

Real-time vacancy analysis:

Early findings on changes in vacancy levels by local area and job type

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This Briefing Note is the first of a series exploring changes in vacancies since the Covid-19 crisis began. The work is funded by the Joseph Rowntree Foundation, and uses vacancy data collected by Adzuna (www.adzuna.co.uk).

Adzuna is one of the largest online job search engines in the UK, and runs the government's 'Find a Job' service. It aggregates job ads from thousands of sources and cleans, de-duplicates and standardises the information to provide a robust picture of employer demand, covering at least 90 per cent of all vacancy activity. Adzuna is supplying IES with weekly, real-time data on all job vacancies notified and live across the UK.

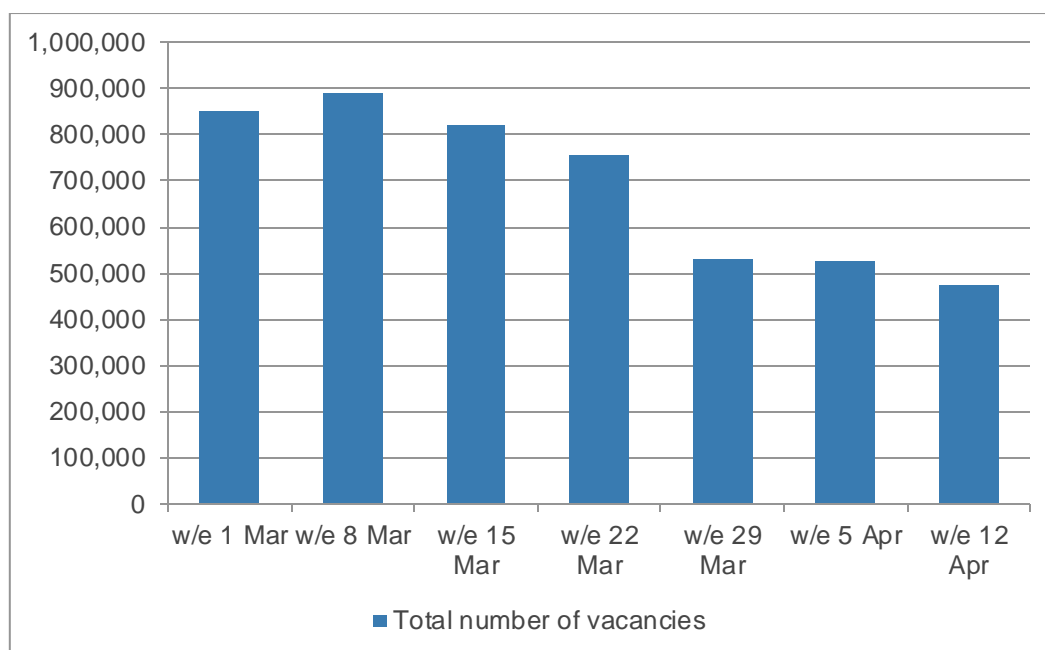
This first briefing note presents early findings on how vacancy levels have changed overall, across local areas and by different job types.

Headline findings

Our analysis finds that job vacancies across the UK have fallen by 42% since the lockdown began in mid-March. As at 15 March 2020, Adzuna was listing 820 thousand UK vacancies, which by 12 April had fallen to 475 thousand. Weekly changes in vacancy levels are set out in Figure 1 below, from late February onwards. This monthly fall is two-and-a-half times greater than the previous largest single monthly fall recorded in official vacancy statistics, of 17% in the depths of the last recession (November 2008)¹.

