



**Economic Impact of the
Downturn in the North East
Triangle and BDP:**

Spatial Economic Predictions

Northern Arc (Business Link)

March 2009

This report was prepared by Jim Plunkett-Cole of GWE Business West Research
Tel: 07715 856265 **email:** jim.pc@gwebusinesswest.co.uk

GWE Business West Research, Emlyn Square, Swindon, SN1 5BP

CONTENTS

Executive Summary	2
1 Introduction	7
2 Workplace Economic Impact.....	13
3 Resident Economic Impact.....	28

Executive Summary

This report presents the findings from an analysis which was instigated to predict the economic impact of the 2008 UK and global economic 'Downturn' on and across the North East Triangle (NET) and Bournemouth, Dorset, Poole (BDP) economies.

Three annual impact scenarios can be established from this report:

- A 'Base' scenario which makes predictions on the basis that the national economic trends which occurred in the Quarter of June 2008 to December 2008 persisted for a year (from June 2008 to June 2009). National (Claimant) unemployment rises from 800,000 in June 2008 to 1,420,000 in June 2009, a 77% increase.
- A 'Higher-Pace' scenario which sees unemployment nationally rising far more substantially following the Christmas 2008 period; unemployment nationally rises from 800,000 in June 2008 to 1,730,000 in June 2009, a 116% increase.
- A 'Lower-Pace' Scenario which sees national unemployment increasing at half the rate which occurred from June 2008 to December 2008; unemployment rises from 800,000 in June 2008 to 1,110,000 in June 2009, a 39% increase.

The remainder of this Executive Summary and Report refers to the Base scenario findings. However, and whatever the overall extent of the Downturn, we suggest that the general *patterns* across the North East Triangle and Bournemouth, Dorset and Poole will be the same, though ramped up (or down) at a rate commensurate with the overall extent of the national Downturn.

Though not presented in the report, the reader is advised that the 'Higher-Pace' scenario volume changes and percentages can be established by simply multiplying the relevant Baseline prediction by a factor of 1.5. The 'Lower-Pace' Scenario predictions can be established through the application of a factor of 0.75 to the relevant volume changes and percentages in the Base prediction.

To extend the predictive timeframe beyond June 2009, for example for six months to December 2009, the reader would multiply the annual change or percentage change by a factor of 1.5 and add this to the June 2009 prediction. Due to the immense uncertainty surrounding the current economic situation, and further uncertainties concerning the impact of global and UK macro-economic measures, we would not advise using this framework or approach to make predictions beyond the end of 2009.

Workplace Economy Analysis

Workplace Employment

The analysis predicts that NET workplaces will shed a total of 26,000 jobs by June 2009 (from an estimated 1,183,000 jobs in June 2008, a 2.19% decline).

As would be expected, spatial variations in terms of the volumes of losses follow very much spatial variations in the overall employment size of the economy in question. At times these will be concentrated in relatively (geographically) small urban industrial areas and at times they will be spread over relatively larger mixed (urban and rural economies). For example, almost 7,000 losses can be expected in Bristol and a similar volume across Gloucestershire. Greater Bristol, which includes the North and North East fringes of Bristol (and which lie in the Upper Tier Authority of South Gloucestershire), would lose about 7,500 jobs as a result of the Downturn over the course of the year. Gloucestershire is followed by Wiltshire with around 4,200 predicted losses and Dorset with 3,500 losses and Swindon with 2,700 losses. Losses in each of the four remaining Upper Tier Authorities will be somewhere between 1,500 and 2,000 to June 2009.

In terms of the predicted decline to June 2009 as a proportion of total employment in June 2008 (the starting period), the analysis suggests that Swindon will be the most adversely affected of all

the Upper Tier Authorities (with a decline of 2.48% from its June 2008 employment level). Swindon is followed by South Gloucestershire, Poole and North Somerset on this measure. In the most general of terms, spatial variations in the percentage change impact of the Downturn on employment are due to the local industrial profile; rural areas with employment concentrations in 'essential' sectors such as Agriculture and Energy and Water and/or areas with higher proportions of employment in Public Administration and Defence, Health or Education will be impacted less than urban industrial areas with higher concentrations of employment in other more market-sensitive sectors.

Amongst Lower Tier District Authorities the highest volumes of jobs decline can be expected in Cheltenham and Gloucester (each declining by at least 1,600 jobs). However, the analysis of percentage decline from pre-Downturn levels shows that the worst-affected Districts are likely to be Stroud and West Wiltshire. Also well above average in terms of their decline are Cotswold District and Tewkesbury District in Gloucestershire and Christchurch in Dorset.

With respect to an urban and rural area analysis, and combining the percentage change from pre-Downturn levels with the overall size of the economy, the most adversely affected parts of the NET / BDP are Swindon Town (by a considerable margin), Poole, Rural North Somerset, Rural South Gloucestershire, Cirencester, and Stonehouse.

Workplace Output

Under the Baseline scenario, NET's workplace output will decline by around £1,000 million in the year to June 2009, a 2.72% fall from the pre-Downturn level of June 2008.

For the most part, spatial variations in volume output patterns reflect the patterns of job losses described above. However, Poole's output will be the most adversely affected of all the Upper Tier Authorities (with a decline of 2.98% from its June 2008 employment level). Poole is followed by Wiltshire and North Somerset.

As with job losses, spatial variations in the impact of the Downturn on output are due to the local industrial profile. In general, the most affected areas will be those with relatively higher concentrations of employment in (one or more of) the higher-value added per head and/or higher expected employment decline sectors of Transport and communications, Manufacturing, Construction, Wholesale and retail, hotel and catering and Other services.

In terms of output losses (percentage change) and amongst reasonably 'heavyweight' economies of NET / BDP only, the most adversely affected parts of the Triangle are all urban.

Workplace Job Losses by Industry

Across NET's workplaces, the highest volumes of job losses will be felt in Distribution, hotels and restaurants (with around 7,000 losses predicted under the Baseline scenario). This sector is followed by Manufacturing and Banking, finance and insurance etc. (often referred to simply as 'Business services'). Each of these sectors is predicted to lose around 5,000 jobs.

In general, most economies follow the NET pattern of highest volume losses in Distribution, hotels and restaurants followed by volume losses in either Business services or Manufacturing depending upon the type of economy in question. For example, Greater Bristol, North Somerset, Bournemouth, and Bath and North East Somerset all have Business services following Distribution, hotels and restaurants in volume loss terms. Alternatively, Gloucestershire, Wiltshire, Swindon, South Gloucestershire and Poole all have Manufacturing following Distribution in terms of volume losses.

Resident Economy Analysis

Resident Claimant Unemployment

Overall, NET is predicted to see a rise in Claimant Unemployment of around 25,000 amongst its residents from June 2008 to June 2009, a rise of 127% from current levels. Whilst this rate of growth of unemployment is almost double the national rate (rising by 77%) it must be remembered that NET's current unemployment rates (of the workforce) are substantially lower than nationally. As a result, and in all areas with a relatively low current rate of unemployment, a relatively small volume increase can lead to a relatively high growth rate increase.

Amongst the ten NET Upper Tier Authorities the greatest volume of new Claimants will be in Gloucestershire (6,300 new Claimants). Gloucestershire is followed by Wiltshire (4,900 new Claimants), Bristol (4,100) and Dorset (4,000). South Gloucestershire is fifth with 2,900 expected new Claimants. Each of the remaining 6 Upper Tier Authorities will produce somewhere between 1,500 to 2,500 new Claimants.

The analysis of workplace employment in showed that the Top 4 Upper Tier Authorities in terms of job losses were Bristol followed by Gloucestershire, Wiltshire and Dorset. The higher rankings of Gloucestershire and Wiltshire in terms of Claimant Unemployment, a resident-based count, illustrates the relative importance of these areas as commuter areas. The finding shows how the larger urban centres will carry the weight of job losses from the closure or contraction of business, production and commerce but that the implications of these losses will impact far more evenly in the rural commuter zones of NET (though spread over a far greater physical area).

The general rule on new Claimant percentage growth tends to be that the lower the current volume of unemployed in the area, the higher the growth rate and the greater the potential impact on the community in that area. This general trend becomes more apparent, the smaller the geographical area of focus. For example, amongst the Districts, the highest rates are found in the relatively sparsely populated, wealthier commuter communities of Dorset (and also Cotswold in Gloucestershire). However, these high percentage growth areas are likely to be relatively wealthy and overly professional in terms of their new Claimant profile, characteristics which are likely to mean that their residents are, *on average*, better able to withstand the Downturn or to mitigate the impact of the Downturn on themselves and their families. The potential impact in these areas may well not be realised as a result.

Cities and Towns with historically higher rates of unemployment are perhaps more used to dealing with unemployment (and have the support infrastructures in place to deal with unemployment as a result). Partners should ensure that the support infrastructure across NET is able to deal with the rising demand for their services from these areas in terms of such services as benefits claims processing, support for finding work and retraining and also business start-up. This provision needs to reflect the rapid surges in new Claimants living in the more rural and at times remote areas of NET. Service accessibility will be key in these areas.

As well as accessibility, the support service infrastructure (especially support for finding work and start-up) will need to recognise the differences in the types of Claimants in the more rural areas. The Claimant profile is far more professional in the NET rural areas. Demand for the business start-up option in the NET rural areas is likely to see a significant surge, driven largely by entrepreneurial professionals backed with a redundancy payment. These potential start-ups are likely to have a different profile to that of the NET's more urban areas, which are characterised by larger concentrations of lower skilled new Claimants. However, a surge in start-ups in NET urban areas should also be expected (and supported).

In the case of support for finding work in the NET rural areas, the high rates of out-commuting mean that many of these newly unemployed are likely to be commuters. Local support partner linkages with the relevant partners in these commuter destinations will be essential.

Resident Earnings

Readers should be aware of the 'double-whammy' effect of earnings lost on the public sector purse; when earnings fall, so too does taxation, and, when earnings fall as a result of job losses, additional public funds are required to pay for benefits drawn as a result.

In total it is estimated that earnings across NET will fall from £25.6 billion in June 2008 to £25.2 billion in 2009, a £0.5 billion decrease (equivalent to a 1.77% decrease).

In general, areas with larger concentrations of employment in Skilled Trades and Process, Plant and Machine Operatives will see the greatest earnings losses. This certainly seems to be true of the earnings losses experienced by Swindon, Poole and Wiltshire.

Amongst the Upper Tier Authorities, the Counties of Gloucestershire, Wiltshire and Dorset occupy three of the top 4 positions in terms of the expected volume fall in earnings. Bristol lies in third place with an expected annual loss of earnings of £76 million. Amongst the Unitaries and District Authority areas, and as with new Claimants, the top positions are all held by the larger Unitary Authorities, pretty much in order of the relative size of the economy (with Bristol in top place). An exception to this is Swindon which has a slightly higher ranking in terms of volume loss than the size of its economy. With relatively low Claimant growth in Swindon this must be due to the occupational profile of Swindon; Swindon's job losses are, on average, located in better paid occupations.

Amongst the urban and rural area categories, the main volume contributors to earnings decline across NET will derive from the large urban area of Greater Bristol. Following Bristol (by a very considerable way), are Swindon Town and Bath City. The urban area of Weston-Super-Mare also makes it into the Top 10 highest volume losers. However six of the Top 10 volume loser placings are actually taken up by rural areas, endorsing the earlier point that whilst urban industrial areas will take the brunt of workplace losses, these losses will be felt far more evenly amongst the (residents of) the NET rural areas.

In terms of the percentage change from the Pre-Downturn earnings levels, the worst affected of the Upper Tier Authorities will be Swindon, Poole and Wiltshire. Amongst the Unitaries and Districts, the Top 5 highest percentage declining areas are Gloucester, Swindon, Christchurch, West Dorset and West Wiltshire. Amongst urban and rural areas, earnings percentage decline is expected to be highest for economies of NET / BDP such as Midsomer Norton and Radstock, Melksham, Calne, Trowbridge, Cirencester, Swindon Town, Yate and Chipping Sodbury and Christchurch Town.

It is perhaps noticeable that most of the larger and more worst-affected economies here are noted for their concentrations of (resident and workplace) employment in Blue-Collar (manual) industries with the associated high concentrations of Skilled Tradespeople and Operatives. From the Business Link start-up perspective, these areas are most likely to produce start-ups in the skilled trades.

Resident Job Losses by Skill Level

In general, there is an inverse relationship between employment and self-employment (and starting and running one's own business). Employment losses as a result of the Downturn will inevitably instigate a surge in start-ups as a result. Allied to this, it should also be noted that skilled workers, in general, are less reliant upon employment (as opposed to self-employment or starting their own business) than unskilled workers. Skilled workers also tend to be more creative and entrepreneurial in finding work in general when faced with redundancy (not least as they will have more employment options available to them than unskilled workers).

The nature of job losses across NET, will be very slightly more highly skilled than the job losses experienced nationally. However, the lion's share of job losses (61% of losses) will be unskilled, leaving 39% of losses being skilled in their nature.

Amongst the Upper Tier Authorities, higher proportions of skilled job losses are expected to be found in Gloucestershire and Dorset. Conversely, higher proportions of unskilled losses are predicted across Bath and North East Somerset and Swindon. In fact, of all the Upper Tier Authorities, Swindon is marked out for its very high proportion of unskilled losses and very low proportion of skilled losses; 70% of Swindon losses will be unskilled and 30% skilled compared to NET averages of 61% and 39% respectively.

Amongst the Unitaries and Districts, the main areas with well above average skilled losses are Purbeck, Christchurch, Stroud, Kennet, Cheltenham and North Dorset. The highest proportions of unskilled losses are predicted to occur in Swindon, Weymouth and Portland and West Wiltshire.

Amongst the urban and rural classified areas, the highest proportions of skilled jobs (and lowest proportions of unskilled jobs) will be lost in the economies of Christchurch Town (Christchurch), and the rural areas of Kennet, Stroud, North Dorset, Cotswold, North Somerset, Salisbury, South Gloucestershire and the Forest of Dean.

Almost all the worst-affected urban and rural classified areas are either large rural areas or smaller market or coastal towns. The analysis points to the significant strategic opportunity which exists for Business Link to work in partnership in these areas with Jobcentre Plus to target new benefit Claimants as a result of the Downturn with start-up workshops and networking opportunities (with a view to generating collaborative start-ups).

At the other end of things are those urban and rural economies with low proportions of unskilled losses and higher proportions of unskilled losses. It is these areas where jobsearch and retraining strategies and actions (alongside inward investment if possible) will be most valid. The larger economies to which this applies are Swindon, Trowbridge, Midsomer Norton and Radstock, Melksham, Other Cotswold Urban, Calne, Keynsham and Ferndown.

As with all NET and BDP economies, jobsearch, retraining and business start-up support strategies and action plans are essential.

Resident Job Losses by Industry

Predicted Estimates of Job Losses by Key Industry (Blue Collar and Services) suggest that, as a result of the Downturn, 44% of losses will be in Blue Collar Industries and 56% will be in Services. Upper Tier Authority Areas with a larger share of losses in Blue Collar Industries and a commensurately smaller loss in Services are Swindon, Poole, Gloucestershire and Wiltshire. Areas with a larger share of losses in Services and a commensurately smaller loss in Blue Collar Industries are Bournemouth, Bath and North East Somerset and Bristol.

