

RECESSION BRIEFING

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South West RDA

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INTRODUCTION

This is the latest report in a series of Recession Briefings produced by SLIM at the request of the People, Employment and Skills sub-group of the Regional Economic Task Group. It is also available for general circulation and use by partners within the South West region.

SUMMARY

Employment / unemployment

Recent unemployment data shows some encouraging signs. The latest LFS data shows regional unemployment at 6.4% of the working age population, down from 6.7% in Dec - Feb 2010. Claimant unemployment remains stable at 2.9%, down very slightly from 3.1% in February and 3.0% in March 2010. The claimant count rate for the South West remains the lowest of all the English regions.

In the latest quarter, the number of people in employment in the region grew by 19,000. This is welcome although it represents only a small reverse of a long-standing decline in employment in the region. The South West has seen a bigger fall in the percentage of the working age population in employment (-2.8 percentage points) than any other region over the last year.

The regional picture also disguises some different local effects. Having been hit badly at the start of the recession Swindon appears to be staging something of a recovery. In the year to April 2010 the claimant unemployment rate fell by 1.3 percent of the working age population. Gloucestershire also saw a significant fall in claimant unemployment, of 0.5% of the working age population. Bournemouth was the only sub-region in which the claimant count rose over the last year.

The composition of claimants by duration of claim continues to change. The number of people claiming benefits for six months or less continued to decline gradually, from a peak of around 80,000 to around 60,000. The number of claimants who have been claiming for over six months and over one year continues to grow, a shift towards long-term unemployment.

The proportion of people leaving JSA benefits each month had been rising throughout 2009, before the normal seasonal decline around the New Year. Off-flows appear to be picked up well in the early months of 2010, though it is too early to tell whether this is a sign of a sustained long-term rise in off-flows.

Vacancies

The number of live unfilled vacancies available through Jobcentre Plus remained fairly stable in three months from February to April 2010. The normal fall in vacancies that occurs during November & December of each year was comparatively slight in 2009, compared to the two previous years. Vacancies fell by 55%, from 31,300 to under 14,000 in the winter of 2008. Last winter the decline was a modest 8,000 or 30%.

The number of claimants per vacancy rose dramatically from around 1.5 at the start of the recession, to a high of 5.5 in April 2009. It has since declined, levelling off between 3.5 claimants per vacancy in October 2009 and 4.2 in the latest month, April 2010.

Following a gradual decline to the end of November 2009, the number of redundancies notified to Jobcentre Plus has risen in recent months. Hopefully this is not a sign of an approaching 'double dip' recession.

Impact on different groups

The early stages of the recession appear to have had a bigger impact on male than female employment.

LFS data suggests that 77% of South West males were in employment during the quarter to March 2010, down 3.4% on the same quarter a year earlier. Female employment fell by 2.0%, from 74.8% to 72.8% during this period. This is likely to be due to differences in employment by the occupations and industries in which men and women tend to work.

This trend, of a convergence in male and female employment rates, appears to have reversed in recent months. Given the preponderance of female employment in the public sector, there is a significant risk that female employment will decline as a result of public sector spending cuts.

Male claimant unemployment has fallen faster in recent months, compared to female unemployment.

LFS and Claimant count data both indicate that the recession has hit young people hard. LFS data suggests that the fall in employment rates among people aged 16 to 19 (-6.6 percentage points) and people aged 20 to 24 (-2.7 percentage points) was significantly higher than that for those in older age groups (e.g. -0.9% among 35 to 49 year olds).

While rates of Claimant Count growth have been broadly similar for all age bands, differences in the baselines for different groups has resulted in a widening of the 'gap' between the proportion of young people claiming JSA and the proportion of those in older age groups. The proportion of young people aged 20 to 24 on JSA was 5.0% in April 2010, compared to 2.3% in April 2008. This is significantly above the figure of around 2.5% for those aged between 35 and 55

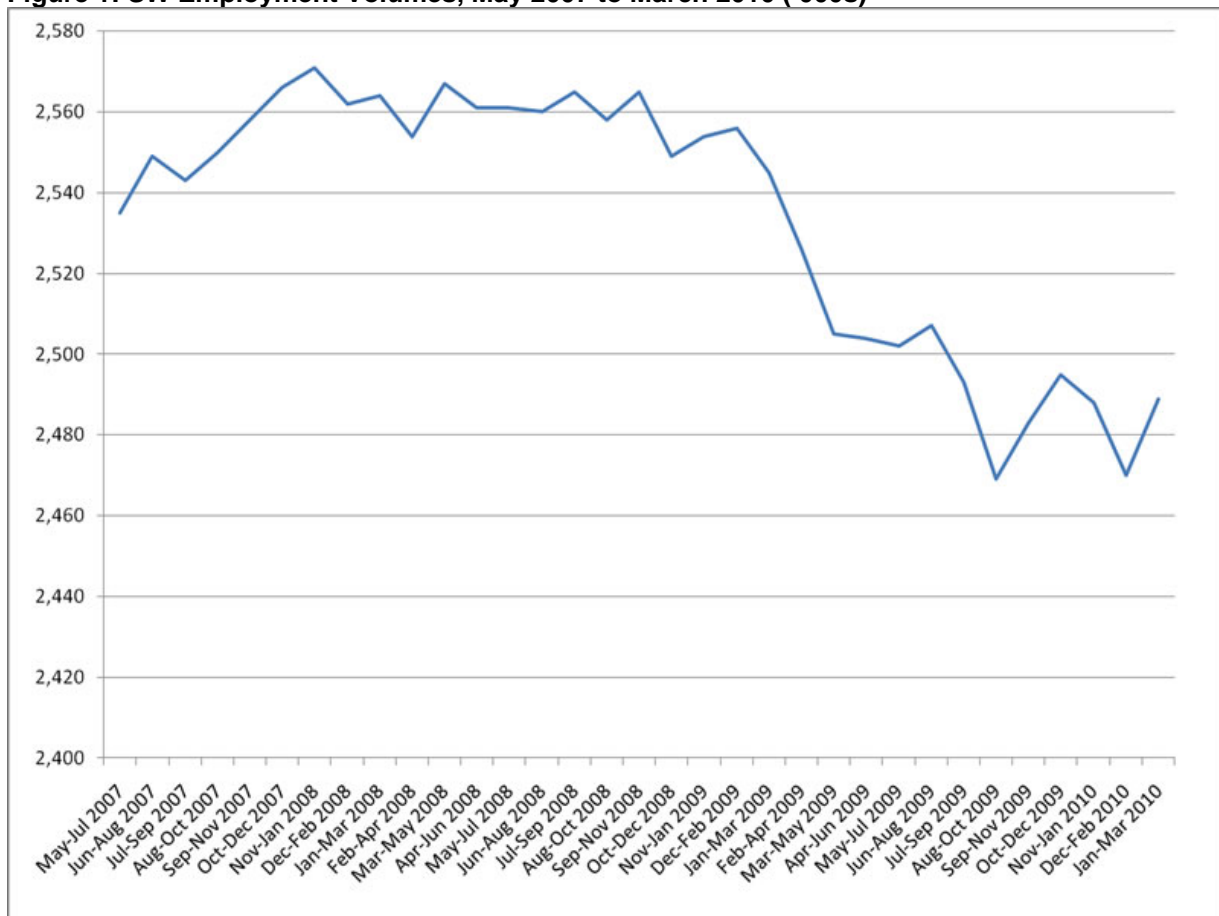
Unemployment rates for people in lower skilled occupations continue to be significantly higher than those for more skilled occupations.

1. EMPLOYMENT / UNEMPLOYMENT

Before the recession, the South West economy had been successful in creating large numbers of jobs. The number of people in employment remained fairly constant through 2008, including through the early part of the recession. Since the start of 2009 regional employment levels have declined significantly. Recent data suggests that the decline was halted and that employment volumes have been fairly stable during the 7 months since July to September 2009. There are currently an estimated 56,000 fewer people in employment in the South West region than there were one year ago, despite an increase of 19,000 in the latest period, January to March 2010¹. The regional decline in employment since the start of the recession is roughly 70,000 to 80,000.

The data is volatile and we await the impact of the public sector spending cuts, which may have a further negative impact on employment in the region (see Figure 1).

Figure 1: SW Employment Volumes, May 2007 to March 2010 ('000s)

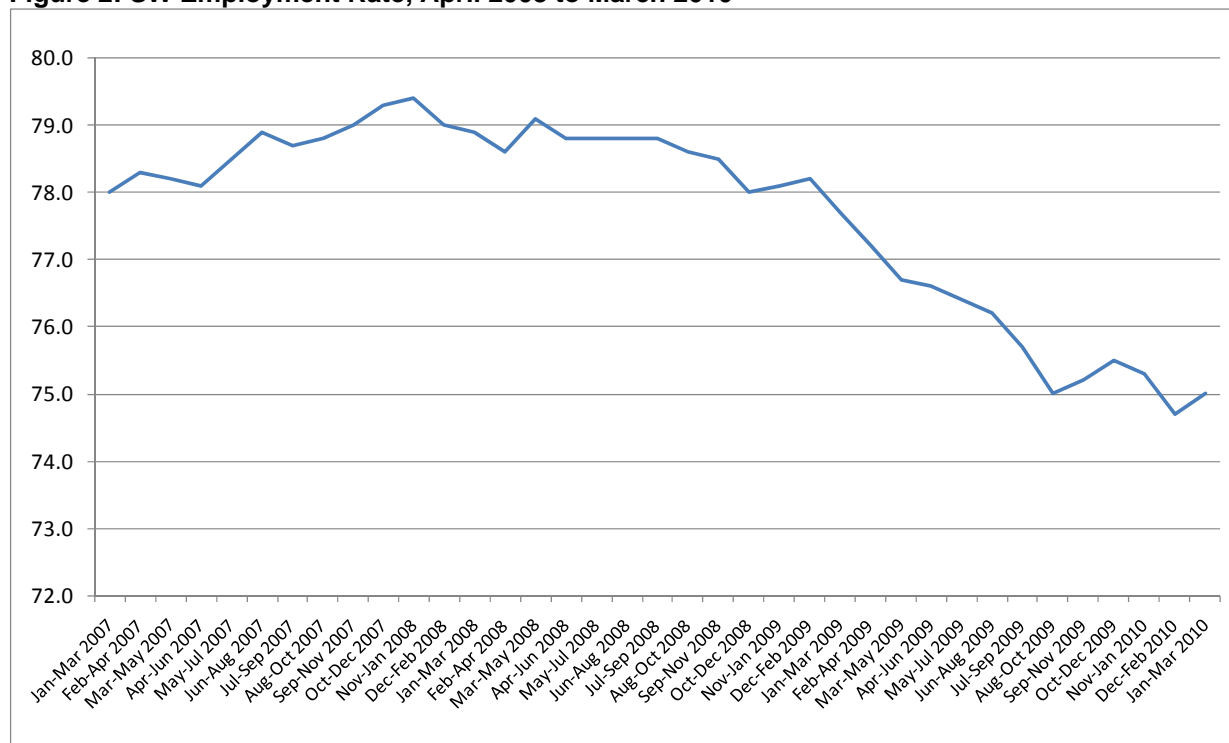


Source: LFS, ONS

¹ <http://www.statistics.gov.uk/StatBase/Product.asp?vlnk=15084>

The proportion of the region's working age population that was in employment has fallen by 2.7 percentage points in the last year and 3.7 percentage points over 2 years. The 0.3 percent point rise in the latest rolling quarter employment has returned the employment rate to 75.0%, the same level as five months ago (see Figure 2).

