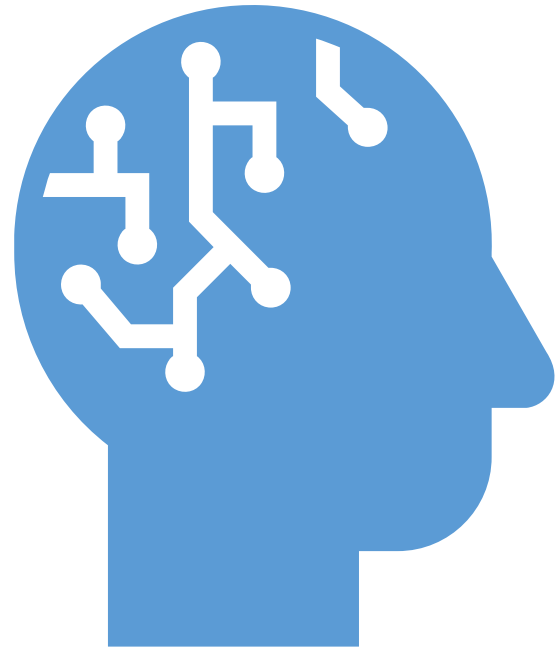


Labour Market Intelligence

SWLEP May 2020



Contents

Data Sources

Swindon & Wiltshire Overview

Swindon & Wiltshire Covid-19 Impact



What data do we have available



Business Register Employment Survey (BRES)
Workforce Jobs Series (WJS)
Annual Survey of Hours and Earnings (ASHE)
Labour Force Survey (LFS)
Annual Population Survey (APS)
Mid-Year Population Estimates



Job postings: 800,000 – 1m postings harvested per month
Normalised job titles connected through Emsi taxonomy to occupations (SOC)
Skills data: hard and soft; current and longitudinal (4 years)
Employers identified



LabourInsight

real-time LMI, with historic job postings since 2012

40,000 data sources; extracting 70 different data points from job ads

View the actual job advert/posting that all reports and data is based on

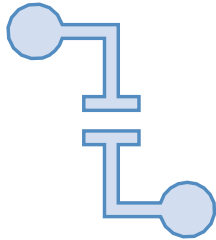
salaries against government data



Swindon & Wiltshire
LOCAL ENTERPRISE PARTNERSHIP

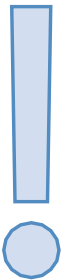
UP TO DATE: E.G. ON 15 JUN, JOB POSTINGS TO 14 JUN AVAILABLE

Analysis based on online job postings data should be treated with care



Key characteristics of the job postings data:

- Real-time data, e.g. on 1 June, showing data up to 31 May
- Indicative, providing a sample of jobs
- More qualitative, providing 'colour and context'
- Rich detail, incl. job titles, locations, employers, skills – anything that's available in a job advert



Therefore:

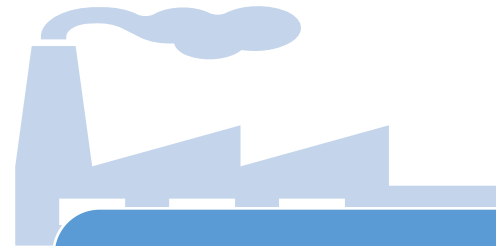
- Treat with extreme caution
- Use as a starting point to identify potential trends
- Find other data sources to corroborate