1 Introduction

- 1.1 This report presents the findings from an analysis which was instigated to predict the economic impact of the 2008 UK and global economic 'Downturn' on and across the North East Triangle (NET) economy.
- 1.2 The analysis explores both the NET workplace economy (and its constituent workplace sub-economies) and also its resident-based economy (and its constituent resident-based sub-economies). The workplace economy comprises the economic activity which physically takes place within NET (and its sub-economies on a day to day basis).
- 1.3 The resident-based economy is defined as the economic activity undertaken by residents from a particular area on a day to day basis. This activity can physically take place within or outside the geographical area of focus. An exploration of the workplace and resident-based economies has two key advantages: firstly, it enables an economic picture to be constructed for an area which considers net commuting; and, secondly, by additionally focusing on residents, it supports the construction of a more socio-economic picture for an area.
- 1.4 The analysis included the development of a simple short-term predictive economic model comprising a series of basic assumptions regarding the impact of the Downturn. These assumptions have been heavily influenced by the datasets available at the time of development. In summary however, these assumptions were as follows:
 - i. To establish the baseline predictions for Claimant Unemployment and employment the analysis drew upon the trends in Claimant Unemployment by Usual Occupation dataset for Great Britain for the six month timeframe June 2008 to December 2008. This timeframe was considered suitable as it was in May 2008 that unemployment nationally began to rise.
 - ii. It was assumed that the trends in occupational unemployment over this quarter would continue evenly for a further six months (to make a 12 month prediction).
 - iii. It was assumed that there is a direct inverse relationship between Claimant Unemployment (Job Seekers Allowance) and employment. In other words, it was assumed that all those who lose their jobs as a result of the Downturn will attempt to claim unemployment benefit. This may only be to ensure they continue to pay their National Insurance contributions, something all job seekers are encouraged and advised to do by the JobCentre Plus network.
 - iv. It was assumed that unemployment amongst NETs's workplace and resident-based occupational profiles would decline in line with national trends within each broad occupational group.
 - v. To construct the industrial tables, it was assumed that unemployment would occur within industries according to the national structure of broad industries and broad occupations (known by some as the national SIC / SOC matrix).
 - vi. It was assumed that employment in Agriculture, Energy and water and the Public sector remains constant over the period.
 - vii. It should be pointed out here that it is (generally slight) variations in local structures of employment by industry and occupation that lead to (generally slight) discrepancy between the occupational and industrial totals predictions for such indicators as employment and unemployment.

- 1.5** At present, the model is occupationally-led. As such, the accuracy of the occupational predictions depends very much on the extent to which national trends in unemployment by occupation are replicated in NET unemployment by occupation. For the output and industrial analysis, their accuracy relies upon the extent to which national unemployment by industry follows the general national pattern of industries within occupations (except the industries of Agriculture, Energy and water and the Public sector which are assumed constant). The predictions will be more accurate the more evenly the Downturn impacts across each broad industrial sectors (except Agriculture, Energy and water and the Public sector) and thus reflects the general national pattern of industries within occupations.
- 1.6** It should be noted that workplace employment data from the Annual Population Survey is only available for 'All in employment' and not for those in employment but of working age only. Since only those of working age can claim Jobseekers Allowance, the Model is likely to underestimate change in employment and unemployment. Comparison of resident-based data shows that this is likely to be somewhere in the region of a 5% under-estimate of job losses / gains (based on the difference between 'All in employment' and 'All in employment of working age' for the South West). This under-estimate will apply to each spatial area covered by the predictions in this report.
- 1.7** It is intended that the model will be modified and updated in the future. In particular, it is suggested that once the national employment dataset for the June 2008 quarter is released (data for the third quarter of 2008), that this could be introduced to make the model industry-led, as opposed to occupationally-led as at present. Whilst the current occupationally-led model is not ideal (particularly for the industrial analysis), it has been improved by the constraint of employment losses to certain industries only (as highlighted).
- 1.8** The Tables were constructed to illustrate predicted workplace and resident-based trends in unemployment along with each of the three key economic measures of output, employment and income (earnings). The reader should note that a lack of data meant that it was not possible to develop workplace-based occupational breakdowns and predictions below District level. As a result, these columns, and their dependent columns, have been 'greyed out' in the Tables.
- 1.9** The tables show the baseline predictions, from June 2008 to June 2009, for a series of relevant workplace and resident-based economies. As mentioned previously, these predictions are based upon national trends by occupation for June 2008 to December 2008 continuing for the six months into the future. Over the year, the approach predicts that national Claimant Unemployment will rise from around 800,000 in June 2008 to 1,420,000 in June 2009, a 77% rise (and a volume rise of 620,000). In reality, these trends may well alter and a suitable 'Hi-Pace' scenario is perhaps to assume that unemployment volumes nationally will rise at 50% higher than the June 2008 to December 2008 rate for the year, i.e. at around 116% for the year. If this were to occur then national unemployment would reach around 1,730,000 by June 2009. However, this is highly likely to be the very worst-case scenario and relies upon a huge shakeout of employment in the New Year. Whilst a shakeout of considerable order is likely following the Christmas 2008 period, it is not expected to be of this magnitude.
- 1.10** In order to establish the impact of the 'Hi-Pace' scenario from the Baseline Tables presented here, it is simply a case of multiplying the relevant volume change figure for most indicators by a factor of 1.5. For example, if the Baseline Table shows that unemployment volumes in a particular sub-economy were expected to rise by 3,000 additional individuals than in June 2008, then the 'Hi-Pace' scenario would predict an additional 4,500 individuals over the same period. However, although the overall order and pace of the Downturn is

uncertain, the general trends within NET should remain constant, albeit at the higher order or higher pace of change. This is a particularly important point from an analytical standpoint as it suggests that the findings of the analysis can be applied even if the overall pace of prediction is inaccurate.

- 1.11** A further point concerns the timeframe for the predictions. In this analysis we have concentrated on a shorter-term predictive timeframe of several months from the time of writing. This approach has been adopted for a number of reasons. Firstly, it is quite feasible (and indeed recommended) that a more medium term set of predictions can be established from the shorter-term Baseline predictions presented here by multiplying the relevant volume change figures by an appropriate factor. For example, to create a prediction from June 2008 (the start of the Downturn impact) to December 2009, the relevant volume change figure should be multiplied by 1.5. For a prediction to September 2009, the multiplying factor would be 1.25. Due to the immense uncertainty surrounding the current economic situation, and further uncertainties concerning the impact of global and UK macro-economic measures, we would not advise using these predictions to make predictions beyond the end of 2009.
- 1.12** Within NET, a number of different types of geographic building block economies are presented. These areas include the South West Region, Upper Tier (Counties and Unitaries) and Lower Tier Authorities (Districts) and a number of bespoke sub-economies. A full list of these areas is presented in the Panel below:

Panel 1: Economies and Sub-economies Analysed in this Report

Great Britain
South West
North East Triangle (Gloucestershire CC, South Gloucestershire UA, Wiltshire CC, Swindon UA, Bristol UA, North Somerset UA, Bath and North East Somerset UA)
North East Triangle and Bournemouth UA, Dorset CC, Poole UA
Bristol & South Gloucestershire
West of England Partnership Area
Bournemouth, Dorset and Poole
Gloucestershire
Cotswold
Cirencester
Other Urban Cotswold
Rural Cotswold
Cheltenham
Forest of Dean
Cinderford
Coleford
Lydney
Other Urban Forest of Dean
Rural Forest of Dean
Gloucester
Stroud
Dursley
Nailsworth
Stonehouse
Stroud Town
Other Urban Stroud
Rural Stroud
Tewkesbury
Brockworth
Tewkesbury
Other Urban Tewkesbury
Rural Tewkesbury
South Gloucestershire
N and NE Fringes of Bristol (in South Gloucs)
Yate and Chipping Sodbury (South Gloucs)
Other Urban South Gloucestershire
Rural South Gloucestershire
Wiltshire
Kennet
Devizes
Marlborough
Pewsey
Ludgershall and Tidworth
Rural Kennet
Other Urban Kennet
North Wiltshire
Calne
Chippenham
Wootton Bassett
Corsham
Other Urban North Wiltshire
Rural North Wiltshire
Salisbury
Amesbury
Salisbury City
Other Urban Salisbury
Rural Salisbury
West Wiltshire
Melksham
Trowbridge
Warminster
Westbury
Bradford-on-Avon
Other Urban West Wiltshire
Rural West Wiltshire

...continues over...

...Panel 1 continued from previous page...

Swindon	Highworth Swindon Town Other urban Swindon Rural Swindon
Bristol	Greater Bristol (parts of Bristol UA and South Gloucestershire UA)
Bath and North East Somerset	Bath City Keynsham Midsomer Norton and Radstock Other Urban Bath and North East Somerset Rural Bath and North East Somerset
North Somerset	Clevedon Nailsea Portishead Weston-Super-Mare Other Urban North Somerset Rural North Somerset
Bournemouth	
Poole	
Dorset	Christchurch Christchurch Town Other Urban Christchurch Rural Christchurch
	East Dorset St Leonards and St Ives Ferndown Verwood West Moors Wimborne Minster Other Urban East Dorset Rural East Dorset
	Purbeck Swanage Other Urban Purbeck Rural Purbeck
	North Dorset Blandford Forum Gillingham Other Urban North Dorset Rural North Dorset
	West Dorset Sherbourne Dorchester Bridport Other Urban West Dorset Rural West Dorset
	Weymouth and Portland Portland Weymouth

1.13 Annual Population Survey employment data for 2007 has been widely used in the Model. At the local level, and in particular sectors and occupations, the data is subject to relatively wide margins of confidence in terms of the accuracy of the estimates. In some instances, it has been necessary to impute missing data in certain areas and for certain sectors or occupations. In other instances it has been necessary to estimate missing data using other methods (such as estimation based upon Annual Business Inquiry employee data). The general rule is that the smaller the local economy in question, the less accurate the data upon which the model functions, and the less accurate the Model's predictions. However, particular data problems exist for:

- Agriculture in Cheltenham District
- Christchurch District
- Agriculture and Energy and Water in Cotswold District
- Agriculture in the Forest of Dean District

2 Workplace Economic Impact

2.1 The workplace impact of the Downturn across NET is illustrated through the following proxy measures:

- Predicted Job Losses amongst NET Workplaces
- Predicted Loss of Output amongst NET Workplaces
- Predicted Estimates of Job Losses by Broad Industry for NET Workplaces

Predicted job losses amongst NET workplaces

2.2 Predicted job losses in NET and its sub-economies are shown in Table 1. In general, the volume of losses as a result of the Downturn within an area reflects its volume of employment.

2.3 In total, the analysis predicts that NET workplaces will shed a total of 26,000 jobs by June 2009 (from an estimated 1,183,000 jobs in June 2008, a 2.19% decline). Compared to nationally (also a 2.19% decline), NET will lose a similar proportion of employment whilst compared to regionally (declining by 2.15% across the South West) it will be slightly higher. If Bournemouth, Dorset and Poole (BDP) are added to NET, it is expected that 33,000 jobs will be lost to June 2009 from almost exactly 1.5 million at present (a 2.17% decline).

2.4 Amongst the ten NET and BDP Upper Tier Authorities, almost 7,000 losses can be expected in Bristol and a similar volume across Gloucestershire. Greater Bristol, which includes the North and North East fringes of Bristol (and which lie in the Upper Tier Authority of South Gloucestershire), would lose about 7,500 jobs as a result of the Downturn. Gloucestershire is followed by Wiltshire with around 4,200 predicted losses and Dorset with 3,500 losses and Swindon with 2,700 losses. Losses in each of the ten remaining Upper Tier Authorities will be somewhere between 1,500 and 2,000 to June 2009.

2.5 In terms of the predicted decline as a proportion of total employment in June 2008 (the starting period), the analysis suggests that Swindon will be the most adversely affected of all the Upper Tier Authorities (with a decline of 2.48% from its June 2008 employment level). Swindon is followed by South Gloucestershire, Poole and North Somerset, although each trails Swindon by a considerable margin. Least impacted, though still declining by almost 2%, is Dorset. Also demonstrating below-average expected declines are Wiltshire (a 2.10% decline) and Bath and North East Somerset (a 2.11% decline). In the most general of terms variations in the impact of the Downturn on employment are due to the local industrial profile; rural areas and/or areas with higher proportions of employment in Public Administration and Defence, Health or Education will be impacted less than urban industrial areas with higher concentrations of employment in commercial sectors (excluding 'essential' commercial sectors such as Agriculture and Energy and water). The commercial sectors of Other services and Transport and communications are expected to have the highest percentage decline over the period (2.9% and 2.5% respectively), but even the lowest expected employment decline sector – Manufacturing – is expected to see a reasonably high decline (2.1%).

2.6 Amongst the Lower Tier District Authorities which lie within the Counties of Gloucestershire, Wiltshire and Dorset, the highest volumes of jobs decline can be expected in Cheltenham and Gloucester (each declining by at least 1,600 jobs). However, the analysis of percentage decline from pre-Downturn levels shows that the worst-affected Districts are likely to be Stroud (a 2.43% decline)

and West Wiltshire (a 2.39% decline). Also well above (NET, national and regional) averages in terms of their decline are Cotswold District and Tewkesbury District in Gloucestershire and Christchurch in Dorset.

2.7 Looking at urban and rural areas of NET and BDP, the Top 10 losers in volume terms will be:

- Greater Bristol (Bristol UA and the North and North East Fringes of Bristol which lie in South Gloucestershire)
- Swindon Town
- Cheltenham
- Gloucester
- Poole
- Bournemouth
- Bath City
- The North and North East Fringes of Bristol which lie in South Gloucestershire
- Rural North Somerset
- Weston-Super-Mare

2.8 The urban areas of Salisbury City and Weymouth Town also lie within the Top 20 of the 85 or so smaller areas which have been analysed. However, the large and predominantly rural economies which lie outside the key towns will also be affected, though obviously this impact will be spread over much larger physical areas than that represented by the Towns. For example, the rural areas of the Districts of Salisbury, Cotswold, and North Wiltshire all lie just outside the Top 10 most affected in volume terms. The rural parts of Stroud, South Gloucestershire, West Wiltshire, West Dorset and even Swindon lie within the Top 20.