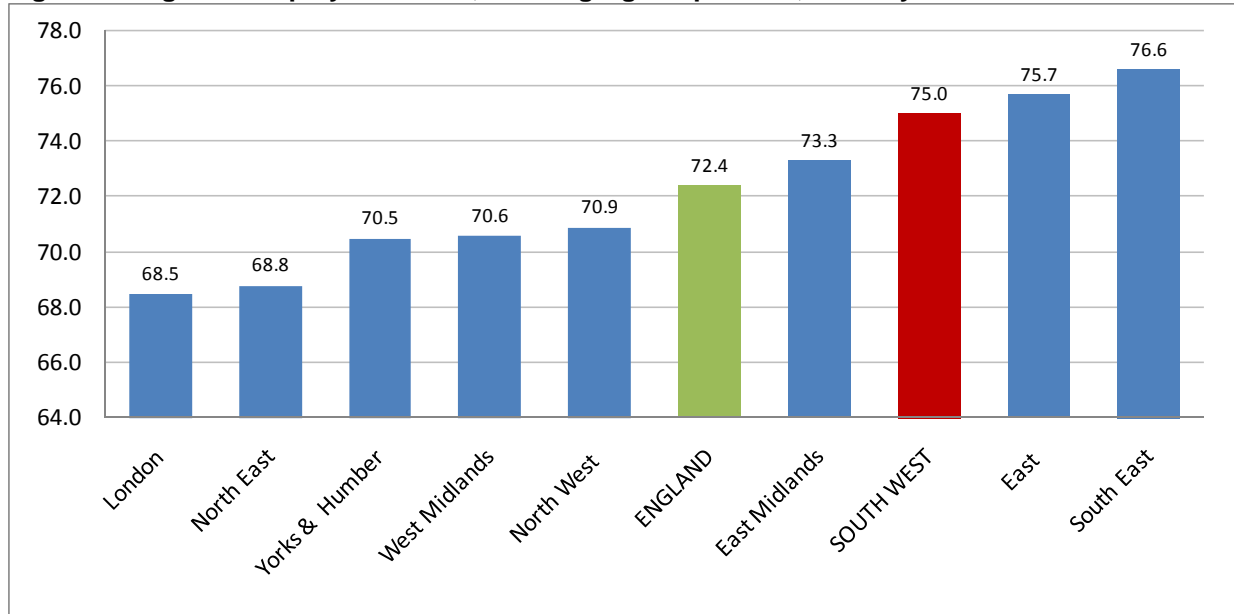
Figure 2: SW Employment Rate, April 2008 to March 2010



Source: LFS, ONS

Although employment rates have fallen considerably in the region, the South West remains one of the three regions with the highest employment rates in the country.

Figure 3: Regional Employment Rate, Working Age Population, January-March 2010

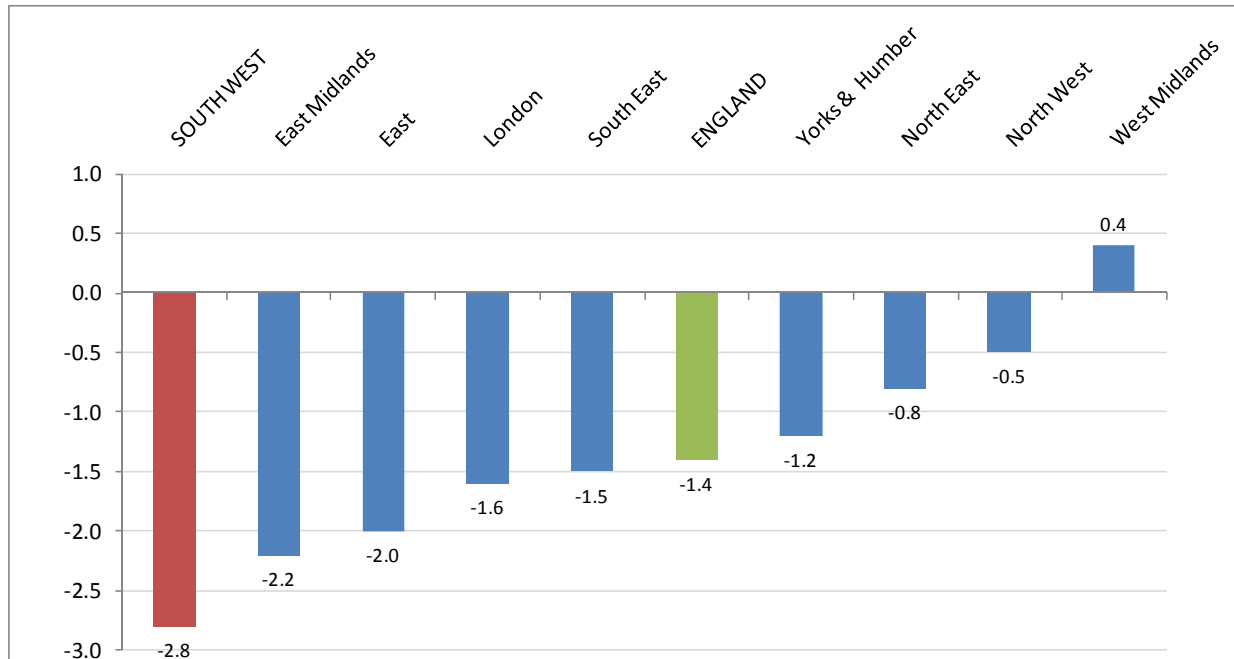


Source: LFS, ONS

Prior to the recession the South West and South East were the two regions with the highest national employment rates, followed fairly closely by the Eastern region. The employment rate in the South West has now slipped behind that in the East of England.

In the latest year the employment rate in the South West has fallen by 2.8%. This is the largest decline in any English region and twice the decline recorded nationally.

Figure 4: Annual Change in Regional Employment Rate, Working Age Population, Year to January to March 2010

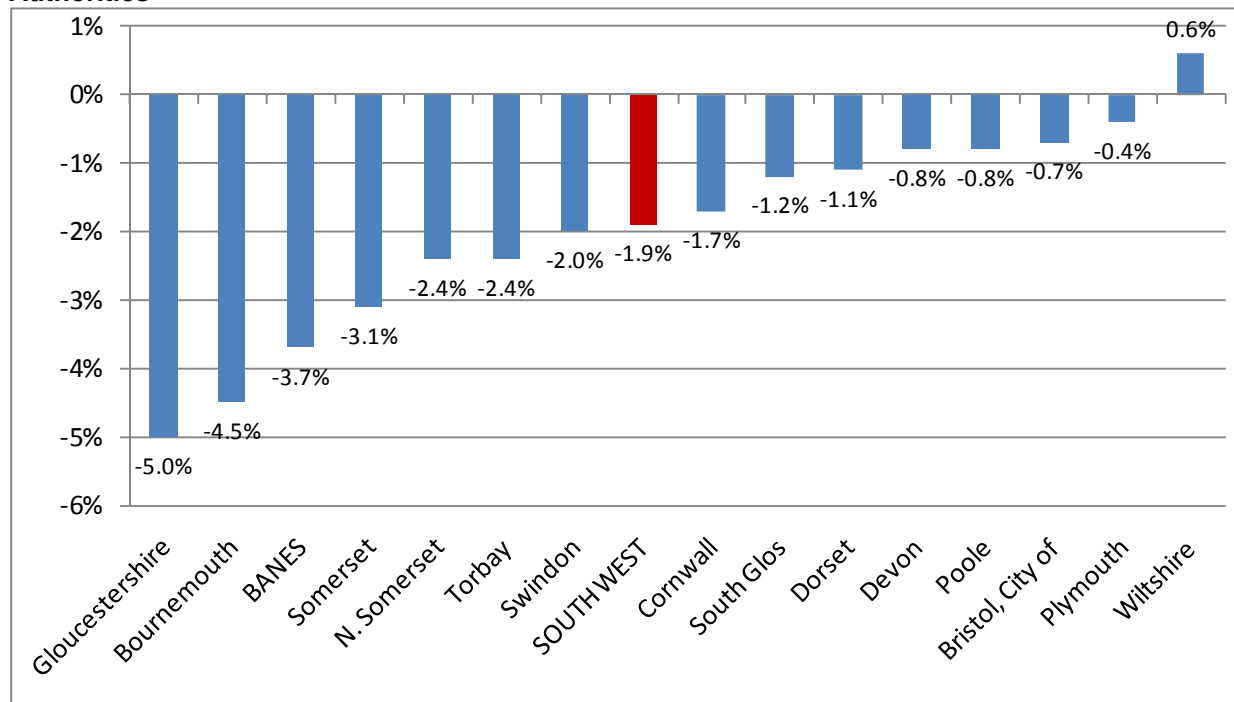


Source: LFS, ONS

This decline is unevenly distributed across the region. Unfortunately sub-regional LFS data is only available on an annualised basis, which makes comparison with the regional figure above difficult. Caution is also needed as significant confidence intervals of around +/- 2.5% apply to

this data. Nonetheless, a comparison of sub-regional employment rates during the period October 2007 - September 2008 with October 2008 - September 2009 suggests the decline in areas such as Gloucestershire, Bournemouth, BANES and Somerset was significantly larger than that seen in Wiltshire, Plymouth, Bristol, Poole & Devon.

Figure 5: Change in Employment Rate, Oct 2007-Sep 2008 to Oct 2008-Sep 2009, SW Local Authorities



Source: LFS, ONS

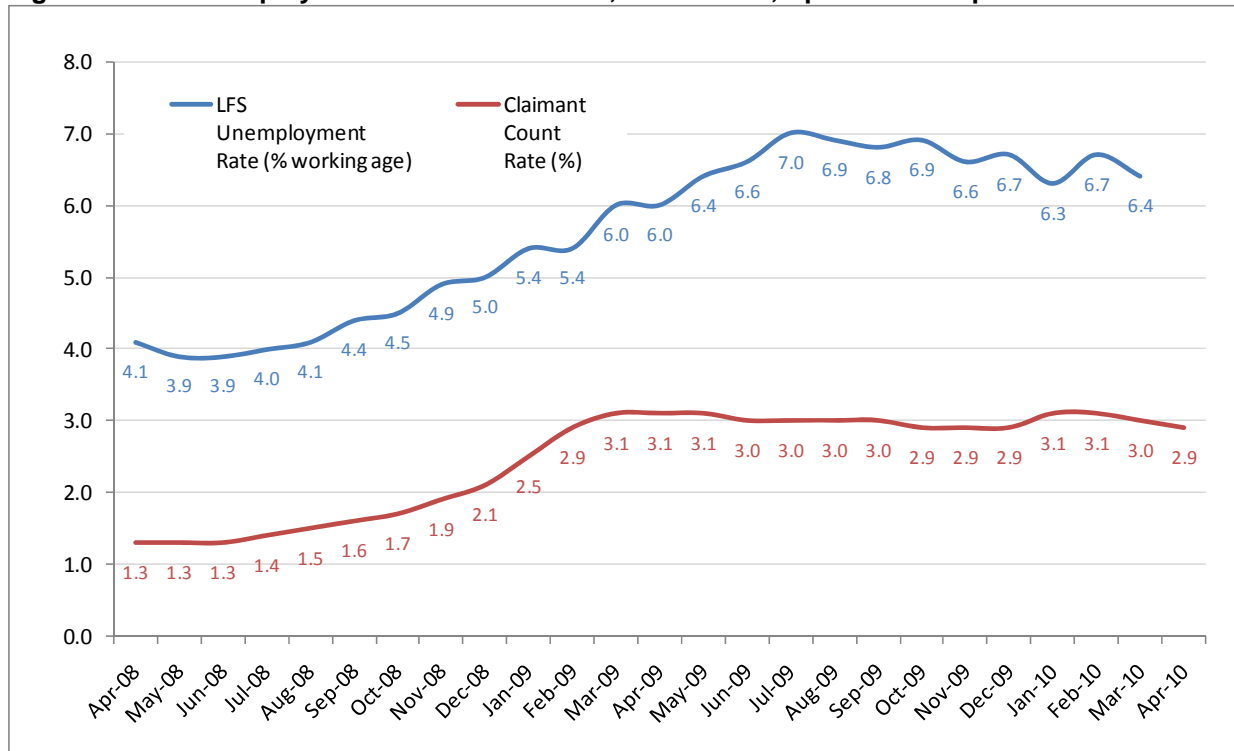
2. CLAIMANTS

2.1 South West

Unemployment is normally assessed using two measures - Claimant Count and Labour Force Survey. The Claimant Count is a precise count of the number of people claiming Jobseekers Allowance (JSA) in any single month. LFS unemployment is derived from survey responses, based on the number of people who state that they are actively seeking employment, but are not actually in employment.

Figure 6 shows that in the South West the regional Claimant Count more than doubled between August 2008 and March 2009, rising from 1.3% to 3.1%, before levelling off at around 3.0% where it remained since. LFS unemployment likewise showed steady growth, from around 4.0% before the recession to 7.0% in July 2009. It too has since levelled out, showing a slight drop over the eight months to March 2010.