However, we are starting to see Covid-19 impacts in the government data too



Number of claimants and furloughed, available at the SWLEP level

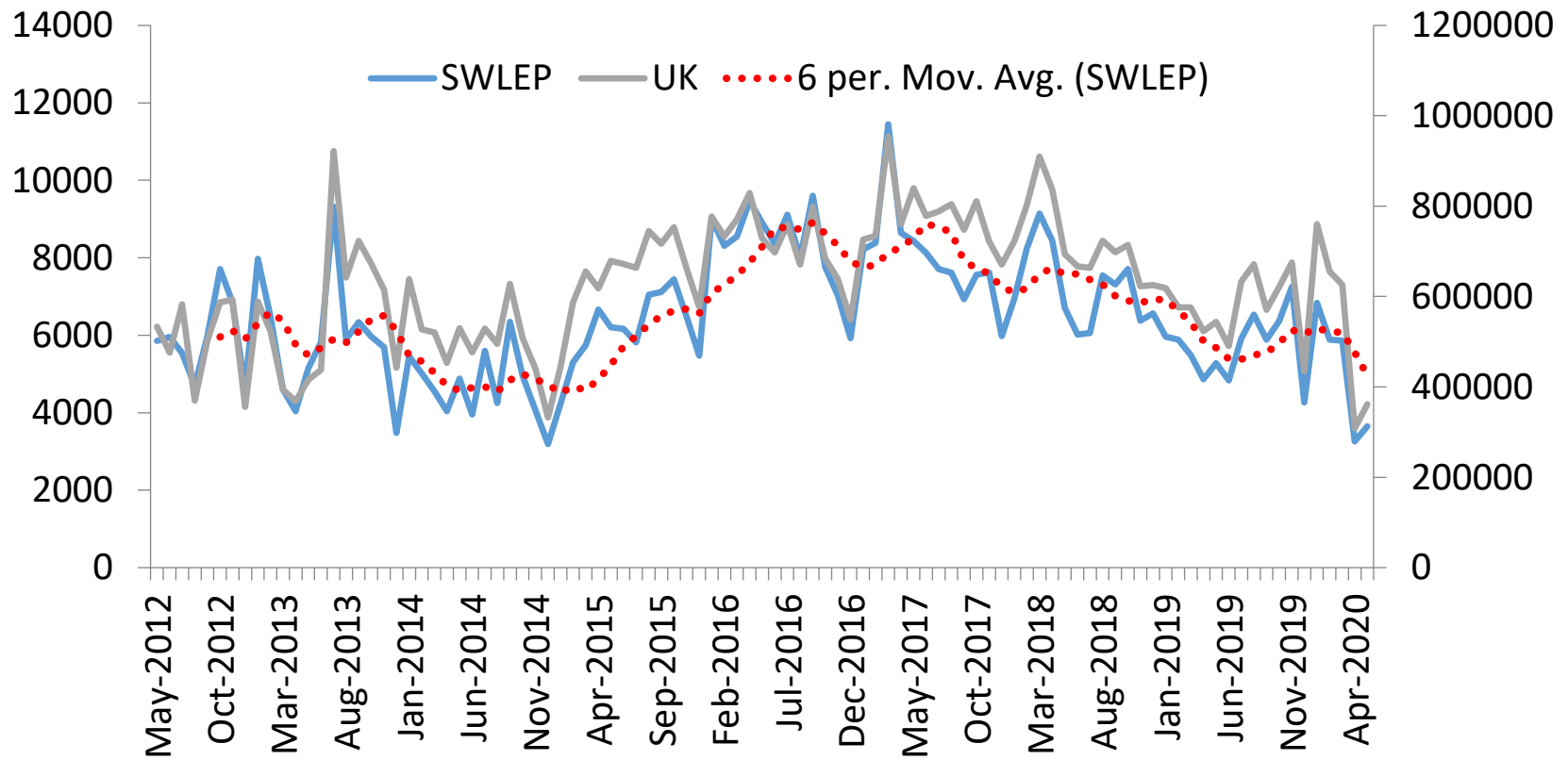


HMRC earnings and furloughed data at the UK level, broken down by industry



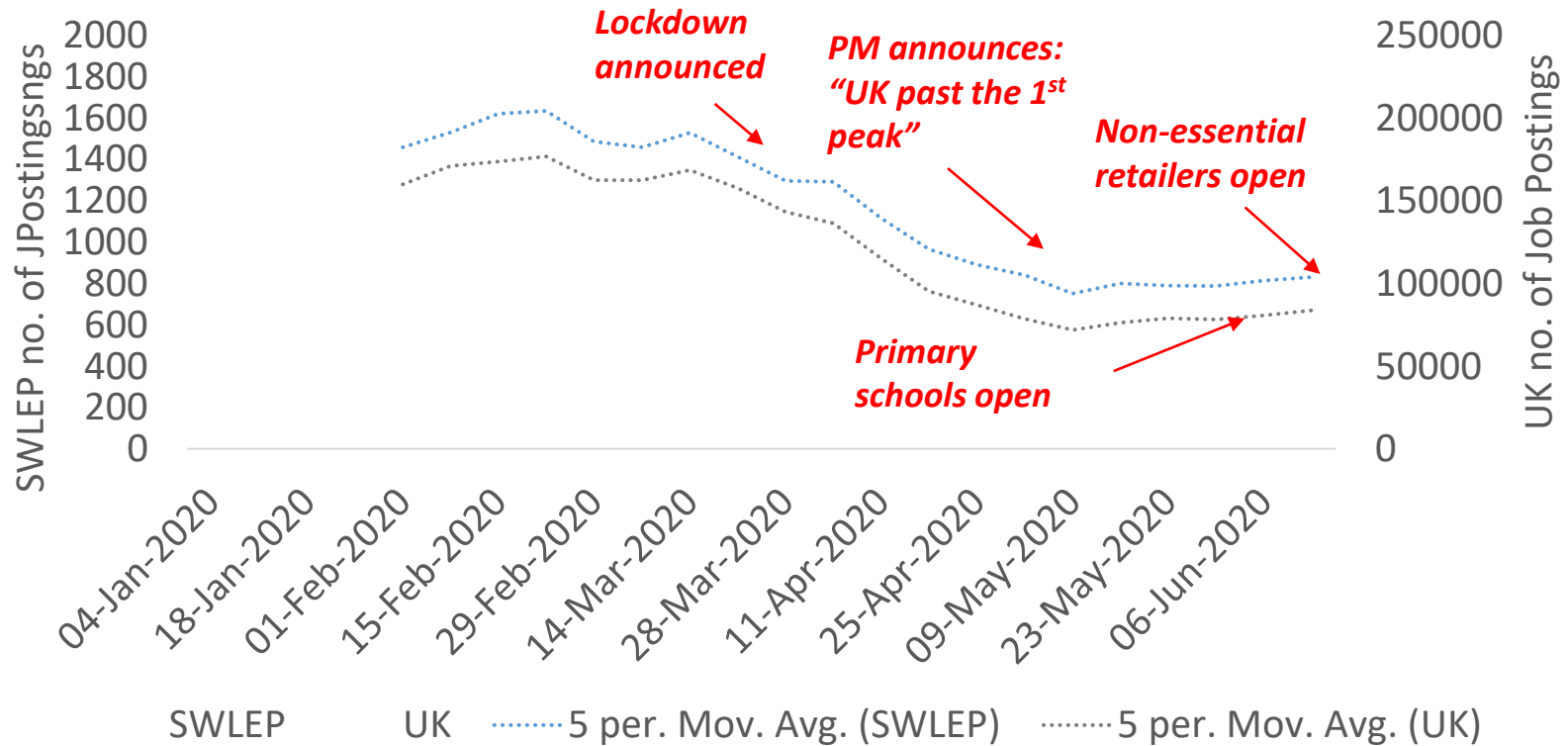
There was a slight increase in job postings between Apr and May 2020

