



timewise
TALENT THROUGH FLEXIBILITY

THE TIMEWISE FLEXIBLE JOBS INDEX 2020

THIS YEAR:
insights into how
the pandemic has
impacted the flexible
jobs market

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

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INTRODUCTION

Every year, our Flexible Jobs Index highlights the disconnect between the demand for flexible working, the number of people working flexibly and the number of jobs that are advertised as flexible. And this year, of all years, we were hoping to see a significant change in the right direction.

At the start of 2020, the picture looked like this: 9 in 10 people wanted flex, 6 in 10 people worked flexibly¹, but less than 2 in 10 job adverts offered flex. Then, in late March 2020, Covid-19 ripped up the rule book on how we work. The proportion of people working from home shot up from 6% to 43% within a couple of months, settling to 37% by June².

So, did the number of flexibly advertised jobs rise to match? Unfortunately, not; instead, the gap between the recruitment market and the employment

market for flexible working grew wider still. The proportion of jobs advertised as flexible rose by only a small amount, from 17% before the pandemic to 22% during and since lockdown (with home-working jobs representing about one third of the 22%).

Clearly, despite the seismic change in the way people are working, employers are still failing to reflect current working practices in their recruitment advertising, leaving employees and candidates who need to work flexibly with few or no options.

HOW PERMANENT IS THE INCREASE IN HOME-WORKING?

The jury is still out on whether the increase in home-working forced by the pandemic will become a permanent feature. A small sampling of home-working job adverts suggested that

many of these newly created home-based jobs are likely to revert to the workplace when possible. And there has been very little movement in the availability of other forms of flexible working (such as part-time and flexible hours).

Yet reverting to pre-pandemic norms would be a huge missed opportunity to rethink how we work, and to unlock more good jobs to flex at the point of hire. Various surveys show that many people are expecting to retain the flex they have gained³, so post-Covid access to some form of flex or hybrid working will be critical for talent acquisition and retention. With some roles still hard to fill, and some industries struggling with persistent skills shortages, smart employers will promote flexible working as an employee benefit in job adverts.

A DECIMATED JOBS MARKET

Additionally, the outlook for jobseekers needing to work flexibly is starker now than it has ever been. The slight rise in the proportion of flexible jobs has coincided with the decimation of the jobs market, which halved during lockdown. By July-Sept, the volume of available jobs was still less than two thirds of the pre-pandemic level.

There are huge challenges ahead, and many more job losses still to come, once the furlough scheme finally ends. More people than ever will be at risk, both in trying to keep their jobs and also find new ones. And flexible workers are likely to be hardest hit, as they are more likely to have additional complex challenges, and face a higher risk of falling out of the workplace, than their non-flex counterparts.

INTRODUCTION

In some cases, this is down to demographics; flexible workers are more likely to be women needing to balance work with caring commitments, or older workers, or people with health issues. In others, it's sector related; low-paid flexible workers are being displaced from frontline jobs in retail or hospitality and struggling to take their part-time or flexible arrangements into other sectors.

THE CASE FOR MORE FLEXIBLE RECRUITMENT

The knock-on effect of all of this is that the brunt of this pandemic-induced recession is being borne by low-paid workers, particularly women. The Resolution Foundation has shown that one third of those in the lowest paid quartile have lost their jobs, been furloughed, or lost hours and pay; for

the highest paid it was 15%⁴. And the IFS found that women are about one third more likely than men to work in a shut-down sector⁵. These groups are disproportionately more likely to work part-time or have flexible shift patterns.

So, what's the answer? Put simply, employers need to think beyond home-working (which is not an option in many roles) and redesign more jobs to offer wider forms of flexible working, at all pay levels and in all role types. This will help keep critical skills in the jobs market, ready for the economic recovery, and create a more level playing field for disadvantaged groups who need to work reduced or flexible hours. Part-time arrangements also create an opportunity to share what work there is amongst a greater number of people, leaving less people behind.