¹ Source: ONS Single Month Vacancy Survey estimates (dataset X06)

Figure 1: Total number of live vacancies, from week ending 1 March to 12 April



Source: Institute for Employment Studies analysis of Adzuna vacancy data

Changes in vacancy levels by geographical area

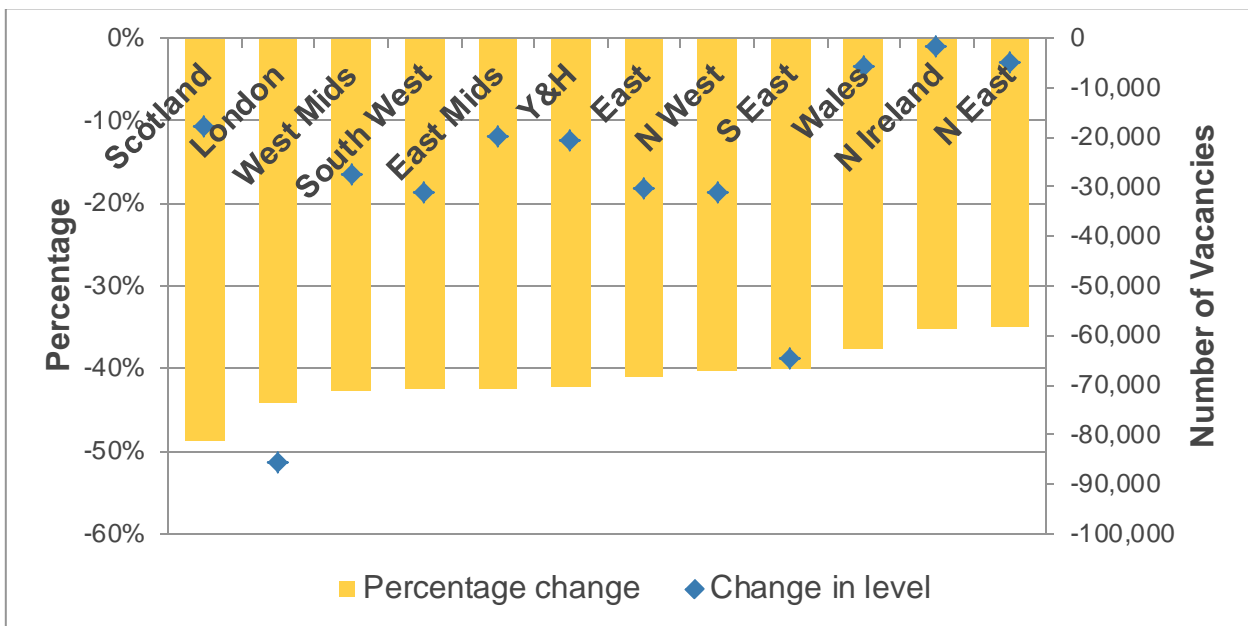
Each vacancy held by Adzuna has a geographical identifier, which we have mapped to Government Office Region and to Upper Tier Local Authority level. The analysis at regional level, which includes the three devolved nations, finds that the largest falls in vacancy levels have been in Scotland (down 49%) and London (down 44%).

London has the highest level of vacancies of any region or nation, so a quarter of the total fall in vacancies between last month and this month is accounted for by an 86 thousand reduction in job openings in London. Similarly, while the South East has seen its vacancies fall by slightly less than the national average (at 40%), the size of the South East economy means that the 65 thousand fall in vacancies equates to nearly a fifth (19%) of the overall fall.

By contrast, Northern Ireland and the North East have seen vacancies fall by around one third (35%). However, these two regions account for only a small fraction of all job opportunities (just 2.5% of the total).

The regional changes are set out in Figure 2 below.

Figure 2: Percentage fall in vacancies (left-hand axis) and change in the level of vacancies (right-hand axis) by region and devolved nation



Source: Institute for Employment Studies analysis of Adzuna vacancy data

In most regions and nations, vacancy levels began their decline in the week ending 15 March and fell precipitously two weeks later (in the week ending 29 March). The exceptions to this were Wales and Northern Ireland, where vacancies have fallen more consistently since the start of March. In all regions and nations, vacancy levels have largely stabilised during April, but at levels between 30 and 50% lower than before the crisis began. These trends are set out in Figure 3 overleaf.