Job Postings, SWLEP vs. UK, May 2012 – May 2020



Job postings seem to have plateaued in May after 2 months of declines

SWLEP vs. UK Job Postings, YTD 15 June, 2020



However, 48 occupations had no job adverts in Swindon and Wiltshire in May 2020

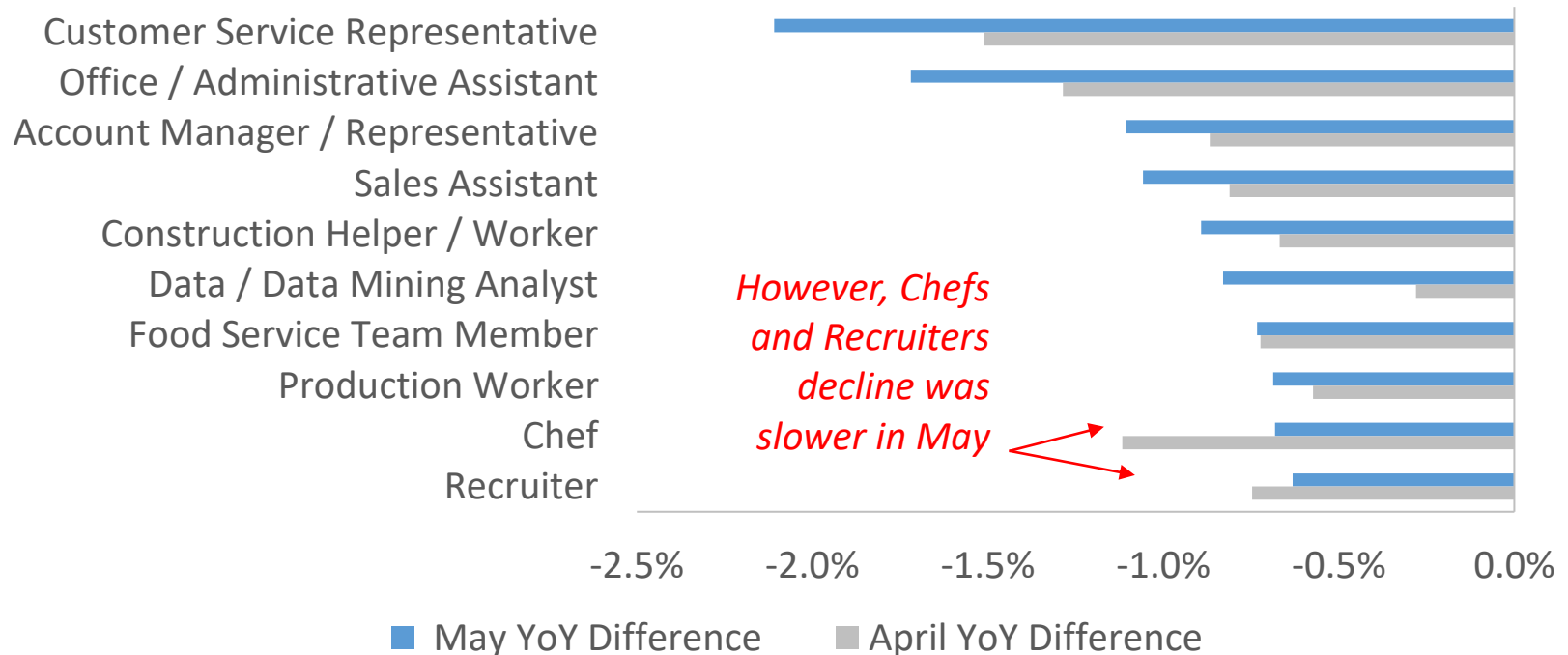
Van / Taxi / Shuttle Driver	Marketing Coordinator / Assistant
Head Waiter/Waitress	Library Assistant / Technician
Repair / Service Technician	Industrial Designer
Plumber	Health and Safety Engineer
Dentist / Orthodontist / Prosthodontist	Business Continuity Planner / Analyst
CAD Designer / Draughtsperson/Draughtsman	Benefit Assessment Officer
Painter	Administration Manager
Data Scientist	Wildlife Biologist
Human Resources Manager	Purchasing Assistant
Fundraising / Development Specialist	Public Relations Manager
Waiter / Waitress	Printers and Print Process Worker
Order Processor / Order Entry Clerk	Manufacturing Engineer
Mobile machine drivers and loaders	Human Resources Assistant
Health Technician / Technologist (Other)	Farm / Nursery / Greenhouse Worker
Dental Hygienist	Document Control / Management Specialist
Restaurant / Food Service Manager	Computer Scientist
Radiology Technician	Barber / Hair Stylist / Cosmetologist
Lifeguard	Data Entry Clerk
Event Specialist	Construction Supervisor
Assistant Practitioner	Chief Executive Officer
Welder / Solderer	Cabinetmaker
Theatre Practitioner / Scrub Nurse	Business Intelligence Architect / Developer
Security Management Specialists	Avionics Technician
Medical Laboratory Technician	Assembler / Fabricator

The most worrying are the 12 occupations in blue boxes, which had no vacancies in Apr or May 2020

But, of 56 occupations with no job postings in April 2020, 44 were advertising again in May 2020

