700	8,600	1,100	15.0%	2.8%
L	Public administration	2,900	11,200	3,600	3,000	4,700	10,800	7,900	271.3%	30.0%
M	Education	4,800	5,400	4,800	4,000	6,700	7,500	2,700	55.8%	9.3%
N	Health and social work	8,700	7,900	8,400	9,700	9,700	10,100	1,500	16.9%	3.2%
O	Other services	4,600	5,200	5,900	5,100	5,200	5,600	900	20.6%	3.8%
	Total	80,000	91,700	84,800	83,900	90,800	95,000	15,000	18.7%	3.5%
Newcastle										
A, B, C, E	Primary & Utilities	1,200	1,300	900	400	600	700	-500	-44.2%	-11.0%
D	Manufacturing	12,500	11,600	11,000	11,200	11,400	11,100	-1,500	-11.7%	-2.4%
F	Construction	5,500	5,400	5,600	6,500	7,200	5,700	200	4.5%	0.9%
G	Wholesale, retail	21,500	21,300	23,200	21,000	22,100	22,300	800	3.5%	0.7%
H	Hotels and restaurants	9,300	9,600	9,600	10,000	9,500	8,800	-500	-5.4%	-1.1%
I	Transport, storage and com.	7,300	7,600	7,800	7,400	7,500	8,400	1,200	15.8%	3.0%
J	Financial intermediation	6,400	6,200	6,600	6,600	6,500	6,300	0	-0.2%	0.0%
K	Business Services	23,300	23,500	24,700	28,100	28,500	26,700	3,300	14.3%	2.7%
L	Public administration	19,500	20,300	22,900	22,500	26,500	19,700	200	1.0%	0.2%
M	Education	15,500	16,300	14,600	16,800	18,100	20,000	4,500	29.0%	5.2%
N	Health and social work	18,100	22,400	23,500	24,600	23,200	24,700	6,600	36.4%	6.4%
O	Other services	8,800	9,700	10,300	9,500	10,700	11,300	2,400	27.4%	5.0%
	Total	149,000	155,100	160,700	164,600	171,900	165,700	16,700	11.2%	2.1%
North Tyneside										
A, B, C, E	Primary & Utilities	400	400	1,000	700	900	1,200	800	196.6%	24.3%
D	Manufacturing	12,400	10,200	9,800	9,900	9,400	8,200	-4,200	-34.1%	-8.0%
F	Construction	5,900	5,100	4,600	4,600	4,700	4,500	-1,400	-23.7%	-5.3%
G	Wholesale, retail	9,500	9,900	10,000	9,400	10,600	10,900	1,400	14.4%	2.7%
H	Hotels and restaurants	3,700	4,200	3,900	3,700	3,700	3,400	-300	-9.1%	-1.9%
I	Transport, storage and com.	1,800	2,100	3,400	4,600	4,300	4,300	2,400	132.9%	18.4%
J	Financial intermediation	900	800	800	700	800	700	-200	-20.8%	-4.5%
K	Business Services	6,300	6,300	7,700	8,300	10,500	8,100	1,800	29.2%	5.3%
L	Public administration	2,800	2,900	3,200	2,800	2,600	2,400	-400	-13.0%	-2.7%
M	Education	5,100	4,900	5,000	5,000	5,700	6,500	1,400	27.1%	4.9%
N	Health and social work	7,600	7,900	8,400	8,900	8,300	9,100	1,600	20.6%	3.8%
O	Other services	3,700	4,100	3,300	3,000	3,100	3,600	-100	-3.0%	-0.6%
	Total	60,100	58,800	61,000	61,600	64,600	62,800	2,800	4.6%	0.9%
South Tyneside										
A, B, C, E	Primary & Utilities	100	700	700	200	200	200	200	252.3%	28.6%
D	Manufacturing	11,500	10,400	9,200	6,200	6,500	5,700	-5,800	-50.8%	-13.2%
F	Construction	2,800	3,000	1,700	2,200	2,000	1,800	-1,000	-37.1%	-8.8%
G	Wholesale, retail	7,000	7,600	7,500	7,600	7,300	6,900	-100	-1.6%	-0.3%
H	Hotels and restaurants	2,700	3,000	2,800	2,900	2,900	2,400	-300	-11.0%	-2.3%
I	Transport, storage and com.	1,800	1,500	1,300	1,600	1,900	1,800	0	-0.4%	-0.1%
J	Financial intermediation	600	500	500	500	500	500	-100	-19.7%	-4.3%
K	Business Services	3,300	3,500	4,700	6,100	4,600	3,700	400	13.0%	2.5%
L	Public administration	2,300	2,000	2,300	2,000	2,200	2,700	400	17.7%	3.3%
M	Education	3,700	3,600	3,700	3,900	4,100	4,800	1,100	29.3%	5.3%
N	Health and social work	6,300	5,800	6,500	6,900	6,300	7,500	1,200	18.8%	3.5%
O	Other services	2,300	3,200	3,000	2,500	2,400	2,700	300	13.9%	2.6%
	Total	44,400	44,700	43,700	42,500	40,700	40,500	-3,800	-8.6%	-1.8%
Sunderland										
A, B, C, E	Primary & Utilities	1,000	1,200	1,100	1,400	1,900	1,900	900	92.0%	13.9%
D	Manufacturing	27,000	25,700	25,800	24,400	24,100	20,100	-6,800	-25.4%	-5.7%
F	Construction	4,200	5,900	6,200	4,500	4,100	4,000	-200	-4.4%	-0.9%
G	Wholesale, retail	17,700	21,900	20,300	19,100	18,500	19,600	1,900	10.5%	2.0%
H	Hotels and restaurants	6,300	6,000	5,600	5,300	5,700	5,500	-800	-11.9%	-2.5%
I	Transport, storage and com.	5,300	5,300	5,000	7,000	6,500	5,500	200	4.0%	0.8%
J	Financial intermediation	2,200	2,100	2,500	4,100	4,200	4,300	2,100	93.1%	14.1%
K	Business Services	11,800	9,300	8,200	11,300	10,900	13,200	1,400	11.6%	2.2%
L	Public administration	5,600	5,200	5,500	5,500	5,800	5,800	200	3.5%	0.7%
M	Education	9,300	9,500	9,000	8,700	10,900	11,600	2,300	24.7%	4.5%
N	Health and social work	12,400	12,100	12,700	12,500	12,800	14,000	1,600	13.0%	2.5%
O	Other services	4,700	6,500	5,700	4,700	4,400	5,100	400	7.7%	1.5%
	Total	107,600	110,800	107,600	108,400	109,900	110,800	3,100	2.9%	0.6%

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity, gas & water supply)

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

7.1.2 Men's Employment

Men's employment growth reflected that overall. Thus, between 1998 and 2003, men's employment growth was particularly strong in Newcastle (up 9,700 or 14.1%) and Gateshead (up 5,900 or 13.5%) (Table 14). As overall, moderate growth was experienced in North Tyneside (up 1,200 or 4.0%) and Sunderland (up 2,800 or 5.2%). In contrast to growth in the other districts, men's employment fell 3,700 in South Tyneside (-16.3%). [This will be substantially due to the questionable 50%+ -4,400 drop reported in Manufacturing.]