For the local analysis, we have mapped the postal town of the vacancy to local areas on a ‘best fit’ basis. In all of the country except for London and Northern Ireland, we have mapped to the Upper Tier Local Authority level (which includes Counties, Metropolitan Districts and Unitary Authorities). Analysis for London and Northern Ireland has been broken down into seven and four areas respectively².

The data shows that the differences within regions are greater than the differences between them. In all, ten local areas have seen vacancies fall by 50% or more – comprising:

² For London this reflects post code areas: Central (Combining EC and WC), East, North, North East, South East, South West, and West London. In Northern Ireland, the areas are Belfast, East, North, and West and South.

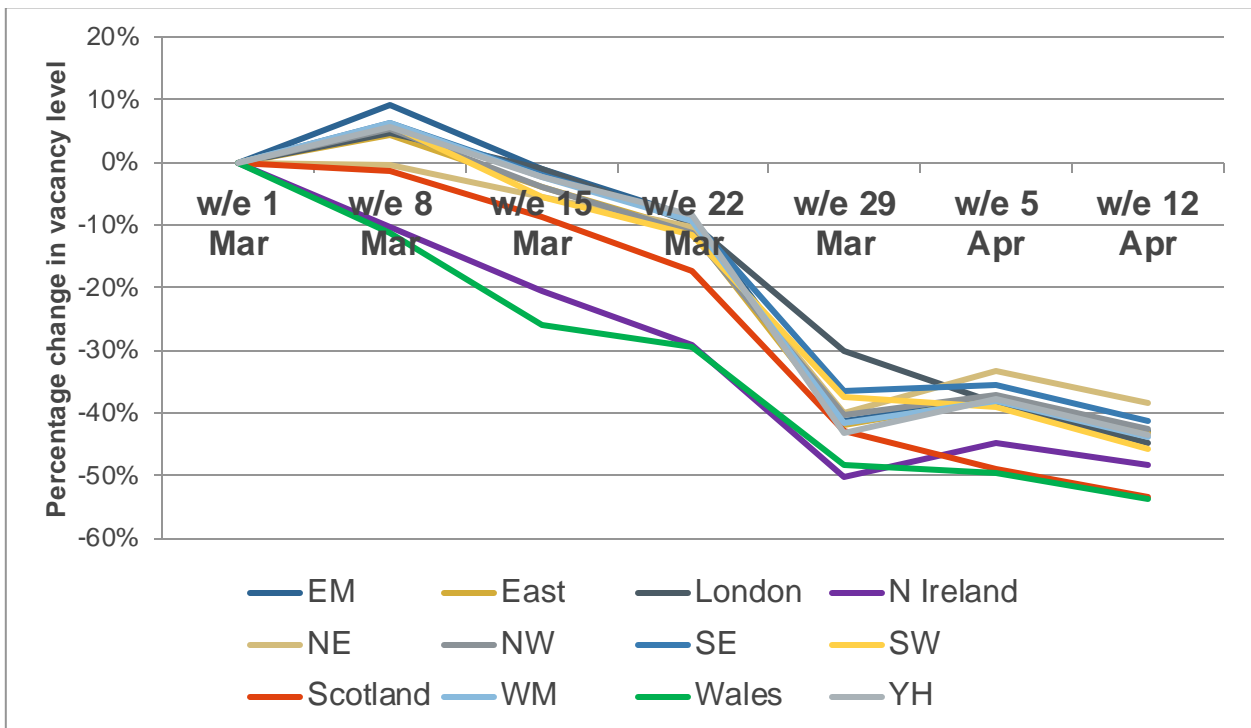
- Two areas in the North West of England – with Blackpool seeing the single largest monthly fall, of 69%, and Trafford in Greater Manchester down by 51%
- Five areas in Scotland – with Edinburgh among these, falling by 58%
- Two areas in the South West of England – including Devon, which is down by 53%
- South East London, where vacancies have fallen by 50%