Without such a change, thousands of workers who lose their jobs during this recession will find themselves FLEXCLUDED from work, as (currently) so few jobs are advertised with the option to work either flexibly or part-time. We can't let that happen.



Emma Stewart
CEO, Timewise

- 1 CIPD, 2019, Flexible Working in the UK
- 2 Alan Felstead and Darja Reuschke, 2020, Homeworking in the UK: Before and During the 2020 Lockdown.
- 3 For example: Alan Felstead and Darja Reuschke, Homeworking in the UK: Before and During the 2020 Lockdown found that 88% of those working from home wanted to continue to do so 'in some capacity' in the future.
- 4 Resolution Foundation, A new settlement for the low paid
- 5 IFS, Sector shutdowns during the coronavirus crisis: which workers are most exposed?

HOW THE INDEX CONTRIBUTES TO JOB MARKET KNOWLEDGE

- The index fills a knowledge gap in job market statistics by reporting on advertised flexible vacancies, where flexible working is offered as a positive benefit to candidates. By updating the index annually, we are tracking progress in flexible recruitment.
- The index enables employers to benchmark their recruitment practices around flexible working against national averages - by salary, role type, region and types of flexibility offered.
- Additionally, in this first year of covid, we explore the pandemic's impact on the job market across three periods: pre-covid, during first national lockdown, and during the first three months of lockdown easing. The increase in home-working is a particular focus.

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METHODOLOGY

The Timewise Flexible Jobs Index 2020 is based on analysis of a total of 6 million job adverts from over 450 UK job boards across 3 periods: 24 Dec 2019 to 23 March 2020 (the 3 months pre-lockdown); 24 March to 3 July 2020 (UK national lockdown); 4 July to 3 Oct 2020 (the first 3 months of lockdown easing).

The data source is Gartner, and jobs were filtered using 17 keywords relating to different forms of flexible working. As our aim is to track progress in 'quality' permanent jobs, the following job types were excluded from the analysis: temporary jobs, self-employed, freelance, commission only. Additional data adjustments have been made to exclude job adverts where flexible working is mentioned, but not as an employee benefit.

WHAT DO WE MEAN BY A 'FLEXIBLE JOB'?

In this report, 'flexible job' means any advertised vacancy that is either part-time or offers home-working, flexible start and finish times, flexible shift patterns, remote working, term-time, or job-share. Additionally, jobs that generically offer 'flexible working' or 'agile working' are tracked; these tend to be full-time jobs where the employer is open to flexible working patterns by arrangement with the candidate.



SUMMARY OF KEY FINDINGS

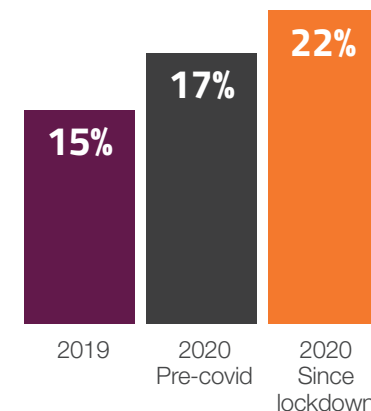
THE OVERALL PICTURE

- The proportion of job adverts offering flexible working rose slightly to 17% at the start of 2020 (from 15% in 2019). The rise in flexible recruitment at this point of the year, before the impact of Covid-19, was continuing at the same slow pace as the previous 5 years.
- During national lockdown in Spring 2020, the rate increased to 22% and remained the same as lockdown eased. More than 1 in 5 jobs were offering flex.
- Even at this increased ratio, the availability of flexible jobs fails to match actual working patterns in the workplace – 6 in 10 employees work flexibly¹. And it lags even further behind the extremely high demand for flexible working – 9 in 10 employees want it².
- Moreover, it is uncertain how much of the increase in flexible recruitment will be sustained when the pandemic eventually subsides. A close analysis of 1,000 home-working job adverts that referenced the pandemic found that many employers (52% of the sample) are intending to revert to the office when possible.