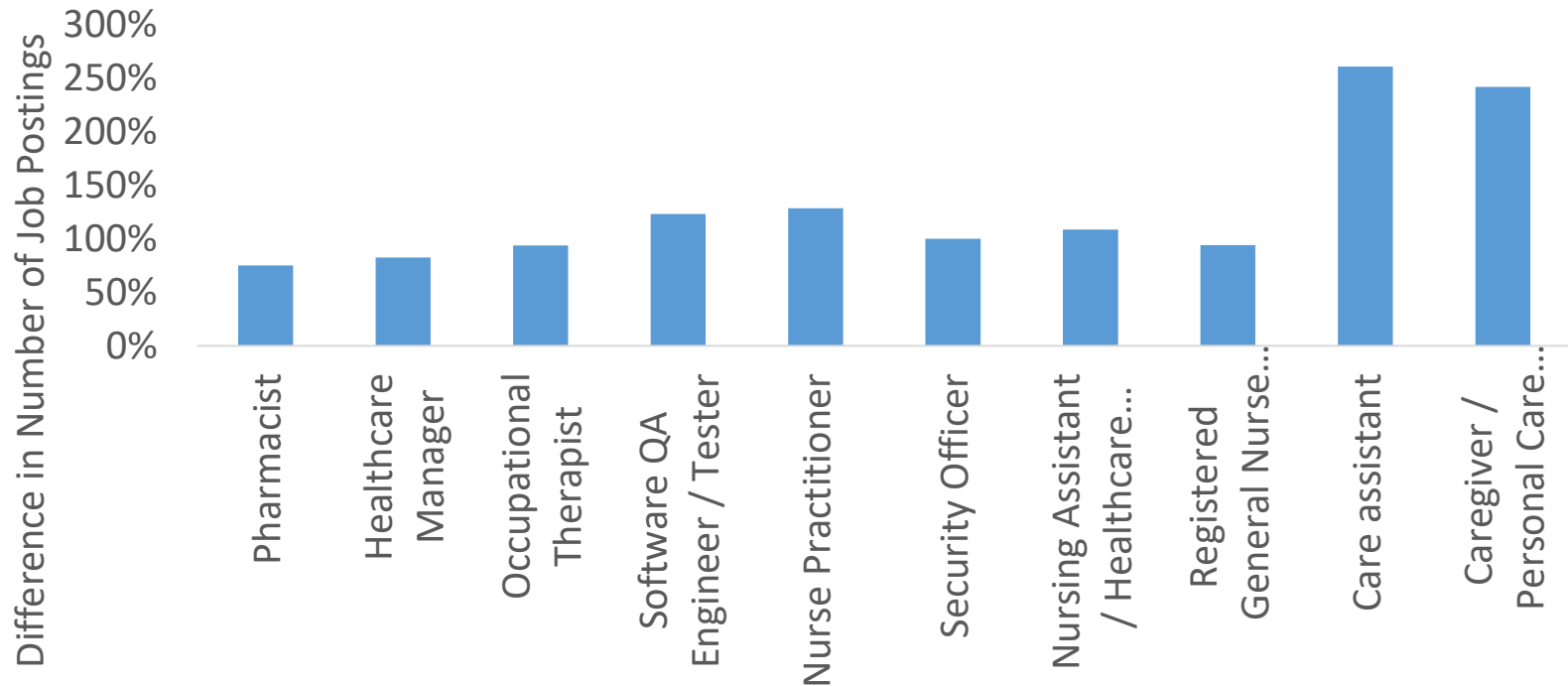
Sales and customer service occupations continued to be amongst the fastest declining

SWLEP 10 Fastest Declining Occupations Apr 2020 vs. Apr 2019
and May 2020 vs. May 2019 (% Total)



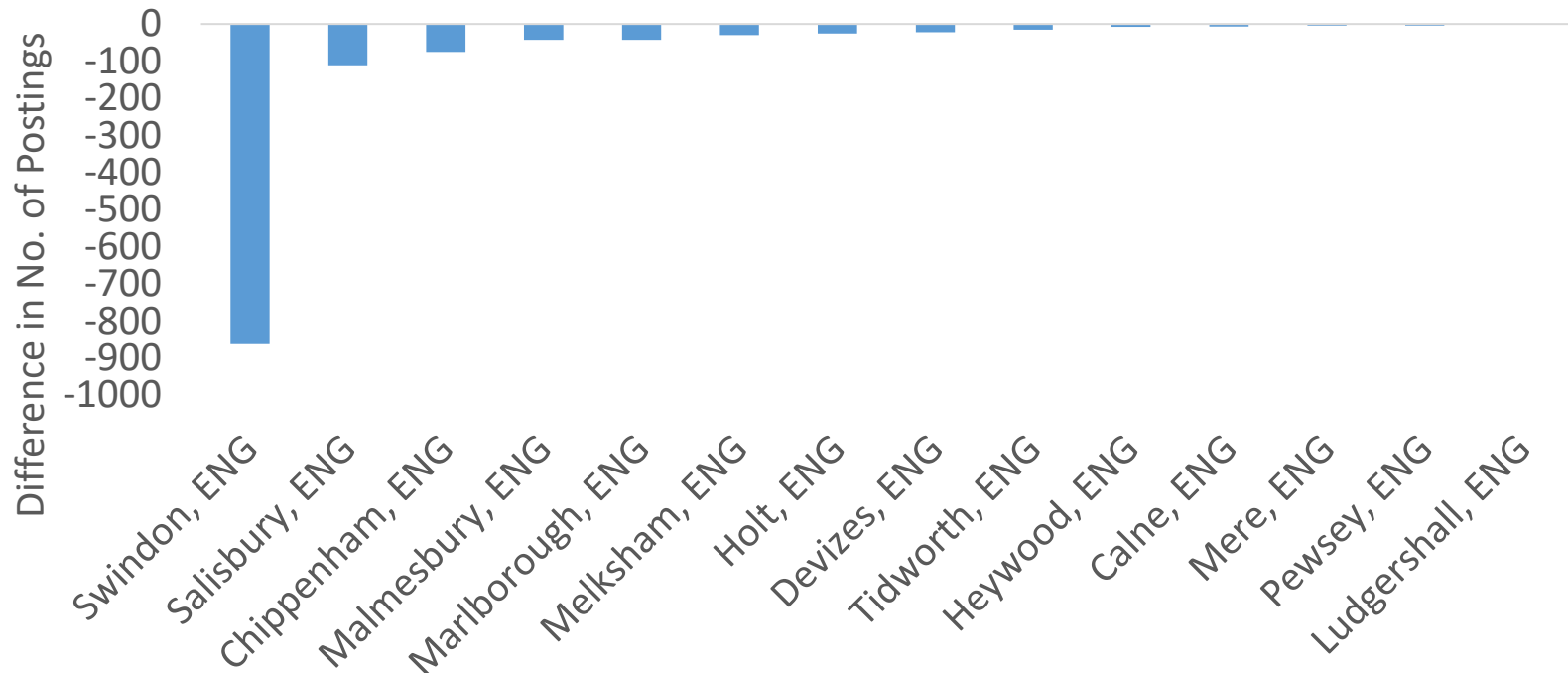
Care and nursing staff jobs continued at the heightened levels