2.9 Turning to the percentage change from pre-Downturn levels experienced within the smaller areas, the Top 20 most adversely affected parts of the region are:

- Westbury (West Wiltshire)
- Other Urban BANES
- **Stonehouse (Stroud)**
- Verwood (East Dorset)
- Lydney (Forest of Dean)
- Other Stroud Urban
- **Rural North Somerset**
- Melksham (West Wiltshire)
- **Rural South Gloucestershire**
- Rural Christchurch
- Dursley (Stroud)
- **Keynsham (Bath and North East Somerset)**
- Brockworth (Tewkesbury)
- Highworth (Swindon UA)
- Other Urban North Dorset
- **Swindon Town (Swindon UA)**
- **Midsomer Norton and Radstock (BANES)**
- **Cirencester (Cotswold)**
- **Other Urban North Wiltshire**
- Other Urban West Wiltshire

2.10 Of these, several areas have been emboldened because, in June 2008, they also accounted for a reasonably significant proportion of total NET jobs (at least 0.5%). These emboldened areas therefore account for significant employment volumes, but are also expected to see a significant, and above-average, employment decline from Pre-downturn levels. Swindon Town, by a considerable margin, is actually the largest of these 'hardest-hit' economies. Other above-average affected heavyweights are Poole, Rural North Somerset, Rural South Gloucestershire, Cirencester, and Stonehouse. The reasonably 'heavyweight' economies of Gloucester, Cheltenham, Bath City, Weston-Super-Mare and Rural Salisbury are predicted to experience below average employment percentage decline.

Table 1: Estimated and Predicted Jobs, and Change (Volumes and %), June 2008 and June 2009, Workplaces, Base Scenario. Authorities and Smaller Areas Ranked within category by volume change.

Area	Jobs in June 2008	Jobs in June 2009	Volume Change	% Change
Great Britain	28,095,500	27,481,146	-614,354	-2.19
South West	2,540,500	2,485,788	-54,712	-2.15
North East Triangle and BDP	1,503,000	1,470,313	-32,687	-2.17
North East Triangle	1,183,300	1,157,369	-25,931	-2.19
West of England Partnership	567,200	554,861	-12,339	-2.18
Bristol & South Gloucestershire	392,100	383,589	-8,511	-2.17
Bournemouth, Dorset and Poole	319,600	312,844	-6,756	-2.11
Upper Tier Authorities				
Gloucestershire	307,700	301,000	-6,700	-2.18
Wiltshire	199,500	195,314	-4,186	-2.10
Dorset	174,500	171,020	-3,480	-1.99
Bristol	315,300	308,567	-6,733	-2.14
Swindon	109,000	106,297	-2,703	-2.48
Bath and North East Somerset	92,200	90,256	-1,944	-2.11
North Somerset	83,000	81,109	-1,891	-2.28
South Gloucestershire	76,700	74,925	-1,775	-2.31
Poole	72,500	70,837	-1,663	-2.29
Bournemouth	72,300	70,693	-1,607	-2.22
Unitary and District Authority Areas				
Bristol	315,300	308,567	-6,733	-2.14
Swindon	109,000	106,297	-2,703	-2.48
Bath and North East Somerset	92,200	90,256	-1,944	-2.11
North Somerset	83,000	81,109	-1,891	-2.28
South Gloucestershire	76,700	74,925	-1,775	-2.31
Poole	72,500	70,837	-1,663	-2.29
Cheltenham	83,100	81,446	-1,654	-1.99
Gloucester	77,400	75,788	-1,612	-2.08
Bournemouth	72,300	70,693	-1,607	-2.22
West Wiltshire	52,900	51,634	-1,266	-2.39
Salisbury	60,100	58,941	-1,159	-1.93
North Wiltshire	55,100	53,946	-1,154	-2.09
Stroud	46,100	44,979	-1,121	-2.43
Cotswold	43,600	42,588	-1,012	-2.32
West Dorset	47,300	46,436	-864	-1.83
East Dorset	31,900	31,225	-675	-2.11
Tewkesbury	28,600	27,936	-664	-2.32
Forest of Dean	29,400	28,762	-638	-2.17
Kennet	31,600	30,989	-611	-1.93
Weymouth and Portland	27,500	26,921	-579	-2.11
North Dorset	28,500	27,939	-561	-1.97
Christchurch	18,300	17,876	-424	-2.31
Purbeck	20,700	20,329	-371	-1.79
Urban and Rural Sub-Areas				
Greater Bristol (Bristol & Part South Gloucs)	349,409	341,913	-7,495	-2.15
Swindon Town (Swindon UA)	87,123	84,939	-2,184	-2.51
Cheltenham	83,100	81,446	-1,654	-1.99
Gloucester	77,400	75,788	-1,612	-2.08
Poole	72,500	70,837	-1,663	-2.29
Bournemouth	72,300	70,693	-1,607	-2.22
Bath City (Bath and North East Somerset)	58,716	57,583	-1,134	-1.93
N and NE Fringes of Bristol (South Gloucs)	48,065	46,985	-1,080	-2.25
Rural North Somerset	30,947	30,110	-836	-2.70
Weston-Super-Mare (North Somerset)	28,934	28,380	-554	-1.91
Rural Salisbury	27,275	26,821	-454	-1.66
Salisbury City	26,790	26,195	-595	-2.22
Rural Cotswold	26,396	25,804	-591	-2.24
Rural North Wiltshire	21,974	21,476	-498	-2.27
Weymouth (Weymouth and Portland)	20,636	20,207	-429	-2.08
Rural Stroud	20,442	19,945	-497	-2.43
Rural South Gloucestershire	19,876	19,351	-525	-2.64
Rural West Wiltshire	18,814	18,363	-451	-2.40

...Table 1 continues over...

Economic Impact of the Downturn in the North East Triangle and BDP

...Table 1 continued from previous page

Rural West Dorset	18,352	17,979	-373	-2.03
Rural Swindon (Swindon UA)	18,377	17,937	-439	-2.39
Trowbridge (West Wiltshire)	18,179	17,770	-409	-2.25
Dorchester (West Dorset)	17,124	16,888	-236	-1.38
Chippenham (North Wiltshire)	16,821	16,494	-327	-1.95
Rural Bath and North East Somerset	15,737	15,382	-355	-2.25
Rural North Dorset	15,238	14,969	-268	-1.76
Christchurch Town (Christchurch)	14,731	14,402	-329	-2.23
Rural Forest of Dean	14,413	14,135	-277	-1.93
Rural Kennet	13,299	13,054	-245	-1.84
Cirencester (Cotswold)	11,714	11,422	-293	-2.50
Devizes (Kennet)	10,330	10,125	-206	-1.99
Ferndown (East Dorset)	10,234	10,006	-228	-2.23
Stroud Town	9,988	9,795	-193	-1.93
Midsomer Norton and Radstock (BANES)	9,778	9,533	-245	-2.51
Tewkesbury	9,624	9,385	-239	-2.48
Other Urban Purbeck	9,229	9,096	-133	-1.44
Rural East Dorset	9,061	8,877	-184	-2.03
Clevedon (North Somerset)	8,966	8,763	-203	-2.26
Rural Tewkesbury	8,094	7,931	-163	-2.01
Stonehouse (Stroud)	8,161	7,925	-236	-2.89
Rural Purbeck	7,747	7,573	-174	-2.24
Other Tewkesbury Urban	7,554	7,377	-177	-2.35
Keynsham (Bath and North East Somerset)	6,941	6,761	-179	-2.58
Portland (Weymouth and Portland)	6,870	6,719	-150	-2.19
Portishead (North Somerset)	6,697	6,564	-132	-1.98
Other Urban North Wiltshire	5,773	5,629	-144	-2.50
Wimborne Minster (East Dorset)	5,722	5,598	-124	-2.17
Yate and Chipping Sodbury (South Gloucs)	5,512	5,405	-107	-1.94
Warminster (West Wiltshire)	5,497	5,376	-121	-2.21
Sherbourne (West Dorset)	4,964	4,873	-91	-1.84
Calne (North Wiltshire)	4,944	4,836	-108	-2.18
Blandford Forum (North Dorset)	4,903	4,809	-94	-1.93
Bridport (West Dorset)	4,753	4,638	-115	-2.41
Nailsea (North Somerset)	4,673	4,565	-108	-2.31
Other Urban North Dorset	4,460	4,346	-113	-2.54
Melksham (West Wiltshire)	4,447	4,328	-118	-2.66
Marlborough (Kennet)	4,342	4,258	-84	-1.93
Lydney (Forest of Dean)	4,224	4,107	-118	-2.79
Other Urban Forest of Dean	3,957	3,859	-98	-2.49
Gillingham (North Dorset)	3,900	3,815	-84	-2.17
Amesbury (Salisbury)	3,836	3,758	-78	-2.03
Swanage (Purbeck)	3,724	3,660	-64	-1.73
Coleford (Forest of Dean)	3,726	3,656	-70	-1.89
Corsham (North Wiltshire)	3,694	3,649	-44	-1.20
Rural Christchurch	3,568	3,474	-94	-2.64
Other Stroud Urban	3,373	3,280	-93	-2.76
Brockworth (Tewkesbury)	3,328	3,243	-85	-2.55
Other Urban South Gloucs	3,248	3,185	-63	-1.94
Westbury (West Wiltshire)	3,159	3,061	-98	-3.11
Cinderford (Forest of Dean)	3,080	3,006	-74	-2.41
Other Urban North Somerset	2,783	2,726	-57	-2.05
Verwood (East Dorset)	2,544	2,472	-72	-2.84
Highworth (Swindon UA)	2,401	2,340	-61	-2.55
Dursley (Stroud)	2,376	2,314	-62	-2.59
Ludgershall and Tidworth (Kennet)	2,222	2,177	-46	-2.05
Other Urban Salisbury	2,199	2,167	-32	-1.45
St Leonards and St Ives (East Dorset)	2,189	2,163	-26	-1.19
Bradford-on-Avon	2,129	2,078	-51	-2.39
Other Urban West Dorset	2,108	2,060	-49	-2.31
Wootton Bassett (North Wiltshire)	1,895	1,862	-33	-1.72
Nailsworth (Stroud)	1,760	1,720	-41	-2.32
West Moors (East Dorset)	1,505	1,479	-26	-1.70
Pewsey (Kennet)	1,405	1,374	-32	-2.25
Other Urban Swindon	1,100	1,082	-19	-1.69
Other Urban BANES	1,094	1,061	-33	-2.99
Other Urban West Wiltshire	675	658	-17	-2.50
Other Urban East Dorset	645	631	-14	-2.18

Source: GWE Business West Research, 2009

Predicted loss of output amongst NET workplaces

- 2.11** Under the Baseline scenario, NET's workplace output will decline by around £1,000 million in the year to June 2009, a 2.72% fall from the pre-Downturn level of June 2008 (Table 2). NET percentage change output decline will be very slightly less than the predictions for Great Britain and the South West. Earlier it was seen that the NET job loss change would be identical to that predicted nationally and the conclusion from the combined analysis is that the job losses across the NET are slightly lower value added, on average, than their national counterparts.
- 2.12** Amongst the NET Upper Tier Authorities, around £270 million output loss can be expected in Bristol and a similar volume across Gloucestershire. Greater Bristol would lose about £300 million as a result of the Downturn. Gloucestershire is followed by Wiltshire with around £170 million predicted output loss, Dorset with £140 million output loss and Swindon with £111 million output loss. Losses in each of the five remaining Upper Tier Authorities will be somewhere between £50 million and £75 million to June 2009.
- 2.13** In terms of the predicted decline as a proportion of total output in June 2008 (the pre-Downturn starting period), the analysis suggests that Poole will be the most adversely affected of all the Upper Tier Authorities (with a decline of 2.98% from its June 2008 employment level). Poole is followed by Wiltshire, declining by 2.89%, followed by North Somerset declining by 2.79%. Least impacted, though still declining by almost 2.55%, is South Gloucestershire.
- 2.14** As with job losses, spatial variations in the impact of the Downturn on output are due to the local industrial profile. With Public Administration and Defence, Health and Education, Agriculture and Energy and water held constant, it will be local variations of output in the following sectors which will explain these variations:
- Manufacturing
 - Construction
 - Distribution, hotels and restaurants
 - Transport and communications
 - Banking, finance and insurance, etc
 - Other services
- 2.15** In general, the most affected areas (areas affected above the national average) will be those with relatively higher concentrations of employment in (one or more of) the higher-value added per head and/or higher expected employment decline sectors of:
- Transport and communications (high value-added and high expected employment decline)
 - Manufacturing and Construction (both relatively higher value added)
 - Wholesale and retail, hotel and catering (represented by Distribution, hotels and restaurants in the Tables and a high expected employment decline sector)
 - Other services (expected to have the highest employment decline of all sectors)
- 2.16** Amongst the Lower Tier District Authorities which lie within the Counties of Gloucestershire, Wiltshire and Dorset, the highest volumes of output decline can be expected in Cheltenham and Gloucester (each declining by at least £65 million). However, the analysis of percentage decline from pre-Downturn levels

shows that the worst-affected Districts are likely to be West Wiltshire (a 2.98% decline) and North Wiltshire (a 2.92% decline). Also above (NET, national and regional) averages in terms of their decline are Christchurch in Dorset, Cotswold District in Gloucestershire and Salisbury District in Wiltshire.

2.17 Amongst the Upper Tier Authorities, the largest volume output declines across NET and BDP will be found in Gloucestershire and Bristol, both with very similar declines of somewhere around £270 million from June 2008 to June 2009. Following these two Authorities, Wiltshire, Dorset and Swindon will decline by £170 million, £140 million and £110 million respectively. Each of the 5 remaining Upper Tier Areas will decline by somewhere in the region of £60 million to £75 million over the year.

2.18 Looking at the Upper and Lower Tier Authorities of NET and BDP which are a mix of urban and rural, and where an analysis of smaller urban and rural areas is therefore meaningful to one degree or another, the worst smaller areas affected in volume terms are Greater Bristol (output decline of £297 million), Swindon Town (output decline of £90 million), the North and North East Fringes of Bristol which lie in South Gloucestershire (a £50 million decline) and Bath City (a £40 million decline). The urban areas of Salisbury City and Weston-Super-Mare also lie within the Top 10 most output-volume affected areas. However, the large and predominantly rural economies which lie outside the key towns will also be affected, though obviously this impact will be spread over much larger physical areas than that represented by the Towns. For example, the rural areas of the Districts of North Somerset, Cotswold, Stroud, North Wiltshire, and South Gloucestershire all lie within the Top 10 most affected in volume terms.

2.19 Turning to the percentage change from pre-Downturn levels experienced within the smaller areas, the Top 20 most adversely affected parts of the NET region are:

- Other Urban (Bath and North East Somerset)
- Westbury (West Wiltshire)
- Cinderford (Forest of Dean)
- **Melksham (West Wiltshire)**
- **Keynsham (Bath and North East Somerset)**
- Other Stroud Urban
- Verwood (East Dorset)
- **Stonehouse (Stroud)**
- Other Urban North Dorset
- Brockworth (Tewkesbury)
- Rural Swindon (Swindon UA)
- Other Urban West Wiltshire
- Highworth (Swindon UA)
- **Lydney (Forest of Dean)**
- **Calne (North Wiltshire)**
- Dursley (Stroud)
- **Other Urban North Wiltshire**
- Other Urban West Dorset
- **Midsomer Norton and Radstock (BANES)**
- **Bridport (West Dorset)**

2.20 Of these, several areas have been emboldened because, in June 2008, they also accounted for a reasonably significant proportion of total NET and BDP output (at least 0.3%). These emboldened areas therefore account for (at

least) reasonably significant output volumes, but are also expected to see a significant, and above-average, output decline from Pre-downturn levels. Stonehouse and Midsomer Norton and Radstock are actually the largest of these 'hardest-hit' economies. The reasonably 'heavyweight' economies of Rural North Somerset, Bath City, Swindon Town and Rural Stroud are predicted to experience slightly below average output percentage decline.