DIFFERENCES BY SALARY

- At the start of the year, as in all previous index reports, jobseekers' access to flexible working was significantly higher amongst low paid vacancies. 25% of jobs paying less than £20k FTE offered flex, compared to ratios of 15% to 17% for all higher salary bands.
- During and since national lockdown, steeper increases in flexible recruitment at the higher salary bands have flattened out the difference. The ratio is now broadly similar across all salaries, though still slightly higher for roles paid less than £20k FTE (26%, versus ratios of between 20% and 25% for the higher salary bands).
- The sharp increase in flexible recruitment at higher salaries reflects the fact that these roles tend to adapt more easily to home-working.

PROPORTION OF JOB ADVERTS OFFERING FLEXIBLE WORKING



¹ Flexible Working in the UK, CIPD, 2019

² Flexible Working: A Talent Imperative, Timewise, 2017

SUMMARY OF KEY FINDINGS

DIFFERENT TYPES OF FLEXIBILITY

- Part-time and generic flexible working have always been the two most commonly offered types of flex, and this was the case at the start of 2020.
- During lockdown and into lockdown easing, all forms of flex increased in the jobs market. Unsurprisingly, the rise was greatest for home-working, where the ratio more than doubled (from 3.4% to 7.7%).
- However, at 7.7%, the incidence of home-working jobs is astoundingly low given the wholesale change in the workplace. It is still the case that more jobs offer part-time (8.4%) or generic flexible working (8.2%).
- A troubling disparity is developing across salary levels, that will cause blocks in career progression for people who need flexibility. Part-time is common amongst the lowest paid jobs but is relatively rare in higher paid roles. Conversely, home-working and flexible working are disproportionately offered at higher salary levels and are rarely offered in low-paid jobs.

FLEXIBILITY BY ROLE CATEGORY

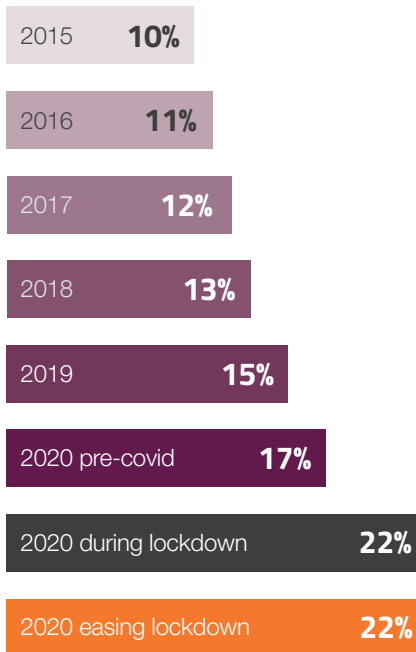
- Availability of flexible jobs varies by role category. The pattern is similar to previous years, with medical/health roles and social services well ahead of other role categories. Meanwhile male dominated roles such as construction and engineering lag well behind.
- During and since national lockdown, all categories have seen an increase in flexible recruitment, and the overall pattern of differences remains largely unchanged.
- If any new pattern is emerging, it is that roles that lend themselves to home-working are beginning to catch up with health and social services. The biggest flex winner is IT. Admin, finance, HR, legal and marketing are also gaining ground.

REGIONAL VARIATIONS

- During and since lockdown, rates of flexible recruitment have flattened out to be broadly similar across the UK, with the South West slightly ahead (26%) while the East of England, East Midlands and London bring up the rear (all on 20%).
- Historically, London had always been significantly behind all other regions, but the gap is now closing. We believe the main reason for this is that higher salaries in London had previously kept its flex ratio down, as (historically) high salaries equated to fewer flex jobs. But the differences in flex by salary have diminished. At the same time, these higher paid roles are disproportionately office based roles that can easily adapt to home-working.

YEAR ON YEAR GROWTH

PROPORTION OF JOBS ADVERTISED WITH FLEXIBLE WORKING



KEY FINDINGS

- The proportion of jobs offering flexible working as an employee benefit rose to 17% at the start of 2020, before the impact of Covid-19. This represented a small increase on 2019 (15%) – continuing the steady but painfully slow progress in flexible recruitment over the last 6 years.
- During national lockdown in Spring 2020, the rate increased to 22% and remained the same as lockdown eased. 1 in 5 jobs were now offering flex.