SWLEP Job Postings, May 2020 vs. May 2019, Fastest Growing Occupations



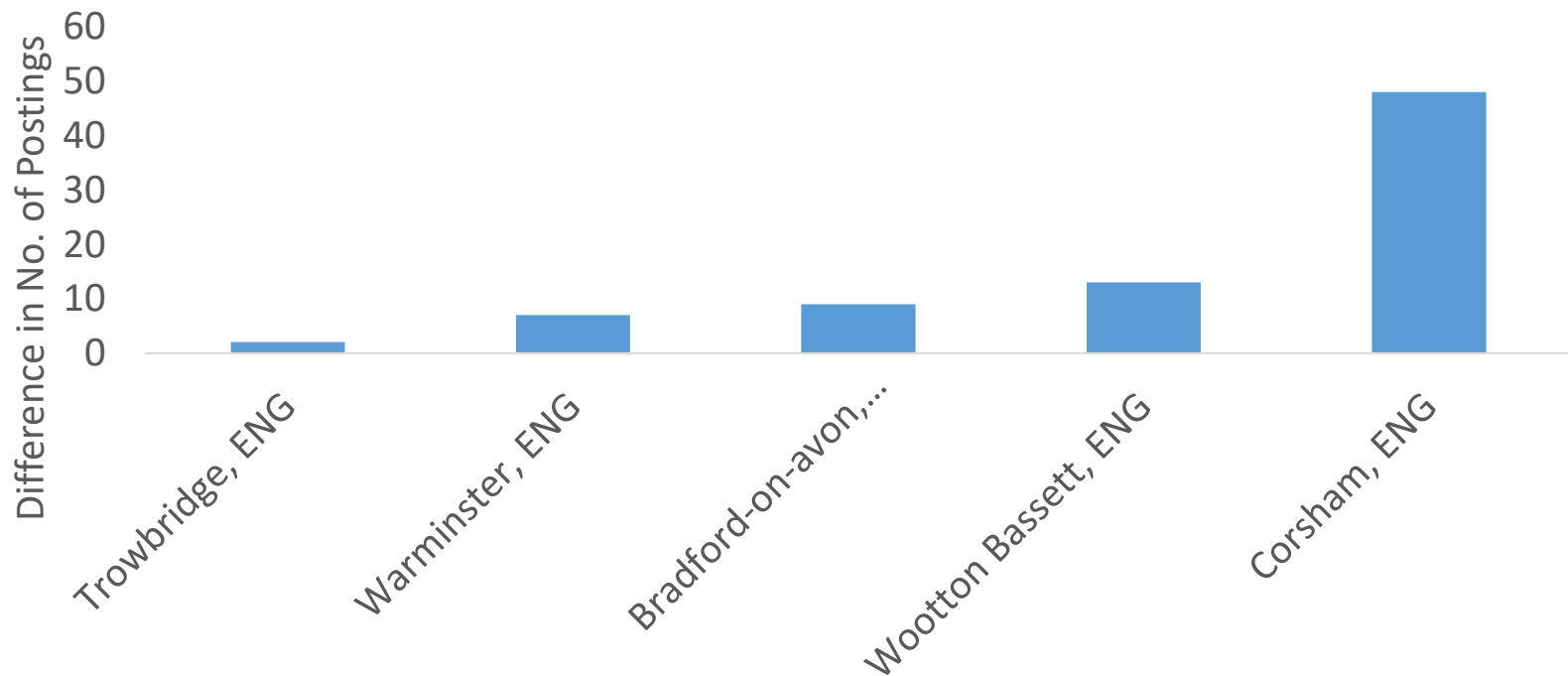
Swindon was responsible for the largest declines, with vacancies down by 1/3