Figure 6: LFS Unemployment & Claimant Count, South West, April 2008 to April 2010



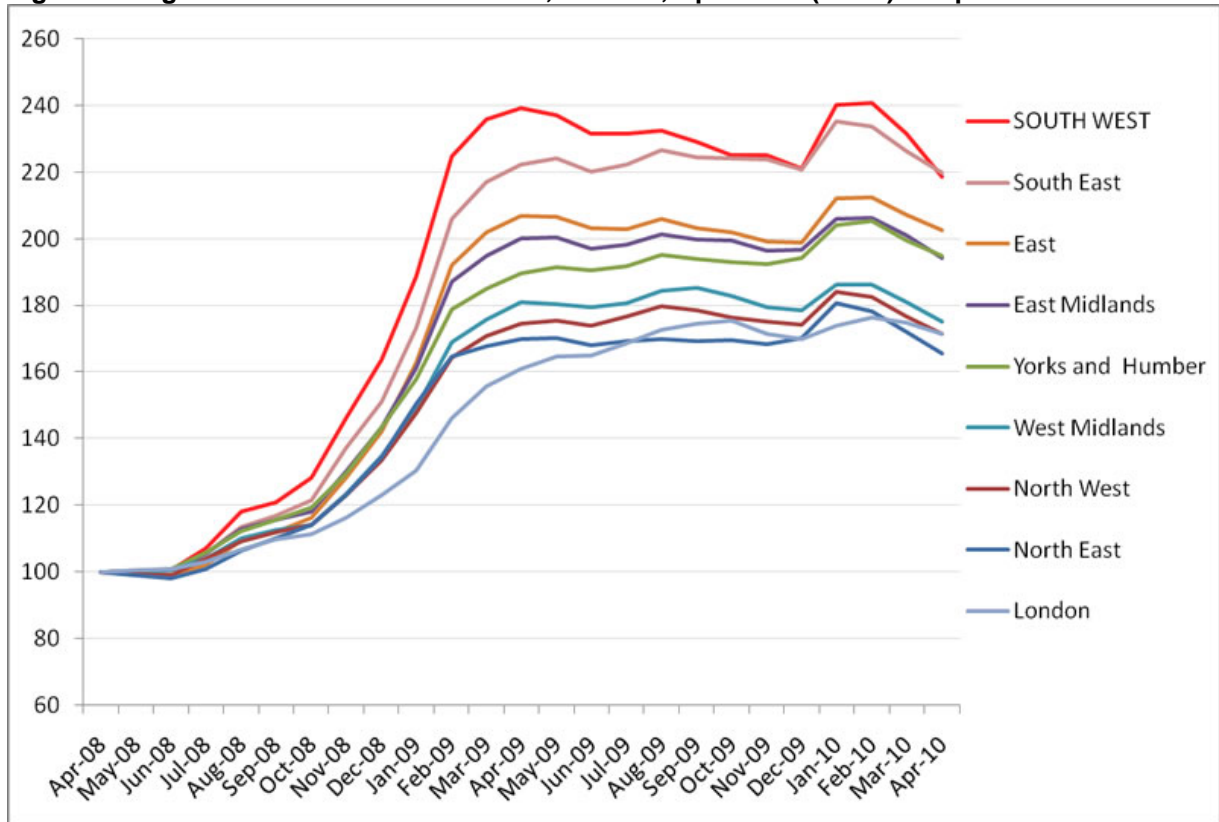
Source: JC+ / NOMIS and LFS

2.2 Inter-regional comparisons

It has been argued that the South West was hit early and hit hard by the recession², due in part to the credit crunch, which reached its peak on October 2008, coinciding with the seasonal decline in employment. To an extent this is true. Figure 7 shows that the number of people claiming JSA in the region grew by 140% between April 2008 and April 2009 – the fastest rate of growth of all UK regions. The South West has seen a slightly greater decline in regional claimant count over recent months than most other regions, bringing us back nearer to growth rates seen in other regions.

² Jobcentre Plus – Performance Monitoring Report to SW RESP Board, July 2009.

Figure 7: Regional Claimant Count Growth, indexed, April 2008 (= 100) to April 2010

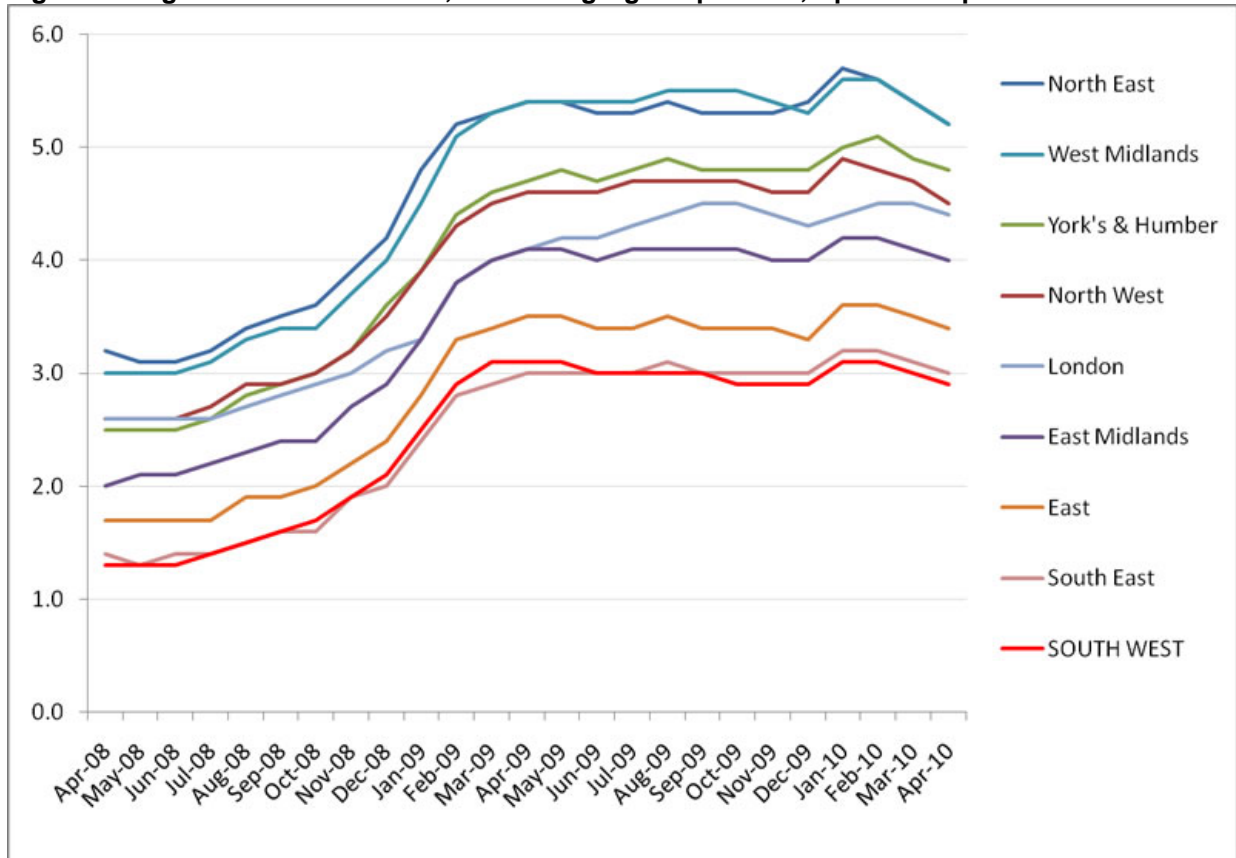


Source: JC+ / NOMIS

However, it should be noted that the South West, along with the two other regions with the highest indexed growth rates (South East and East), started from a lower baseline, resulting in a higher proportionate effect for each additional person added to the Claimant Count.

Figure 8 shows that the proportion of the South West's working age population that is claiming JSA continues to remain below that for any other region. It would therefore be wrong to argue that the South West had, in general terms, been worse affected than other regions.

Figure 8: Regional Claimant Count, % Working Age Population, April 08 – April 2010



Source: JC+ / NOMIS

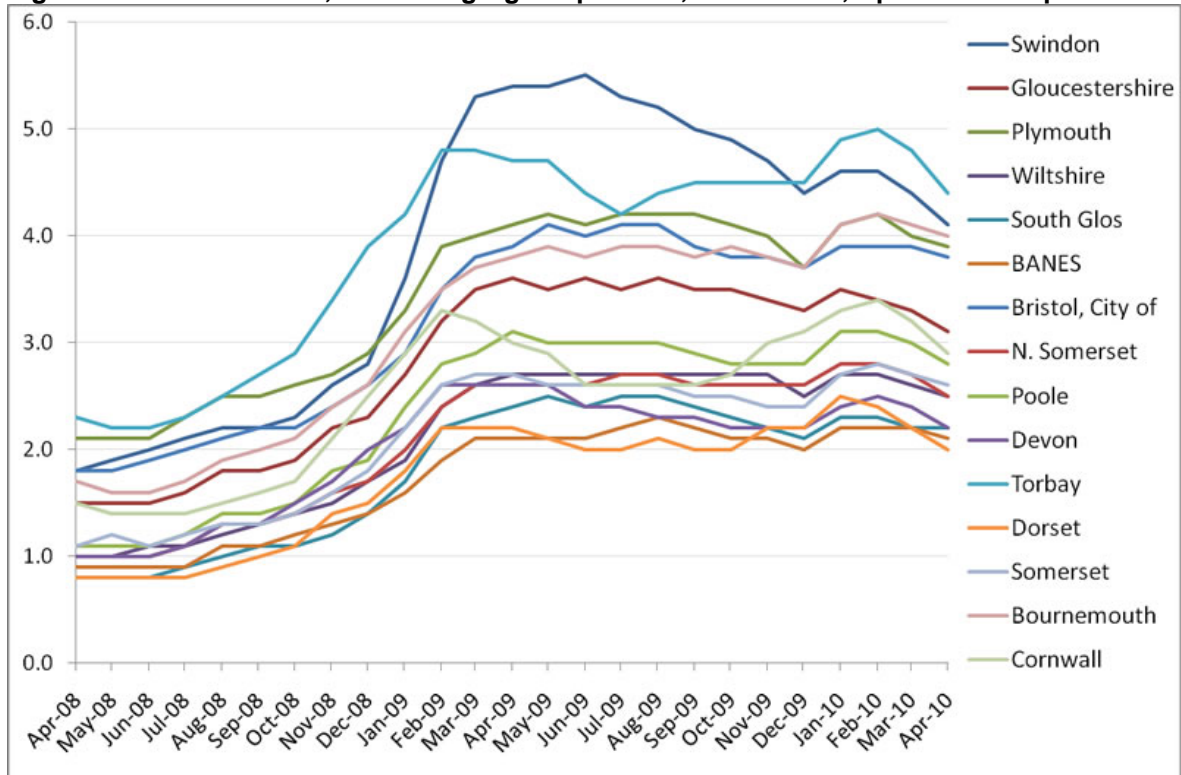
2.3 Unemployment - Local Authority Level

The regional averages shown in the charts above disguise a range of different employment effects that the recession has had at the Local Authority level.

Unfortunately, due to large confidence intervals (typically +/- 1.5%) and time lags LFS data on unemployment is not very helpful at Local Authority level.

Claimant count rates have grown in all Local Authority areas, but by very different amounts. As a result we have seen a considerable increase in the range, between the Local Authority with the highest and lowest Claimant Count. In April 2008 this range was 1.5%, between Torbay's Claimant Count Rate of 2.3% and Dorset's of 0.8%. By July 2009 it had increased to 3.5%, due to an additional 3.6% of Swindon's working age population joining the claimant count compared to 1.2% in Dorset and Bath & NE Somerset. Swindon has since something of a recovery, as a result of which, by April 2010, the range had fallen to 2.4%, between 4.4% in Torbay and 2.0% in Dorset.

Figure 9: Claimant Count, % Working Age Population, South West, April 2008 to April 2010

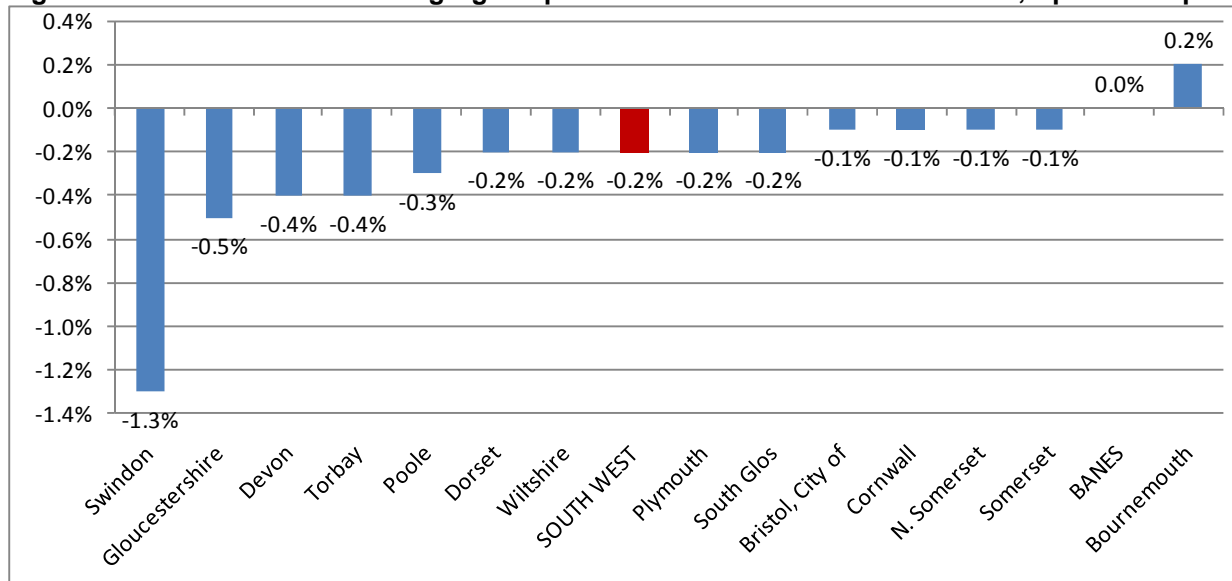


Source: JC+ / NOMIS

Figure 10 shows the proportion of the working age population that has been added to the Claimant Count in each Local Authority area during the year to April 2010.