TIMEWISE VIEW

Following lockdown, the proportion of flexible jobs has remained much lower than might be expected. The recruitment market is not mirroring the seismic change that has happened in workplaces, where the proportion of people working from home jumped from 6% at the start of 2020 to 43% in April, dropping back a little to 37% in June³. And aside from home-working, 24% of employees work part-time⁴, and many more people have other types of flexible working patterns.

The proportion of flexible jobs lags even further behind popular demand: 9 in 10 people want to work flexibly⁵.

Low levels of flexible recruitment cause a block in job mobility for

people who are only able to work if they can find a flexible role. 4 in every 5 jobs are closed to them.

And with mass unemployment looming, the problem faced by those needing flex will become even more acute. How can part-time workers find their way back into work, if employers do not advertise jobs as part-time?

The groups most disadvantaged are those with caring commitments (mostly women), older workers, and those with health conditions. So failing to offer part-time and flexible options at the point of hire will create set-backs to building an inclusive labour market when the UK economy recovers.

³ Alan Felstead and Darja Reuschke, Homeworking in the UK: Before and During the 2020 Lockdown.

⁴ ONS Labour Force Survey for Jan-March 2020 and May-July 2020

⁵ Flexible Working: A Talent Imperative, Timewise, 2017

FLEXIBLE JOBS BY SALARY

PROPORTION OF JOBS ADVERTISED WITH FLEXIBLE WORKING, BY SALARY LEVEL



KEY FINDINGS

- At the start of the year, as in all previous index reports, jobseekers' access to flexible working was significantly higher amongst low paid vacancies (25% in the pre-covid period), compared to salary bands above £20k FTE (where the range was 15%-17% in the same period).
- Across all salary bands, the proportion of flexible jobs increased during lockdown, when home-working became the default for office based work, and employers changed working patterns and practices to cope with the pandemic.
- However, as restrictions began to ease, flexible recruitment fell back a little for the two lowest paid salary bands (less than £34k FTE); at all the higher salary bands, the proportion continued to increase.
- So, by the end of the analysis period, levels of flexible recruitment were broadly similar across all salaries, though slightly higher for roles paid <£20k and £60k-£79k FTE.
- However, even at the highest ratio of low-paid roles, it's important to remember that this falls well short of candidate demand for flexible working (9 in 10 people want it⁶).