There was some variation in the industries where significant gains in men's employment occurred between 1998 and 2003 within the Tyne & Wear districts:

- Gateshead and South Tyneside both experienced major gains in 'Public Administration and Defence' (up 3,400 or 289.7%³⁴ and 400 or 42.9% respectively)
- Newcastle men experienced significant employment growth in 'Education' (up, 2,500 or 43.9%) followed by 'Other Services' (up 2,200 or 61.7%)
- North Tyneside men had significant employment growth in 'Transport, Storage & Communications' (up 1,500 or 109.5%)
- Sunderland experienced the greatest growth in men's employment in 'Wholesale & Retail' (up 1,300, or 16.4%)

Manufacturing provided the largest loss in men's employment across all five districts. Other major employment losses for men were in 'Construction' in North Tyneside (down 1,400 or -26.2%) and South Tyneside (down 900 or -35.9%).

7.1.3 Women's Employment

Between 1998 and 2003, women's employment growth was particularly strong in Gateshead (up 9,100 or 25.1%)³⁵ and Newcastle (up 7,000 or 8.7%) (Table 15). Moderate employment growth was experienced in North Tyneside (up 1,500 or 5.3%). There was very little growth in women's employment in Sunderland (300 or 0.5%). South Tyneside was the only district to experience women's employment decline (down 100 or -0.7%).

Women's employment growth in all of the districts apart from Gateshead was dominated by 'Health & Social Work':

- Newcastle: 'Health & Social Work' (up 4,500, or 30.1%), followed by 'Business Services' (up 2,700, or 27.2%)
- North Tyneside: 'Health & Social Work' (up 1,200 or 19.5%), followed by 'Transport & Communications' (up 1,000, or 198.1%)³⁶
- South Tyneside: 'Health & Social Work' (up 900 or 16.8%), followed by 'Education' (up 800 or 30.6%)
- Sunderland: 'Health & Social Work' (up 1,800 or 18.1%), followed by 'Education' (up 1,500 or 23.7%)

Gateshead was the only district where the major women's employment gain was in 'Public Administration and defence' (up 4,500 or 258.9%)³⁷, followed by 'Education' (up 2,000 or 58.5%).

³⁴ Caution: Gateshead error (see Appendix 5)

³⁵ Caution: Gateshead error (see Appendix 5).

³⁶ Including BT and Orange

³⁷ Caution: Gateshead error (see Appendix 5)

Major women's employment losses in Gateshead and Newcastle were led by 'Hotels and Restaurants' (down 700, -25.6% and down 1,200, -20.9% respectively). In North Tyneside, South Tyneside and Sunderland, the largest women's employment losses were in 'Manufacturing':

- North Tyneside: Employment down 1,600, or -48.4% (-12.4% average growth p.a.)
- South Tyneside: Employment down 1,400, or -51.5% (-13.5% average growth p.a.)
- Sunderland: Employment down 4,100, or -52.5% (-13.8% average growth p.a.)

Table 14: Changes by Industry 1998-2003 - Men, T&W Districts

	1998	1999	2000	2001	2002	2003	Change 1998-03	% change	Annual Average Growth	
Gateshead										
A, B, C, E	Primary & Utilities	500	100	300	200	200	500	0	-0.6%	-0.1%
D	Manufacturing	13,300	12,800	13,700	12,400	13,100	12,500	-800	-6.1%	-1.2%
F	Construction	4,100	4,800	5,000	5,800	5,600	4,500	400	10.4%	2.0%
G	Wholesale, retail	8,300	8,700	8,100	8,600	9,700	9,800	1,400	17.2%	3.2%
H	Hotels and restaurants	2,100	2,300	2,000	2,000	2,000	2,000	-100	-6.5%	-1.3%
I	Transport, storage and com.	4,300	4,700	4,500	4,000	4,400	4,200	0	-0.6%	-0.1%
J	Financial intermediation	800	700	700	900	900	800	0	-4.1%	-0.8%
K	Business Services	4,300	4,800	4,100	5,700	5,100	4,300	0	0.4%	0.1%
L	Public administration	1,200	3,900	2,200	1,900	2,300	4,600	3,400	289.7%	31.3%
M	Education	1,400	1,400	1,200	1,100	1,900	2,100	700	49.1%	8.3%
N	Health and social work	1,500	1,300	1,400	1,600	1,700	1,700	200	12.6%	2.4%
O	Other services	2,200	2,100	3,300	2,800	3,000	3,000	800	35.3%	6.2%
	Total	43,800	47,500	46,500	46,900	49,900	49,700	5,900	13.5%	2.6%
Newcastle										
A, B, C, E	Primary & Utilities	700	1200	700	400	400	400	-300	-41.3%	-10.1%
D	Manufacturing	9,300	8,000	8,700	8,300	8,700	8,400	-800	-8.9%	-1.8%
F	Construction	4,800	4,700	5,100	5,800	6,400	5,200	400	8.8%	1.7%
G	Wholesale, retail	9,500	9,000	9,300	8,700	9,600	9,900	400	4.5%	0.9%
H	Hotels and restaurants	3,800	4,100	4,100	4,300	4,000	4,500	700	17.1%	3.2%
I	Transport, storage and com.	4,800	4,900	5,400	5,200	4,900	6,100	1,300	27.9%	5.1%
J	Financial intermediation	2,800	2,600	2,800	3,000	3,200	2,900	100	2.7%	0.5%
K	Business Services	13,400	12,600	11,900	16,100	15,400	14,100	600	4.8%	0.9%
L	Public administration	7,500	9,200	9,300	9,100	13,200	8,100	500	6.7%	1.3%
M	Education	5,600	6,300	5,700	6,400	7,000	8,100	2,500	43.9%	7.6%
N	Health and social work	3,100	4,600	4,300	5,100	4,700	5,200	2,100	66.9%	10.8%
O	Other services	3,600	3,600	5,500	4,800	5,700	5,800	2,200	61.7%	10.1%
	Total	69,000	70,800	72,800	77,200	83,200	78,700	9,700	14.1%	2.7%
North Tyneside										
A, B, C, E	Primary & Utilities	300	300	700	600	800	1000	700	194.8%	24.1%
D	Manufacturing	9,100	7,800	7,300	7,400	7,500	6,500	-2,600	-29.0%	-6.6%
F	Construction	5,200	4,200	3,500	3,700	4,200	3,800	-1,400	-26.2%	-5.9%
G	Wholesale, retail	4,500	4,300	4,400	4,200	4,900	5,300	800	18.5%	3.4%
H	Hotels and restaurants	1,500	1,800	1,600	1,500	1,500	1,800	300	17.4%	3.3%
I	Transport, storage and com.	1,300	1,600	2,500	3,000	2,800	2,800	1,500	109.5%	15.9%
J	Financial intermediation	400	300	300	300	300	300	-100	-29.4%	-6.7%
K	Business Services	3,400	3,100	4,000	4,900	5,100	4,700	1,300	38.3%	6.7%
L	Public administration	1,100	1,300	1,600	1,300	1,300	1,100	0	1.8%	0.4%
M	Education	1,400	1,300	1,300	1,200	1,400	1,900	500	34.7%	6.1%
N	Health and social work	1,300	1,200	1,200	1,400	1,400	1,700	300	25.7%	4.7%
O	Other services	1,800	1,600	1,700	1,400	1,500	1,800	0	-0.2%	0.0%
	Total	31,400	28,900	30,100	30,900	32,700	32,600	1,200	4.0%	0.8%
South Tyneside										
A, B, C, E	Primary & Utilities	0	600	700	100	200	200	100	287.2%	31.1%
D	Manufacturing	8,700	7,400	7,200	4,800	5,000	4,300	-4,400	-50.6%	-13.1%
F	Construction	2,500	2,700	1,600	1,900	1,800	1,600	-900	-35.9%	-8.5%
G	Wholesale, retail	2,900	3,200	3,000	3,100	3,100	3,100	200	6.7%	1.3%
H	Hotels and restaurants	1,100	1,300	1,200	1,200	1,100	1,200	100	13.6%	2.6%
I	Transport, storage and com.	1,300	1,100	1,000	1,200	1,300	1,500	200	18.3%	3.4%
J	Financial intermediation	200	200	200	200	200	200	-100	-29.9%	-6.9%
K	Business Services	1,800	1,800	2,300	3,000	2,000	1,600	-100	-6.6%	-1.4%
L	Public administration	900	900	1,000	900	1,200	1,300	400	42.9%	7.4%
M	Education	1,100	900	1,100	1,100	1,100	1,300	300	26.1%	4.8%
N	Health and social work	1,000	800	900	1,100	1,100	1,300	300	29.6%	5.3%
O	Other services	1,100	1,200	1,500	1,200	1,100	1,200	200	17.0%	3.2%
	Total	22,600	22,100	21,600	20,000	19,200	18,900	-3,700	-16.3%	-3.5%
Sunderland										
A, B, C, E	Primary & Utilities	800	900	700	1000	1400	1500	700	90.6%	13.8%
D	Manufacturing	19,200	19,800	19,500	19,000	19,600	16,500	-2,800	-14.4%	-3.1%
F	Construction	3,600	3,900	4,200	3,900	3,600	3,500	-100	-2.1%	-0.4%
G	Wholesale, retail	8,100	8,600	8,800	8,700	8,300	9,400	1,300	16.4%	3.1%
H	Hotels and restaurants	2,400	2,400	2,200	2,200	2,300	2,600	200	9.5%	1.8%
I	Transport, storage and com.	3,800	3,800	3,600	4,300	4,200	3,900	100	2.7%	0.5%
J	Financial intermediation	1,000	1,000	1,000	2,000	2,000	1,900	900	89.7%	13.7%
K	Business Services	6,200	4,700	4,100	6,700	6,000	7,200	1,000	15.6%	3.0%
L	Public administration	2,200	2,200	2,500	2,500	3,000	2,600	400	17.3%	3.2%
M	Education	2,800	2,300	2,500	2,300	3,000	3,600	800	26.9%	4.9%
N	Health and social work	2,500	2,300	2,300	2,200	2,300	2,300	-200	-7.9%	-1.6%
O	Other services	2,000	2,500	2,800	2,200	2,200	2,500	500	26.6%	4.8%
	Total	54,600	54,500	54,300	57,000	58,000	57,400	2,800	5.2%	1.0%