Swindon has experienced a decline in the claimant count of 1.3 percentage points in the last year. Gloucestershire, another area hit hard during the early stages of recession, and Devon both saw a decline of 0.5 percentage points in the last 12 months. Only Bournemouth has seen a slight overall increase in unemployment of 0.2% in the past year.

Figure 10: Growth in % of Working Age Population added to the Claimant Count, Apr '09 to Apr '10

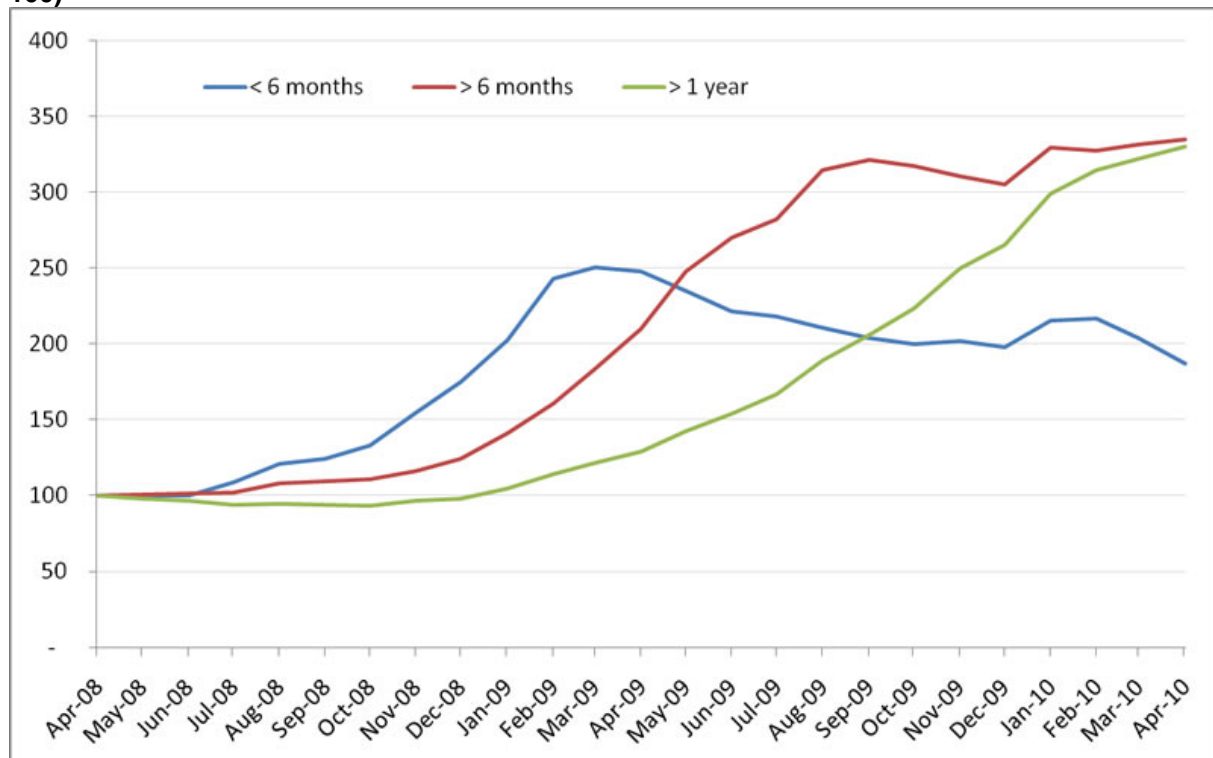


Source: JC+ / NOMIS

2.4 Claim duration

Figure 11 shows changes in the duration over which South West JSA claimants have been in receipt of benefits.

Figure 11: South West Claimant Count by duration of claim, to April 2010 (indexed, April 2008 = 100)



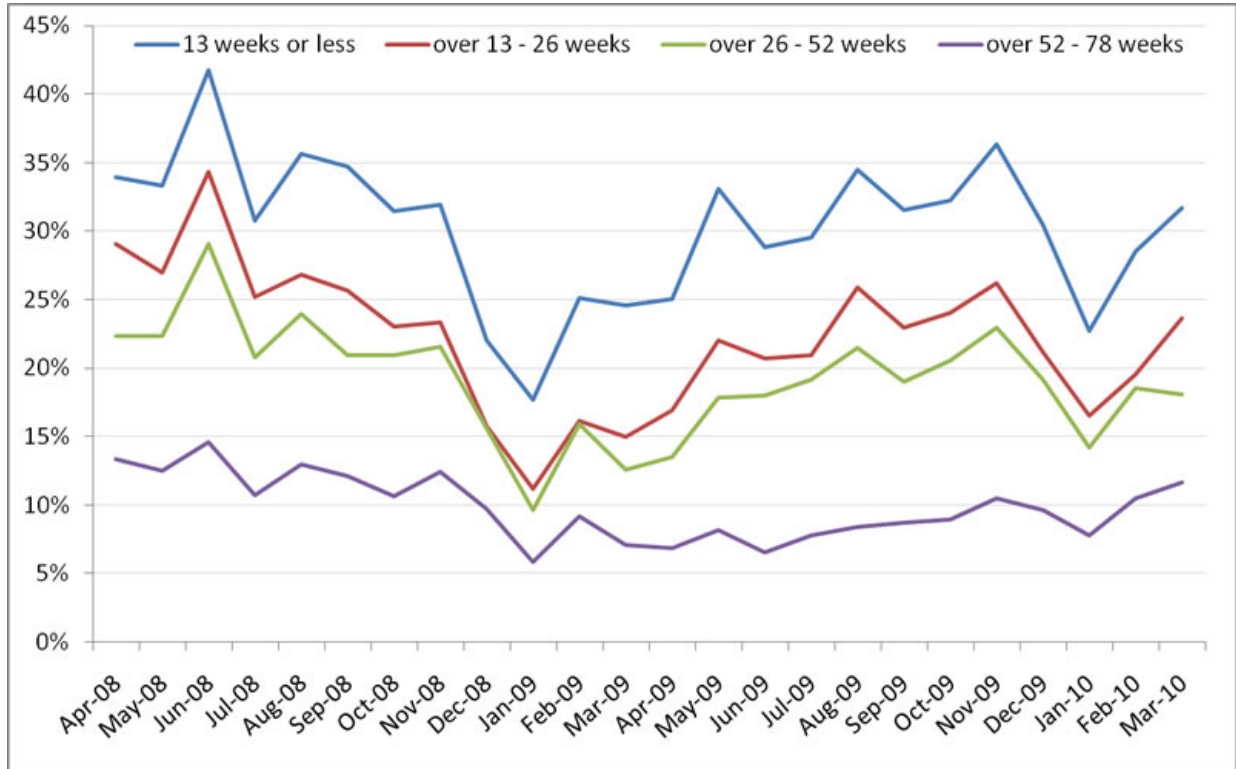
Source: JC+ / NOMIS

At the outset of recession, from October 2008 to February 2009, there was a sharp rise in the number of new claimants (those claiming < 6 months). The number of short-term claimants peaked at 79,640 in March 2009 and has fallen since, to 59,330 in April 2010. By contrast, the rise in the number of long-term claimants (> 6 months) lagged at first, picking up from January 2009 onwards since when it has continued to rise to 29,460 in April 2010. The number of very long-term (>12 months) claimants also continues to rise, and is continuing to rise at a faster pace, having reached 11,995 in April 2010.

This shift, sometimes referred to as a 'hardening' of unemployment, is a cause for concern as long-term unemployment leads to loss of skills and alienation from the labour market. The principal reason for this shift towards long-term unemployment is that recent claimants tend to be more successful at finding new jobs than those who have been on benefits for longer.

Figure 12 shows that although the proportion of people leaving JSA varies each month, recent claimants are consistently much more likely to leave the Claimant Count than those who have been unemployed for longer. Broadly speaking, around 30% of people who had been claiming JSA for less than 13 weeks leave the Claimant Count each month, compared to about 15% to 20% of those claiming between 26 weeks and 52 weeks, and 5% to 12% of those claiming for over one year.

Figure 12: Proportion of claimants leaving JSA each month, by duration of unemployment, April 2008 to March 2010



Source: JC+ / NOMIS

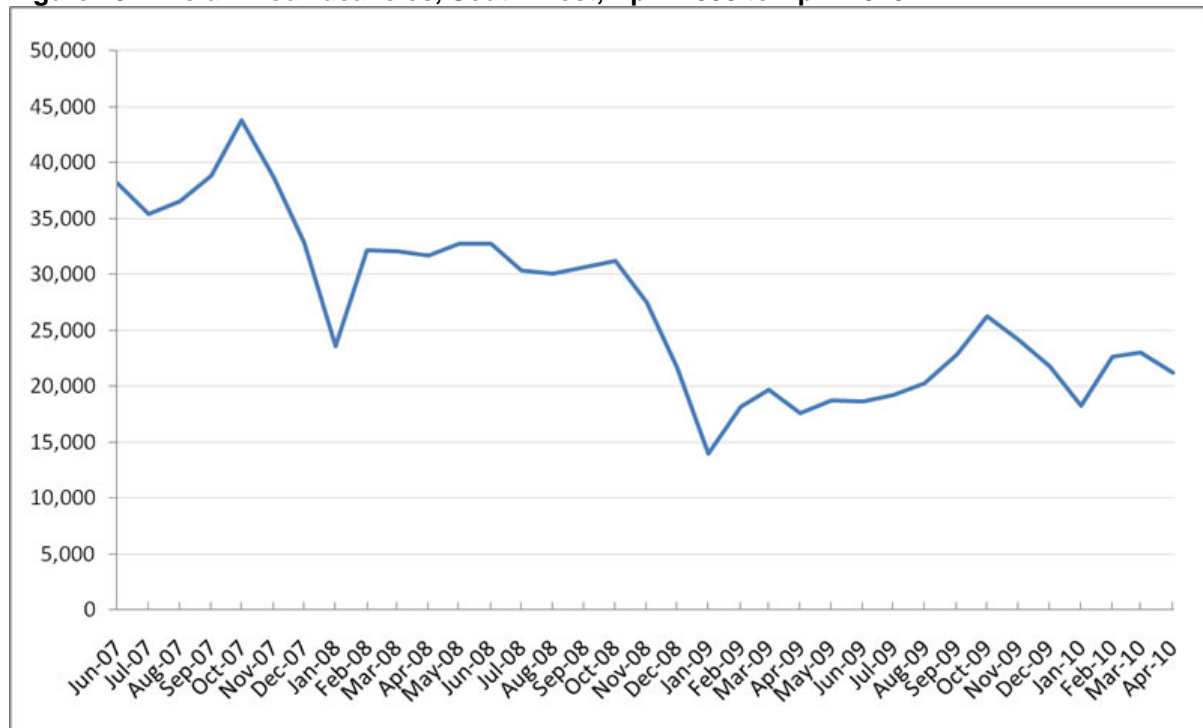
3. VACANCIES

The number of vacancies available through Jobcentre Plus tends to follow an annual cycle in response to peaks and troughs employer demand. Vacancy numbers normally fall rapidly between October and January, recovering in the New Year.

Figure 13 shows that vacancy levels had fallen before the recession had begun. In the South West, unfilled vacancies fell by 31% between September 2007 and September 2008. As the credit crunch hit the UK in October 2008 it is hard to tell what part of the vacancy collapse between October 2008 and January 2009 was seasonal and what was down to recessionary effects. However, from February to August 2009 the number of live unfilled vacancies in the South West was around 20,000 or 40% to 50% down on levels seen two years earlier.

Recent months have seen some signs of recovery. Vacancies rose strongly between August and November 2009 and the expected cyclical declines from November and December 2009 were much smaller than in previous years. Hopefully vacancy numbers will rise in the summer of 2010 as they did in 2009.

