



timewise
TALENT THROUGH FLEXIBILITY

THE TIMEWISE FLEXIBLE JOBS INDEX 2018

RESEARCH PARTNER:

Gartner[®]

An annual index of the proportion of UK jobs advertised with flexible working options

INTRODUCTION

Welcome to the Timewise Flexible Jobs Index 2018. Based on in-depth research across more than 6 million job adverts, it's designed to provide insight into the quality flexible jobs market (by which we mean jobs paid more than £20,000 FTE).

The positive news is that it's a growing market. The proportion of quality jobs that are advertised with flexible working options now stands at 11.1% – up from 6.2% in our first Index, four years ago. It's great to see the concept of 'flexible hiring' beginning to take off. It is now recognised as the important next step in the evolution of flexible working, by some of the UK's most progressive employers.

This last year has also seen the government's Taylor review of modern work, which shone light on the value to workers, employers and the economy of building a fairer flexible jobs market. And

companies are now reporting on their gender pay gaps, bringing into sharp focus the link between the lack of senior women in business and the lack of good quality flexible roles. Meanwhile, tackling skills shortages is a perennial priority for employers.

So the case for 'why' organisations need to offer flexible working from the point of hire has never been clearer.

And yet, the pace of change is far too slow. A recent Timewise study, 'Flexible Working: A Talent Imperative', found that 9 in 10 people now want to work flexibly; which is inversely proportionate to the 1 in 10 supply of quality flexible jobs revealed by this Index.

To speed the rate of progress, a paradigm shift is needed. We now need to focus on 'how' more employers can design better

flexible jobs and adapt their recruitment processes. Only systemic change will start to really turn the dial on the availability of quality flexible jobs.

That's why Timewise is now focusing our attention on working with sectors where operational and behavioural blocks are particularly challenging, helping employers to overcome these blocks and create good flexible jobs.

So watch this space. Next year's Index will report back on the state of the flexible jobs market and also on what we've learnt with employers about how to drive change for the benefit of both business and their employees.

Karen Mattison and Emma Stewart
Joint CEOs of Timewise

"Systemic change is needed to turn the dial on the availability of quality flexible jobs."

EMMA STEWART,
JOINT CEO, TIMEWISE

OBJECTIVES OF THE INDEX

- To help fill a knowledge gap in job market statistics by reporting on quality flexible vacancies
- to track progress in flexible hiring by updating the index annually
- to enable employers to measure how well their recruitment practice keeps pace with the index, or betters it.

METHODOLOGY

The Timewise Flexible Jobs Index 2018 is based on analysis of 6 million job adverts from over 300 UK job boards in the period January to April 2018¹. The data source was CEB Talent Neuron, and jobs were filtered using 14 keywords relating to different forms of flexible working. The following job types were excluded from the analysis: temping, self-employed, commission only, freelance, franchise opportunities.

WHAT DO WE MEAN BY A 'QUALITY FLEXIBLE JOB'?

Flexible

Different organisations use different language for 'flexible working' – agile working or smart working for example. But we're all talking about the same thing: working patterns that are different from a rigid 9 to 5 at the employer's premises.

In this report, 'flexible job' means any advertised vacancy that is either part-time or, if full-time, clearly states that the job is open to flexible working. Different forms of flexible

working include: part-time, working from home, flexible start and finish times, remote working, term-time, job-share, annualised or compressed hours.

Quality

By 'quality' we mean:

- jobs with an annual FTE salary of £20,000 or higher²
- excluding jobs that are: low paid zero hours, temping, self-employed, freelance, franchise opportunities.