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity, gas & water supply)

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

Table 15: Changes by Industry 1998-2003 - Women T&W Districts

	1998	1999	2000	2001	2002	2003	Change 1998-03	% change	Annual Average Growth
Gateshead									
A, B, C, E	Primary & Utilities	100	0	0	0	100	0	-11.0%	-2.3%
D	Manufacturing	3,600	3,500	3,700	3,500	2,900	3,300	-400	-10.2%
F	Construction	600	600	500	800	600	500	-100	-10.5%
G	Wholesale, retail	8,800	9,700	9,600	9,600	9,800	9,800	1,000	11.2%
H	Hotels and restaurants	2,900	3,400	3,200	2,800	2,900	2,100	-700	-25.6%
I	Transport, storage and com.	1,200	1,200	1,500	1,000	1,600	1,300	100	9.5%
J	Financial intermediation	1,000	900	1,000	1,200	1,100	1,100	100	10.8%
K	Business Services	3,200	3,800	4,200	3,600	4,600	4,300	1,100	34.5%
L	Public administration	1,700	7,300	1,400	1,100	2,400	6,200	4,500	258.9%
M	Education	3,400	4,000	3,500	2,900	4,800	5,400	2,000	58.5%
N	Health and social work	7,200	6,500	7,000	8,100	8,000	8,500	1,300	17.8%
O	Other services	2,400	3,200	2,600	2,300	2,200	2,600	200	7.3%
	Total	36,200	44,200	38,300	37,000	41,000	45,300	9,100	25.1%
Newcastle									
A, B, C, E	Primary & Utilities	500	200	100	100	200	300	-200	-48.1%
D	Manufacturing	3,300	3,500	2,300	2,900	2,700	2,600	-600	-19.5%
F	Construction	700	700	500	700	800	500	-200	-24.4%
G	Wholesale, retail	12,000	12,300	13,900	12,300	12,500	12,300	300	2.8%
H	Hotels and restaurants	5,500	5,500	5,500	5,700	5,400	4,400	-1,200	-20.9%
I	Transport, storage and com.	2,500	2,700	2,400	2,200	2,600	2,300	-200	-7.7%
J	Financial intermediation	3,600	3,500	3,800	3,700	3,400	3,500	-100	-2.5%
K	Business Services	9,900	10,900	12,800	12,000	13,100	12,600	2,700	27.2%
L	Public administration	12,000	11,000	13,600	13,300	13,300	11,700	-300	-2.6%
M	Education	9,800	10,000	8,900	10,400	11,100	11,800	2,000	20.5%
N	Health and social work	15,000	17,900	19,200	19,500	18,500	19,600	4,500	30.1%
O	Other services	5,200	6,200	4,800	4,600	5,000	5,400	200	3.8%
	Total	80,000	84,300	87,300	87,300	88,700	87,000	7,000	8.7%
North Tyneside									
A, B, C, E	Primary & Utilities	100	100	300	100	100	200	100	209.7%
D	Manufacturing	3,200	2,400	2,500	2,500	1,900	1,700	-1,600	-48.4%
F	Construction	700	900	1,100	800	500	600	0	-4.3%
G	Wholesale, retail	5,100	5,700	5,600	5,200	5,700	5,600	500	10.8%
H	Hotels and restaurants	2,200	2,400	2,300	2,200	2,200	1,600	-600	-27.1%
I	Transport, storage and com.	500	500	800	1,600	1,500	1,400	1,000	198.1%
J	Financial intermediation	500	500	500	400	400	500	-100	-15.0%
K	Business Services	2,900	3,100	3,700	3,400	5,400	3,500	600	18.8%
L	Public administration	1,700	1,600	1,700	1,500	1,300	1,300	-400	-22.9%
M	Education	3,700	3,600	3,600	3,800	4,300	4,600	900	24.3%
N	Health and social work	6,200	6,700	7,200	7,500	6,900	7,400	1,200	19.5%
O	Other services	1,900	2,500	1,700	1,600	1,500	1,800	-100	-5.6%
	Total	28,700	29,900	30,900	30,700	31,800	30,200	1,500	5.3%
South Tyneside									
A, B, C, E	Primary & Utilities	0	100	100	100	0	0	0	161.1%
D	Manufacturing	2,800	3,000	1,900	1,400	1,400	1,300	-1,400	-51.5%
F	Construction	200	300	100	200	200	100	-100	-49.8%
G	Wholesale, retail	4,100	4,400	4,500	4,400	4,100	3,800	-300	-7.6%
H	Hotels and restaurants	1,600	1,700	1,700	1,700	1,700	1,200	-400	-27.5%
I	Transport, storage and com.	500	400	300	300	600	300	-200	-44.0%
J	Financial intermediation	400	300	300	300	300	300	0	-13.2%
K	Business Services	1,500	1,700	2,400	3,100	2,600	2,100	500	35.3%
L	Public administration	1,400	1,100	1,300	1,200	1,100	1,400	0	1.9%
M	Education	2,600	2,600	2,600	2,800	3,000	3,400	800	30.6%
N	Health and social work	5,300	5,000	5,600	5,800	5,200	6,200	900	16.8%
O	Other services	1,300	2,000	1,400	1,300	1,300	1,400	100	11.5%
	Total	21,800	22,700	22,200	22,600	21,500	21,600	-100	-0.7%
Sunderland									
A, B, C, E	Primary & Utilities	200	300	400	400	500	400	200	97.6%
D	Manufacturing	7,700	5,900	6,300	5,500	4,500	3,700	-4,100	-52.5%
F	Construction	600	1,900	2,000	500	400	500	-100	-17.9%
G	Wholesale, retail	9,600	13,300	11,500	10,400	10,100	10,200	500	5.5%
H	Hotels and restaurants	3,900	3,600	3,400	3,200	3,400	2,900	-1,000	-24.8%
I	Transport, storage and com.	1,500	1,500	1,400	2,600	2,300	1,600	100	7.3%
J	Financial intermediation	1,300	1,100	1,500	2,100	2,200	2,500	1,200	95.7%
K	Business Services	5,600	4,500	4,100	4,600	4,900	6,000	400	7.1%
L	Public administration	3,400	3,100	3,100	3,000	2,800	3,200	-200	-5.6%
M	Education	6,400	7,200	6,500	6,400	7,900	8,000	1,500	23.7%
N	Health and social work	10,000	9,800	10,400	10,300	10,500	11,800	1,800	18.1%
O	Other services	2,700	4,000	2,800	2,400	2,300	2,600	-200	-5.8%
	Total	53,100	56,300	53,300	51,500	51,900	53,300	300	0.5%