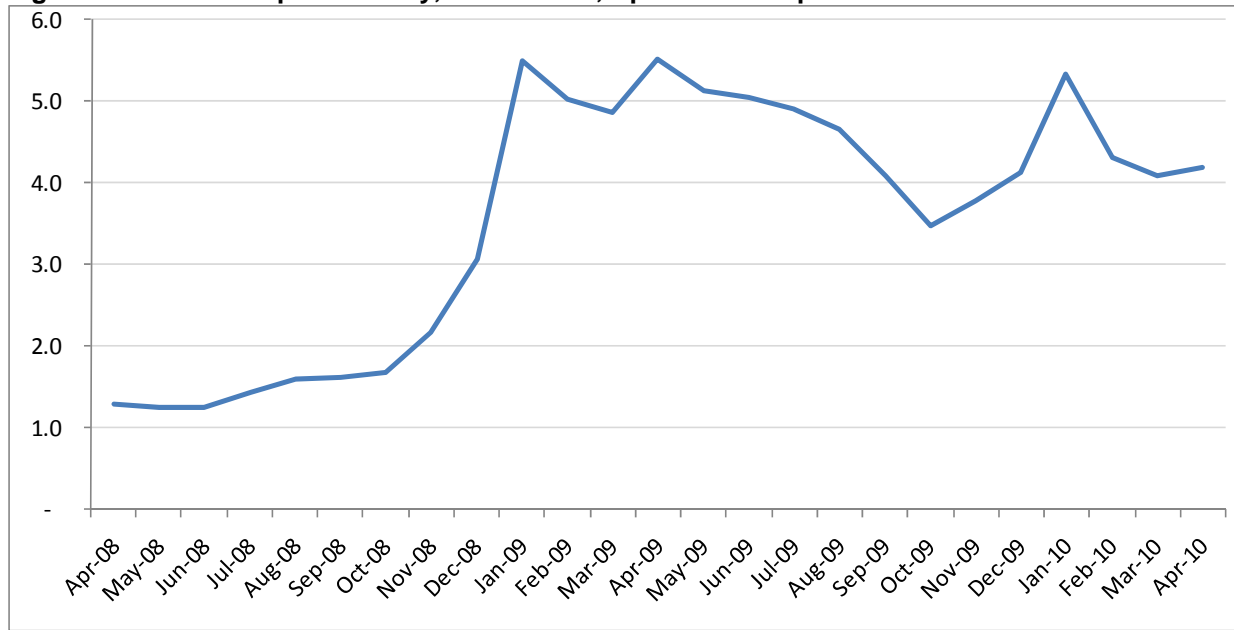
Figure 13: Live unfilled vacancies, South West, April 2008 to April 2010



Source: JC+ / NOMIS

Data on the number of claimants per live unfilled vacancy provides rough measure of the level of competition for jobs or the difficulty that claimants will have finding work.

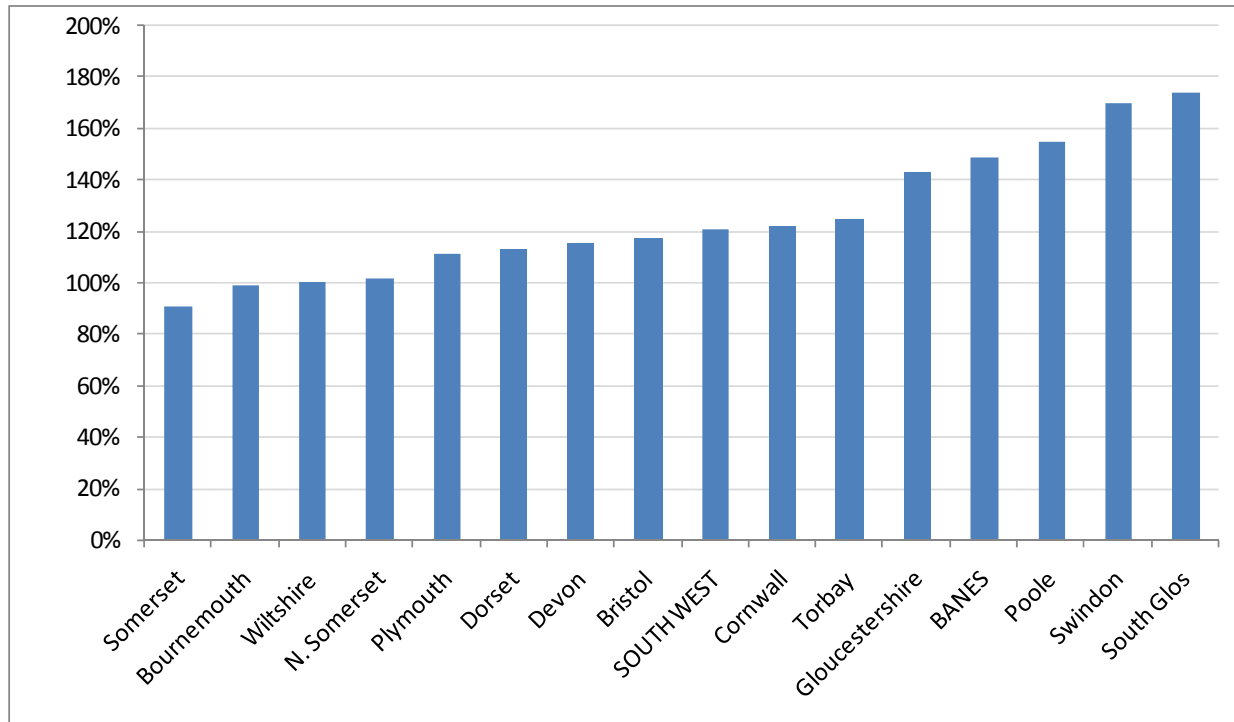
Figure 14: Claimants per Vacancy, South West, April 2008 to April 2010



Source: JC+ / NOMIS

Figure 14 shows that in April 2010 there were 4.2 claimants per vacancy in the region, a decline since the 5.3 claimants per vacancy seen in December 2009. Though welcome, this remains a figure almost four times that of the 1.2 claimants per vacancy, seen from April to June 2008.

Figure 15: Live Unfilled Vacancy, Feb-Apr '09 to Feb-Apr '10 (vacancies as a % of Feb-Apr '09), SW Local Authorities



Source: JC+ / NOMIS

Figure 15 shows the change over the last year in the number of unfilled vacancies available in different Local Authority areas in the South West. Due to data volatility the comparison is between volumes of vacancies over a three month period, from February to April 2010, compared to the same period in 2008.

Logic would suggest that a relationship should exist between this data and that for unemployment – a significant reduction in vacancies might be expected to contribute to

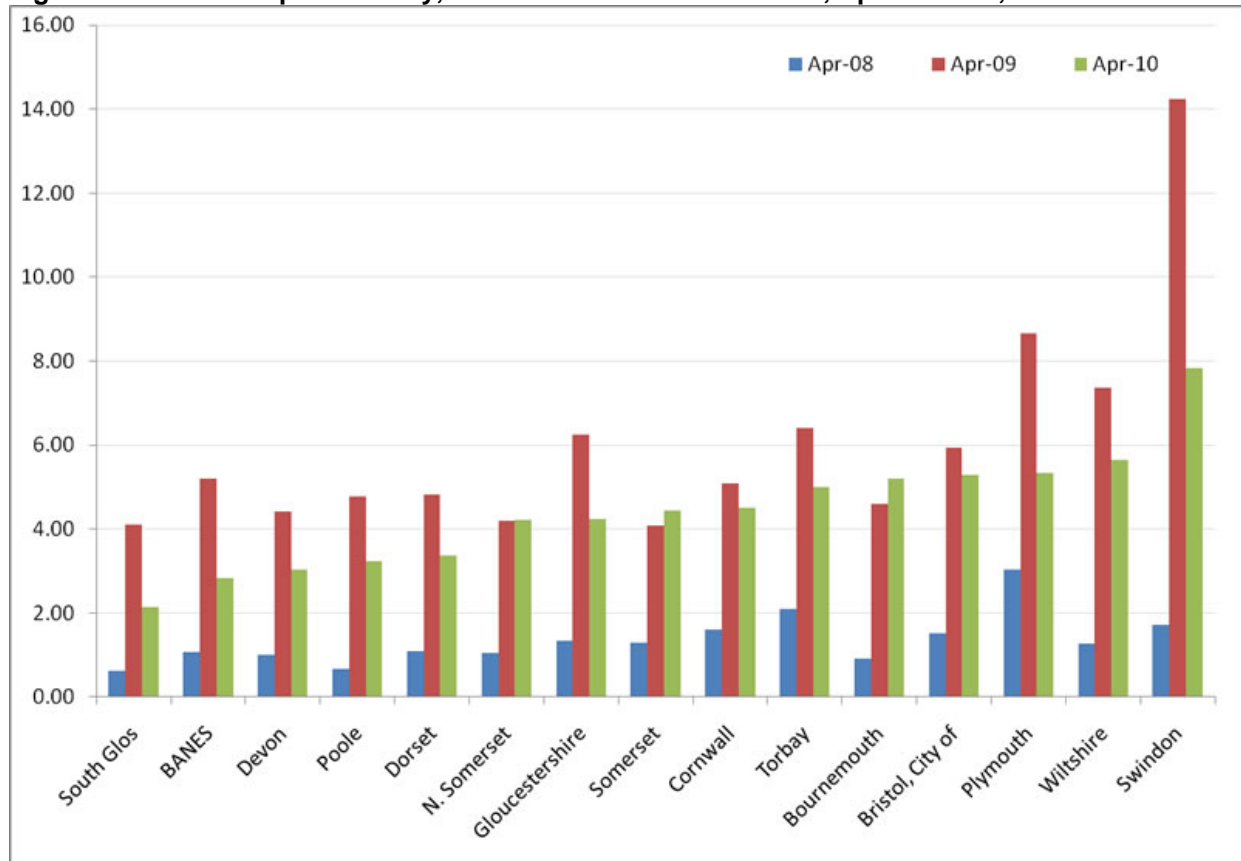
unemployment growth, while large numbers of unemployed people could be expected to fill available vacancies more quickly.

To an extent this holds true. In the early stages of the recession Swindon experienced the largest rise in unemployment and one of the largest reductions in the number of vacancies. In Devon and Cornwall, where vacancy levels held up well, the rise in unemployment was significantly smaller.

Over the last 12 months Swindon saw the second largest recovery in vacancy numbers and the largest fall in unemployment. Bournemouth, the only sub-region to experience rising unemployment, was one of only two areas to see vacancy numbers fall.

The relationship is however fairly weak. There are areas such as South Gloucestershire that have seen a good recovery in vacancies but only a marginal fall in unemployment.

Figure 16: Claimants per Vacancy, South West Local Authorities, April of 2008, 2009 and 2010



Source: JC+ / NOMIS

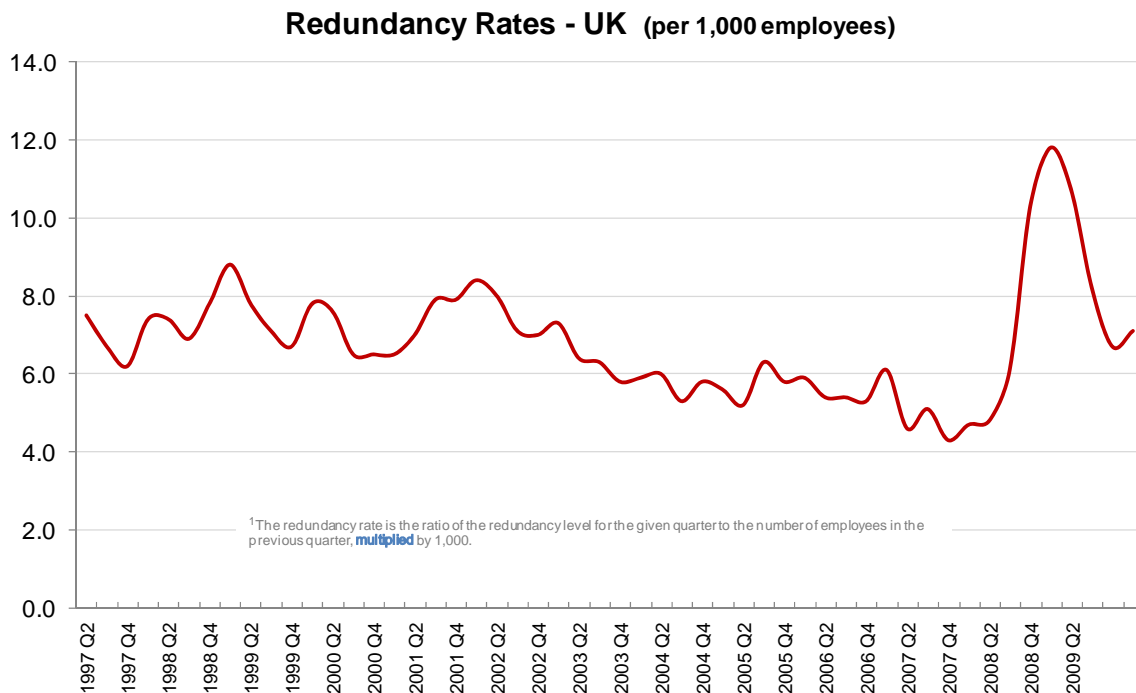
Looking at claimants per vacancy Figure 16 shows that as of April 2010 Swindon (7.8%), Wiltshire (5.6%), and Plymouth (5.3%), were the Local Authorities with the greatest number of claimants per vacancy. They are also all areas that had a relatively large number of claimants per vacancy one year into the recession.