SLOW YEAR ON YEAR GROWTH

PROPORTION OF JOBS AT £20K+ FTE, ADVERTISED AS BEING OPEN TO FLEXIBILITY

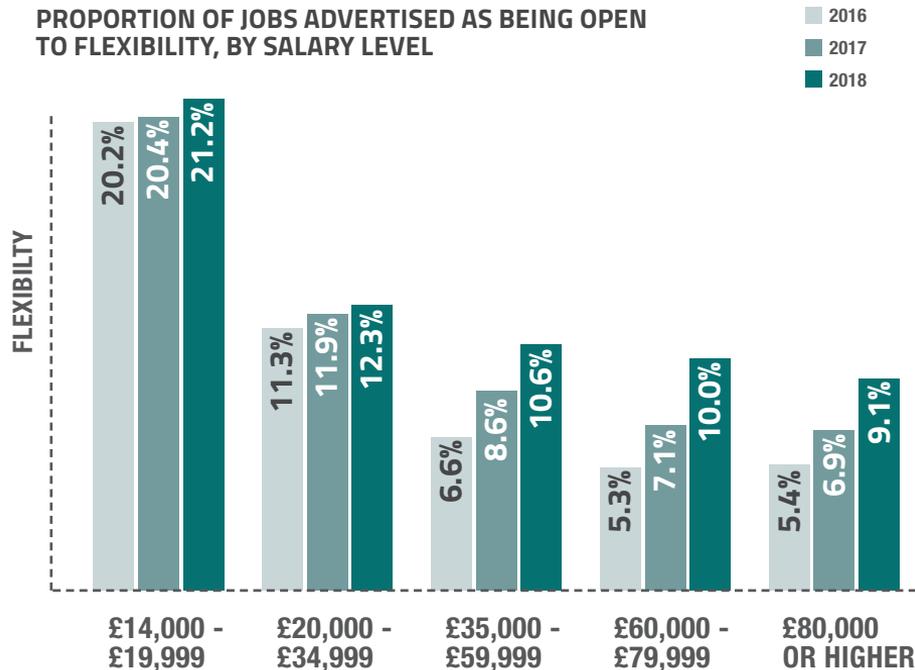


KEY POINTS

- The proportion of quality flexible jobs is creeping up by only a few percentage points each year.
- In sharp contrast, the demand for flexible working has soared in recent years. A 2017 Timewise report put employee demand for flexible working at 87%³.
- Therefore, in spite of the increase in the proportion of flexible jobs, the situation is actually getting worse not better. Supply (11%) and demand (87%) have never been more starkly out of sync.