Notes: Primary & Utilities consists of Sections A (Agriculture, hunting & forestry), B (Fishing), C (Mining & quarrying) and E (Electricity, gas & water supply)

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

7.2 By 2-digit SIC

At 2-digit SIC classification level, the major themes in employment change in Tyne & Wear continued as discussed above (Tables 16-20, below). The top two major numerical gains in employment in three of the five districts were in public sector employment:

- Gateshead: SIC 75 'Public Admin.' (up 7,900)³⁸ and 80 'Education' (up 2,700) (Table 16)
- Newcastle: SIC 85 'Health & Social Work' (up 6,600) and 80 'Education' (up 4,500) (Table 17).
- South Tyneside: SIC 85 'Health & Social Work' (up 1,200) and 80 'Education' (up 1,100) (Table 19).

In Sunderland, major gains in employment were experienced in 'Education' (up 2,300), followed by 'Retail Trade' (2,000) (Table 20). In North Tyneside, the largest gain in employee jobs was in the private sector, in 'Post & Telecommunications' (3,000) [inc. BT and Orange], followed by 'Health & Social Care' (1,600) (Table 18).

Major gains in private sector employment in the five districts were as follows:

- Gateshead: SIC 52 'Retail Trade' (up 1,800 or 17.2%) [including expansion of the MetroCentre Red Zone and Retail Parks]
- Newcastle: SIC 74 'Other Business Activities' (up 2,200 or 11.9%) [Including Legal]
- North Tyneside: SIC 64 'Post & Telecommunications' (up 3,000 or 2461.7%) [Including BT and Orange]
- South Tyneside: SIC 74 'Other Business Activities' (up 700 or 27.8%)
- Sunderland: SIC 52 'Retail Trade' (up 2,000 or 16.0%) [inc. major expansion of the Bridges Shopping Centre].

In terms of major numerical employment losses by 2-digit SIC classification, all five Tyne & Wear districts were dominated by falls in private sector employment, most notably in manufacturing:

- Gateshead: SIC 55 'Hotels & Restaurants' (down by 900 or -17.6%) and SIC 31 'Manufacture of other electrical machinery' (down by 600 or -38.0%)
- Newcastle: SIC 29 'Manufacture of other machinery' (down by 1,400 or -40.1% - including Parsons³⁹) and SIC 63 'Supporting transport activities' (down by 1,100 or -30.7%)
- North Tyneside: SIC 45 'Construction' (down by 1,400 or -23.7%) and SIC 25 'Manufacture of rubber and plastic products' (down by 800 or -41.4%)
- South Tyneside: SIC 45 'Construction' (down by 1,000 or -37.1%)⁴⁰
- Sunderland: SIC 31 'Manufacture of other electrical machinery' (down by 1,400 or -60.1%)⁴¹

³⁸ If the Gateshead Public Administration employment remained unchanged (as in Appendix 5), Gateshead's 2nd biggest growth was in Retailing (up 1,800, or +17%).

³⁹ TWRI's JCD logged losses of 333 at Parsons in 1996. These may have come on line in subsequent years.

⁴⁰ Larger numerical losses were experienced in other SIC classes in South Tyneside; however, due to disclosure control these cannot be published.

⁴¹ Larger numerical losses were experienced in other SIC classes in Sunderland; however, due to disclosure control these cannot be published.