At the other end of the list, fifteen local authorities have seen vacancies fall by less than 30%. These are:

- Five areas in the North West – Blackburn with Darwen, Oldham, Bury, Tameside and Bolton (all with falls of between 23 and 28%)
- Five in the North East – Hartlepool, Darlington, Middlesbrough, Redcar and Cleveland, and North Tyneside (all between 18 and 27%)
- Monmouthshire and Newport in Wales, down by 28%
- Rutland in the East Midlands, down 27%
- East Sussex (down 15%) and the Isle of Wight (down 2%) in the South East
- Rotherham in Yorkshire and Humberside, where vacancies are down just 4%

A full list of changes by local area is set out in an Annex to this briefing note.

Figure 3: Percentage changes in vacancy levels by region, since week ending 1 March 2020



Source: Institute for Employment Studies analysis of Adzuna vacancy data

Changes by job types

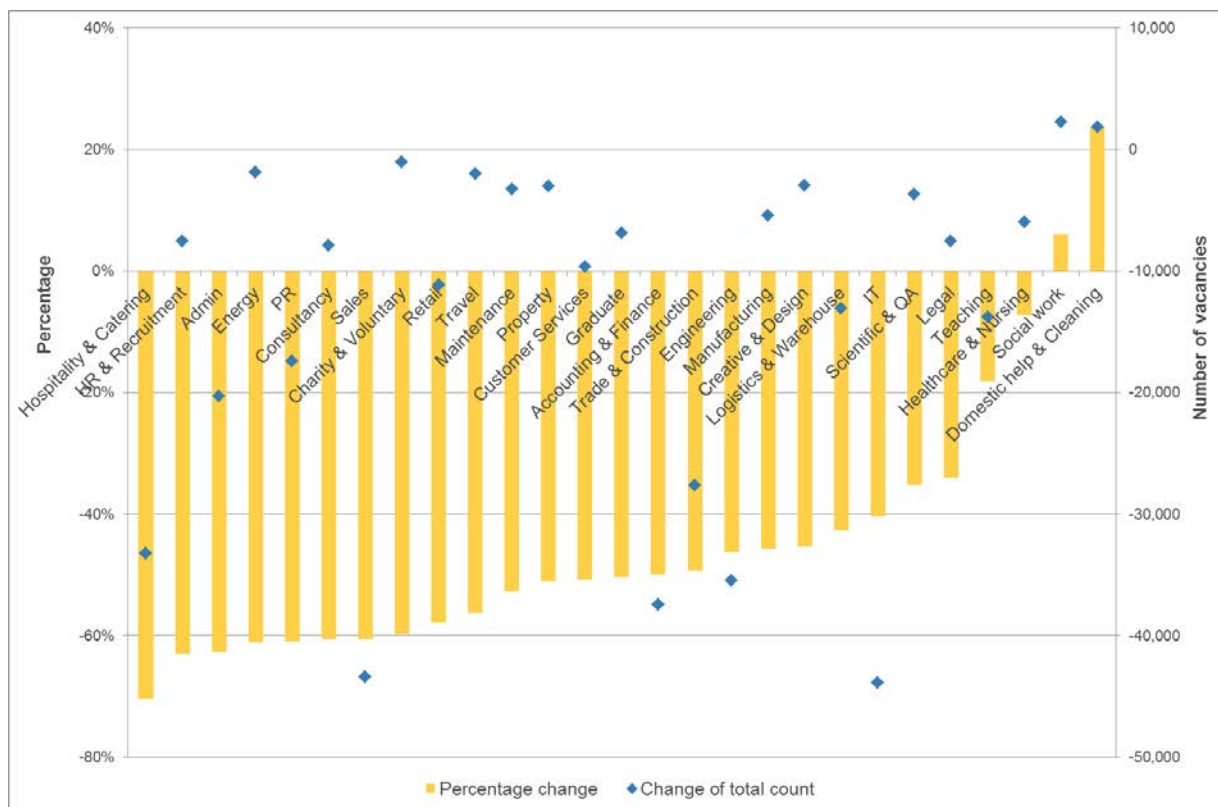
Finally, we have analysed changes in vacancies by the high level ‘job types’ that are recorded by Adzuna. These categorise all jobs into one of 27 groups, reflecting the broad occupational category for that work. This analysis is presented in Figure 4 below, showing the change in the level of vacancies and the percentage change for each type.