Table 2: Estimated and Predicted Estimates of Output Value and Change (Value and %), June 2008 and June 2009, Workplaces, Base Scenario. Authorities and Smaller Areas Ranked within category by volume change.

Area	Output in June 2008 (£ million)	Output in June 2009 (£ million)	Volume Change (£ million)	% Change
Great Britain	949,166	923,078	-26,088	-2.75
South West	78,426	76,281	-2,145	-2.73
North East Triangle and BDP	47,359	46,064	-1,296	-2.74
North East Triangle	37,897	36,866	-1,031	-2.72
West of England Partnership	17,860	17,374	-486	-2.72
Bristol & South Gloucestershire	12,547	12,208	-339	-2.70
Bournemouth, Dorset and Poole	9,458	9,193	-265	-2.80
Upper Tier Authorities				
Gloucestershire	10,115	9,847	-268	-2.65
Bristol	9,727	9,461	-267	-2.74
Wiltshire	5,749	5,583	-166	-2.89
Dorset	4,963	4,828	-135	-2.72
Swindon	4,240	4,129	-111	-2.62
Bath and North East Somerset	2,691	2,618	-74	-2.74
North Somerset	2,629	2,555	-73	-2.79
South Gloucestershire	2,816	2,744	-72	-2.55
Poole	2,254	2,187	-67	-2.98
Bournemouth	2,233	2,171	-62	-2.77
Unitary and District Authority Areas				
Bristol	9,727	9,461	-267	-2.74
Swindon	4,240	4,129	-111	-2.62
Bath and North East Somerset	2,691	2,618	-74	-2.74
North Somerset	2,629	2,555	-73	-2.79
South Gloucestershire	2,816	2,744	-72	-2.55
Gloucester	2,604	2,537	-67	-2.56
Poole	2,254	2,187	-67	-2.98
Cheltenham	2,304	2,239	-65	-2.80
Bournemouth	2,233	2,171	-62	-2.77
West Wiltshire	1,669	1,619	-50	-2.98
North Wiltshire	1,628	1,581	-47	-2.92
Stroud	1,957	1,910	-46	-2.37
Salisbury	1,587	1,542	-45	-2.85
Cotswold	1,319	1,282	-38	-2.85
West Dorset	1,224	1,192	-32	-2.64
Tewkesbury	1,015	988	-27	-2.64
Forest of Dean	933	907	-26	-2.79
East Dorset	927	901	-25	-2.74
Kennet	894	870	-24	-2.70
Weymouth and Portland	862	838	-24	-2.75
North Dorset	802	780	-22	-2.79
Christchurch	556	540	-16	-2.86
Purbeck	582	567	-15	-2.58
Urban and Rural Sub-Areas of the North East Triangle and BDP				
Greater Bristol (Bristol & South Gloucs UA)	10,637	10,340	-297	-2.79
Swindon Town (Swindon UA)	3,516	3,428	-88	-2.51
N and NE Fringes of Bristol (South Gloucs)	1,533	1,488	-45	-2.95
Bath City (Bath and North East Somerset)	1,610	1,569	-41	-2.54
Rural North Somerset	1,276	1,241	-35	-2.71
Rural Cotswold	798	776	-22	-2.74
Salisbury City (Salisbury)	754	732	-22	-2.96
Rural Stroud	1,032	1,012	-21	-2.00
Rural North Wiltshire	715	694	-21	-2.89
Rural South Gloucestershire	881	861	-20	-2.31
Weston-Super-Mare (North Somerset)	706	686	-20	-2.84
Rural Salisbury	682	664	-19	-2.74

... Table 2 continues over...

Economic Impact of the Downturn in the North East Triangle and BDP

...Table 2 continued from previous page

Rural Swindon (Swindon UA)	617	598	-19	-3.15
Rural West Wiltshire	610	593	-17	-2.78
Weymouth (Weymouth and Portland)	554	537	-17	-3.06
Trowbridge (West Wiltshire)	539	523	-16	-3.05
Rural West Dorset	558	544	-14	-2.57
Rural Bath and North East Somerset	492	478	-14	-2.92
Chippenham (North Wiltshire)	460	447	-13	-2.88
Christchurch Town (Christchurch)	403	391	-12	-2.90
Rural North Dorset	424	413	-11	-2.56
Cirencester (Cotswold)	356	346	-11	-2.98
Rural Forest of Dean	441	430	-11	-2.54
Tewkesbury Town	345	336	-10	-2.78
Stonehouse (Stroud)	330	320	-10	-3.17
Midsomer Norton and Radstock (BANES)	328	318	-10	-3.07
Rural Kennet	401	392	-10	-2.45
Dorchester (West Dorset)	353	344	-9	-2.43
Ferndown (East Dorset)	284	275	-9	-3.04
Devizes (kennet)	281	273	-8	-2.91
Clevedon (North Somerset)	262	254	-8	-2.91
Stroud Town	334	327	-7	-2.14
Other Tewkesbury Urban	322	315	-7	-2.29
Portland (Weymouth and Portland)	308	301	-7	-2.21
Rural East Dorset	301	294	-7	-2.29
Rural Purbeck	288	281	-7	-2.43
Keynsham (Bath and North East Somerset)	228	221	-7	-3.18
Rural Tewkesbury	235	229	-6	-2.66
Other Urban Purbeck	208	203	-6	-2.66
Other Urban North Wiltshire	197	191	-6	-3.09
Portishead (North Somerset)	172	167	-5	-2.90
Wimborne Minster (East Dorset)	159	154	-5	-2.95
Melksham (West Wiltshire)	155	150	-5	-3.19
Warminster (West Wiltshire)	154	149	-5	-3.00
Lydney (Forest of Dean)	152	148	-5	-3.11
Calne (North Wiltshire)	146	142	-5	-3.11
Yate and Chipping Sodbury (South Gloucs)	321	317	-4	-1.26
Rural Christchurch	153	149	-4	-2.77
Bridport (West Dorset)	140	135	-4	-3.07
Other Urban North Dorset	138	134	-4	-3.17
Nailsea (North Somerset)	137	133	-4	-2.91
Blandford Forum (North Dorset)	130	126	-4	-2.95
Other Stroud Urban	127	123	-4	-3.18
Westbury (West Wiltshire)	127	123	-4	-3.33
Brockworth (Tewkesbury)	113	109	-4	-3.17
Other Urban Forest of Dean	144	140	-4	-2.86
Sherbourne (West Dorset)	116	113	-3	-2.85
Marlborough (kennet)	110	107	-3	-2.75
Gillingham (North Dorset)	110	107	-3	-3.02
Amesbury (Salisbury)	106	103	-3	-2.75
Coleford (Forest of Dean)	99	96	-3	-2.83
Cinderford (Forest of Dean)	96	93	-3	-3.23
Verwood (East Dorset)	88	85	-3	-3.18
Dursley (Stroud)	83	80	-3	-3.11
Highworth (Swindon UA)	83	80	-3	-3.13
Swanage (Purbeck)	85	82	-2	-2.88
Other Urban South Gloucs	81	78	-2	-2.85
Other Urban North Somerset	76	74	-2	-2.92
Corsham (North Wiltshire)	69	67	-2	-2.63
Bradford-on-Avon (West Wiltshire)	63	61	-2	-2.87
Other Urban West Dorset	58	56	-2	-3.09
Ludgershall and Tidworth (Kennet)	59	57	-2	-3.02
Nailsworth (Stroud)	50	49	-1	-2.96
Other Urban Salisbury	45	44	-1	-2.92
Pewsey (Kennet)	43	41	-1	-3.04
Wootton Bassett (North Wiltshire)	41	40	-1	-2.79
St Leonards and St Ives (East Dorset)	37	36	-1	-2.48
Other Urban (Bath and North East Somerset)	36	35	-1	-3.49
West Moors (East Dorset)	33	32	-1	-2.89
Other Urban East Dorset	26	25	-1	-2.21
Other Urban Swindon	24	23	-1	-2.88
Other Urban West Wiltshire	21	21	-1	-3.15

Source: GWE Business West Research, 2009

Predicted estimates of job losses by broad industry for NET workplaces

2.21 Table 3 shows the various patterns of predicted job losses by sector. When looking at these findings the reader is advised to consider the 'output per head' nature of certain sectors (mentioned earlier). This is advised on the basis that an understanding of output per head of a particular sector helps, in turn, to make the link between employment decline and output decline. The output per head (2007-based) of the six key sectors explored in this analysis are as follows (ranked, highest first):

- Transport and communications - £57,000
- Construction - £54,000
- Manufacturing - £52,000
- Banking, finance and insurance, etc - £ 41,000
- Distribution, hotels and restaurants - £29,000
- Other services - £30,000

2.22 Within NET the industrial patterns of job loss volumes will vary according to the industrial profile of the respective area. The top 2 sectors in terms of job losses in each area have been highlighted in ochre.

2.23 Across NET's workplaces, the highest volumes of job losses will be felt in Distribution, hotels and restaurants (with around 7,000 losses predicted under the Baseline scenario). This sector is followed by Manufacturing and Banking, finance and insurance etc. (often referred to simply as 'Business services'). Each of these sectors is predicted to lose around 5,000 jobs.

2.24 In general most economies follow the NET pattern of highest losses in Distribution, hotels and restaurants. Notable exceptions to this are as follows (the very smallest economies excluded):

- Rural Swindon (Manufacturing highest)
- Stonehouse (Manufacturing highest)
- Portland (Manufacturing highest)
- Other Urban Stroud (Manufacturing highest)
- Other Urban Purbeck (Manufacturing highest)
- Other Urban Forest of Dean (Manufacturing highest)
- Rural North Dorset (Construction highest)

2.25 Areas where Business services, along with Distribution etc, account for the highest volumes are as follows. These are essentially the more Business services characterised economies of the NET and BDP:

- Greater Bristol (Bristol & South Gloucs UA)
- Bristol
- North Somerset
- Bath and North East Somerset
- Salisbury
- Cotswold
- Bournemouth
- Christchurch
- Swindon Town (Swindon UA)
- Bath City (Bath and North East Somerset)

- Salisbury City
- Cirencester (Cotswold)
- Christchurch Town (Christchurch)
- Clevedon (North Somerset)
- Rural East Dorset
- Stroud Town
- Dorchester (West Dorset)
- Nailsea (North Somerset)

2.26 Areas where Manufacturing, along with Distribution etc, account for the highest volumes are as follows. These are essentially the more Manufacturing characterised economies of the NET and BDP:

- Gloucestershire
- Wiltshire
- Swindon
- South Gloucestershire
- Poole
- Cheltenham
- Stroud
- Gloucester
- North Wiltshire
- West Wiltshire
- Forest of Dean
- East Dorset
- Weymouth and Portland
- N and NE Fringes of Bristol (South Gloucs)
- Rural North Somerset
- Stonehouse (Stroud)
- Rural Salisbury
- Rural Stroud
- Chippenham
- Rural South Gloucestershire
- Tewkesbury Town
- Rural West Wiltshire
- Midsomer Norton and Radstock (BANES)
- Other Tewkesbury Urban
- Other Urban North Wiltshire
- Ferndown (East Dorset)
- Other Stroud Urban
- Devizes
- Lydney (Forest of Dean)
- Calne
- Melksham
- Dursley (Stroud)
- Wimborne Minster (East Dorset)
- Westbury
- Rural Tewkesbury
- Warminster
- Highworth (Swindon UA)

- Clevedon (North Somerset)
- Yate and Chipping Sodbury (South Gloucs)
- Verwood (East Dorset)
- Coleford (Forest of Dean)

2.27 There are a number of exceptions to those economies where either Manufacturing or Business Services accompany Distribution etc as the main volume decline sectors. These are:

- Kennet, West Dorset, Purbeck and North Dorset, where Construction will accompany Distribution etc as the highest volume decline sectors
- Rural Swindon and Portland where Manufacturing and Transport and communications show the highest predicted declines
- In Other Urban Purbeck and Other Urban Forest of Dean, Business Services accompany Manufacturing as the sectors predicted to experience the highest losses to June 2009.
- In Rural North Dorset, Business Services accompanies Construction as the highest-volume decline sectors.