Table 16: Employment Structure in Gateshead, 1998-2003, by 2-digit SIC

Division Description	1998	1999	2000	2001	2002	2003	Change 1998-03	% change
01 : Agriculture, hunting etc								
02 : Forestry, logging etc	0	0						0.0%
05 : Fishing, operation of fish hatcheries/farms	0	0	0	0	0	0	0	0.0%
10 : Mining of coal/lignite, extraction of peat								
11 : Extraction of crude petroleum and natural gas		0		0	0			
12 : Mining of uranium and thorium ores	0	0	0	0	0	0	0	0.0%
13 : Mining of metal ores	0	0	0	0	0	0	0	0.0%
14 : Other mining and quarry				100				
15 : Manuf. of food and beverages	1,600	1,400	1,600	1,700	1,500	1,600	-100	-4.4%
16 : Manuf. of tobacco products	0	0	0	0	0	0	0	0.0%
17 : Manuf. of textiles								
18 : Manuf.apparel; dressing/dyeing of fur								
19 : Tanning/dressing of leather etc								
20 : Manuf. of wood and products of wood/cork	400	400	300	400	200	200	-200	-50.7%
21 : Manuf. of pulp, paper and paper products								
22 : Publishing, printing, reprod. of recorded media	1,200	1,100	1,200	1,300	1,200	1,100	-100	-8.2%
23 : Manuf. of coke, refined petroleum products								
24 : Manuf. of chemicals and chemical products	1,400	1,000	1,600	1,600	1,700	1,600	200	11.9%
25 : Manuf. of rubber and plastic products	700	900	900	700	600	600	0	-2.4%
26 : Manuf. of other non-metallic mineral products	700	700	900	800	900	900	200	21.3%
27 : Manuf. basic metals								
28 : Manuf. of fabricated metal products	2,600	2,900	2,800	2,400	2,800	3,000	500	17.4%
29 : Manuf. of other machinery and equipment	3,600	3,200	3,500	2,900	2,900	3,100	-500	-15.0%
30 : Manuf. of office machinery and computers								-55.6%
31 : Manuf. of other electrical machinery	1,700	1,600	1,600	1,100	1,200	1,100	-600	-38.0%
32 : Manuf. of radio, t.v. and communic. equip.								
33 : Manuf. of medical instruments								
34 : Manuf. of motor vehicles, trailers etc								
35 : Manuf. of transport equipment				0	0			
36 : Manuf. of furniture; other	500	400	500	500	600	500	0	6.1%
37 : Recycling								
40 : Electricity, gas, steam and hot water supply								
41 : Collection, purification and distribution of water	0	0	0	0	0	0	0	0.0%
45 : Construction	4,700	5,400	5,400	6,600	6,200	5,000	400	7.7%
50 : Sale, maintenance and repair of motor vehicles	1,900	1,600	1,500	1,600	1,600	1,900	0	-1.3%
51 : Wholesale and commission trade	4,800	6,200	5,300	5,800	5,900	5,400	600	13.5%
52 : Retail trade, except of motor vehicles	10,500	10,600	10,800	10,900	11,900	12,300	1,800	17.2%
55 : Hotels and restaurants	5,000	5,700	5,200	4,900	4,900	4,100	-900	-17.6%
60 : Land transport; transport via pipelines	2,100	1,900	2,000	1,800	1,400	1,700	-400	-17.2%
61 : Water transport				0	0	0		
62 : Air transport	0	0	0	0	0	0	0	0.0%
63 : Supporting transport activities; travel agencies	500	300	300	300	500	500	-100	-15.8%
64 : Post and telecommunications	2,900	3,800	3,600	2,900	4,100	3,400	500	18.9%
65 : Financial intermediation	1,500	1,200	1,300	1,600	1,800	1,700	200	15.3%
66 : Insurance and pension funding, etc								
67 : Activities auxiliary to financial intermediation	200	200	200	200	200	200	0	-16.2%
70 : Real estate activities	1,200	1,000	1,000	1,200	1,200	1,000	-200	-18.6%
71 : Renting of machinery and equipment	500	600	700	700	600	500	0	2.5%
72 : Computer and related activities	700	800	800	1,100	1,600	1,000	200	33.2%
73 : Research and development								
74 : Other business activities	5,000	6,200	5,900	6,300	6,300	6,100	1,100	21.5%
75 : Public administration and defence etc	2,900	11,200	3,600	3,000	4,700	10,800	7,900	271.3%
80 : Education	4,800	5,400	4,800	4,000	6,700	7,500	2,700	55.8%
85 : Health and social work	8,700	7,900	8,400	9,700	9,700	10,100	1,500	16.9%
90 : Sewage/refuse disposal, sanitation etc								
91 : Other membership organisations	900	1,300	1,100	700	800	900	0	1.3%
92 : Recreational, cultural and sporting activities	2,400	2,400	3,200	3,400	2,800	2,900	500	21.1%
93 : Other service activities	1,100	1,200	1,400	900	1,000	1,100	0	3.8%
TOTAL	80,000	91,700	84,800	83,900	90,800	95,000	15,000	18.8%

Source: ABI (data rounded, percentage change unrounded. Where data is flagged, cells have been left blank to avoid disclosure)

Table 17: Employment Structure in Newcastle, 1998-2003, by 2-digit SIC

Division Description	1998	1999	2000	2001	2002	2003	Change 1998-03	% change
01 : Agriculture, hunting etc								
02 : Forestry, logging etc								
05 : Fishing, operation of fish hatcheries/farms			0					
10 : Mining of coal/lignite, extraction of peat			0					
11 : Extraction of crude petroleum and natural gas	0	0	0	0	0	0	0	0.0%
12 : Mining of uranium and thorium ores	0	0	0	0	0	0	0	0.0%
13 : Mining of metal ores	0	0	0	0	0	0	0	0.0%
14 : Other mining and quarry								
15 : Manuf. of food and beverages	2,200	2,600	2,500	2,400	2,400	2,300	100	2.8%
16 : Manuf. of tobacco products	0	0	0	0	0	0		0.0%
17 : Manuf. of textiles								
18 : Manuf.apparel; dressing/dyeing of fur								
19 : Tanning/dressing of leather etc								
20 : Manuf. of wood and products of wood/cork								
21 : Manuf. of pulp, paper and paper products								
22 : Publishing, printing, reprod. of recorded media	1,700	1,400	1,300	1,600	1,700	1,500	-100	-8.4%
23 : Manuf. of coke, refined petroleum products	0	0	0	0	0	0	0	0.0%
24 : Manuf. of chemicals and chemical products								
25 : Manuf. of rubber and plastic products								
26 : Manuf. of other non-metallic mineral products								
27 : Manuf. basic metals								
28 : Manuf. of fabricated metal products	900	900	1,100	900	1,000	900	0	-3.2%
29 : Manuf. of other machinery and equipment	3,600	2,200	2,600	2,600	2,200	2,100	-1,400	-40.1%
30 : Manuf. of office machinery and computers								
31 : Manuf. of other electrical machinery								
32 : Manuf. of radio, t.v. and communic. equip.								
33 : Manuf. of medical instruments	300			200	200	200	-100	-37.7%
34 : Manuf. of motor vehicles, trailers etc								
35 : Manuf. of transport equipment								
36 : Manuf. of furniture; other	400	400	400	500	500	300	-100	-18.8%
37 : Recycling								
40 : Electricity, gas, steam and hot water supply								
41 : Collection, purification and distribution of water								
45 : Construction	5,500	5,400	5,600	6,500	7,200	5,700	200	4.5%
50 : Sale, maintenance and repair of motor vehicles	2,900	2,900	2,300	2,300	2,200	2,700	-200	-7.3%
51 : Wholesale and commission trade	2,700	3,500	3,900	3,400	3,600	2,800	100	4.1%
52 : Retail trade, except of motor vehicles	15,900	14,900	17,000	15,400	16,300	16,700	900	5.5%
55 : Hotels and restaurants	9,300	9,600	9,600	10,000	9,500	8,800	-500	-5.4%
60 : Land transport; transport via pipelines	1,000	1,400	1,700	1,400	1,600	2,600	1,500	145.7%
61 : Water transport								
62 : Air transport								
63 : Supporting transport activities; travel agencies	3,700	2,800	2,400	2,100	2,100	2,500	-1,100	-30.7%
64 : Post and telecommunications	2,000	1,900	2,300	2,300	2,300	2,100	100	6.9%
65 : Financial intermediation	3,400	3,300	3,100	3,600	4,000	4,000	600	18.3%
66 : Insurance and pension funding, etc	1,900	1,900	2,600	2,200	1,400	1,400	-500	-27.8%
67 : Activities auxiliary to financial intermediation	1,100	1,000	1,000	900	1,000	1,000	-100	-9.8%
70 : Real estate activities	2,100	2,100	2,300	2,300	2,400	1,700	-400	-17.3%
71 : Renting of machinery and equipment	700	700	700	1,000	700	600	-100	-14.8%
72 : Computer and related activities	1,800	1,900	2,200	3,500	3,500	3,200	1,400	77.2%
73 : Research and development								
74 : Other business activities	18,700	18,700	19,200	21,100	21,600	20,900	2,200	11.9%
75 : Public administration and defence etc	19,500	20,300	22,900	22,500	26,500	19,700	200	1.0%
80 : Education	15,500	16,300	14,600	16,800	18,100	20,000	4,500	29.0%
85 : Health and social work	18,100	22,400	23,500	24,600	23,200	24,700	6,600	36.4%
90 : Sewage/refuse disposal, sanitation etc								
91 : Other membership organisations	2,800	3,200	2,900	2,300	3,100	2,700	-100	-3.1%
92 : Recreational, cultural and sporting activities	3,900	4,100	3,700	3,400	5,500	5,900	2,000	50.8%
93 : Other service activities	1,700	2,100	1,600	1,600	1,700	2,100	400	24.0%
TOTAL	149,000	155,100	160,700	164,600	171,900	165,700	16,700	11.2%