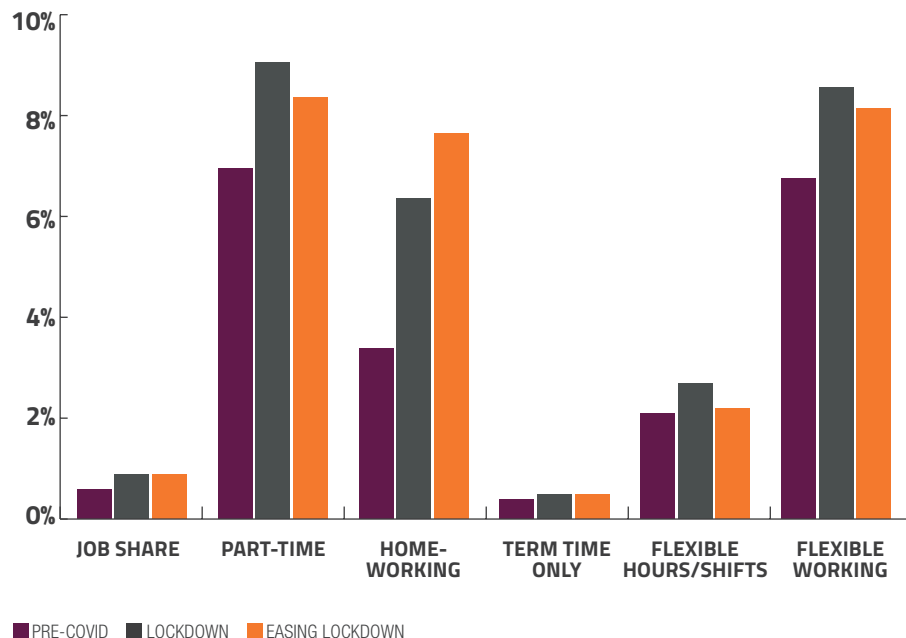
TIMEWISE VIEW

Timewise has always called for even access to flexibility for all. So, on the surface, it is encouraging to see that the concentration of flex in lower-paid job adverts seems to be a diminishing problem.

However, the flattening out of the availability of flex across salary levels hides several complexities. Our analysis of flex types and role categories (to follow on the next few pages) highlights some sharp divisions between office jobs that can be done from home, and frontline jobs that can't.

WHICH TYPES OF FLEXIBLE WORKING ARE MOST COMMON?

PROPORTION OF JOB ADVERTS OFFERING SPECIFIC TYPES OF FLEXIBLE WORKING



KEY FINDINGS

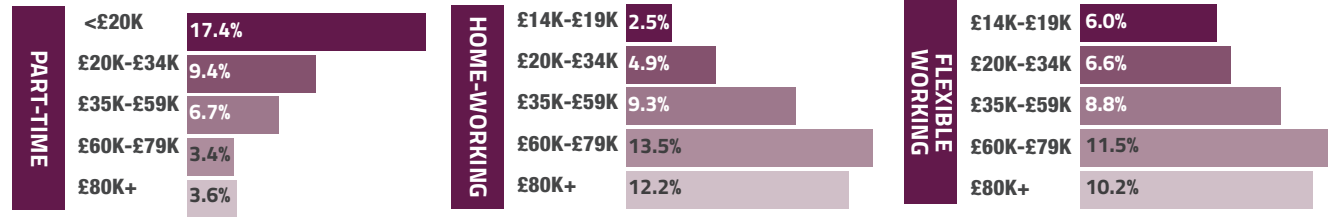
- Before the impact of covid, as in recent years' index reports, part-time and generic flexible working were the two most commonly offered types of flex. (Most jobs offering generic 'flexible working' are full-time jobs where the employer is open to unspecified variations to working pattern, by negotiation with the candidate.)
- During lockdown, offers of all forms of flex increased in the jobs market. Although several fell back a little when lockdown eased, the ratios all remain higher than at the start of the year.
- Home-working is of particular interest, given the requirement for people to work from home when possible. Its ratio has increased the most, from 3.4% to 7.7% over the three periods. However, home-working jobs still remain fewer than part-time jobs or those offering generic flexible working.

TIMEWISE VIEW

The low incidence of home-working, during and since lockdown, is astounding. There has been a wholesale shift away from offices, but the massive impact of covid on our working patterns has barely touched the world of recruitment. Most employers have not adapted the way they describe jobs to candidates.

DIFFERENCES IN TYPES OF FLEX BY SALARY LEVEL

ANALYSIS BY SALARY LEVEL, FOR KEY FLEX TYPES, IN LOCKDOWN EASING PHASE



KEY FINDINGS

Looking at snapshots of the three main types of flex during the third period (easing lockdown), a startling picture emerges of disparity across salary levels:

- Part-time is common amongst the lowest paid jobs (17.4%), but falls by almost half above £20k FTE (to 9.4%) and is offered in less than 4% of job adverts at £60k or more.
- Conversely, both home-working and flexible working are disproportionately offered at higher salary levels. Home-working is only an option in less than 3% of job adverts for roles paid less than £20k FTE.

TIMEWISE VIEW

A fractured flexible jobs market is revealed by the differences in types of flex offered by salary level. Part-time continues to be heavily associated with low-pay, and the stigma around it will persist for as long as that remains the case. At higher salaries, people who can only work part-time are excluded from the jobs market, negatively impacting the UK talent pool and workplace inclusivity.