SWLEP Job Postings, May 2020 vs. May 2019, Declines by Town



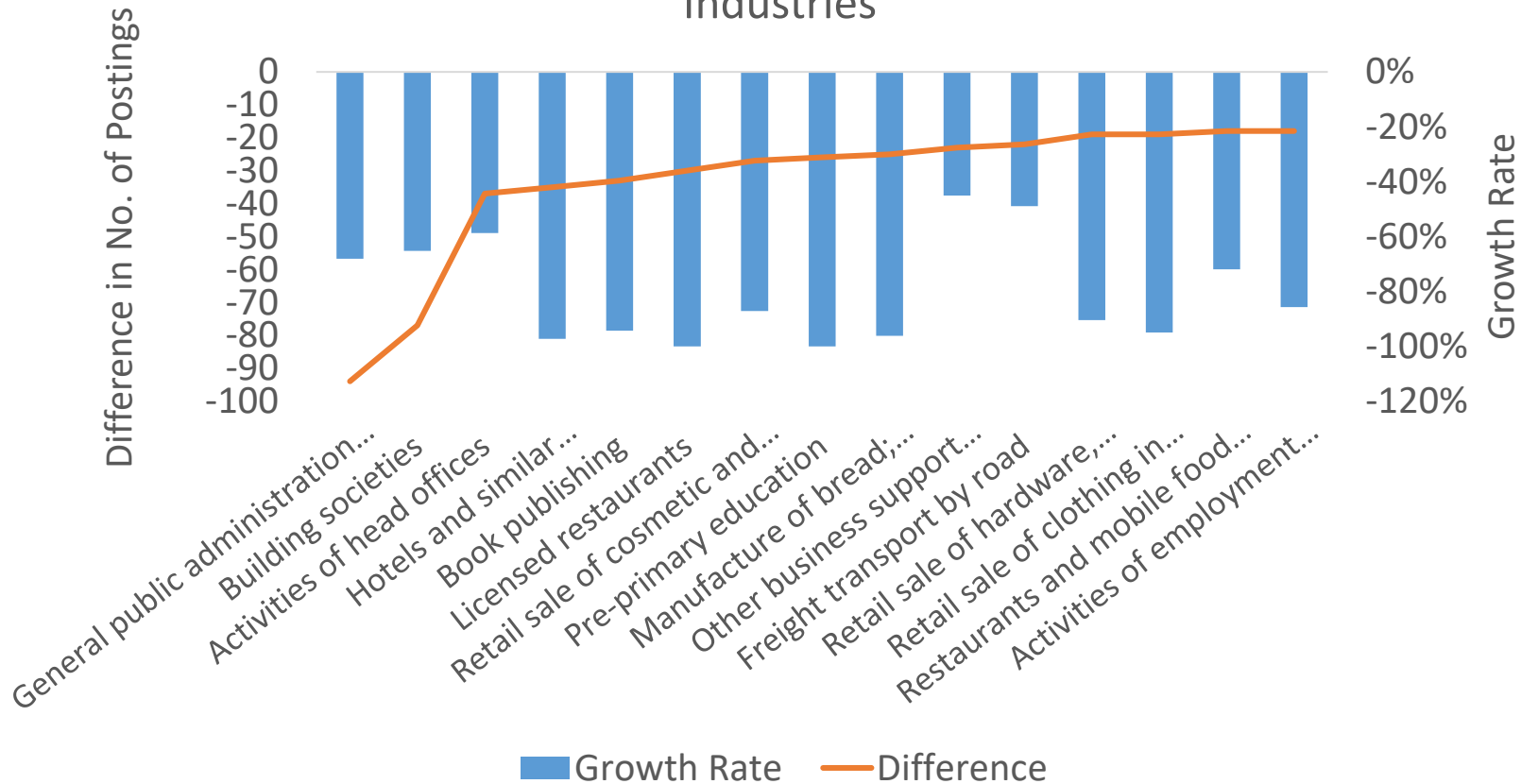
Several towns, however, have recorded increases

SWLEP Job Postings, May 2020 vs. May 2019, Growth by Towns



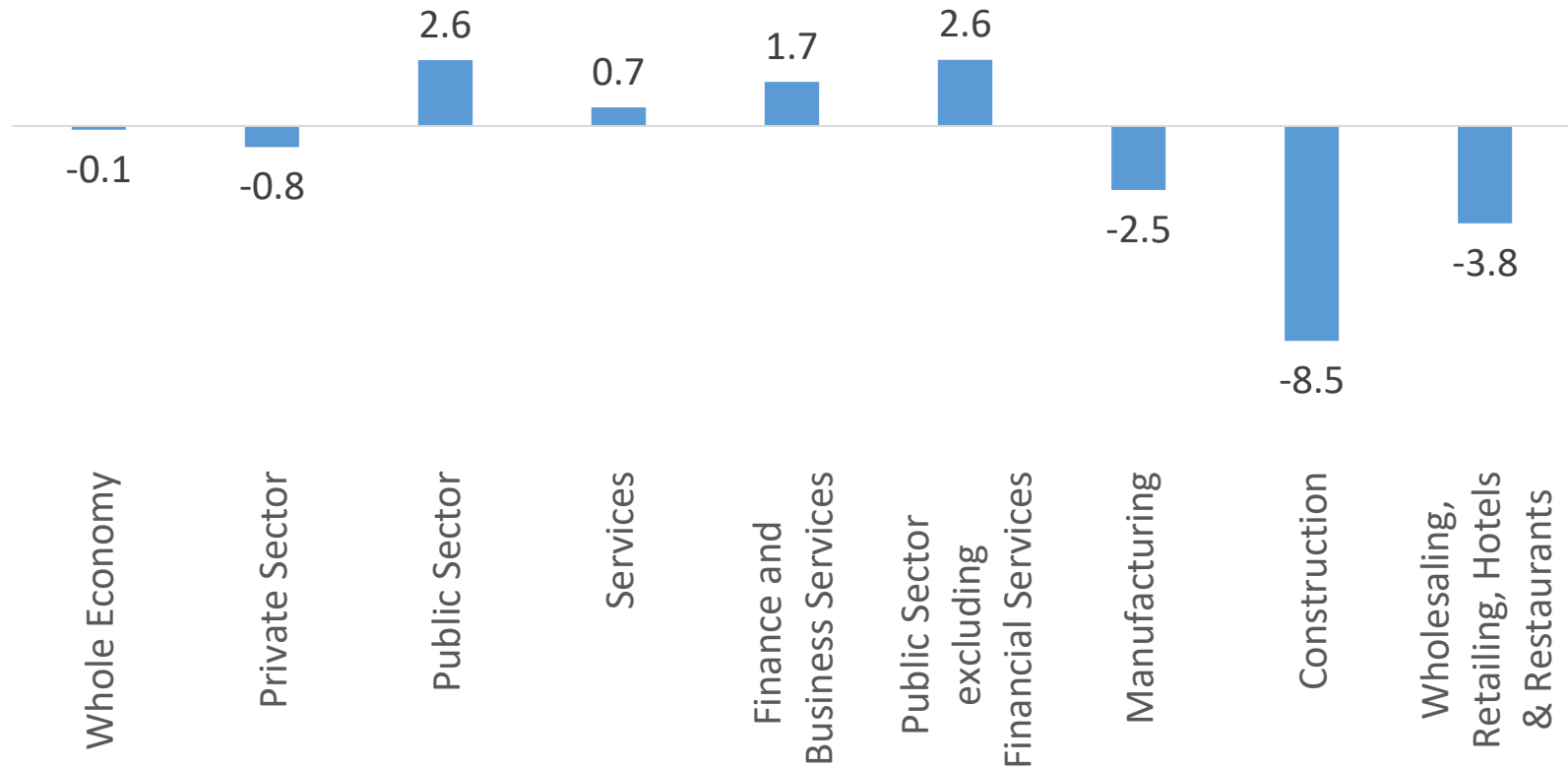
Hospitality and retail sectors have seen the greatest declines