Source: ABI (data rounded, percentage change unrounded. Where data is flagged, cells have been left blank to avoid disclosure)

Table 18: Employment Structure in North Tyneside, 1998-2003, by 2-digit SIC

Division Description	1998	1999	2000	2001	2002	2003	Change 1998-03	% change
01 : Agriculture, hunting etc								0.0%
02 : Forestry, logging etc								0.0%
05 : Fishing, operation of fish hatcheries/farms				100			0	
10 : Mining of coal/lignite, extraction of peat	0	0	0			0	0	0.0%
11 : Extraction of crude petroleum and natural gas	0	0	0				0	0.0%
12 : Mining of uranium and thorium ores	0	0	0	0	0	0	0	0.0%
13 : Mining of metal ores	0	0	0	0	0	0	0	0.0%
14 : Other mining and quarry								
15 : Manuf. of food and beverages	1,900	1,800	1,900	1,800	1,500	1,400	-500	-26.0%
16 : Manuf. of tobacco products	0	0	0	0	0	0	0	0.0%
17 : Manuf. of textiles								
18 : Manuf.apparel; dressing/dyeing of fur								
19 : Tanning/dressing of leather etc								
20 : Manuf. of wood and products of wood/cork								
21 : Manuf. of pulp, paper and paper products					400		-200	-32.4%
22 : Publishing, printing, reprod. of recorded media	400	400	500	800	700	600	200	41.7%
23 : Manuf. of coke, refined petroleum products								
24 : Manuf. of chemicals and chemical products								
25 : Manuf. of rubber and plastic products	1,900	2,000	2,000		1,300	1,100	-800	-41.4%
26 : Manuf. of other non-metallic mineral products								
27 : Manuf. basic metals								
28 : Manuf. of fabricated metal products	1,200	1,500	1,200	1,000	900	800	-500	-39.1%
29 : Manuf. of other machinery and equipment	600	500	300	300	300	300	-200	-41.1%
30 : Manuf. of office machinery and computers								
31 : Manuf. of other electrical machinery					800		300	74.7%
32 : Manuf. of radio, t.v. and communic. equip.								
33 : Manuf. of medical instruments								
34 : Manuf. of motor vehicles, trailers etc								0.0%
35 : Manuf. of transport equipment								
36 : Manuf. of furniture; other	700	700	700	1,000	500	300	-400	-55.3%
37 : Recycling								
40 : Electricity, gas, steam and hot water supply								
41 : Collection, purification and distribution of water	0	0	0	0				
45 : Construction	5,900	5,100	4,600	4,600	4,700	4,500	-1,400	-23.7%
50 : Sale, maintenance and repair of motor vehicles	1,600	1,400	1,300	1,300	1,100	1,600	0	2.5%
51 : Wholesale and commission trade	1,400	1,800	1,900	1,600	2,200	1,900	500	33.6%
52 : Retail trade, except of motor vehicles	6,500	6,700	6,800	6,500	7,300	7,300	800	13.0%
55 : Hotels and restaurants	3,700	4,200	3,900	3,700	3,700	3,400	-300	-9.1%
60 : Land transport; transport via pipelines	1,100	1,000	900	900	700	900	-300	-25.5%
61 : Water transport								
62 : Air transport					0	0	0	
63 : Supporting transport activities; travel agencies	600	400	1,200	1,100	400	300	-200	-42.3%
64 : Post and telecommunications	100	600	1,300	2,600	3,200	3,100	3,000	2461.7%
65 : Financial intermediation	700	700	700	600	600	600	-200	-23.5%
66 : Insurance and pension funding, etc								
67 : Activities auxiliary to financial intermediation			100	100				
70 : Real estate activities	800	700	700	800	1,000	900	100	10.0%
71 : Renting of machinery and equipment	400	300	300	300	300	200	-100	-37.4%
72 : Computer and related activities	500	500	600	700	700	800	200	46.5%
73 : Research and development								
74 : Other business activities	4,200	4,100	5,500	6,300	7,400	5,200	1,000	25.0%
75 : Public administration and defence etc	2,800	2,900	3,200	2,800	2,600	2,400	-400	-13.0%
80 : Education	5,100	4,900	5,000	5,000	5,700	6,500	1,400	27.1%
85 : Health and social work	7,600	7,900	8,400	8,900	8,300	9,100	1,600	20.6%
90 : Sewage/refuse disposal, sanitation etc								
91 : Other membership organisations	1,000	1,200	1,100	800	800	1,000	-100	-5.0%
92 : Recreational, cultural and sporting activities	1,100	1,300	1,200	1,100	1,500	1,500	400	32.4%
93 : Other service activities	900	1,100	800	700	600	900	0	-2.0%
TOTAL	60,100	58,800	61,000	61,600	64,600	62,800	2,800	4.6%

Source: ABI (data rounded, percentage change unrounded. Where data is flagged, cells have been left blank to avoid disclosure)