Unsurprisingly, this shows that the largest single fall has been in hospitality and catering jobs (down 70%), which have been most affected by the economic shutdown. However, it is concerning that there are very steep falls across a broad range of job types and not just in those directly shut down. Notably, vacancies have fallen by more than 60% in sales, administration, public relations, consulting, HR and recruitment, energy and charity work.

By volume, the largest falls have been in IT (down 44 thousand), sales (43 thousand), accounting and finance (37 thousand) and engineering (35 thousand). Combined, these four job types account for nearly half (44%) of the total fall in vacancies.

Looking at those job types where vacancies are holding up, job openings have fallen only slightly in healthcare and have risen in social work and in cleaning. With the steep falls in vacancies elsewhere, these three areas now account for a quarter of all open vacancies compared with just one in seven a month ago.

Figure 4: Percentage fall in vacancies (left-hand axis) and change in the level of vacancies (right-hand axis) by high level job type



Source: Institute for Employment Studies analysis of Adzuna vacancy data

Conclusions and next steps

This early analysis of real-time vacancy data paints a fairly stark picture of how the jobs market and employer demand have been affected over the first month of lockdown. These impacts are far greater than anything that has been witnessed in at least a generation, and are affecting all places and nearly all parts of the economy.

It shows in particular that many workers who are at high risk of being in poverty, such as those working in restaurants and in non-food retail, are likely among those being hit the hardest. At the same time, it demonstrates that demand has fallen dramatically in many professional occupations too.

Nonetheless, one conclusion from this analysis is that there remain nearly half a million current live vacancies, and that this number appears to have stabilised in the last two weeks. So there are still jobs available for those looking for work, and it is important to keep supporting those who are out of work to find those jobs.

None of this analysis should be read as arguing that the lockdown should be eased in the immediate future. Until Covid-19 is under control, we risk far greater economic damage by ending the lockdown than we do by continuing it.

Assuming that the lockdown can be eased during May and June, we should expect to see vacancies start to rise again. There are differing views about how rapid that recovery will be but in our view it is imperative that government, employers and wider labour market stakeholders start planning for that recovery now.

In the coming weeks, we will be publishing further analysis of new vacancy data as this becomes available. We anticipate that this analysis will include:

- Analysis of the unemployment to vacancy ratio in local areas
- Mapping of Adzuna Job Types to Standard Occupational Classifications
- More detailed analysis of what is driving changes in vacancies within local areas
- Analysis of how the salary levels of vacancies are changing over time
- Analysis of the 'flow' of new vacancies, as well as of overall vacancy levels

We would welcome input and feedback on this briefing note, and on the content and analysis for future briefings.