Somerset and Bournemouth are the only two sub-regions that have seen the number of claimants per vacancy grow over the last 12 months. Significant declines have been recorded in all other areas apart from Cornwall and Bristol, where this has remained fairly static.

4. REDUNDANCIES

The LFS shows that over the last decade the national rate of redundancies tended to be fairly constant, at around 5% to 8% per 1,000 employees each quarter. This accelerated rapidly at the onset of the recession, rising from 6.1 per 1,000 employees in Quarter 3 of 2008, to 10.3 in Quarter 4 and 11.8 in Quarter 1 of 2009. From this peak the redundancy rate has fallen significantly, to between 7 and 8 per 1,000 employees over the last three quarters.

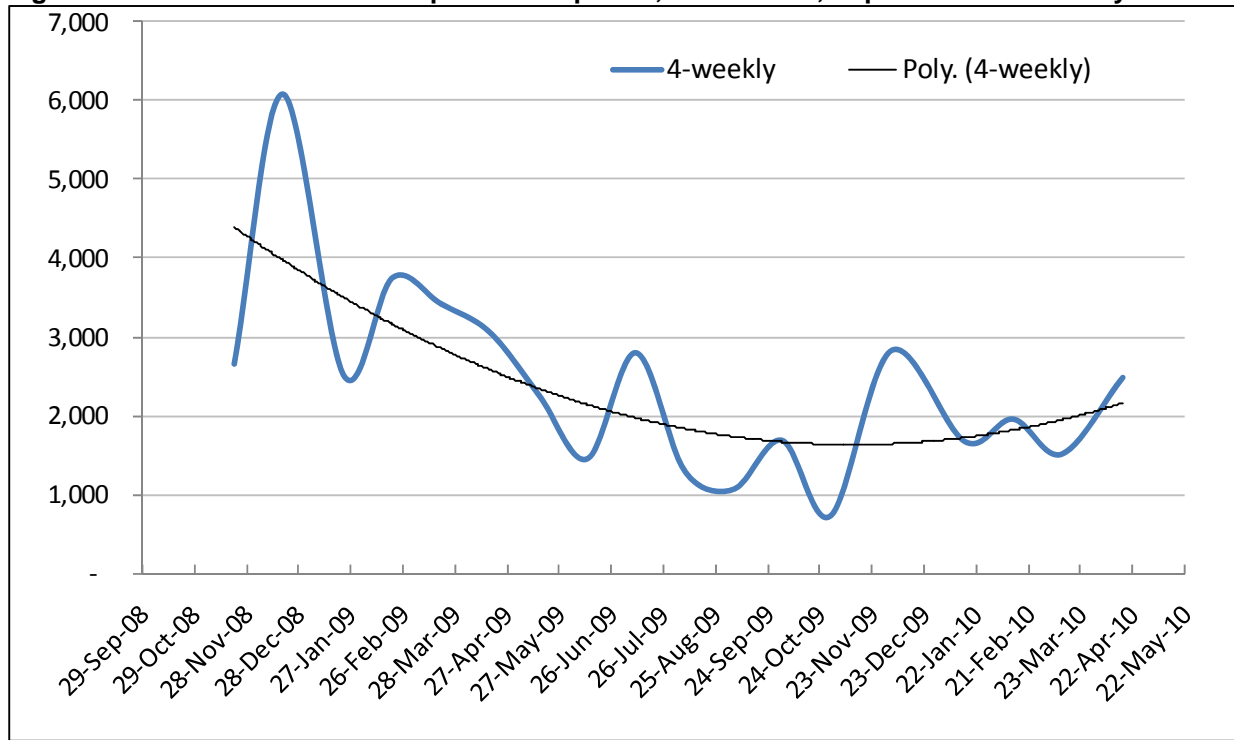
Figure 17: Redundancy Rates per 1,000 employees, SW & UK, Quarter 1, 1997 to Quarter 1, 2010



Source: LFS, ONS

The contention that redundancy levels have been falling since reaching a high in the early stages of the recession is supported by regional data on Notified Redundancies from Jobcentre Plus, shown in Figure 18.

Figure 18: Notified redundancies per 4 week period, South West, September 2008 to May 2010



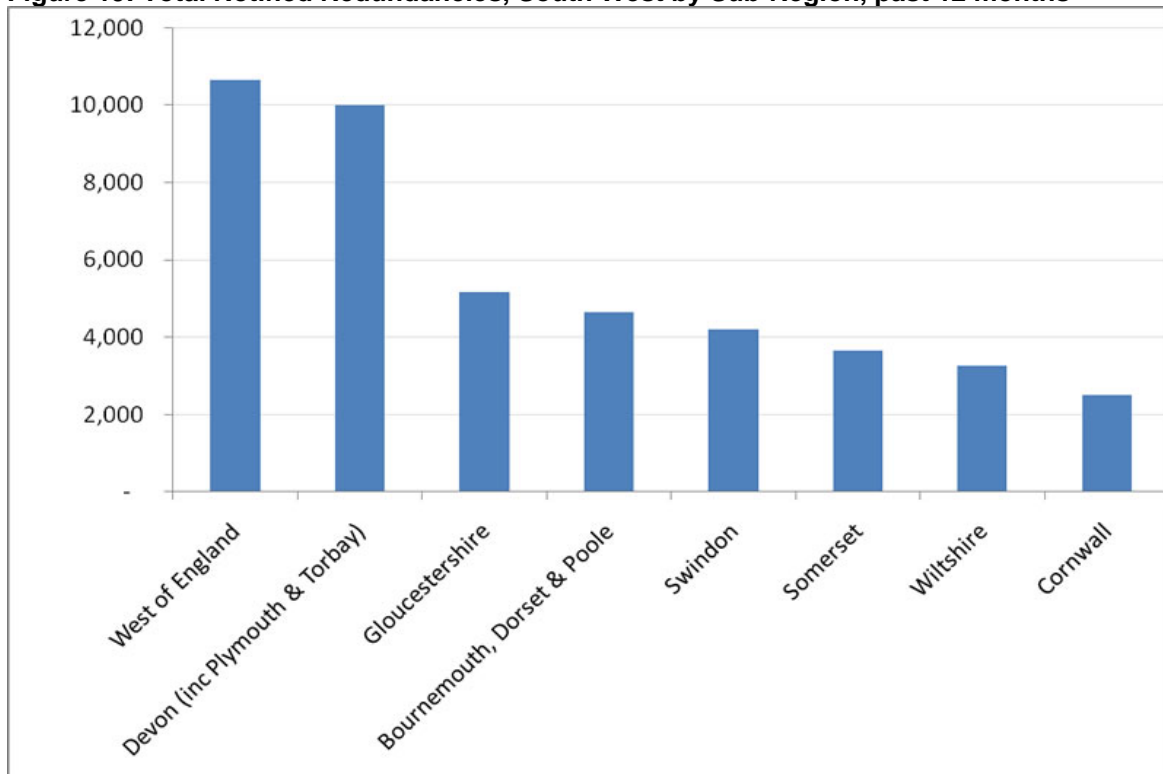
Source: Jobcentre Plus Administrative Data

Although numbers fluctuate, the long-term trend appears to be:

- An initial decline in redundancy rates, from around 4,000 per 4-week period at the turn of the year to around 2,000 every four weeks during the second half of 2009
- A rise in notified redundancies in the weeks leading up to Christmas 2010 and a further upturn in the most recent period.

Hopefully this isn't a sign of a 'double dip' and further growth in redundancies in coming months.

Figure 19: Total Notified Redundancies, South West by Sub-Region, past 12 months

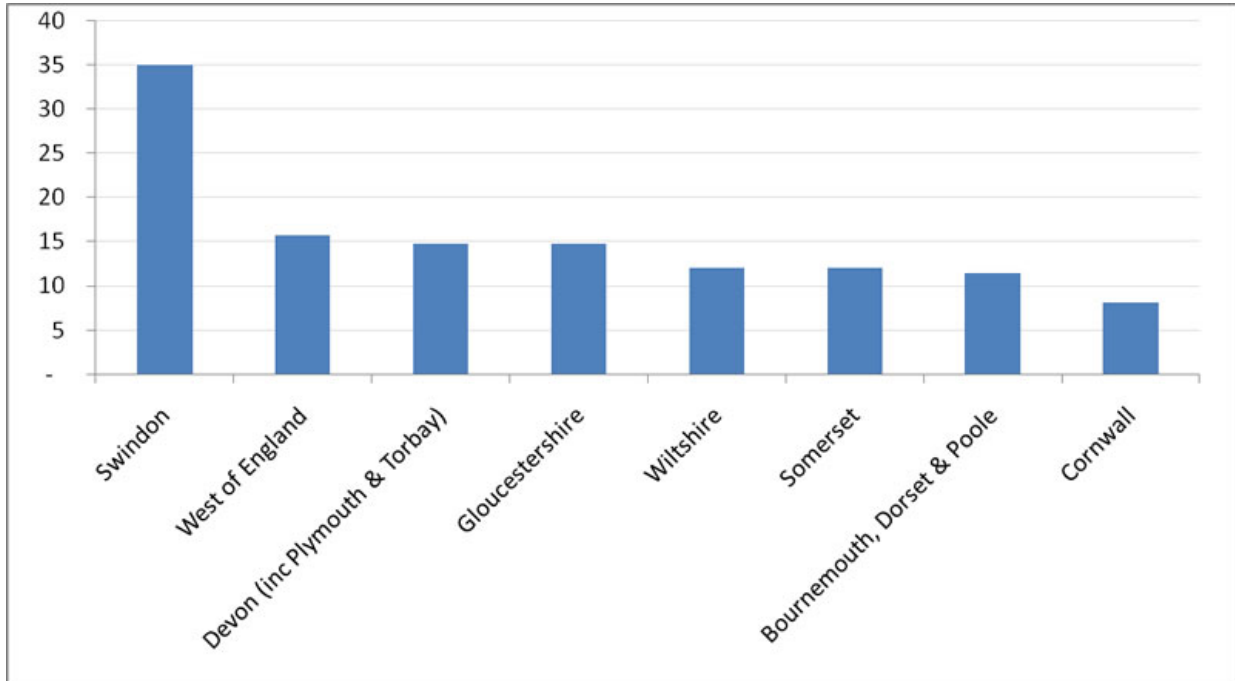


Source: Jobcentre Plus Administrative Data

Figure 19 shows that sub-regionally, the greatest numbers of redundancies have been made in the West of England³ and the county of Devon⁴ This is primarily due to their larger populations.

A more useful measure is the number of redundancies per capita. According to this measure Swindon emerges clearly as worst hit, with more than twice the number of redundancies per 1,000 members of the working age population⁵ than the regional average.

Figure 20: Notified redundancies per 1,000 working age population, SW Counties, 8/11/08 to 14/5/2010



Source: Jobcentre Plus Administrative Data

³ West of England includes the City of Bristol, South Gloucestershire, North Somerset and Bath & North East Somerset.

⁴ Local / Unitary Authority data is not available.

⁵ These have been calculated using mid-year population estimates for 2007.

5. IMPACT ON DIFFERENT GROUPS

5.1 Gender

So far the recession has produced a greater decline in male than female employment.

LFS data suggests that 77% of South West males were in employment during the quarter to March 2010, down 3.4% on the same quarter a year earlier. Female employment fell by 2.0%, from 74.8% to 72.8% during this period.