SWLEP Job Postings, May 2020 vs. May 2019, Fastest Declining Industries



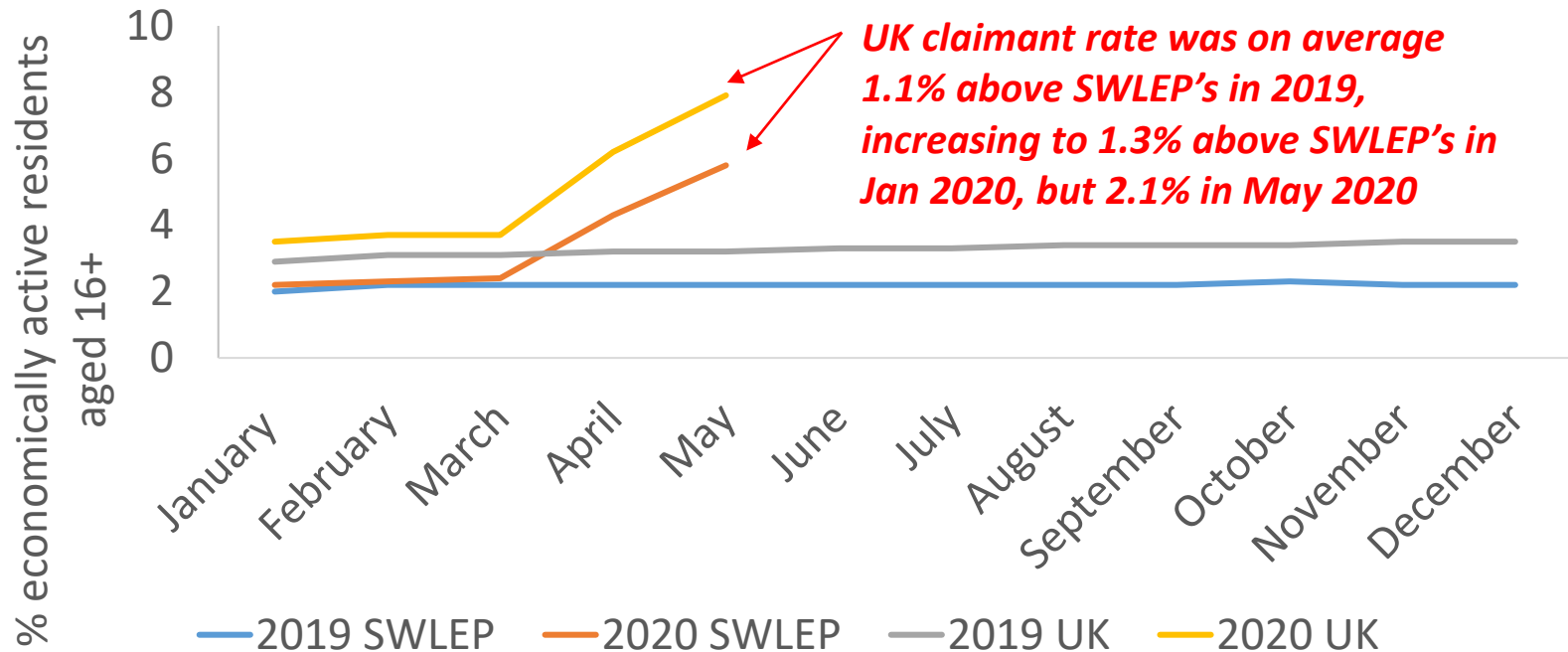
Construction earnings declined most between Mar and Apr 2020

April 2020 UK Average Weekly Earnings: Single Month Growth Rate (%), Not Seasonally Adjusted, Excl. Bonuses, Incl. Arrears