FLEXIBILITY DECLINES AS SALARY RISES

PROPORTION OF JOBS ADVERTISED AS BEING OPEN TO FLEXIBILITY, BY SALARY LEVEL

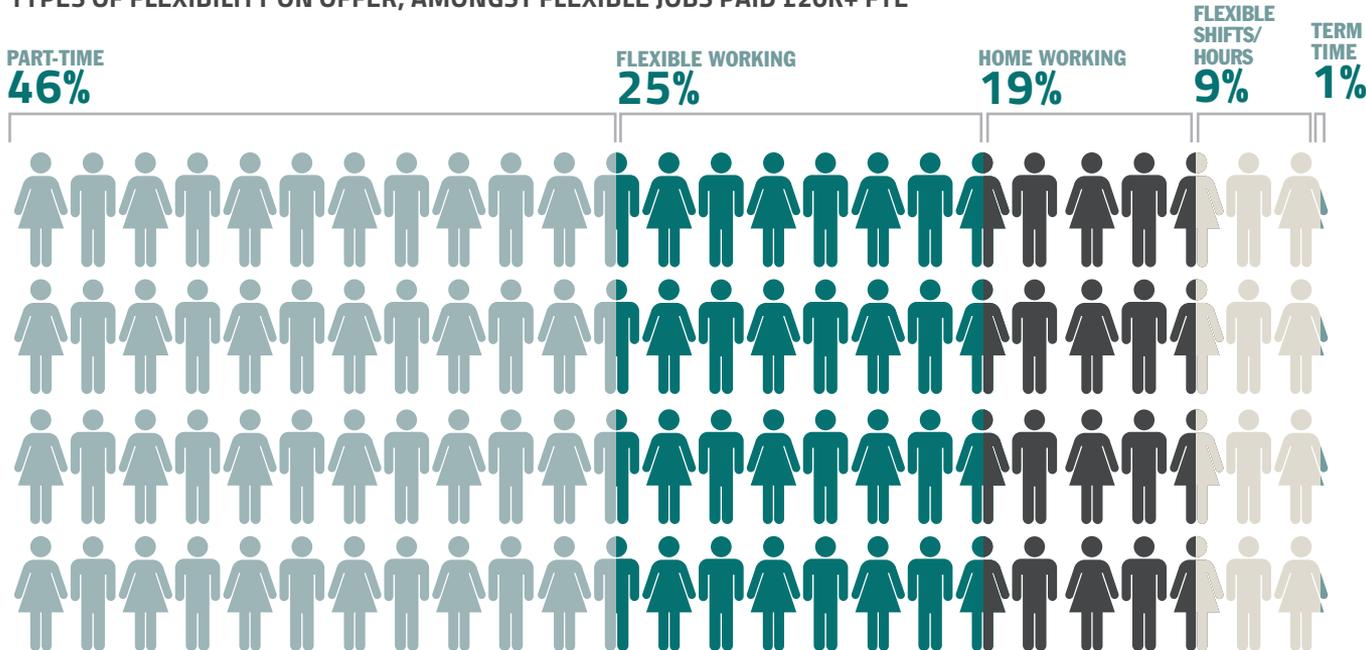


KEY POINTS

- Availability of flexible jobs is at its best below our quality jobs threshold of £20k FTE, at 21.2% in 2018. Other research studies⁴ have also found a correlation between low-paid jobs and flexibility (in particular part-time work).
- There then follows a sharp drop in the availability of flexible jobs - from 21.2% for jobs paid £19k or less, to 12.3% for those in the £20k-£34k salary band (2018 data). This poses a huge challenge for low paid flexible workers who want to progress to a higher salary whilst retaining their flexible arrangement.
- Interestingly, the three year trend shows that the proportion of flexible jobs at salaries above £35k is increasing at a much faster rate than lower salaries. So the flexible jobs ratio is beginning to flatten out above £20k.
- In terms of career progression for flexible workers, this means that once past the £20k quality jobs threshold, opportunities are now available at a reasonably similar rate at all salary levels. This is a significant improvement on the situation only three years ago, when the availability of flexible jobs at £60k+ (5.3% in 2016) was less than half that for jobs paid £20k-£34k (11.3% in 2016).
- However, the most significant point of all is simply that the availability of flexible jobs falls woefully short of demand (87%³) at ALL salary levels – even low-paid jobs.

WHICH TYPES OF FLEXIBLE WORKING ARE MOST COMMON?

TYPES OF FLEXIBILITY ON OFFER, AMONGST FLEXIBLE JOBS PAID £20K+ FTE



KEY POINTS

- Nearly half of all quality flexible jobs are part-time.
- The greatest potential for growth in the flexible jobs market lies with the other forms of flexibility, as employers can potentially open up their full-time jobs to remote working or flexible hours. Indeed, this is clearly beginning to happen, as the share of flexible jobs that are open to considering flexible working generally has grown to 25% - up from 19% last year.
- The absence of job-share from the chart will be of interest to some. In spite of this being a much talked-about flexible option, the numbers of advertised job shares are too scarce to register reliably.

FLEXIBILITY VARIES WIDELY BY TYPE OF ROLE

PROPORTION OF JOBS AT £20K+ FTE, ADVERTISED AS BEING OPEN TO FLEXIBILITY, BY ROLE TYPE

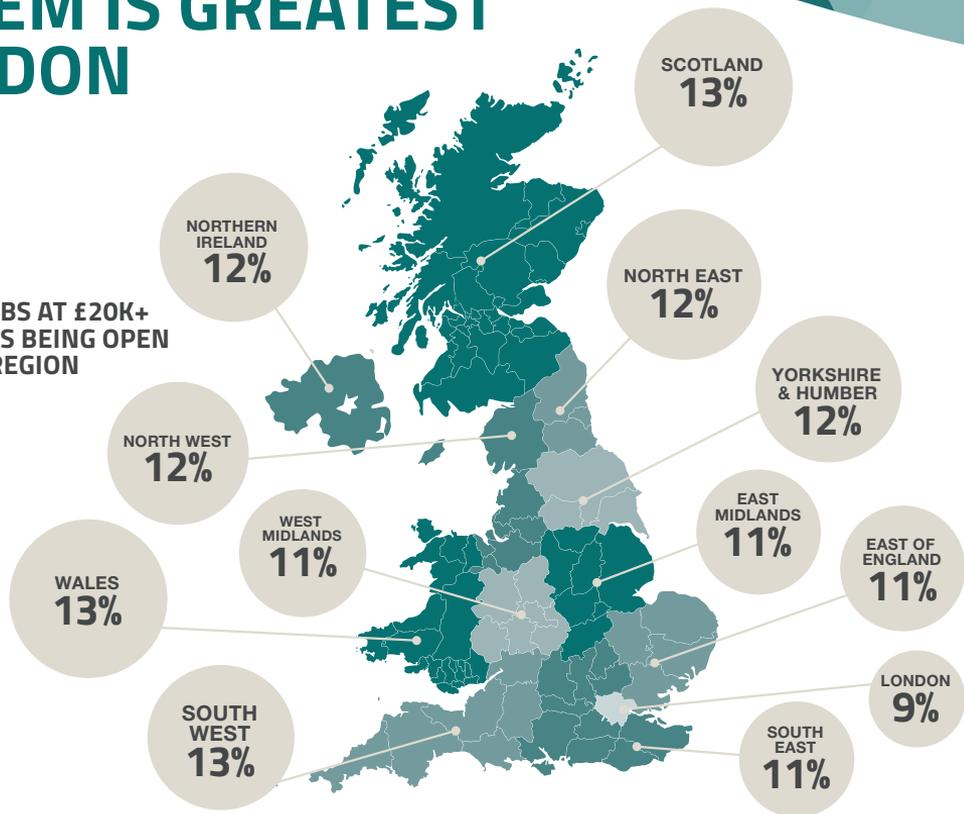


KEY POINTS

- Health and social services are significantly ahead of all other categories, reflecting the shift-work patterns of nurses and care workers, and possibly the fact that these are largely 'feminised' roles.
- Low rates of flexibility in areas such as maintenance, engineering, manufacturing and construction may also stem from gender issues.
- Many 'professional' roles also suffer from lower than average rates of flexible working. This goes hand in hand with the earlier finding of lower rates of flexibility at higher salaries.