Economic Impact of the Downturn in the North East Triangle and BDP

Table 3: Job Losses by Broad Industry – WORKPLACE BASED

Area	Manufacturing	Construction	Distribution, hotels and restaurants	Transport and communications	Banking, finance and insurance, etc	Other services
Great Britain	- 119,253	- 85,126	- 173,699	- 73,380	- 107,502	- 55,394
South West	- 10,107	- 8,044	- 17,342	- 5,203	- 9,189	- 4,827
North East Triangle and BDP	- 6,269	- 4,631	- 9,335	- 3,269	- 6,306	- 2,878
North East Triangle	- 5,148	- 3,508	- 7,321	- 2,712	- 5,017	- 2,226
West of England Partnership	- 1,967	- 1,790	- 3,528	- 1,226	- 2,713	- 1,115
Bristol & South Gloucestershire	- 1,418	- 1,143	- 2,214	- 936	- 2,051	- 749
Bournemouth, Dorset and Poole	- 1,118	- 1,124	- 2,017	- 557	- 1,289	- 652
Upper Tier Authority Areas						
Gloucestershire	- 1,706	- 834	- 1,828	- 600	- 1,137	- 595
Wiltshire	- 883	- 609	- 1,285	- 441	- 616	- 353
Dorset	- 559	- 636	- 1,151	- 275	- 510	- 349
Bristol	- 965	- 895	- 1,752	- 751	- 1,787	- 582
Swindon	- 592	- 274	- 677	- 445	- 551	- 164
South Gloucestershire	- 453	- 248	- 461	- 186	- 264	- 164
Poole	- 453	- 221	- 441	- 147	- 287	- 113
North Somerset	- 288	- 308	- 638	- 178	- 322	- 157
Bath and North East Somerset	- 265	- 339	- 680	- 112	- 340	- 208
Bournemouth	- 109	- 263	- 422	- 135	- 489	- 189
Unitary and District Authority Areas						
Bristol	- 965	- 895	- 1,752	- 751	- 1,787	- 582
Swindon	- 592	- 274	- 677	- 445	- 551	- 164
South Gloucestershire	- 453	- 248	- 461	- 186	- 264	- 164
Poole	- 453	- 221	- 441	- 147	- 287	- 113
Cheltenham	- 433	- 122	- 471	- 124	- 331	- 173
Stroud	- 380	- 145	- 271	- 101	- 152	- 72
Gloucester	- 374	- 305	- 376	- 174	- 289	- 94
North Wiltshire	- 327	- 187	- 301	- 116	- 154	- 69
North Somerset	- 288	- 308	- 638	- 178	- 322	- 157
Bath and North East Somerset	- 265	- 339	- 680	- 112	- 340	- 208
West Wiltshire	- 248	- 152	- 448	- 166	- 147	- 104
Tewkesbury	- 212	- 76	- 180	- 50	- 99	- 47
Salisbury	- 198	- 160	- 379	- 116	- 211	- 94
Forest of Dean	- 175	- 114	- 131	- 39	- 94	- 85
East Dorset	- 139	- 107	- 235	- 12	- 103	- 79
Cotswold	- 132	- 76	- 399	- 112	- 170	- 123
Weymouth and Portland	- 129	- 76	- 157	- 101	- 51	- 66
Bournemouth	- 109	- 263	- 422	- 135	- 489	- 189
Kennet	- 109	- 114	- 157	- 43	- 103	- 85
West Dorset	- 102	- 160	- 320	- 46	- 124	- 110
Purbeck	- 83	- 84	- 92	- 19	- 62	- 31
North Dorset	- 63	- 137	- 167	- 58	- 92	- 44
Christchurch	- 40	- 69	- 177	- 39	- 78	- 22
Urban and Rural Sub-Areas of the North East Triangle and BDP						
Greater Bristol (Bristol & South Gloucs UA)	- 1,221	- 934	- 1,973	- 815	- 1,881	- 672
Swindon Town (Swindon UA)	- 354	- 240	- 583	- 362	- 497	- 148
N and NE Fringes of Bristol (South Gloucs)	- 326	- 153	- 202	- 117	- 184	- 99
Rural Swindon (Swindon UA)	- 208	- 22	- 75	- 78	- 47	- 8
Rural North Somerset	- 185	- 132	- 220	- 135	- 98	- 67
Stonehouse (Stroud)	- 146	- 26	- 26	- 6	- 26	- 6
Rural Salisbury	- 124	- 100	- 106	- 26	- 65	- 32
Bath City (Bath and North East Somerset)	- 123	- 102	- 464	- 60	- 253	- 131
Rural Stroud	- 119	- 92	- 124	- 62	- 67	- 32
Chippenham	- 107	- 41	- 92	- 21	- 50	- 16
Rural South Gloucestershire	- 101	- 71	- 197	- 57	- 57	- 41
Tewkesbury Town	- 98	- 14	- 65	- 10	- 36	- 16
Rural North Wiltshire	- 94	- 101	- 125	- 75	- 68	- 35
Rural West Wiltshire	- 92	- 46	- 180	- 35	- 53	- 44
Portland (Weymouth and Portland)	- 80	- 11	- 15	- 25	- 9	- 11
Rural Cotswold	- 78	- 51	- 224	- 55	- 97	- 86
Midsomer Norton and Radstock (BANES)	- 77	- 50	- 61	- 14	- 23	- 20
Other Tewkesbury Urban	- 70	- 24	- 39	- 11	- 24	- 9
Other Urban North Wiltshire	- 70	- 11	- 32	- 10	- 15	- 6
Salisbury City	- 69	- 43	- 236	- 76	- 116	- 55
Ferndown (East Dorset)	- 61	- 33	- 88	- 4	- 20	- 22
Rural West Dorset	- 60	- 87	- 124	- 14	- 41	- 46
Rural Forest of Dean	- 59	- 59	- 52	- 16	- 47	- 45
Other Stroud Urban	- 52	- 9	- 15	- 5	- 8	- 4

...Table 3 continues over...

Economic Impact of the Downturn in the North East Triangle and BDP

...Table 3 continued from previous page

Devizes	- 51	- 36	- 54	- 10	- 32	- 21
Lydney (Forest of Dean)	- 50	- 11	- 30	- 3	- 11	- 13
Weymouth (Weymouth and Portland)	- 49	- 65	- 142	- 76	- 42	- 56
Trowbridge	- 46	- 41	- 140	- 99	- 53	- 30
Calne	- 46	- 19	- 26	- 5	- 8	- 4
Weston-Super-Mare (North Somerset)	- 45	- 86	- 244	- 26	- 111	- 43
Other Urban Purbeck	- 45	- 24	- 24	- 6	- 25	- 9
Rural Kennet	- 44	- 51	- 50	- 18	- 45	- 37
Melksham	- 43	- 24	- 29	- 6	- 9	- 8
Keynsham (Bath and North East Somerset)	- 35	- 47	- 48	- 13	- 18	- 19
Other Urban Forest of Dean	- 35	- 11	- 14	- 8	- 22	- 8
Dursley (Stroud)	- 34	- 3	- 12	- 1	- 6	- 4
Rural Purbeck	- 33	- 44	- 41	- 9	- 29	- 17
Rural Bath and North East Somerset	- 32	- 130	- 91	- 21	- 46	- 35
Cirencester (Cotswold)	- 31	- 15	- 131	- 31	- 59	- 26
Christchurch Town (Christchurch)	- 30	- 55	- 163	- 3	- 62	- 15
Wimborne Minster (East Dorset)	- 30	- 15	- 41	- 3	- 19	- 17
Westbury	- 30	- 21	- 26	- 15	- 4	- 3
Rural Tewkesbury	- 29	- 34	- 56	- 6	- 25	- 14
Warminster	- 29	- 11	- 46	- 8	- 16	- 11
Highworth (Swindon UA)	- 28	- 7	- 11	- 4	- 6	- 5
Clevedon (North Somerset)	- 26	- 33	- 74	- 7	- 50	- 12
Rural North Dorset	- 24	- 80	- 80	- 27	- 48	- 10
Rural East Dorset	- 24	- 29	- 53	- 2	- 50	- 27
Stroud Town	- 22	- 12	- 78	- 24	- 37	- 21
Yate and Chipping Sodbury (South Gloucs)	- 21	- 16	- 39	- 6	- 11	- 13
Verwood (East Dorset)	- 18	- 13	- 27	- 2	- 8	- 4
Coleford (Forest of Dean)	- 18	- 9	- 20	- 7	- 8	- 10
Bridport (West Dorset)	- 16	- 24	- 50	- 5	- 10	- 9
Blandford Forum (North Dorset)	- 16	- 12	- 28	- 17	- 17	- 5
Brockworth (Tewkesbury)	- 15	- 5	- 20	- 24	- 14	- 7
Gillingham (North Dorset)	- 14	- 15	- 30	- 8	- 14	- 3
Cinderford (Forest of Dean)	- 14	- 25	- 15	- 5	- 6	- 9
Dorchester (West Dorset)	- 13	- 25	- 88	- 19	- 56	- 35
Portishead (North Somerset)	- 12	- 32	- 47	- 4	- 26	- 12
Nailsea (North Somerset)	- 12	- 14	- 40	- 5	- 26	- 12
Sherborne (West Dorset)	- 9	- 11	- 37	- 7	- 13	- 14
Other Urban North Dorset	- 9	- 31	- 30	- 6	- 12	- 26
Other Urban North Somerset	- 9	- 12	- 13	- 2	- 11	- 11
Rural Christchurch	- 9	- 13	- 13	- 35	- 16	- 7
Corsham (North Wiltshire)	- 8	- 10	- 11	- 4	- 8	- 3
Nailsworth (Stroud)	- 7	- 2	- 16	- 3	- 7	- 5
Marlborough	- 6	- 10	- 32	- 6	- 15	- 14
Swanage (Purbeck)	- 5	- 16	- 26	- 4	- 8	- 5
Other Urban West Dorset	- 5	- 12	- 21	- 1	- 5	- 5
Amesbury	- 4	- 8	- 26	- 7	- 27	- 6
Other Urban South Gloucs	- 4	- 7	- 23	- 5	- 12	- 11
Bradford-on-Avon	- 4	- 6	- 23	- 2	- 10	- 6
Ludgershall and Tidworth (Kennet)	- 4	- 7	- 13	- 7	- 6	- 9
Pewsey	- 4	- 10	- 7	- 2	- 5	- 3
Other Urban West Wiltshire	- 4	- 5	- 4	- 0	- 2	- 2
Wootton Bassett	- 2	- 5	- 15	- 1	- 5	- 5
St Leonards and St Ives (East Dorset)	- 2	- 4	- 12	- 0	- 3	- 5
West Moors (East Dorset)	- 2	- 7	- 10	- 0	- 2	- 3
Other Urban Salisbury	- 1	- 9	- 11	- 7	- 3	- 2
Other Urban Swindon	- 1	- 5	- 7	- 1	- 2	- 3
Other Urban East Dorset	- 1	- 6	- 4	- 0	- 2	- 1
Other Urban BANES	-	-	- 11	- 15	- 4	- 3

Source: GWE Business West Research, 2009

3 Resident Economic Impact

3.1 The resident economic impact of the recession across NET is illustrated through the following proxy measures:

- Predicted Claimant Unemployment amongst NET Residents
- Predicted Estimates of Earnings for NET Residents
- Predicted Estimates of Job Losses by Key Skill Type (Skilled and Unskilled Occupations) for NET Residents
- Predicted Estimates of Job Losses by Key Industry (Blue Collar and Services) for NET Residents

Predicted Claimant Unemployment amongst NET Residents

3.2 Table 4 shows the various patterns of predicted unemployment across NET's resident-based economies. Overall, NET is predicted to see a rise in Claimant Unemployment of around 25,000 amongst its residents from June 2008 to June 2009, a rise of 127% from current levels. Whilst this rate of growth of unemployment is almost double the national rate (rising by 77%) it must be remembered that NET's current unemployment rates (of the workforce) are substantially lower than nationally. As a result, and in all areas with a relatively low current rate of unemployment, a relatively small volume increase can lead to a relatively high growth rate increase. The NET Claimant unemployment increase is slightly lower than that expected for the South West region as a whole, though the differences is barely significant.

3.3 Amongst the ten NET Upper Tier Authorities the greatest volume of new Claimants will be in Gloucestershire (6,300 new Claimants). Gloucestershire is followed by Wiltshire (4,900 new Claimants), Bristol (4,100) and Dorset (4,000). South Gloucestershire is fifth with 2,900 expected new Claimants. Each of the remaining 6 Upper Tier Authorities will produce somewhere between 1,500 to 2,500 new Claimants.

3.4 The analysis of workplace employment in Table 1 showed that the Top 4 Upper Tier Authorities in terms of job losses were Bristol followed by Gloucestershire, Wiltshire and Dorset. The higher rankings of Gloucestershire and Wiltshire in terms of Claimant Unemployment, a resident-based count, illustrates the relative importance of these areas as commuter areas. The finding shows how the larger urban centres will carry the weight of job losses from the closure or contraction of business, production and commerce but that the implications of these losses will impact far more evenly in the rural commuter zones of NET (though spread over a far greater physical area).

3.5 Amongst the Unitary Authorities and Districts, the largest volumes of new Claimants will derive from each of the seven Unitaries with Bristol fairly substantially ahead at the top of the list. Amongst the Districts, North Wiltshire, West Wiltshire, Gloucester and Salisbury will produce the highest new Claimant volumes. In general, fewest new Claimants will be produced by the smaller Dorset Districts economies.

3.6 In terms of the urban and rural area classifications explored in this analysis, Greater Bristol is by far and away the greatest source of new Claimants. Greater Bristol will produce more than 7,000 new Claimants, around 29% of all NET's new Claimants. Following Greater Bristol, the following urban areas will produce the largest new Claimant volumes:

- Swindon Town
- N and NE Fringes of Bristol

- Bournemouth
- Poole
- Gloucester
- Cheltenham
- Bath City
- Weston-Super-Mare

3.7 The urban areas of Weymouth, Yate / Chipping Sodbury and Salisbury City make it into the Top 20 in terms of volumes of new Claimants. However, whilst the key NET urban areas hold almost all of the Top 10 volume change placings, there are a number of rural areas within or around the Top 10. These include the rural areas of North Wiltshire, Cotswold, North Somerset, West Dorset, Salisbury and Stroud. Rural South Gloucestershire and Rural Bath and North East Somerset also make the Top 20 in terms of new Claimant volumes.

3.8 In terms of growth of new Claimants from pre-Downturn levels, and amongst the Upper Tier Authorities, Dorset and South Gloucestershire, with growth percentages which are both in excess of 220%. The lowest percentage growth rates are found amongst the relatively concentrated urban areas of Swindon, Bournemouth, and Bristol (displaying lowest growth!).

3.9 The general rule on new Claimant percentage growth tends to be that the lower the current volume of unemployed in the area, the higher the growth rate and the greater the potential impact on the community in that area. This general trend becomes more apparent, the smaller the geographical area of focus. For example, amongst the Districts, the highest rates are found in the relatively sparsely populated, wealthier commuter communities of:

- West Dorset
- North Dorset
- Cotswold
- Purbeck
- East Dorset

3.10 However, these high percentage growth areas are likely to be relatively wealthy and overly professional in terms of their new Claimant profile, characteristics which are likely to mean that their residents are, *on average*, better able to withstand the Downturn or to mitigate the impact of the Downturn on themselves and their families.

3.11 The lowest growth is found in the Authority areas of:

- Swindon
- Bournemouth
- Gloucester
- Bristol
- Cheltenham

3.12 In terms of the 85 or so urban and rural area classifications, and in terms of growth from current levels, the Top 20 areas in terms of percentage growth of new Claimants from pre-Downturn levels are as follows:

- Rural Christchurch
- Other Urban North Somerset
- Other Urban East Dorset
- **Rural West Dorset**

- Other Urban Salisbury
- Nailsea
- Sherbourne
- Rural Purbeck
- **Rural Cotswold**
- Other Urban North Dorset
- Portishead
- **Rural Salisbury**
- **Rural Bath and North East Somerset**
- Rural East Dorset
- **Clevedon**
- **Rural North Dorset**
- Other Cotswold Urban
- Other Urban South Gloucestershire
- **Rural South Gloucestershire**
- Swanage

3.13 Many of these areas demonstrate the lowest rates of Claimant unemployed found across the North East Triangle.

3.14 The emboldened areas in the Top 20 list are also likely to produce significant volumes of new Claimants as well as having a relatively high percentage growth from pre-Downturn levels. It is noticeable that all of those areas with high percentage growth and significant volumes, which can therefore be described (in relative terms) as the 'hardest hit' areas of NET, are rural. It should also be noted that none of the Top 20 can be described as a NET 'heavyweight' economy. In fact, and of the heavyweights, only the North and North East Fringes of Bristol (which lie in South Gloucestershire), and Poole, have reasonably above-average growth percentages of new Claimants. Each of the remaining 'heavyweight' NET economies will either generate new Claimants at a growth percentage below or above the NET average.

3.15 One of the implications from this analysis is that smaller and often wealthier commuter communities characterised by (pre-Downturn) lower current unemployment rates and higher employment rates will actually be hit harder as a result of the Downturn than larger areas with relatively low employment rates and high unemployment rates.

3.16 We would also point out that those Towns with historically higher rates of unemployment are perhaps more used to dealing with unemployment (and have the support infrastructures in place to deal with unemployment as a result). We advise that, on the basis of these findings, partners should ensure that the support infrastructure across NET is able to deal with the rising demand for their services from these areas in terms of such services as benefits claims processing, support for finding work and retraining and also business start-up. This provision needs to reflect the rapid surges in new Claimants living in the more rural and at times remote areas of NET. Service accessibility will be key in these areas.