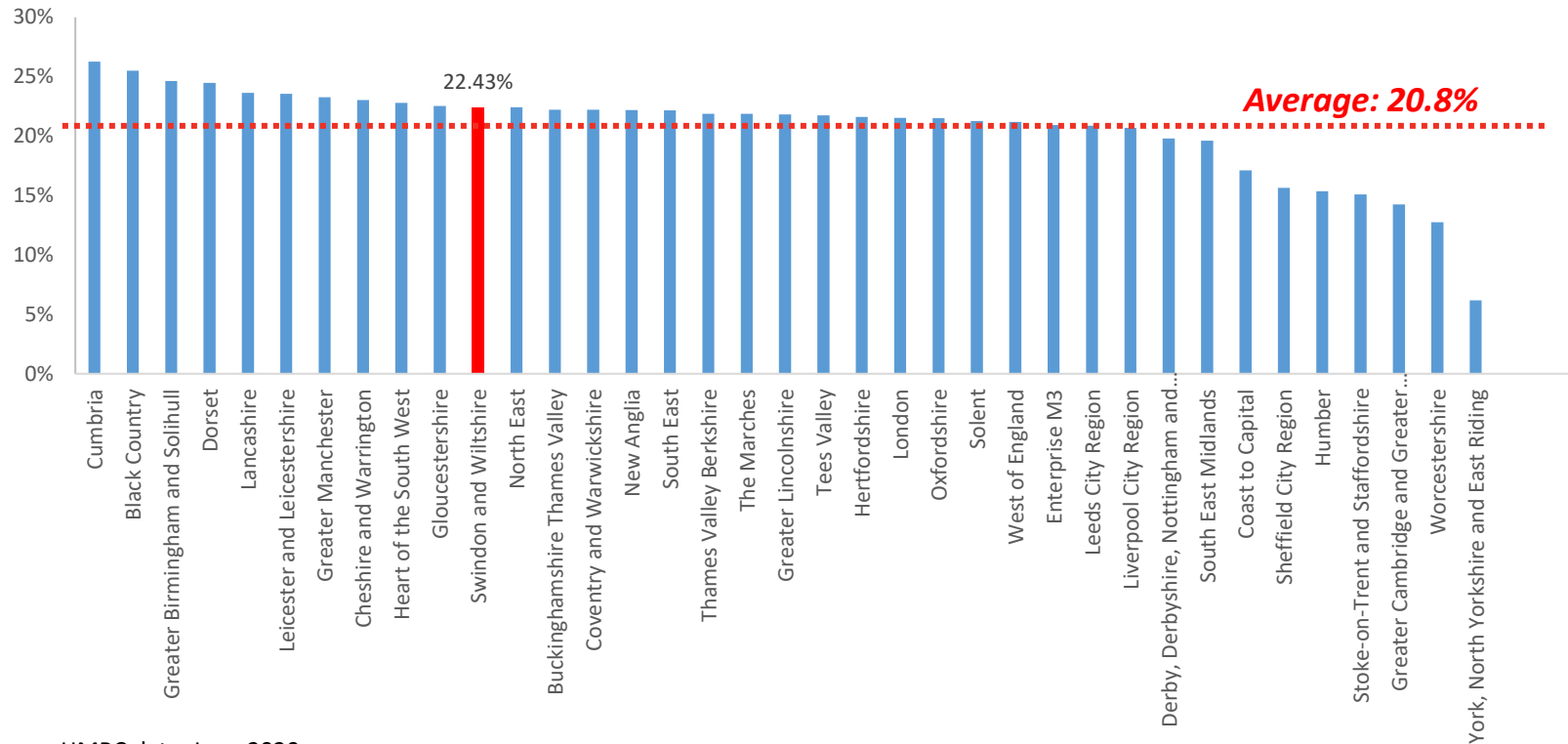
Number of claimants increasing, but SWLEP slightly better than national average

Swindon & Wiltshire Claimants (% of economically active residents aged 16+)



Swindon and Wiltshire were 11th highest LEP in terms of furloughed workers

Furloughed as % of Economically Active



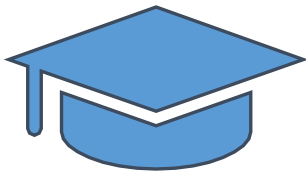
Source: HMRC data, June 2020

This is driven by SWLEP's industry mix: Wholesale And Retail Trade; Accommodation And Food Service Activities; and Manufacturing, which nationally account for nearly 60% of furloughed staff, employ 46% people in SWLEP

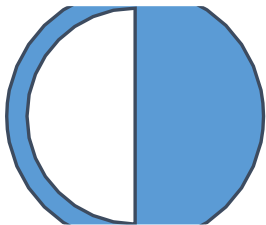
Recent McKinsey report estimates...



Up to 59m European jobs, or 26% of the total, at risk in the short term through reductions in hours or pay, temporary furloughs, or permanent layoffs



c. 80% percent of jobs at risk, or 46m, are held by people who do not have a tertiary degree, making employees without a tertiary qualification almost twice as likely as those with a university degree to have jobs at risk



c. 24m jobs, almost 50% of the jobs displaced through automation and 10% of all jobs, are at risk of displacement though COVID-19 as well

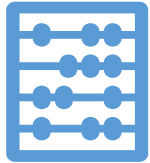


Recap



Job postings

- Still depressed, but levelling off, with 12 occupations without a single job advert in April or May in Swindon and Wiltshire



HMRC data

- Construction has seen the greatest impact in the UK average weekly earnings (-8.5%)
- Followed by Wholesale, Retail, Hotels & Restaurants (-3.8%) and Manufacturing (-2.5%)



Claimant & furloughed figures

- Increasing across the country, with the proportion of economically active residents aged 16+ claiming benefits c. 2.5 times higher in May 2020 vs. May 2019
- SWLEP rates following the national trend, but slightly slower, improving from 1.3% behind the UK in Jan 2020 to 2.1% in May 2020
- SWLEP's proportion of furloughed economically active above the national average, driven by the sector mix



Longer-term trends

- c. 50% of occupations at risk of being displaced by automation in the longer term are also at risk from the coronavirus crisis in the short term