Annex: Changes in vacancy levels by local area

Table A.1: Changes in vacancy levels by local area, March 2020 to April 2020

| Local Authority | Region/ nation | W/e 15 March | W/e 12 April | Change on month |
|-----------------------------|----------------------|-----------------|-----------------|--------------------|
| Blackpool | North West | 698 | 213 | -69% |
| Edinburgh | Scotland | 7,412 | 3,135 | -58% |
| South Ayrshire | Scotland | 330 | 146 | -56% |
| West Lothian | Scotland | 1,235 | 573 | -54% |
| North Eastern Scotland | Scotland | 4,665 | 2,183 | -53% |
| Devon | South West | 10,123 | 4,752 | -53% |
| Trafford | North West | 1,241 | 604 | -51% |
| East Lothian and Midlothian | Scotland | 3,348 | 1,635 | -51% |
| Isles Of Scilly | South West | 14 | 7 | -50% |
| South East London | London | 29,254 | 14,757 | -50% |
| Wokingham | South East | 853 | 431 | -49% |
| Solihull | West Midlands | 1,423 | 721 | -49% |
| Birmingham | West Midlands | 17,772 | 9,192 | -48% |
| Luton | East of England | 1,512 | 783 | -48% |
| Leicestershire | East Midlands | 5,426 | 2,842 | -48% |
| Falkirk | Scotland | 412 | 216 | -48% |
| Bracknell Forest | South East | 1,625 | 852 | -48% |
| Glasgow | Scotland | 7,451 | 3,920 | -47% |
| Gateshead | North East | 663 | 350 | -47% |
| Bedford | East of England | 2,118 | 1,119 | -47% |
| Windsor and Maidenhead | South East | 2,783 | 1,478 | -47% |
| Central Bedfordshire | East of England | 3,936 | 2,105 | -47% |
| North West London | London | 7,611 | 4,086 | -46% |
| Sheffield | Yorkshire and Humber | 9,173 | 4,936 | -46% |
| West Sussex | South East | 10,257 | 5,522 | -46% |
| Buckinghamshire | South East | 9,481 | 5,107 | -46% |
| North Lincolnshire | Yorkshire and Humber | 1,112 | 599 | -46% |
| Northamptonshire | East Midlands | 10,047 | 5,433 | -46% |
| South West London | London | 13,590 | 7,364 | -46% |
| Borders | Scotland | 348 | 189 | -46% |
| West Berkshire | South East | 1,451 | 789 | -46% |
| Slough | South East | 2,623 | 1,428 | -46% |
| Warrington | North West | 2,345 | 1,277 | -46% |
| Gloucestershire | South West | 13,304 | 7,246 | -46% |
| Cumbria | North West | 4,795 | 2,618 | -45% |

Real time vacancy analysis: 20 April 2020

| Local Authority | Region/ nation | W/e 15 March | W/e 12 April | Change on month |
|---------------------------------|-----------------------|-------------------------|-------------------------|----------------------------|
| Barnsley | Yorkshire and Humber | 758 | 414 | -45% |
| Kent | South East | 22,587 | 12,355 | -45% |
| Warwickshire | West Midlands | 7,178 | 3,937 | -45% |
| Leeds | Yorkshire and Humber | 14,495 | 7,958 | -45% |
| Milton Keynes | South East | 6,651 | 3,668 | -45% |
| Telford and Wrekin | West Midlands | 1,552 | 856 | -45% |
| Clackmannanshire and Fife | Scotland | 1,599 | 887 | -45% |
| Calderdale | Yorkshire and Humber | 1,112 | 618 | -44% |
| Worcestershire | West Midlands | 5,785 | 3,220 | -44% |
| Central London (EC & WC) | London | 117,498 | 65,526 | -44% |
| Reading | South East | 12,913 | 7,209 | -44% |
| Staffordshire | West Midlands | 6,869 | 3,848 | -44% |
| Hertfordshire | East of England | 19,503 | 10,941 | -44% |
| Surrey | South East | 23,109 | 12,972 | -44% |
| Plymouth | South West | 1,954 | 1,097 | -44% |
| Cornwall | South West | 3,829 | 2,151 | -44% |
| Hampshire | South East | 19,317 | 10,853 | -44% |
| Cheshire West and Chester | North West | 7,543 | 4,244 | -44% |
| North Yorkshire | Yorkshire and Humber | 5,743 | 3,242 | -44% |
| Perth and Kinross, and Stirling | Scotland | 1,052 | 594 | -44% |
| York | Yorkshire and Humber | 2,965 | 1,675 | -44% |
| Essex | East of England | 17,079 | 9,671 | -43% |
| Bridgend and Neath Port Talbot | Wales | 645 | 366 | -43% |
| Oxfordshire | South East | 13,563 | 7,697 | -43% |
| Central Valleys | Wales | 528 | 301 | -43% |
| North Lanarkshire | Scotland | 773 | 443 | -43% |
| Coventry | West Midlands | 3,699 | 2,122 | -43% |
| Cardiff | Wales | 6,485 | 3,748 | -42% |
| Medway | South East | 1,485 | 860 | -42% |
| Angus and Dundee | Scotland | 1,242 | 721 | -42% |
| Dumfries and Galloway | Scotland | 538 | 313 | -42% |
| Nottinghamshire | East Midlands | 5,367 | 3,133 | -42% |
| Wakefield | Yorkshire and Humber | 2,663 | 1,555 | -42% |
| Cheshire East | North West | 4,427 | 2,590 | -41% |
| Bath and North East Somerset | South West | 2,255 | 1,321 | -41% |
| Stockport | North West | 2,654 | 1,555 | -41% |
| Nottingham | East Midlands | 6,700 | 3,962 | -41% |
| Bristol, City of | South West | 16,179 | 9,590 | -41% |
| East of Northern Ireland | Northern Ireland | 1,985 | 1,178 | -41% |
| Lincolnshire | East Midlands | 5,805 | 3,456 | -40% |