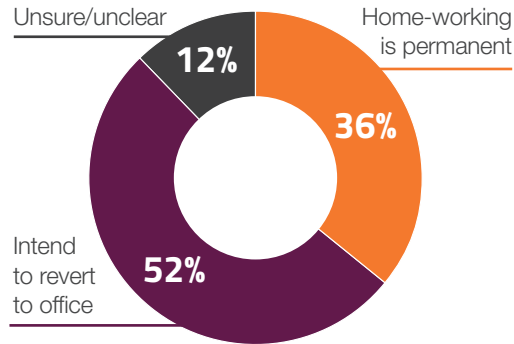
Home-working, on the other hand, is the preserve of higher-paid roles.

A two-tier jobs market of flexible haves and have-nots is emerging: low-paid roles have fixed working hours and locations (although part-time can easily be accommodated); while higher paid jobs can offer softer forms of flexibility to support work-life balance (but part-time is virtually a no-go area).

Timewise believes that the solution to a fairer jobs market is investment in better job design. Greater availability of part-time and flexible arrangements across all salary levels will allow more fluid career progression for more people, and help create more inclusive workplaces.

IS INCREASED HOME-WORKING HERE TO STAY?

ANALYSIS OF A SAMPLE OF HOME-WORKING JOB ADVERTS THAT REFERENCED THE PANDEMIC



KEY FINDINGS

- First, it's important to note that our sample of jobs was taken from the minority (16%) of home-working job adverts that mentioned the pandemic. The majority of employers made no reference to the situation, and whether the arrangement was permanent or not (although many of these are likely to be the permanent home-working roles that existed pre-covid).
- Nevertheless, the results give a clear indication that many employers (52% of the sample) are intending to revert to the office when possible.

TIMEWISE VIEW

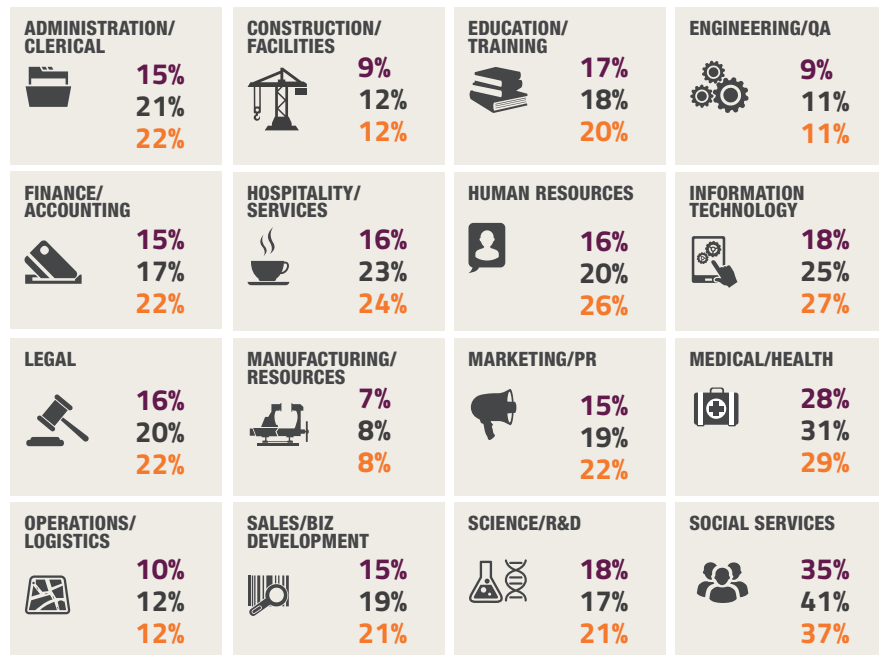
The jury is still out on the extent to which the home-working forced by the covid outbreak will become a permanent feature of our working lives. Initially, there was overwhelming support for home-working with many reports of workers saying they would demand home-working in the long-term, having proved that they can be just as productive from home, if not more so. But as lockdown dragged on, a few cracks began to show, with aspects of team work suffering through lack of personal contact, some employees not coping well working in isolation, and the on-boarding of new employees proving particularly difficult.