3.17 As well as accessibility, the support service infrastructure (especially support for finding work and start-up) will need to recognise the differences in the types of Claimants in the more rural areas. The Claimant profile (as we will see shortly in the occupational analysis section below) is likely to be far more professional in the NET rural areas. Demand for the business start-up option in the NET rural areas is likely to see a significant surge, driven largely by entrepreneurial professionals backed with a redundancy payment. These potential start-ups are likely to have a different profile to that of the NET's more urban areas, which

are likely to be characterised by larger concentrations of lower skilled new Claimants. However, a surge in start-ups in NET urban areas should also be expected (and supported).

- 3.18** In the case of support for finding work in the NET rural areas, the high rates of out-commuting mean that many of these newly unemployed are likely to be commuters. Local support partner linkages with the relevant partners in these commuter destinations will be essential.

Table 4: Actual and Predicted Claimant Unemployment Volumes and Change (Volumes and %), June 2008 and June 2009, Residents, Base Scenario. Authorities and Smaller Areas Ranked within category by volume change.

Area	Claimants in June 2008	Claimants in June 2009	Volume Change	% Change
Great Britain	803,865	1,423,596	619,731	77.1
South West	40,745	96,024	55,279	135.7
North East Triangle and BDP	23,715	55,405	31,690	133.6
North East Triangle	19,460	44,098	24,638	126.6
West of England Partnership	8,790	19,825	11,035	125.5
Bristol & South Gloucestershire	6,570	13,426	6,856	104.4
Bournemouth, Dorset and Poole	4,255	11,308	7,053	165.8
Upper Tier Authorities				
Gloucestershire	5,420	11,703	6,283	115.9
Wiltshire	2,885	7,770	4,885	169.3
Bristol	5,280	9,424	4,144	78.5
Dorset	1,735	5,715	3,980	229.4
South Gloucestershire	1,290	4,174	2,884	223.6
Swindon	2,370	4,808	2,438	102.9
North Somerset	1,205	3,339	2,134	177.1
Bath and North East Somerset	1,010	2,884	1,874	185.6
Bournemouth	1,640	3,281	1,641	100.1
Poole	880	2,312	1,432	162.7
Unitary and District Authority Areas				
Bristol	5,280	9,424	4,144	78.5
South Gloucestershire	1,290	4,174	2,884	223.6
Swindon	2,370	4,808	2,438	102.9
North Somerset	1,205	3,339	2,134	177.1
Bath and North East Somerset	1,010	2,884	1,874	185.6
Bournemouth	1,640	3,281	1,641	100.1
Poole	880	2,312	1,432	162.7
North Wiltshire	755	2,180	1,425	188.8
West Wiltshire	1,180	2,564	1,384	117.3
Gloucester	1,625	2,996	1,371	84.4
Salisbury	565	1,821	1,256	222.2
Stroud	685	1,811	1,126	164.4
Cheltenham	1,380	2,446	1,066	77.2
West Dorset	310	1,370	1,060	342.1
Cotswold	360	1,369	1,009	280.4
Tewkesbury	595	1,474	879	147.7
Forest of Dean	775	1,604	829	107.0
Kennet	380	1,202	822	216.3
East Dorset	300	1,117	817	272.2
Weymouth and Portland	535	1,166	631	117.9
North Dorset	205	792	587	286.5
Purbeck	170	637	467	274.9
Christchurch	220	639	419	190.2
Urban and Rural Sub-Areas of the North East Triangle and BDP				
Greater Bristol (Bristol & South Gloucs UA)	6,175	13,203	7,028	113.8
Swindon Town (Swindon UA)	2,195	4,344	2,149	97.9
N and NE Fringes of Bristol (South Gloucs)	870	2,985	2,115	243.1
Bournemouth	1,640	3,281	1,641	100.1
Poole	880	2,312	1,432	162.7
Gloucester	1,625	2,996	1,371	84.4
Cheltenham	1,380	2,446	1,066	77.2
Bath City (Bath and North East Somerset)	630	1,485	855	135.8
Weston-Super-Mare (North Somerset)	725	1,464	739	101.9
Rural North Wiltshire	295	735	680	230.6
Rural Cotswold	180	826	646	358.9
Rural North Somerset	265	896	631	238.1
Rural West Dorset	125	706	581	464.8
Rural Salisbury	180	753	573	318.6
Rural Stroud	240	807	567	236.2
Weymouth (Weymouth and Portland)	435	926	491	112.8

... Table 4 continues over...

Economic Impact of the Downturn in the North East Triangle and BDP

...Table 4 continued from previous page

Rural South Gloucestershire	170	636	466	274.2
Yate and Chipping Sodbury (South Gloucs)	170	624	454	267.1
Salisbury City (Salisbury)	300	752	452	150.5
Rural Bath and North East Somerset	140	585	445	317.8
Rural West Wiltshire	340	775	435	128.1
Rural Forest of Dean	280	713	433	154.7
Rural Kennet	170	584	414	243.7
Chippenham (North Wiltshire)	225	622	397	176.6
Christchurch Town (Christchurch)	215	609	394	183.1
Rural North Dorset	115	470	355	308.3
Trowbridge (West Wiltshire)	485	838	353	72.7
Midsomer Norton and Radstock (BANES)	140	442	302	215.5
Other Tewkesbury Urban	180	450	270	150.3
Clevedon (North Somerset)	85	348	263	309.4
Rural Tewkesbury	125	387	262	209.6
Tewkesbury	215	470	255	118.6
Stroud Town	225	468	243	108.2
Rural East Dorset	75	313	238	317.5
Cirencester (Cotswold)	120	345	225	187.3
Other Urban South Gloucs	80	302	222	277.8
Warminster (West Wiltshire)	130	338	208	159.8
Melksham (West Wiltshire)	105	304	199	190.0
Nailsea (North Somerset)	50	242	192	383.9
Other Urban Purbeck	85	275	190	223.8
Dorchester (West Dorset)	75	265	190	253.8
Portishead (North Somerset)	55	245	190	346.3
Rural Purbeck	50	233	183	365.3
Calne (North Wiltshire)	130	305	175	134.8
Keynsham (Bath and North East Somerset)	75	249	174	232.5
Other Cotswold Urban	60	233	173	288.0
Devizes (kennet)	110	266	156	141.8
Ferndown (East Dorset)	65	221	156	240.5
Wimborne Minster (East Dorset)	60	206	146	244.0
Ludgershall and Tidworth (Kennet)	55	196	141	257.1
Portland (Weymouth and Portland)	100	237	137	137.0
Bridport (West Dorset)	60	192	132	219.3
Other Stroud Urban	55	177	122	221.4
Other Urban Salisbury	30	150	120	399.1
Other Urban North Somerset	25	144	119	477.1
Highworth (Swindon UA)	60	174	114	190.5
Amesbury (Salisbury)	55	166	111	201.5
Coleford (Forest of Dean)	145	253	108	74.7
Rural Swindon (Swindon UA)	60	167	107	179.0
Other Urban Forest of Dean	90	189	99	110.0
Cinderford (Forest of Dean)	130	228	98	75.6
Swanage (Purbeck)	35	129	94	269.5
Blandford Forum (North Dorset)	40	133	93	232.6
Sherbourne (West Dorset)	25	118	93	370.9
Lydney (Forest of Dean)	130	221	91	69.9
Brockworth (Tewkesbury)	75	166	91	121.6
Bradford-on-Avon (West Wiltshire)	75	166	91	121.6
Verwood (East Dorset)	35	125	90	257.0
Stonehouse (Stroud)	75	160	85	113.6
Corsham (North Wiltshire)	55	133	78	141.9
Marlborough (kennet)	30	108	78	261.5
Wootton Bassett (North Wiltshire)	50	127	77	153.7
Other Urban East Dorset	15	87	72	477.1
Westbury (West Wiltshire)	35	106	71	202.4
Gillingham (North Dorset)	30	100	70	232.5
Other Urban North Dorset	20	90	70	349.8
Other Urban Swindon	55	122	67	122.5
Other Urban West Dorset	25	90	65	259.0
Dursley (Stroud)	60	123	63	104.5
West Moors (East Dorset)	30	91	61	203.5
St Leonards and St Ives (East Dorset)	20	73	53	266.2
Nailsworth (Stroud)	30	76	46	153.2
Pewsey (Kennet)	20	53	33	165.9
Rural Christchurch	5	33	28	552.3
Other Urban West Wiltshire	10	37	27	266.2

Source: GWE Business West Research, 2009

Predicted Estimates of Earnings for NET Residents

- 3.19** Table 5 shows predictions of the impact of the Downturn on levels of earnings across NET between June 2008 and June 2009. The reader should be aware of the 'double-whammy' effect of earnings lost on the public sector purse; when earnings fall, so too does taxation, and, when earnings fall as a result of job losses, additional public funds are required to pay for benefits drawn as a result.
- 3.20** In total it is estimated that earnings will fall from £25.6 billion in June 2008 to £25.2 billion in 2009, a £0.5 billion decrease (equivalent to a 1.77% decrease). Across NET and BDP they will fall by around 1.78%. The fall in earnings across NET and NET and BDP are both expected to be slightly lower than the percentage falls predicted across The South West and Great Britain (both predicted to fall by around 1.85% from their pre-Downturn levels).
- 3.21** Amongst the Upper Tier Authorities, the greatest volume fall in earnings, by a considerable way, is expected to be found across Gloucestershire. The Counties of Gloucestershire, Wiltshire and Dorset occupy three of the top 4 positions in terms of the expected volume fall in earnings. Bristol lies in third place with an expected annual loss of earnings of £76 million.
- 3.22** Amongst the Unitaries and District Authority areas, and as with new Claimants, the top positions are all held by the larger Unitary Authorities, pretty much in order of the relative size of the economy (with Bristol in top place). An exception to this is Swindon which has a slightly higher ranking in terms of volume loss than the size of its economy. With relatively low Claimant growth in Swindon (see the new Claimant analysis above) this must be due to the occupational profile of Swindon; Swindon's job losses are, on average, located in better paid occupations.
- 3.23** Amongst the urban and rural area categories, the main volume contributors to earnings decline across NET will derive from the large urban area of Greater Bristol. Following Bristol (by a very considerable way), are Swindon Town and Bath City. The urban area of Weston-Super-Mare also makes it into the Top 10 highest volume losers. However six of the Top 10 volume loser placings are actually taken up by rural areas, endorsing the earlier point that whilst urban industrial areas will take the brunt of workplace losses, these losses will be felt far more evenly amongst the (residents of) the NET rural areas. It may be recalled from the workplace analysis of job losses in this report, that only one of the Top 10 volume job loss positions was held by a rural area of NET.
- 3.24** Turning now to the percentage change from the Pre-Downturn earnings levels, the worst affected of the Upper Tier Authorities will be Swindon, Poole and Wiltshire. Each of these areas has an above-average percentage decline. Percentage decline is driven by the occupational profile of the area; areas with larger concentrations of employment in higher-decline occupations and/or concentrations of employment in higher-paid occupations will be worst-affected. To understand this further when looking at the results for an area, the higher-decline occupations are at the top of the list as follows:
- Process, Plant and Machine Operatives (declining by 5% over the year)
 - Elementary Occupations (5% decline)
 - Skilled Trades (4% decline)
 - Sales and Customer Service (3% decline)
 - Administrative and Secretarial (2% decline)
 - Associate Prof & Technical (1% decline)

- Personal Service (1% decline)
- Managers and Senior Officials (1% decline)
- Professional Occupations (1% decline)

3.25 An area with higher concentrations of employment in these sectors is likely to be hit relatively hard in terms of earnings.

3.26 The high-paid occupations are as follows:

- Managers and Senior Officials (£700 per week national average earnings)
- Professional Occupations (£600 per week)
- Associate Prof & Technical (500 per week)
- Skilled Trades (£400 per week)
- Process, Plant and Machine Operatives (£400 per week)
- Administrative and Secretarial (£300 per week)
- Elementary Occupations (£200 per week)
- Personal Service (£200 per week)
- Sales and Customer Service (£200 per week)

3.27 Again, an area with employment concentrations in these occupations is expected to have experienced relatively heavy earnings losses.

3.28 Combining the two tables suggests that areas with larger concentrations of employment in Skilled Trades and Process, Plant and Machine Operatives will see the greatest earnings losses. This certainly seems to be true of the earnings losses experienced by Swindon, Poole and Wiltshire.

3.29 Amongst the Unitaries and Districts, the Top 5 highest percentage declining areas are:

- Gloucester
- Swindon
- Christchurch
- West Dorset
- West Wiltshire

3.30 Amongst the urban and rural areas of NET and BDP, earnings percentage decline is expected to be highest for the following areas (larger economies emboldened):

- Cinderford
- **Midsomer Norton and Radstock**
- Bridport
- Other Urban
- **Melksham**
- **Calne**
- Devizes
- Other Urban Forest of Dean
- Coleford
- Portland
- **Trowbridge**
- Lydney
- **Cirencester**
- **Swindon Town**

- Amesbury
- Corsham
- **Yate and Chipping Sodbury**
- Other Urban Salisbury
- Rural Christchurch
- **Christchurch Town**

3.31 It is perhaps noticeable that most of the larger economies here are noted for their concentrations of (resident and workplace) employment in Blue-Collar (manual) industries with the associated high concentrations of Skilled Tradespeople and Operatives. From the Business Link start-up perspective, these areas are most likely to produce start-ups in the skilled trades.

Table 5: Estimated and Predicted Estimates of Earnings Value and Change (Value and %), June 2008 and June 2009, Residents, Base Scenario. Authorities and Smaller Areas Ranked within category by volume change.