PROBLEM IS GREATEST IN LONDON

PROPORTION OF JOBS AT £20K+ FTE, ADVERTISED AS BEING OPEN TO FLEXIBILITY, BY REGION



KEY POINT

- The proportion of quality flexible jobs is low in all parts of the UK, but at its lowest in London. This reflects a regional bias that can also be seen in ONS data on the part-time employment market⁵.

SUMMARY

KEY CONCLUSIONS

- The proportion of quality jobs (paid £20k+ FTE) which are advertised with flexible working options is only 11.1%. This proportion has increased over the four years that Timewise has produced this Index, but far too slowly – it is creeping up by only one or two percentage points per year.
- The proportion of quality flexible jobs is very low, falling well short of the extremely high demand - an estimated 87% of employees want to work flexibly³.

IMPLICATIONS FOR FLEXIBLE WORKERS

- People who work flexibly, particularly part-time, often get 'stuck' in their current roles, because there isn't a flexible jobs market for them to go to. Even at their current employer, it's hard for flexible workers to progress, as roles they might move up to are not openly advertised as flexible. As a result, it's common practice for flexible workers to trade down to get the flexibility they need, or even abandon their careers entirely.

IMPLICATIONS FOR EMPLOYERS

- **Skills drain:** The tendency of flexible workers to trade salary for flexibility, or even abandon their careers, results in a significant loss of skills to business and the economy.
- **Missing out on candidates:** The gap between the proportion of people who want to work flexibly (87%³) and the availability of flexible opportunities at the point of hire (11.1% for quality roles above £20k FTE) is causing a talent bottleneck. Employers are cutting themselves off from a proportion of the candidate market, by not stating their openness to flexibility in their recruitment advertising. These 'lost' candidates include some of the very best available talent.
- **Exacerbating the gender pay gap:** Although many groups of people want to work flexibly (including older workers, millennials, carers and people with their own health concerns), mothers remain disproportionately disadvantaged by the scarcity of quality flexible jobs. To progress women through the middle stages of their careers, and address gender equality issues, employers need to openly promote the availability of flexible working in senior roles.



SO, WHAT CAN EMPLOYERS DO?

- **Understand job design:** Employers who take a more proactive approach to job design, understanding when, where and in how much time a job can be done, will be better placed to attract and progress the best and widest possible talent.
- **Build flexible career pathways:** Having adapted to flexible job design, employers can motivate and support their flexible workers to progress their careers, by internally promoting roles as being open to flexibility. Neglecting this issue causes a failure in the talent pipeline.
- **Adapt to flexible hiring:** The final step is to adapt to hiring people on a flexible basis. Employers simply have to ask themselves: 'Can this role be worked flexibly in any way?' Then, if the answer is 'yes', say so clearly in their recruitment advertising. This doesn't commit an employer to making the role flexible, it just means being open to discussion for the right candidate.

Timewise works to unlock the flexible jobs market in the UK. We share market insights on flexible working and flexible hiring, deliver training and consultancy to help businesses attract and develop the best talent, and conduct research such as this annual Flexible Jobs Index. We also run Timewise Jobs, a jobs board for roles that are part-time or open to flexibility.

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1. The most recent possible months have been analysed for this research, but these are not the same as in previous years, when the months analysed were September to December. In previous years there was a longer gap between fieldwork and publication, so eg the 2017 Index was actually based on data from Sept-Dec 2016. For this year's 2018 Index, we checked the months Sept to Dec 2017 to ensure the index shows an accurate year on year trend, which we are satisfied it does. The variance in the overall proportion of flexible jobs between Sep-Dec 2017 and Jan-Apr 2018 is less than 0.2%.
2. £20,000 is the threshold for meeting minimum income standards for parents, older people and disabled people. Source: How Flexible Hiring Could Improve Business Performance and Living Standards, Joseph Rowntree Foundation, 2016.
3. Flexible Working: A Talent Imperative, Timewise, 2017
4. Sources include: The Great Escape? Low pay and Progression in the UK Labour Market, Social Mobility Commission, 2017 and The Gender Wage Gap, Institute for Fiscal Studies, 2016
5. ONS Regional Labour Statistics, May 2018, 22% of employees in London work part-time, the lowest proportion of any UK region (average proportion for the UK is 27%).