The most likely future scenario is a patchwork of different approaches by different employers, with some choosing to shed the real estate costs of the office by converting permanently to full home-working, while others will opt for a blended approach with reduced office working.

However this pans out, two things are certain: better job design will be needed to ensure good use of home-working; and employers will need to make their job adverts much clearer with regard to their home-working offer.

FLEXIBILITY VARIES WIDELY BY TYPE OF ROLE

PROPORTION OF JOBS ADVERTISED WITH FLEXIBLE WORKING, BY ROLE



■ PRE-COVID ■ LOCKDOWN ■ EASING LOCKDOWN

KEY FINDINGS

- In the pre-covid period (as in all previous index reports), medical/ health and social services were significantly ahead of all other categories for flexible recruitment.
- During and since lockdown, all categories have seen an increase in flex.
- The biggest winner is IT, where the ratio has risen by more than half, making it the third best role category for flexible jobs. Admin, finance, HR, legal and marketing also saw large rates of increase. These are, of course, all jobs that are relatively easy to do from home.
- The lowest rates of increase tend to be in 'frontline' roles that can't easily adapt to home-working: education, manufacturing, medical/ health, operations/logistics and social services.

TIMEWISE VIEW

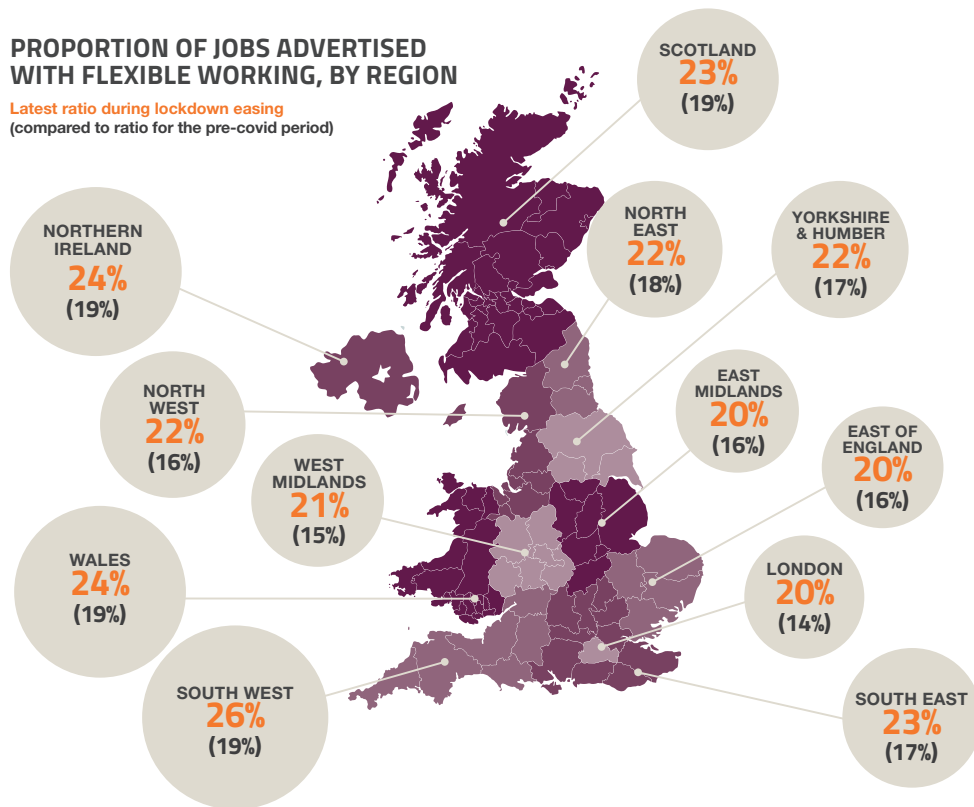
As noted in our analysis of flex by salary level, a two-tier jobs market is emerging. For role categories where home-working is easy to implement, rates of flexible recruitment have risen steeply; other categories are seeing slower growth. The ratio remains particularly low for three role categories where (in addition to home-working being problematic) gender inequality may be at play: engineering, construction, and manufacturing.