| Local Authority | Region/ nation | W/e 15 March | W/e 12 April | Change on month |
|---|----------------------|-----------------|-----------------|--------------------|
| Manchester | North West | 26,702 | 15,922 | -40% |
| South Lanarkshire | Scotland | 1,167 | 696 | -40% |
| North London | London | 6,331 | 3,784 | -40% |
| Leicester | East Midlands | 4,983 | 2,984 | -40% |
| Inverclyde, E. Renfrewshire and Renfrewshire | Scotland | 1,096 | 657 | -40% |
| Derby | East Midlands | 3,397 | 2,038 | -40% |
| Bournemouth, Christchurch and Poole | South West | 3,573 | 2,146 | -40% |
| Gwent Valleys | Wales | 1,363 | 819 | -40% |
| Derbyshire | East Midlands | 5,838 | 3,510 | -40% |
| Newcastle upon Tyne | North East | 6,012 | 3,618 | -40% |
| Highlands and Islands | Scotland | 2,822 | 1,700 | -40% |
| Lancashire | North West | 9,568 | 5,791 | -39% |
| Wiltshire | South West | 6,449 | 3,908 | -39% |
| Bradford | Yorkshire and Humber | 2,122 | 1,288 | -39% |
| East Dunbartonshire, West Dunbartonshire | Scotland | 504 | 307 | -39% |
| Southampton | South East | 4,759 | 2,926 | -39% |
| East London | London | 9,603 | 5,921 | -38% |
| Somerset | South West | 7,581 | 4,676 | -38% |
| Wigan | North West | 1,249 | 774 | -38% |
| Peterborough | East of England | 2,643 | 1,640 | -38% |
| Stoke-on-Trent | West Midlands | 2,262 | 1,406 | -38% |
| Halton | North West | 910 | 567 | -38% |
| Sefton | North West | 751 | 468 | -38% |
| Thurrock | East of England | 1,103 | 688 | -38% |
| Stockton-On-Tees | North East | 540 | 337 | -38% |
| Southend-on-Sea | East of England | 921 | 576 | -37% |
| Kirklees | Yorkshire and Humber | 1,887 | 1,184 | -37% |
| Cambridgeshire | East of England | 12,191 | 7,682 | -37% |
| East Riding Of Yorkshire | Yorkshire and Humber | 2,448 | 1,543 | -37% |
| Dorset | South West | 5,542 | 3,496 | -37% |
| Shropshire | West Midlands | 3,073 | 1,941 | -37% |
| Wirral | North West | 1,171 | 745 | -36% |
| Torbay | South West | 603 | 384 | -36% |
| Sandwell | West Midlands | 1,154 | 735 | -36% |
| Suffolk | East of England | 6,909 | 4,406 | -36% |
| Knowsley | North West | 263 | 168 | -36% |
| Liverpool | North West | 8,162 | 5,221 | -36% |