Table 19: Employment Structure in South Tyneside, 1998-2003, by 2-digit SIC

Division Description	1998	1999	2000	2001	2002	2003	Change 1998-03	% change
01 : Agriculture, hunting etc								
02 : Forestry, logging etc	0	0		0	0	0	0	0.0%
05 : Fishing, operation of fish hatcheries/farms				0				
10 : Mining of coal/lignite, extraction of peat		0	0	0	0			0.0%
11 : Extraction of crude petroleum and natural gas	0							0.0%
12 : Mining of uranium and thorium ores	0	0	0	0	0	0	0	0.0%
13 : Mining of metal ores	0	0	0	0	0	0	0	0.0%
14 : Other mining and quarry								
15 : Manuf. of food and beverages		200			100			
16 : Manuf. of tobacco products	0	0	0	0	0	0	0	0.0%
17 : Manuf. of textiles								
18 : Manuf.apparel; dressing/dyeing of fur								
19 : Tanning/dressing of leather etc								
20 : Manuf. of wood and products of wood/cork								
21 : Manuf. of pulp, paper and paper products								
22 : Publishing, printing, reprod. of recorded media								
23 : Manuf. of coke, refined petroleum products	0	0	0	0	0	0	0	0.0%
24 : Manuf. of chemicals and chemical products								
25 : Manuf. of rubber and plastic products								
26 : Manuf. of other non-metallic mineral products								
27 : Manuf. basic metals								
28 : Manuf. of fabricated metal products	700	900	800	600	1,000	900	200	29.5%
29 : Manuf. of other machinery and equipment		400	500	500	400	500		
30 : Manuf. of office machinery and computers								0.0%
31 : Manuf. of other electrical machinery					900			
32 : Manuf. of radio, t.v. and communic. equip.								
33 : Manuf. of medical instruments								
34 : Manuf. of motor vehicles, trailers etc								
35 : Manuf. of transport equipment								
36 : Manuf. of furniture; other		500	900	1,000	600	500		
37 : Recycling								
40 : Electricity, gas, steam and hot water supply			0					
41 : Collection, purification and distribution of water	0	0		0	0	0	0	0.0%
45 : Construction	2,800	3,000	1,700	2,200	2,000	1,800	-1,000	-37.1%
50 : Sale, maintenance and repair of motor vehicles	700	800	600	600	600	800	100	13.8%
51 : Wholesale and commission trade	800	1,500	1,200	1,000	1,000	800	-100	-6.9%
52 : Retail trade, except of motor vehicles	5,400	5,300	5,600	5,900	5,600	5,300	-200	-2.8%
55 : Hotels and restaurants	2,700	3,000	2,800	2,900	2,900	2,400	-300	-11.0%
60 : Land transport; transport via pipelines	600	500	600	600	900	800	300	48.5%
61 : Water transport								
62 : Air transport	0	0	0			0	0	0.0%
63 : Supporting transport activities; travel agencies	800	500	300	400	500	600	-100	-17.8%
64 : Post and telecommunications				500	400	300		
65 : Financial intermediation	500	400	400	500	400	400	-100	-11.8%
66 : Insurance and pension funding, etc				0			-100	
67 : Activities auxiliary to financial intermediation								
70 : Real estate activities	300	300	300	300	300	300	0	15.1%
71 : Renting of machinery and equipment	400	400	500	500	300	300	-200	-41.9%
72 : Computer and related activities	200	200	200	200	100	100	-100	-30.9%
73 : Research and development			0	0	0	0	0	
74 : Other business activities	2,400	2,600	3,700	5,100	3,800	3,000	700	27.8%
75 : Public administration and defence etc	2,300	2,000	2,300	2,000	2,200	2,700	400	17.7%
80 : Education	3,700	3,600	3,700	3,900	4,100	4,800	1,100	29.3%
85 : Health and social work	6,300	5,800	6,500	6,900	6,300	7,500	1,200	18.8%
90 : Sewage/refuse disposal, sanitation etc								
91 : Other membership organisations	700	1,000	800	600	600	600	-100	-15.8%
92 : Recreational, cultural and sporting activities	800	1,200	1,100	1,100	1,000	1,300	500	56.0%
93 : Other service activities	500	700	800	500	500	500	100	20.3%
TOTAL	44,400	44,700	43,700	42,500	40,700	40,500	-3,800	-8.6%

Source: ABI (data rounded, percentage change unrounded. Where data is flagged, cells have been left blank to avoid disclosure)

Table 20: Employment Structure in Sunderland, 1998-2003, by 2-digit SIC

Division Description	1998	1999	2000	2001	2002	2003	Change 1998-03	% change
01 : Agriculture, hunting etc								
02 : Forestry, logging etc	0	0				0	0	0.0%
05 : Fishing, operation of fish hatcheries/farms								
10 : Mining of coal/lignite, extraction of peat								
11 : Extraction of crude petroleum and natural gas	0	0		0	0		0	0.0%
12 : Mining of uranium and thorium ores	0	0	0	0	0	0	0	0.0%
13 : Mining of metal ores	0	0	0	0	0	0	0	0.0%
14 : Other mining and quarry								
15 : Manuf. of food and beverages	1,500	1,000	1,100	900	900	800	-800	-50.3%
16 : Manuf. of tobacco products	0	0	0	0	0	0	0	0.0%
17 : Manuf. of textiles								
18 : Manuf.apparel; dressing/dyeing of fur		1,800						
19 : Tanning/dressing of leather etc								
20 : Manuf. of wood and products of wood/cork	200	100	200		300	200	0	-9.6%
21 : Manuf. of pulp, paper and paper products								
22 : Publishing, printing, reproducing of recorded media	1,800	1,700	1,800	2,200	1,900	1,600	-200	-10.5%
23 : Manuf. of coke, refined petroleum products								
24 : Manuf. of chemicals and chemical products								
25 : Manuf. of rubber and plastic products	1,500	1,500	1,300	1,200	1,900	1,300	-200	-13.4%
26 : Manuf. of other non-metallic mineral products	900	900	800	800	700	600	-200	-28.4%
27 : Manuf. basic metals								
28 : Manuf. of fabricated metal products	1,300	1,700	1,700	1,000	1,300	1,200	-100	-10.5%
29 : Manuf. of other machinery and equipment	1,500	1,400	1,800	1,400	2,300	1,300	-200	-12.8%
30 : Manuf. of office machinery and computers								
31 : Manuf. of other electrical machinery	2,300	1,800	1,800	1,200	1,000	900	-1,400	-60.1%
32 : Manuf. of radio, t.v. and communic. equip.								
33 : Manuf. of medical instruments	200	200	300		200	300	100	24.2%
34 : Manuf. of motor vehicles, trailers etc				8,500	8,200			
35 : Manuf. of transport equipment								
36 : Manuf. of furniture; other	2,200	2,100	2,200	2,400	1,900	1,800	-400	-17.8%
37 : Recycling								
40 : Electricity, gas, steam and hot water supply								
41 : Collection, purification and distribution of water	0							0.0%
45 : Construction	4,200	5,900	6,200	4,500	4,100	4,000	-200	-4.4%
50 : Sale, maintenance and repair of motor vehicles	2,600	2,400	2,300	2,600	2,500	2,700	100	5.2%
51 : Wholesale and commission trade	2,900	3,400	4,200	3,700	2,900	2,700	-200	-8.1%
52 : Retail trade, except of motor vehicles	12,200	16,200	13,800	12,800	13,100	14,100	2,000	16.0%
55 : Hotels and restaurants	6,300	6,000	5,600	5,300	5,700	5,500	-800	-11.9%
60 : Land transport; transport via pipelines	2,100	2,100	2,000	2,300	1,400	1,800	-200	-11.6%
61 : Water transport				0			0	
62 : Air transport	0	0	0	0	0	0	0	0.0%
63 : Supporting transport activities; travel agencies	1,100	1,000	700	800	1,400	1,300	300	25.3%
64 : Post and telecommunications	2,200	2,200	2,300	3,900	3,800	2,400	200	8.7%
65 : Financial intermediation	1,500	1,500	2,000	3,100	3,300	3,200	1,800	121.2%
66 : Insurance and pension funding, etc								
67 : Activities auxiliary to financial intermediation	200	300	300	300	200	300	100	24.5%
70 : Real estate activities	1,100	700	700	2,200	2,100	2,200	1,100	106.0%
71 : Renting of machinery and equipment	400	600	500	400	400	400	0	13.5%
72 : Computer and related activities	1,600	1,100	1,500	1,800	1,400	1,300	-300	-17.7%
73 : Research and development								
74 : Other business activities	8,900	6,900	5,500	7,000	7,000	9,300	400	5.1%
75 : Public administration and defence etc	5,600	5,200	5,500	5,500	5,800	5,800	200	3.5%
80 : Education	9,300	9,500	9,000	8,700	10,900	11,600	2,300	24.7%
85 : Health and social work	12,400	12,100	12,700	12,500	12,800	14,000	1,600	13.0%
90 : Sewage/refuse disposal, sanitation etc								
91 : Other membership organisations	1,200	1,600	1,400	1,100	1,000	1,100	-200	-13.7%
92 : Recreational, cultural and sporting activities	2,000	2,800	2,900	2,400	2,100	2,200	100	6.2%
93 : Other service activities	1,200	1,700	1,200	1,000	900	1,200	-100	-5.5%
TOTAL	107,600	110,800	107,600	108,400	109,900	110,800	3,100	2.9%