Investment in job design is needed to identify flexible working patterns that are compatible with the operational requirements of different roles, in order to create fairer access to improved work-life balance and break down gender stereotypes.

FEW REGIONAL VARIATIONS

PROPORTION OF JOBS ADVERTISED WITH FLEXIBLE WORKING, BY REGION

Latest ratio during lockdown easing
(compared to ratio for the pre-covid period)



KEY FINDINGS

In the most recent analysis period (lockdown easing), the availability of flexible jobs is broadly similar across the UK, with the South West slightly ahead of the game (26%). The East of England, the East Midlands and London bring up the rear (all on 20%).

Historically, London has always been behind all other regions (significantly so, in the early years of our index tracking) but the gap is now closing.

TIMEWISE VIEW

- In previous years' index reports, we commented on how regional variations in flexible jobs have largely been due to localised salary variations (high regional flex ratios were usually linked to a high proportion of lower-paid jobs in that region). Recently, and especially since covid, the flatter variations across regions largely reflect the fact that flex ratios are now also much flatter across salary levels, as noted earlier in this report.
- Additional reasons for why London is finally catching up with other regions are likely to include its higher proportion of office based jobs, coupled with fears of commuting during the pandemic.

WHAT THE FINDINGS MEAN FOR THE UK JOBS MARKET

IMPLICATIONS FOR EMPLOYERS, AND WHAT THEY CAN DO ABOUT IT

- The gap between the proportion of people who want to work flexibly (87%1) and the availability of flexible opportunities at the point of hire (22%) causes a talent bottleneck. Employers are cutting themselves off from a proportion of the candidate market, by not offering flexible working in their recruitment advertising. These 'lost' candidates include some of the very best available talent, and also tend to be from the disadvantaged groups that employers aim to support through equality, diversity and inclusion strategies (women, older workers, people with disabilities and health concerns).
- Employers should strive to echo in their recruitment adverts what is happening in their workplaces. This means advertising more roles as being open to flexible working from the point of hire.
- Job adverts need to be as transparent as possible about which forms of flexible working are possible for the role: reduced hours (part-time), home-working (or a blend of home-working/workplace), flexible shifts, flexible start and finish times, or other options such as compressed hours or annualised contracts.
- Employers should consider what flexibility is possible for ALL roles. While there is no one-size-fits-all flexible working pattern, there is always a way to offer employees more input and control - even in frontline roles. Being open and fair in the process is what matters, as options for flexible working will naturally differ for different roles.
- Flexible working must continue to feature in inclusion and diversity plans; additionally, it should be built into post-covid wellbeing and future work strategies.
- Employers who have been hit badly by covid may benefit by using part-time arrangements to build business back, at more manageable cost, and where possible align to the governments job retention schemes
- When developing their action plans for flexible working, employers need to consider management training on job design, and how best to manage post-covid dispersed teams.



WHAT THE FINDINGS MEAN FOR THE UK JOBS MARKET

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.
- The problem has been exacerbated by the pandemic, which has led to increasing unemployment. When a flexible worker becomes unemployed, how can they find their way back into work, when so few jobs are advertised with the option to work flexibly?

WHAT SHOULD POLICY MAKERS DO?

- Consider making wage subsidies for future job creation schemes conditional on employers offering flexible working for newly created roles
- Signpost employers to guidance and support on how to sustain flexible working beyond this current crisis to enhance diversity and inclusion and wellbeing strategies, and future talent acquisition.
- Protect workers from becoming 'flexcluded', through targeted investment in workplace pilots and job design innovation in frontline industries, especially those sectors where the demand will increase not decrease (eg health and social care).



Timewise works to unlock the flexible jobs market in the UK. We share market insights on flexible working and flexible hiring, deliver 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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