Great Britain	612,512	601,203	- 11,309	- 1.85
South West	54,622	53,610	- 1,012	- 1.85
North East Triangle and BDP	32,888	32,302	- 585	- 1.78
North East Triangle	25,640	25,185	- 455	- 1.77
West of England Partnership	11,864	11,662	- 203	- 1.71
Bournemouth, Dorset and Poole	7,245	7,115	- 130	- 1.80
Bristol & South Gloucestershire	6,475	6,352	- 123	- 1.90
Upper Tier Authorities				
Gloucestershire	6,768	6,649	- 118	- 1.75
Wiltshire	4,850	4,759	- 91	- 1.87
Bristol	4,688	4,612	- 76	- 1.62
Dorset	4,168	4,094	- 74	- 1.78
South Gloucestershire	2,942	2,889	- 53	- 1.81
North Somerset	2,297	2,257	- 40	- 1.73
Swindon	2,159	2,116	- 43	- 2.00
Bath and North East Somerset	1,939	1,905	- 34	- 1.74
Bournemouth	1,698	1,668	- 30	- 1.76
Poole	1,378	1,352	- 26	- 1.91
Unitary and District Authority Areas				
Bristol	4,688	4,612	- 76	- 1.62
South Gloucestershire	2,942	2,889	- 53	- 1.81
Swindon	2,159	2,116	- 43	- 2.00
North Somerset	2,297	2,257	- 40	- 1.73
Bath and North East Somerset	1,939	1,905	- 34	- 1.74
Bournemouth	1,698	1,668	- 30	- 1.76
North Wiltshire	1,568	1,540	- 28	- 1.78
Poole	1,378	1,352	- 26	- 1.91
West Wiltshire	1,275	1,250	- 25	- 1.94
Gloucester	1,219	1,195	- 25	- 2.02
Stroud	1,332	1,310	- 22	- 1.64
Salisbury	1,191	1,168	- 22	- 1.88
Cheltenham	1,339	1,319	- 20	- 1.50
Cotswold	1,015	996	- 19	- 1.88
West Dorset	973	954	- 19	- 1.95
Tewkesbury	996	979	- 17	- 1.69
East Dorset	923	908	- 16	- 1.68
Forest of Dean	859	843	- 16	- 1.86
Kennet	817	801	- 16	- 1.90
North Dorset	764	753	- 12	- 1.54
Weymouth and Portland	617	606	- 11	- 1.81
Purbeck	491	482	- 9	- 1.80
Christchurch	404	396	- 8	- 1.98
Urban and Rural Sub-Areas of the North East Triangle and BDP				
Greater Bristol (Bristol & South Gloucs UA)	7,629	7,500	- 129	- 1.69
N and NE Fringes of Bristol (South Gloucs)	2,253	2,214	- 39	- 1.74
Swindon Town (Swindon UA)	1,867	1,829	- 38	- 2.03
Bath City (Bath and North East Somerset)	965	949	- 15	- 1.60
Rural North Wiltshire	812	798	- 14	- 1.69
Weston-Super-Mare (North Somerset)	687	674	- 13	- 1.93
Rural North Somerset	760	747	- 12	- 1.61
Rural Cotswold	694	682	- 12	- 1.80
Rural Stroud	711	700	- 11	- 1.57
Rural Salisbury	580	569	- 11	- 1.83
Rural West Dorset	550	539	- 11	- 1.94
Rural South Gloucestershire	526	517	- 9	- 1.71
Rural Forest of Dean	515	506	- 9	- 1.67
Rural Bath and North East Somerset	500	491	- 8	- 1.67
Rural Kennet	440	431	- 8	- 1.84
Rural West Wiltshire	422	414	- 8	- 1.88
Salisbury City (Salisbury)	417	409	- 8	- 1.89
Yate and Chipping Sodbury (South Gloucs)	409	400	- 8	- 2.00
Chippenham (North Wiltshire)	406	399	- 8	- 1.87
Christchurch Town (Christchurch)	380	373	- 8	- 1.98
Rural North Dorset	493	485	- 7	- 1.48

... Table 5 continues over...

Economic Impact of the Downturn in the North East Triangle and BDP

...Table 5 continued from previous page

Other Tewkesbury Urban	338	332	- 5	- 1.54
Rural Tewkesbury	320	315	- 5	- 1.62
Trowbridge (West Wiltshire)	294	288	- 6	- 2.08
Clevedon (North Somerset)	275	270	- 5	- 1.77
Rural East Dorset	270	266	- 5	- 1.68
Stroud Town	261	257	- 5	- 1.75
Tewkesbury	246	241	- 5	- 1.92
Midsomer Norton and Radstock (BANES)	233	228	- 5	- 2.21
Portishead (North Somerset)	225	221	- 4	- 1.60
Nailsea (North Somerset)	222	219	- 4	- 1.62
Rural Purbeck	204	200	- 4	- 1.74
Cirencester (Cotswold)	198	194	- 4	- 2.05
Other Urban Purbeck	190	187	- 4	- 1.85
Other Urban South Gloucs	250	243	- 4	- 1.65
Warminster (West Wiltshire)	185	182	- 4	- 1.96
Dorchester (West Dorset)	175	172	- 3	- 1.88
Wimborne Minster (East Dorset)	169	166	- 3	- 1.64
Melksham (West Wiltshire)	166	162	- 4	- 2.13
Keynsham (Bath and North East Somerset)	164	161	- 3	- 1.87
Ferndown (East Dorset)	163	160	- 3	- 1.77
Other Stroud Urban	161	158	- 2	- 1.52
Other Cotswold Urban	157	154	- 3	- 1.91
Calne (North Wiltshire)	157	153	- 3	- 2.13
Ludgershall and Tidworth (Kennet)	135	132	- 3	- 1.92
Devizes (kennet)	132	129	- 3	- 2.13
Other Urban North Somerset	128	126	- 2	- 1.72
Rural Swindon (Swindon UA)	128	125	- 2	- 1.62
Portland (Weymouth and Portland)	114	112	- 2	- 2.09
Verwood (East Dorset)	110	108	- 2	- 1.62
Blandford Forum (North Dorset)	110	108	- 2	- 1.60
Bradford-on-Avon (West Wiltshire)	109	107	- 2	- 1.59
Bridport (West Dorset)	106	104	- 2	- 2.18
Highworth (Swindon UA)	105	103	- 2	- 1.95
Other Urban Salisbury	101	99	- 2	- 2.00
Swanage (Purbeck)	96	95	- 2	- 1.85
Coleford (Forest of Dean)	96	94	- 2	- 2.11
Brockworth (Tewkesbury)	93	91	- 2	- 1.82
Amesbury (Salisbury)	92	91	- 2	- 2.03
Other Urban Forest of Dean	87	85	- 2	- 2.12
Other Urban North Dorset	85	84	- 1	- 1.60
Sherbourne (West Dorset)	83	82	- 2	- 1.92
Cinderford (Forest of Dean)	80	79	- 2	- 2.27
Lydney (Forest of Dean)	81	79	- 2	- 2.07
Stonehouse (Stroud)	79	78	- 2	- 1.96
Marlborough (kennet)	78	77	- 1	- 1.86
Other Urban (Bath and North East Somerset)	78	76	- 2	- 2.14
Gillingham (North Dorset)	77	75	- 1	- 1.74
Westbury (West Wiltshire)	75	73	- 1	- 1.78
Other Urban East Dorset	74	73	- 1	- 1.77
St Leonards and St Ives (East Dorset)	73	72	- 1	- 1.47
Wootton Bassett (North Wiltshire)	73	71	- 1	- 1.97
Corsham (North Wiltshire)	73	71	- 1	- 2.01
West Moors (East Dorset)	65	64	- 1	- 1.74
Dursley (Stroud)	63	62	- 1	- 1.83
Other Urban Swindon	60	58	- 1	- 1.95
Other Urban West Dorset	58	57	- 1	- 1.95
Nailsworth (Stroud)	57	56	- 1	- 1.58
Other Urban North Wiltshire	47	47	- 0	- 0.85
Pewsey (Kennet)	32	31	- 1	- 1.98
Rural Christchurch	27	27	- 1	- 1.99
Other Urban West Wiltshire	24	24	- 0	- 1.91

Source: GWE Business West Research, 2009

Predicted Estimates of Job Losses by Key Skill Type (Skilled and Unskilled Occupations) for Wiltshire Residents

- 3.32** Table 6 attempts to predict the types of job losses being felt across NET according to the very broadest of skills classifications: skilled and unskilled¹. It should be noted that, in general, there is an inverse relationship between employment and self-employment (and starting and running one's own business). Allied to this, it should also be noted that skilled workers, in general, are less reliant upon employment (as opposed to self-employment or starting their own business) than unskilled workers. When looking at the findings below, and from a Business Link start-up perspective, it is worth noting those areas which are expected to produce higher proportions of skilled job losses as these areas are likely to be start-up hot-spots.
- 3.33** Overall (and as shown earlier) it is predicted that the Downturn will lead to around 25,000 job losses across NET between June 2008 and June 2009. The model suggests that the nature of job losses across NET, and as with the South West region as a whole, will be slightly more highly skilled than the job losses experienced nationally: 39% of NET losses and South West losses as a result of the Downturn will be skilled jobs compared to 38% nationally. However, the lion's share of job losses (61% of losses), and as with nationally and regionally, will be unskilled.
- 3.34** Amongst the Upper Tier Authorities, higher proportions of skilled job losses are expected to be found in Gloucestershire and Dorset. Conversely, higher proportions of unskilled losses are predicted across Bath and North East Somerset and Swindon. In fact, of all the Upper Tier Authorities, Swindon is marked out for its very high proportion of unskilled losses and very low proportion of skilled losses; 70% of Swindon losses will be unskilled and 30% skilled compared to NET averages of 61% and 39% respectively.
- 3.35** Amongst the Unitaries and Districts, the main areas with well above average skilled losses are:
- Purbeck
 - Christchurch
 - Stroud
 - Kennet
 - Cheltenham
 - North Dorset
- 3.36** The top 2 here, Purbeck and Christchurch, are the only NET/BDP Authorities where the proportion of skilled losses is higher than the proportion of unskilled losses (i.e. it is greater than 50%). Whilst this attribute could be viewed as a weakness in the face of a Downturn, because skilled jobs tend to be better paid than unskilled jobs, it can also be viewed as a strength because, as previously mentioned, skilled workers are often more able and likely to explore the start-up option for finding work. Skilled workers also tend to be more creative and entrepreneurial in finding work in general when faced with redundancy (not least as they will have more employment options available to them than unskilled workers).

¹ Skilled jobs are defined as the occupational groupings of Managers and Senior Officials, Professional Occupations, Associate Prof & Technical and Skilled Trades. Unskilled jobs are defined as the occupational groupings of Administrative and Secretarial, Personal Service, Sales and Customer Services, Process, Plant and Machine Operatives and Elementary Occupations.

3.37 The highest proportions of unskilled losses are predicted to occur in the following Authority areas (highest first):

- Swindon
- Weymouth and Portland
- West Wiltshire

3.38 Amongst the urban and rural classified areas, the highest proportions of skilled jobs (and lowest proportions of unskilled jobs) will be lost in the following areas (larger economies emboldened – each around 2% or more of NET and BDP job losses)

- Rural Purbeck
- Rural Christchurch
- Swanage (Purbeck)
- Other Urban Purbeck
- Pewsey (Kennet)
- **Christchurch Town (Christchurch)**
- **Rural Kennet**
- Other Stroud Urban
- **Rural Stroud**
- **Rural North Dorset**
- Nailsworth (Stroud)
- Rural Tewkesbury
- Marlborough (kennet)
- **Rural Cotswold**
- **Rural North Somerset**
- **Rural Salisbury**
- **Rural South Gloucestershire**
- **Rural Forest of Dean**
- Stroud Town
- Ludgershall and Tidworth (Kennet)

3.39 As can be seen, almost all of these economies are either large rural areas of smaller market or coastal towns. The analysis points to the significant strategic opportunity which exists for Business Link to work in partnership with Jobcentre Plus to target new benefit Claimants as a result of the Downturn with start-up workshops and networking opportunities (with a view to generating collaborative start-ups).

3.40 At the other end of things are those urban and rural economies with low proportions of unskilled losses and higher proportions of unskilled losses. It is these areas where jobsearch and retraining strategies and actions (alongside inward investment if possible) will be most valid. Again, larger economies (with more than 2% of losses) are emboldened:

- Portland (Weymouth and Portland)
- **Swindon Town (Swindon UA)**
- **Trowbridge (West Wiltshire)**
- **Midsomer Norton and Radstock (BANES)**
- **Melksham (West Wiltshire)**
- Wootton Bassett (North Wiltshire)
- Corsham (North Wiltshire)

- **Other Cotswold Urban**
- **Calne (North Wiltshire)**
- Lydney (Forest of Dean)
- Other Urban Swindon
- Other Urban West Wiltshire
- **Keynsham (Bath and North East Somerset)**
- **Ferndown (East Dorset)**
- Highworth (Swindon UA)
- Amesbury (Salisbury)
- Coleford (Forest of Dean)
- Cinderford (Forest of Dean)
- Other Urban (Bath and North East Somerset)
- Sherbourne (West Dorset)

3.41 The heavyweight economy of Greater Bristol lies firmly in the middle in terms of the types of skills. As with all NET and BDP economies, jobsearch, retraining and business start-up support strategies and action plans are essential.

Table 6: Predicted Estimates of Job Losses by Key Skill Type (Skilled and Unskilled) (Volumes and Percentages, June 2008 and June 2009, Base Scenario. Authorities and Smaller Areas Ranked by volume of skilled jobs lost).

Area	Vol. Skilled Jobs Lost	Vol. Unskilled Jobs Lost	% Skilled Jobs Lost (% of all)	% Unskilled Jobs Lost (% of all)
Great Britain	- 226,814	- 392,917	37	63
South West	- 21,322	- 33,957	39	61
North East Triangle	- 9,543	- 15,095	39	61
North East Triangle and BDP	- 12,439	- 19,251	39	61
West of England Partnership	- 4,257	- 6,778	39	61
Bristol & South Gloucestershire	- 2,357	- 4,499	34	66
Bournemouth, Dorset and Poole	- 2,900	- 4,154	41	59
Upper Tier Authorities				
Gloucestershire	- 2,620	- 3,663	42	58
Dorset	- 1,672	- 2,307	42	58
North Somerset	- 850	- 1,285	40	60
Bournemouth	- 651	- 990	40	60
Poole	- 576	- 856	40	60
Wiltshire	- 1,928	- 2,957	39	61
Bristol	- 1,605	- 2,538	39	61
South Gloucestershire	- 1,113	- 1,771	39	61
Bath and North East Somerset	- 689	- 1,185	37	63
Swindon	- 738	- 1,700	30	70
Unitary and District Authority Areas				
Purbeck	- 261	- 206	56	44
Christchurch	- 218	- 200	52	48
Stroud	- 527	- 599	47	53
Kennet	- 390	- 432	47	53
Cheltenham	- 478	- 588	45	55
North Dorset	- 263	- 324	45	55
Cotswold	- 423	- 586	42	58
North Somerset	- 850	- 1,285	40	60
Bournemouth	- 651	- 990	40	60
Poole	- 576	- 856	40	60
Salisbury	- 505	- 751	40	60
West Dorset	- 424	- 636	40	60
Tewkesbury	- 354	- 524	40	60
Bristol	- 1,605	- 2,538	39	61
South Gloucestershire	- 1,113	- 1,771	39	61
North Wiltshire	- 553	- 872	39	61
Forest of Dean	- 327	- 503	39	61
Bath and North East Somerset	- 689	- 1,185	37	63
Gloucester	- 508	- 863	37	63
East Dorset	- 299	- 517	37	63
West Wiltshire	- 480	- 904	35	65
Weymouth and Portland	- 208	- 423	33	67
Swindon	- 738	- 1,700	30	70
Urban and Rural Sub-Areas of the North East Triangle and BDP				
Rural Purbeck	- 107	- 76	59	41
Rural Christchurch	- 16	- 12	58	42
Swanage (Purbeck)	- 54	- 41	57	43
Other Urban Purbeck	- 100	- 90	53	47
Pewsey (Kennet)	- 17	- 16	53	47
Christchurch Town (Christchurch)	- 206	- 188	52	48
Rural Kennet	- 211	- 203	51	49
Other Stroud Urban	- 61	- 61	50	50
Rural Stroud	- 276	- 291	49	51
Rural North Dorset	- 174	- 180	49	51
Nailsworth (Stroud)	- 22	- 24	48	52
Rural Tewkesbury	- 121	- 141	46	54
Marlborough (kennet)	- 36	- 43	46	54
Rural Cotswold	- 293	- 353	45	55
Rural North Somerset	- 282	- 349	45	55
Rural Salisbury	- 258	- 315	45	55
Rural South Gloucestershire	- 208	- 258	45	55