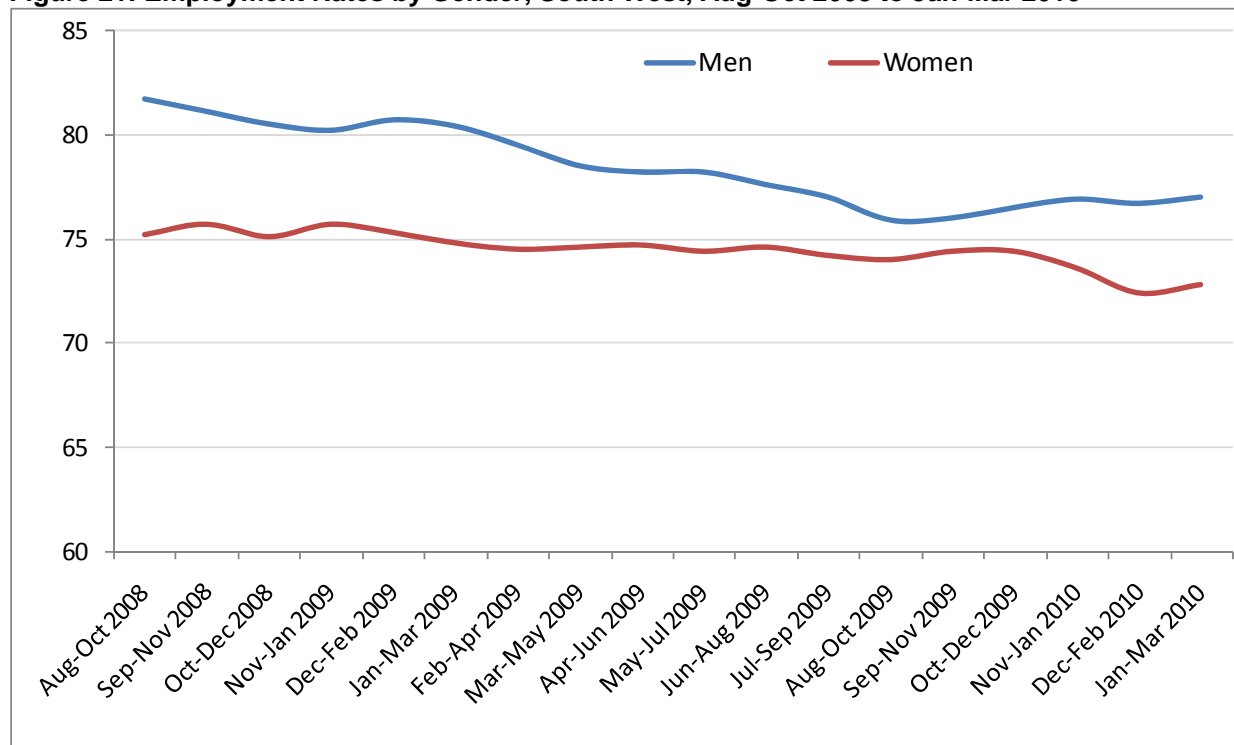
This is mainly due to the fact that:

- more men work in the private sector than women, which has been hit harder by the recession so far; and
- more men than women work in a number of industries, such as manufacturing and construction, that have been badly affected by the recession.

It may also be partly a consequence of other factors, such as women entering employment to replace the incomes of partners who have lost work.

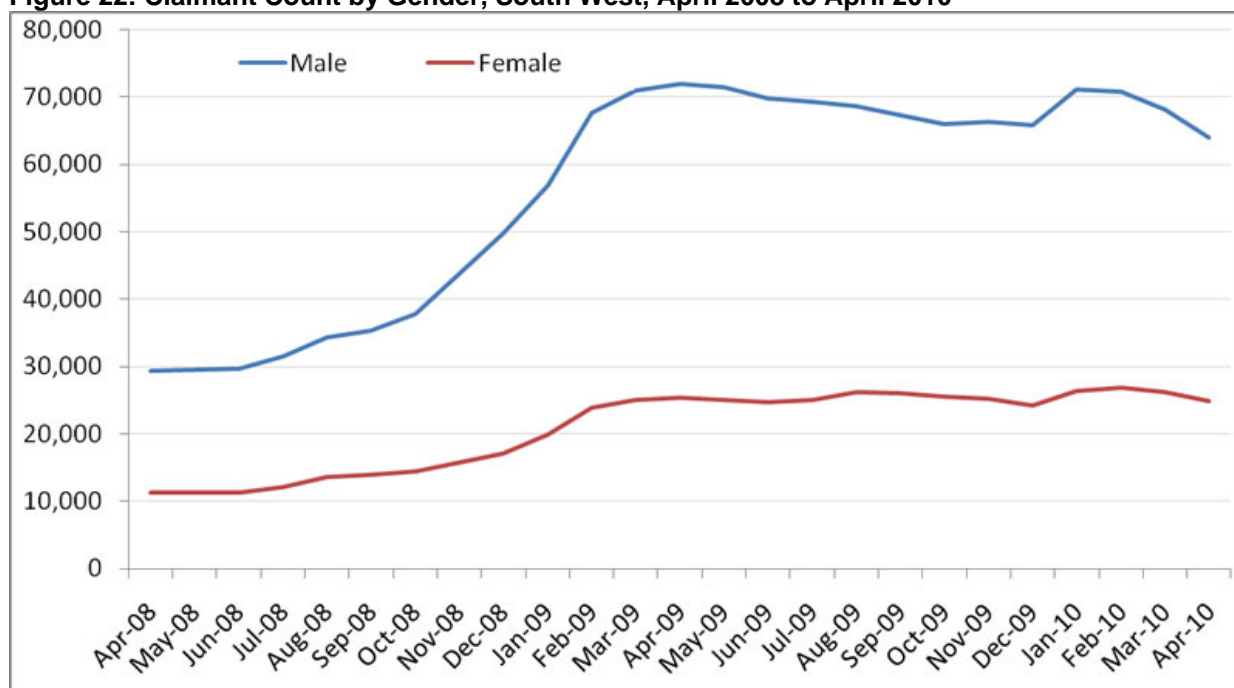
Given the concentration of female employment in the public sector there is a concern that falls in employment produced by public spending cuts may have a disproportionate effect on women. It is possible that the decline in female employment in early 2010 may be an early seen of such a trend.

Figure 21: Employment Rates by Gender, South West, Aug-Oct 2008 to Jan-Mar 2010



Source: JC+ / NOMIS

Figure 22: Claimant Count by Gender, South West, April 2008 to April 2010



Source: JC+ / NOMIS

Figure 22 shows that between April 2008 to April 2010 the number of male JSA Claimants in the South West region rose by 34,544, compared to a rise of just over 13,500 among females⁶.

More recently, in the year to April 2010, the number of male claimants has fallen by over 8,000, compared to a fall of just 500 for females.

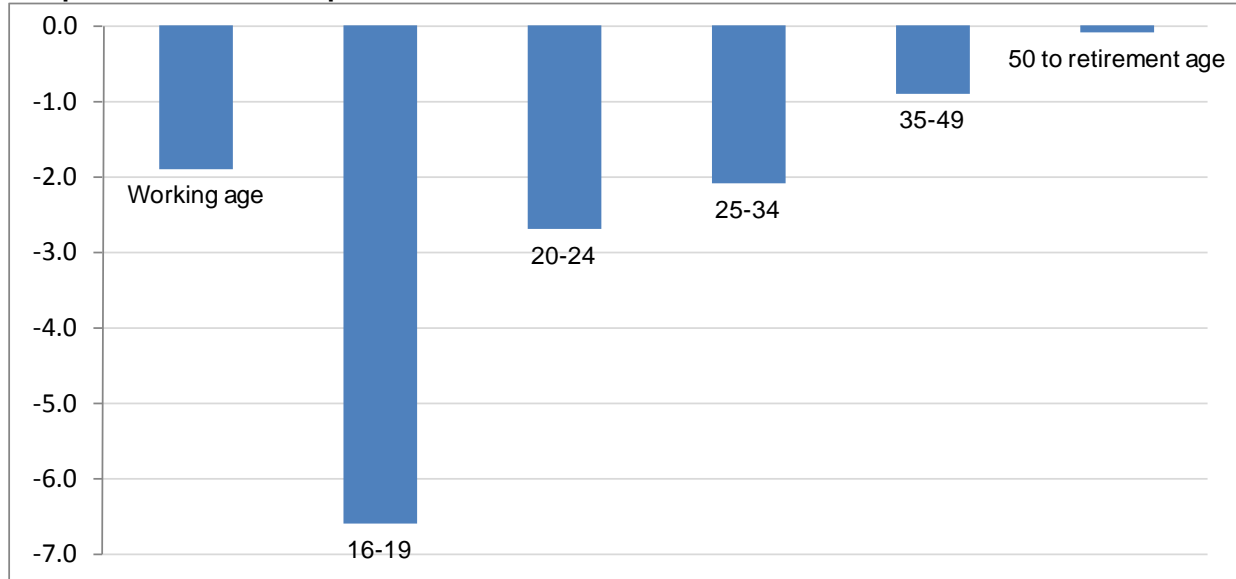
5.2 Youth Unemployment

At the time of writing, regional LFS data on employment rates by age group are available on an annualised basis. However, the data that is available suggests that during the year Oct 2008 to Sept 2009 employment rates fell for all groups below retirement age compared to a year earlier, when the recession had not yet begun.

The 16 to 19 age group saw by far the largest fall in employment rates (-6.6 percentage points) followed by young people aged 20 to 24 (-2.7 percentage points).

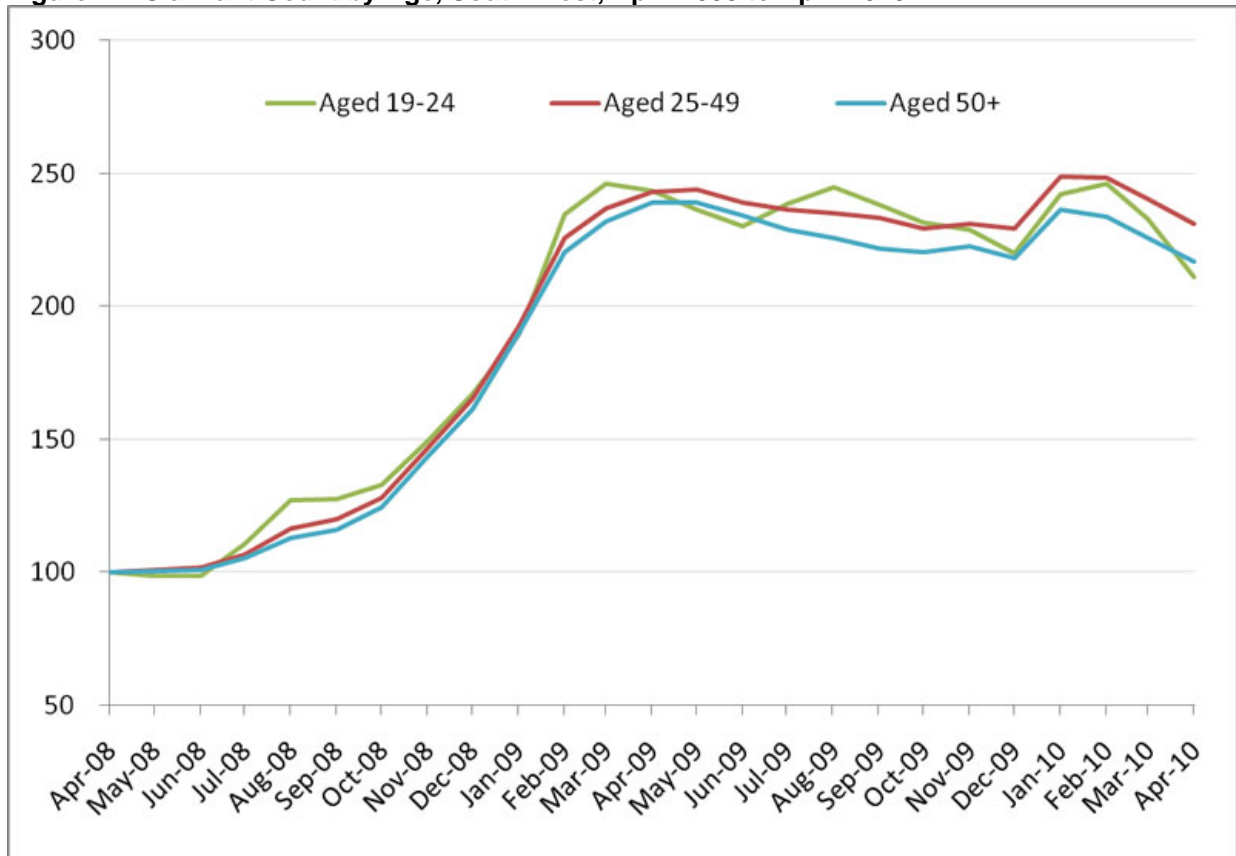
⁶ Some care is required in the interpretation of gender based claimant count figures, in that where joint claims are made on behalf of jobless couples these are commonly made by men.