Source: ABI (data rounded, percentage change unrounded. Where data is flagged, cells have been left blank to avoid disclosure)

Appendices

Appendix 1: Comparison of employee data for Tyne & Wear, 1998-2005 from LFS and APS (residence-based and workplace-based)

Comparison of employee data for Tyne & Wear, 1998-2005 from LFS and APS (residence-based and workplace-based)								
	LFS (1998-2004)							APS (2005)
	1998	1999	2000	2001	2002	2003	2004	2005
Residence-based ^a	404,000	393,000	392,000	404,000	419,000	425,000	424,000	426,300
Residence-based (total employment inc self-employment) ^b	439,000	430,000	433,000	439,000	451,000	460,000	462,000	465,600
Workplace-based ^b	418,986	433,174	458,646	452,101	461,336	497,800

^a LFS Residence-based, 1998-2004 (4-quarter June-May rolling average employees aged 16+) and APS resident-based, 2004-2005 (Oct-Sep, employees aged 16+)

^b LFS Workplace-based employees, 2000-2004 (April-June. This data was a special request by TWRI from the LFS Dataservice and has been reweighted in line with the population estimates). APS Workplace-based employment, 2005 (September, all people working age)

Source: Labour Force Survey, Annual Population Survey, LFS Dataservice [Crown Copyright]

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

Employment Growth in Major English Cities, 1991-2003 (%)						
City by type	Total Emp. (excl farming)	Manufacturing jobs	Public services jobs	Financial services jobs	Other jobs (excl farming)	
England	15.7	-20.8	18.2	43.2	21	
London (type 1)	16.9	-32	6.8	41.6	20.7	
Mets (type 2)						
Birmingham	6.1	-27.5	23.2	33.3	10.7	
Leeds	22.9	-19.6	33.8	61.3	19.8	
Liverpool	5.8	-34.8	25.8	62.9	-4.4	
Manchester	14.1	-30.9	12.8	59.5	20.3	
Newcastle	8.5	-14.9	23.1	7.5	5.3	
Sheffield	11.2	-16.9	27.6	42.2	7.1	
S & E Large City (type 3)						
Bournemouth	23.2	-12.5	23.4	39.7	28.2	
Brighton	28.1	-9.6	25.4	42.7	30.8	
Bristol	20	-19.8	32.6	21.1	29.4	
Leicester	-2.2	-33.4	5.7	47.5	-1.7	
Nottingham	4.6	-30.1	15.6	32.7	6.6	
Portsmouth	14.4	-25.1	25.1	7.9	30.7	
Reading	38.1	-24.9	53.5	91.1	23.4	
Southampton	10.3	-27.5	8.6	22.9	19.1	
N & W Large City (type 4)						
Birkenhead	-1.6	-28.3	10.3	9	4.7	
Bradford	3.1	-20	17	16.6	3.6	
Coventry	3.8	-30.9	4.3	27.7	26.2	
Huddersfield	10.3	-22	21.2	49.6	25.6	
Hull	7	5.9	11.7	27.7	-1	
Middlesbrough	8.8	-36.9	27.7	38.4	19.5	
Stoke	-7.1	-38	38.1	-15.9	-3.9	
Sunderland	14.3	-4.1	20.9	49.5	10.4	
Wigan	10.4	-19.2	9.5	71.6	16.5	

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

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

Public Service Employment Change 1984-2003, Tyne & Wear and Great Britain

	Census of Employment				Annual Employment Survey				Annual Business Inquiry			
	1984	1991	Change	% of total net emp. growth	1991	1998	Change	% of total net emp. growth	1998	2003	Change	% of total net emp. growth
Tyne & Wear												
Public Admin.	33,600	37,300	3,700	49.3	38,800	33,100	-5,700	-69.5	33,100	41,400	8,300	24.5
Education	40,100	39,400	-700	-9.3	38,100	34,400	-3,700	-45.1	38,300	50,200	11,900	35.1
Health & Social Work ^a	25,800	31,000	5,200	69.3	49,600	55,600	6,000	73.2	53,100	65,600	12,500	36.9
PSE Sub-total	99,500	107,700	8,200	109.3	126,500	123,100	-3,400	-41.5	124,500	157,200	32,700	96.5
Total Employment	418,700	426,200	7,500		426,000	434,200	8,200		441,300	475,200	33,900	
Great Britain												
Public Admin.	1,522,600	1,361,900	-160,700	-22.2	1,400,400	1,368,200	-32,200	-1.8	1,366,000	1,411,900	45,900	3.4
Education	1,513,800	1,736,900	223,100	30.9	1,699,200	1,783,700	84,500	4.7	1,861,200	2,322,000	460,800	34.0
Health & Social Work ^a	1,269,600	1,509,900	240,300	33.2	2,306,500	2,425,300	118,800	6.7	2,519,800	2,946,900	427,100	31.5
PSE Sub-total	4,306,000	4,608,700	302,700	41.9	5,406,100	5,577,200	171,100	9.6	5,747,000	6,680,800	933,800	68.9
Total Employment	20,845,900	21,569,000	723,100		21,575,900	23,360,700	1,784,800		24,355,200	25,710,800	1,355,600	

^a Before 1991, 'Health & Social Work' did not exist as an SIC group. Data from the CES for the period 1984-1991 is based on SIC 1980, which refers to 'Medical Services' (SIC 95) only. This does not include Social Work, which is listed instead as SIC 96 'Other services'. This has not been included in this table and the figures for the period 1984-91 refer to 'Medical Services' only.

Sources: CES, AES and ABI from NOMISweb (all data rounded)

Appendix 4: Home Workers

Recent follow-up surveys of ABI contributors sought to establish whether any of these workers were being included as employees in the ABI return and it was found that six of the 549 respondents to the survey said that they had included home workers on piece rates, the ABI is therefore overstated. Homeworkers who are *employees* should be included in the ABI. Again, the follow-up survey sought to establish that they are being included.

Appendix 5: Public Administration Employment in Tyne & Wear, 1998 and 2003

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

Public Administration Employment in Tyne & Wear, 1998 and 2003

	1998	2003	Change
Gateshead ^a	4,000	4,000	0
	(not 2,900)	(not 10,800)	(not 7,900)
North Tyneside ^b	5,800	5,400	-400
	(not 2,800)	(not 2,400)	(-400)
Newcastle ^c	16,500	16,700	200
	(not 19,500)	(not 19,700)	200

^a For Gateshead, the 1998 figure has been revised upwards slightly. The 2003 figure has been revised downwards substantially in accordance with figures held by Gateshead Council in their Places of Employment File (PEF), which found a large disparity between ABI and PEF.

^b For North Tyneside, both the 1998 and 2003 figures have been revised upwards to account for an apparent omission in the ABI of the DWP office at Tyne View Park in North Tyneside.

^c For Newcastle, 3,000 employees have been subtracted from the 1998 and 2003 totals to account for the upward revision made in North Tyneside for the DWP offices.

Sources: ABI and Gateshead Council's Places of Employment File