Economic Impact of the Downturn in the North East Triangle and BDP

Rural Forest of Dean	- 194	- 239	45	55
Stroud Town	- 109	- 134	45	55
Ludgershall and Tidworth (Kennet)	- 64	- 78	45	55
Rural North Wiltshire	- 298	- 382	44	56
Rural West Dorset	- 254	- 327	44	56
Rural Bath and North East Somerset	- 186	- 259	42	58
Rural Swindon (Swindon UA)	- 44	- 64	41	59
Bradford-on-Avon (West Wiltshire)	- 38	- 54	41	59
Westbury (West Wiltshire)	- 29	- 42	41	59
Dursley (Stroud)	- 26	- 37	41	59
St Leonards and St Ives (East Dorset)	- 22	- 31	41	59
N and NE Fringes of Bristol (South Gloucs)	- 707	- 1,080	40	60
Nailsea (North Somerset)	- 76	- 116	40	60
Portishead (North Somerset)	- 76	- 115	40	60
Devizes (kennet)	- 63	- 93	40	60
Verwood (East Dorset)	- 36	- 54	40	60
Stonehouse (Stroud)	- 34	- 51	40	60
Other Urban North Dorset	- 28	- 42	40	60
Clevedon (North Somerset)	- 103	- 160	39	61
Other Urban South Gloucs	- 86	- 136	39	61
Greater Bristol (Bristol & South Gloucs UA)	- 2,281	- 3,663	38	62
Salisbury City (Salisbury)	- 169	- 282	38	62
Rural East Dorset	- 90	- 148	38	62
Brockworth (Tewkesbury)	- 35	- 57	38	62
Gillingham (North Dorset)	- 26	- 44	38	62
Bath City (Bath and North East Somerset)	- 320	- 535	37	63
Weston-Super-Mare (North Somerset)	- 271	- 468	37	63
Rural West Wiltshire	- 163	- 273	37	63
Bridport (West Dorset)	- 49	- 82	37	63
Blandford Forum (North Dorset)	- 35	- 58	37	63
Other Urban West Dorset	- 24	- 41	37	63
Other Tewkesbury Urban	- 75	- 133	36	64
Wimborne Minster (East Dorset)	- 53	- 94	36	64
Other Urban North Somerset	- 43	- 77	36	64
Other Urban Forest of Dean	- 36	- 63	36	64
West Moors (East Dorset)	- 22	- 39	36	64
Warminster (West Wiltshire)	- 72	- 136	35	65
Other Urban East Dorset	- 25	- 47	35	65
Weymouth (Weymouth and Portland)	- 169	- 322	34	66
Yate and Chipping Sodbury (South Gloucs)	- 154	- 300	34	66
Chippenham (North Wiltshire)	- 133	- 264	34	66
Tewkesbury	- 87	- 168	34	66
Cirencester (Cotswold)	- 77	- 148	34	66
Dorchester (West Dorset)	- 65	- 126	34	66
Other Urban Salisbury	- 40	- 79	34	66
Sherbourne (West Dorset)	- 32	- 61	34	66
Keynsham (Bath and North East Somerset)	- 57	- 117	33	67
Ferndown (East Dorset)	- 52	- 105	33	67
Highworth (Swindon UA)	- 38	- 76	33	67
Amesbury (Salisbury)	- 37	- 74	33	67
Coleford (Forest of Dean)	- 36	- 72	33	67
Cinderford (Forest of Dean)	- 32	- 66	33	67
Other Urban (Bath and North East Somerset)	- 32	- 66	33	67
Other Cotswold Urban	- 56	- 117	32	68
Calne (North Wiltshire)	- 56	- 119	32	68
Lydney (Forest of Dean)	- 29	- 62	32	68
Other Urban Swindon	- 22	- 46	32	68
Other Urban West Wiltshire	- 8	- 18	32	68
Trowbridge (West Wiltshire)	- 108	- 245	31	69
Midsomer Norton and Radstock (BANES)	- 93	- 209	31	69
Melksham (West Wiltshire)	- 63	- 137	31	69
Wootton Bassett (North Wiltshire)	- 24	- 53	31	69
Corsham (North Wiltshire)	- 24	- 54	31	69
Swindon Town (Swindon UA)	- 634	- 1,515	30	70
Portland (Weymouth and Portland)	- 40	- 97	29	71

Source: GWE Business West Research, 2009

Predicted Estimates of Job Losses by Key Industry (Blue Collar and Services) for Wiltshire Residents

3.42 Table 7 predicts the types of job losses being felt across NET and BDP according to the very broadest of industrial classifications: Blue Collar (Manual Industries and Services)².

3.43 The analysis suggests that, of the job losses across NET as a result of the Downturn, 44% will be in Blue Collar Industries and 56% will be in Services.

3.44 Looking within NET, there are some significant differences worthy of note. For example, and of the Upper Tier Authority Areas, those with a larger share of losses in Blue Collar Industries and a commensurately smaller loss in Services are:

- Swindon
- Poole
- Gloucestershire
- Wiltshire

3.45 Those Areas with a larger share of losses in Services and a commensurately smaller loss in Blue Collar Industries are:

- Bournemouth
- Bath and North East Somerset
- Bristol

3.46 Of the Unitaries and Districts, those with a larger share of losses in Blue Collar Industries and a commensurately smaller loss in Services are:

- Gloucester
- Weymouth and Portland
- Stroud
- Forest of Dean
- Swindon
- Poole
- West Wiltshire
- Purbeck

3.47 Those Unitaries and Districts with a larger share of losses in Services and a commensurately smaller loss in Blue Collar Industries are:

- Christchurch
- Bournemouth
- West Dorset
- Cheltenham
- Bristol
- Bath and North East Somerset
- East Dorset

² Blue Collar Industries are defined as the industrial groupings of Agriculture and fishing, Energy and water, Manufacturing, Construction, and Transport and communications. Services are defined as activities within Distribution, hotels and restaurants, Banking, finance and insurance, etc, Public admin ,education & health and Other services.

3.48 Of the urban and rural classifications, those with a larger share of losses in Blue Collar Industries and a commensurately smaller loss in Services are:

- Stonehouse (Stroud)
- Cinderford (Forest of Dean)
- Portland (Weymouth and Portland)
- Other Urban North Wiltshire
- Dursley (Stroud)
- Weymouth (Weymouth and Portland)
- Stroud Town
- Other Urban Forest of Dean
- Tewkesbury
- Calne (North Wiltshire)
- Coleford (Forest of Dean)
- Rural Stroud
- Trowbridge (West Wiltshire)
- Melksham (West Wiltshire)
- Other Urban Purbeck
- Devizes (Kennet)
- Lydney (Forest of Dean)
- Westbury (West Wiltshire)

3.49 Those Urban and Rural classifications with a larger share of losses in Services and a commensurately smaller loss in Blue Collar Industries are:

- Bath City (Bath and North East Somerset)
- Dorchester (West Dorset)
- Christchurch Town (Christchurch)
- St Leonards and St Ives (East Dorset)
- Ferndown (East Dorset)
- Rural West Dorset
- Other Urban West Dorset
- Keynsham (Bath and North East Somerset)
- Rural Cotswold
- Amesbury (Salisbury)
- Verwood (East Dorset)
- Wimborne Minster (East Dorset)
- Rural East Dorset
- Salisbury City (Salisbury)
- West Moors (East Dorset)
- Nailsea (North Somerset)
- Cirencester (Cotswold)
- Greater Bristol (Bristol & South Gloucs UA)
- Rural Bath and North East Somerset
- Rural Salisbury

Table 7: Predicted Estimates of Job Losses by Key Industry Type (Blue Collar and Services) (Volumes and Rate, June 2008 and June 2009, Base Scenario. Authorities and Smaller Areas Ranked by volume of services jobs lost.

Area	Vol. Blue Collar Lost	Vol. Services Lost	% Blue Collar Lost (% of all)	% Services Lost (% of all)
Great Britain	-279,499	-337,960	45	55
South West	-23,305	-30,984	43	57
North East Triangle	-11,214	-14,325	44	56
North East Triangle and BDP	-14,195	-18,446	43	57
West of England Partnership	-4,767	-7,019	40	60
Bournemouth, Dorset and Poole	-2,981	-4,119	42	58
Bristol & South Gloucestershire	-2,964	-4,061	42	58
Upper Tier Authorities				
Swindon	-1,215	-1,326	48	52
Poole	-697	-766	48	52
Gloucestershire	-3,129	-3,464	47	53
Wiltshire	-2,106	-2,512	46	54
South Gloucestershire	-1,366	-1,692	45	55
North Somerset	-986	-1,332	43	57
Dorset	-1,641	-2,231	42	58
Bristol	-1,680	-2,798	38	62
Bath and North East Somerset	-735	-1,200	38	62
Bournemouth	-643	-1,122	36	64
Unitary and District Authority Areas				
Gloucester	-766	-576	57	43
Weymouth and Portland	-335	-282	54	46
Stroud	-680	-632	52	48
Forest of Dean	-429	-428	50	50
Swindon	-1,215	-1,326	48	52
Poole	-697	-766	48	52
West Wiltshire	-659	-708	48	52
Purbeck	-199	-218	48	52
North Wiltshire	-661	-730	47	53
Tewkesbury	-417	-492	46	54
Kennet	-347	-411	46	54
South Gloucestershire	-1,366	-1,692	45	55
North Dorset	-262	-340	44	56
North Somerset	-986	-1,332	43	57
Salisbury	-440	-659	40	60
Cotswold	-412	-638	39	61
East Dorset	-356	-553	39	61
Bath and North East Somerset	-735	-1,200	38	62
Bristol	-1,680	-2,798	38	62
Cheltenham	-424	-704	38	62
West Dorset	-340	-565	38	62
Bournemouth	-643	-1,122	36	64
Christchurch	-142	-270	34	66
Urban and Rural Sub-Areas of the North East Triangle and BDP				
Stonehouse (Stroud)	-57	-38	60	40
Cinderford (Forest of Dean)	-56	-41	58	42
Portland (Weymouth and Portland)	-68	-52	57	43
Other Urban North Wiltshire	-19	-14	57	43
Dursley (Stroud)	-39	-32	55	45
Weymouth (Weymouth and Portland)	-265	-229	54	46
Stroud Town	-148	-132	53	47
Other Urban Forest of Dean	-54	-47	53	47
Tewkesbury	-135	-125	52	48
Calne (North Wiltshire)	-81	-75	52	48
Coleford (Forest of Dean)	-57	-53	52	48
Rural Stroud	-340	-327	51	49
Trowbridge (West Wiltshire)	-176	-169	51	49
Melksham (West Wiltshire)	-97	-94	51	49
Other Urban Purbeck	-90	-86	51	49
Devizes (Kennet)	-75	-71	51	49
Lydney (Forest of Dean)	-48	-45	51	49
Westbury (West Wiltshire)	-39	-37	51	49
Corsham (North Wiltshire)	-34	-34	50	50

Economic Impact of the Downturn in the North East Triangle and BDP

Nailsworth (Stroud)	-27	-28	50	50
Other Urban West Wiltshire	-13	-13	50	50
Chippenham (North Wiltshire)	-190	-200	49	51
Midsomer Norton and Radstock (BANES)	-141	-146	49	51
Pewsey (Kennet)	-16	-17	49	51
Yate and Chipping Sodbury (South Gloucs)	-220	-242	48	52
Rural West Wiltshire	-215	-233	48	52
Swindon Town (Swindon UA)	-1,080	-1,162	48	52
Other Urban (Bath and North East Somerset)	-43	-47	48	52
Rural Forest of Dean	-215	-242	47	53
Other Stroud Urban	-69	-77	47	53
Highworth (Swindon UA)	-54	-60	47	53
Brockworth (Tewkesbury)	-42	-48	47	53
Other Urban East Dorset	-37	-42	47	53
Other Urban Swindon	-31	-35	47	53
Rural Purbeck	-74	-86	46	54
Other Cotswold Urban	-64	-75	46	54
Other Urban Salisbury	-41	-49	46	54
Rural North Wiltshire	-302	-365	45	55
Rural Kennet	-182	-224	45	55
Gillingham (North Dorset)	-35	-43	45	55
Wootton Bassett (North Wiltshire)	-34	-42	45	55
Rural South Gloucestershire	-217	-274	44	56
N and NE Fringes of Bristol (South Gloucs)	-861	-1,096	44	56
Rural North Dorset	-155	-197	44	56
Marlborough (kennet)	-34	-43	44	56
Rural North Somerset	-302	-401	43	57
Other Tewkesbury Urban	-125	-165	43	57
Rural Tewkesbury	-115	-154	43	57
Other Urban South Gloucs	-101	-135	43	57
Portishead (North Somerset)	-95	-124	43	57
Warminster (West Wiltshire)	-78	-105	43	57
Other Urban North Somerset	-53	-70	43	57
Bridport (West Dorset)	-50	-67	43	57
Swanage (Purbeck)	-35	-46	43	57
Other Urban North Dorset	-34	-46	43	57
Weston-Super-Mare (North Somerset)	-328	-444	42	58
Clevedon (North Somerset)	-122	-165	42	58
Rural Swindon (Swindon UA)	-50	-69	42	58
Ludgershall and Tidworth (Kennet)	-41	-55	42	58
Bradford-on-Avon (West Wiltshire)	-39	-56	41	59
Blandford Forum (North Dorset)	-39	-55	41	59
Sherbourne (West Dorset)	-31	-46	41	59
Rural Salisbury	-200	-296	40	60
Rural Bath and North East Somerset	-189	-288	40	60
Greater Bristol (Bristol & South Gloucs UA)	-2,527	-3,855	40	60
Cirencester (Cotswold)	-89	-134	40	60
Nailsea (North Somerset)	-86	-127	40	60
West Moors (East Dorset)	-26	-39	40	60
Salisbury City (Salisbury)	-164	-259	39	61
Rural East Dorset	-98	-155	39	61
Wimborne Minster (East Dorset)	-64	-101	39	61
Verwood (East Dorset)	-42	-67	39	61
Amesbury (Salisbury)	-35	-56	39	61
Rural Cotswold	-259	-429	38	62
Keynsham (Bath and North East Somerset)	-69	-110	38	62
Other Urban West Dorset	-26	-43	38	62
Rural West Dorset	-178	-306	37	63
Ferndown (East Dorset)	-64	-107	37	63
St Leonards and St Ives (East Dorset)	-24	-42	37	63
Christchurch Town (Christchurch)	-135	-253	35	65
Dorchester (West Dorset)	-54	-103	35	65
Bath City (Bath and North East Somerset)	-294	-609	33	67

Source: GWE Business West Research, 2008