Real time vacancy analysis: 20 April 2020

| Local Authority | Region/ nation | W/e 15 March | W/e 12 April | Change on month |
|------------------------------------|-----------------------|-------------------------|-------------------------|----------------------------|
| Herefordshire, County of | West Midlands | 1,771 | 1,143 | -35% |
| North East Wales | Wales | 1,622 | 1,047 | -35% |
| Dudley | West Midlands | 9,879 | 6,413 | -35% |
| Portsmouth | South East | 2,335 | 1,516 | -35% |
| South West Wales | Wales | 909 | 592 | -35% |
| North Somerset | South West | 994 | 648 | -35% |
| Salford | North West | 928 | 605 | -35% |
| Brighton and Hove | South East | 5,024 | 3,276 | -35% |
| Doncaster | Yorkshire and Humber | 1,895 | 1,239 | -35% |
| Northumberland | North East | 1,660 | 1,089 | -34% |
| South Tyneside | North East | 335 | 220 | -34% |
| North East Lincolnshire | Yorkshire and Humber | 701 | 466 | -34% |
| Wolverhampton | West Midlands | 1,728 | 1,149 | -34% |
| Norfolk | East of England | 6,831 | 4,551 | -33% |
| Walsall | West Midlands | 937 | 625 | -33% |
| Swansea | Wales | 1,559 | 1,041 | -33% |
| Kingston upon Hull, City of | Yorkshire and Humber | 1,504 | 1,005 | -33% |
| East and North Ayrshire | Scotland | 725 | 489 | -33% |
| Swindon | South West | 1,769 | 1,195 | -32% |
| County Durham | North East | 2,866 | 1,947 | -32% |
| Rochdale | North West | 788 | 536 | -32% |
| West London | London | 10,768 | 7,345 | -32% |
| Belfast | Northern Ireland | 2,339 | 1,596 | -32% |
| North of Northern Ireland | Northern Ireland | 189 | 129 | -32% |
| St. Helens | North West | 592 | 407 | -31% |
| West and South of Northern Ireland | Northern Ireland | 497 | 343 | -31% |
| Sunderland | North East | 961 | 666 | -31% |
| North West Wales | Wales | 1,437 | 998 | -31% |
| South Gloucestershire | South West | 10 | 7 | -30% |
| Powys | Wales | 650 | 458 | -30% |
| Blackburn with Darwen | North West | 921 | 661 | -28% |
| Monmouthshire and Newport | Wales | 1,260 | 910 | -28% |
| Oldham | North West | 940 | 680 | -28% |
| Hartlepool | North East | 232 | 169 | -27% |
| Rutland | East Midlands | 332 | 242 | -27% |
| Bury | North West | 502 | 367 | -27% |
| Tameside | North West | 309 | 226 | -27% |
| Darlington | North East | 763 | 578 | -24% |
| Bolton | North West | 503 | 385 | -23% |

| Local Authority | Region/ nation | W/e 15 March | W/e 12 April | Change on month |
|------------------------|-----------------------|-------------------------|-------------------------|----------------------------|
| Middlesbrough | North East | 858 | 657 | -23% |
| Redcar and Cleveland | North East | 148 | 119 | -20% |
| North Tyneside | North East | 255 | 210 | -18% |
| East Sussex | South East | 20,443 | 17,296 | -15% |
| Rotherham | Yorkshire and Humber | 1,049 | 1,010 | -4% |
| Isle Of Wight | South East | 913 | 897 | -2% |

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