Figure 23: Change in % Employment Rates by Age Group, South West, Oct 2007-Sep 2008 compared to Oct 2008-Sep 2009



Source: LFS/ONS

Figure 24: Claimant Count by Age, South West, April 2008 to April 2010

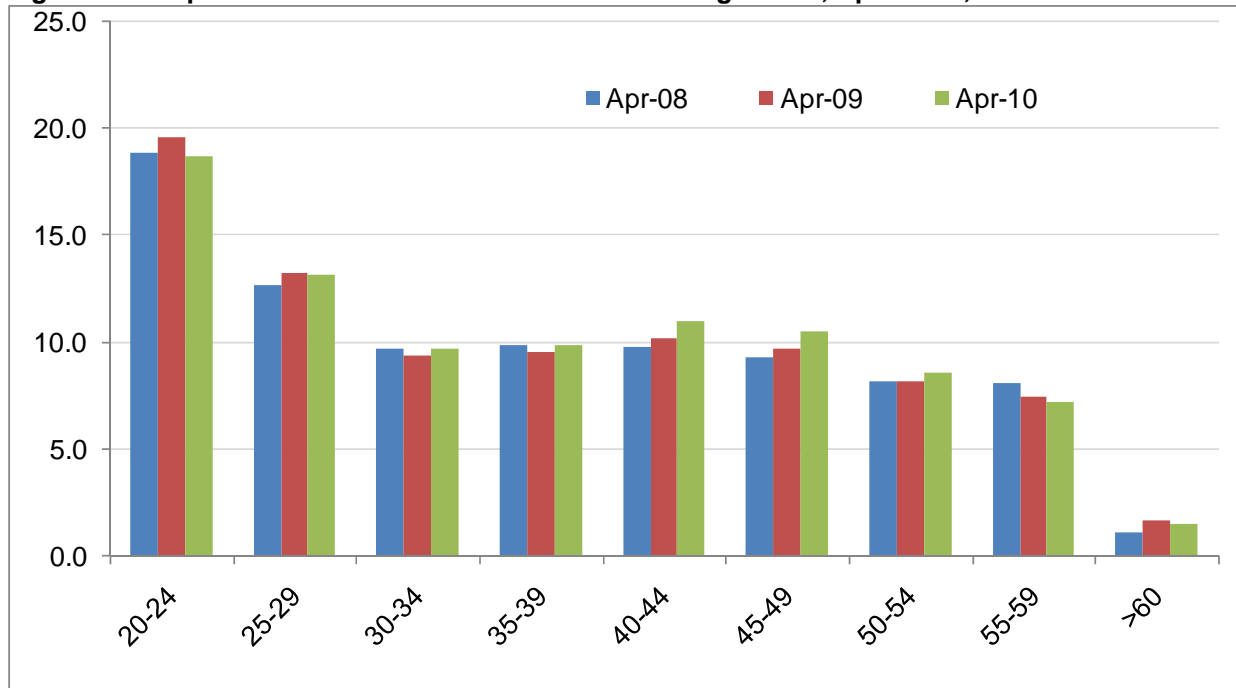


Source: JC+ / NOMIS

Looking at the Claimant Count, Figure 24 shows that the proportionate rise in unemployment during the recession has been fairly similar for all age groups.

As a consequence the balance of unemployment across the different age groups has changed very little. Young people aged 20 to 24 accounted for 18.9% of all JSA claimants in April 2008 compared to 18.7% in April 2010, as shown in Figure 25.

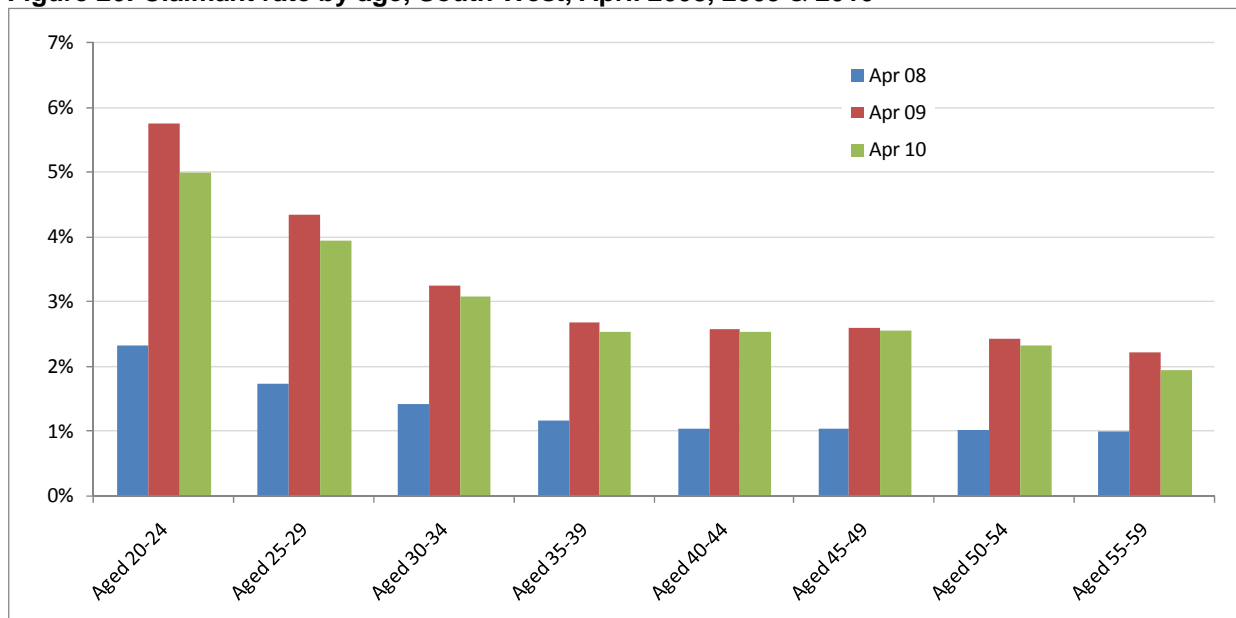
Figure 25: Proportion of Total Claimant Count in Each Age Band, April 2008, 2009 & 2010



Source: JC+ / NOMIS

However once the similar growth rates (seen in Figure 24) are applied to the higher baseline unemployment rate for younger people, the effect of the recession people aged below 30 becomes apparent. While the claimant rate for people aged 35 to 60 rose by around 1.5 percentage points, from roughly 1% to 2.5%, the rise in claimant count among 20 to 24 year olds has risen by 2.7 percentage points, from 2.3% to 5.0%, as shown in Figure 26.

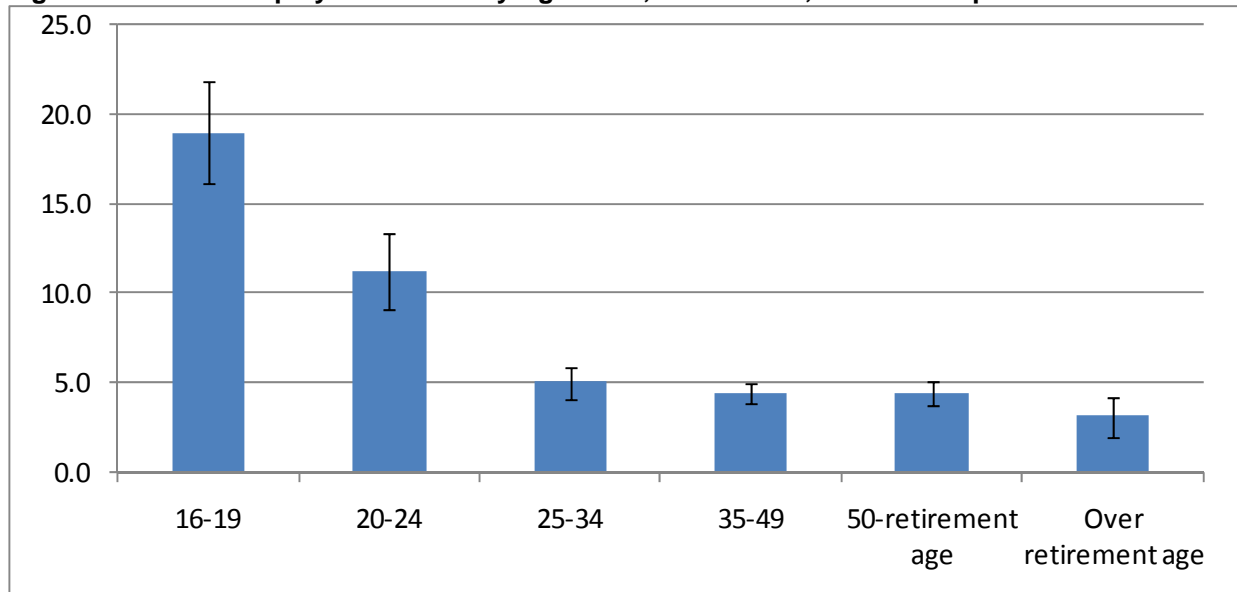
Figure 26: Claimant rate by age, South West, April 2008, 2009 & 2010



Source: NOMIS / JC+

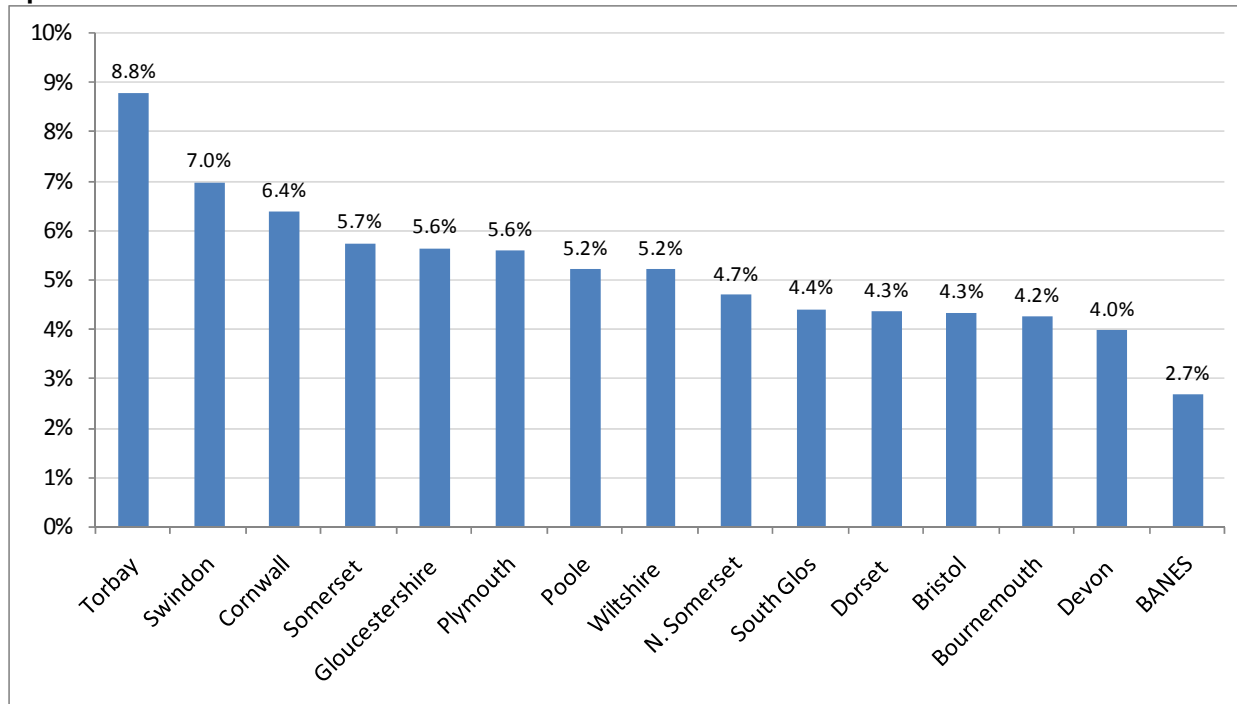
LFS data confirms this pattern, showing unemployment among 16 to 24 year olds running at around 18%, compared to rates of below 5% for those aged over 25.

Figure 27: LFS Unemployment Rates by Age Band, South West, Oct 2008-Sep 2009



Source: LFS / Annual Population Survey.

Figure 28: % Claimant unemployment rate among 20 – 24 year olds, South West local authorities, April 2010



Source: JC+ / NOMIS

Rates of youth unemployment in different Local / Unitary Authority areas vary considerably.

Youth unemployment is particularly high in Torbay where, in April 2010, 8.8% of all people aged 20 to 24⁷ were claiming JSA. Swindon and Cornwall also have high levels of youth unemployment, while BANES has a level significantly lower than other sub-regions.

⁷ Based on August 2009 Claimant Count and 2007 Mid-year Population estimates, by quinary age band.

6. OCCUPATIONAL ANALYSIS

The occupational composition of unemployment in the South West is very similar to that for England as a whole.

However, as Table 1 below shows, unemployment rates for people in lower skilled occupations are significantly higher those found for people in more skilled occupations. While 16% of all regional employment is in Elementary Occupations, people whose usual job was in an Elementary Occupation made up 28% of claimants in the South West in April 2010.

Table 1: Composition of Employment & Claimant Count, South West, April 2010

Occupation - SOUTH WEST	% Claimants	% Employment
1 : Managers and Senior Officials	6%	6%
2 : Professional Occupations	4%	8%
3 : Associate Professional and Technical Occupations	6%	9%
4 : Administrative and Secretarial Occupations	9%	11%
5 : Skilled Trades Occupations	13%	11%
6 : Personal Service Occupations	6%	12%
7 : Sales and Customer Service occupations	17%	12%
8 : Process, Plant and Machine Operatives	10%	15%
9 : Elementary Occupations	28%	16%

Source: NOMIS, (APS) latest quarterly data. Employment by major group / both men and women.