

THE TIMEWISE SCOTTISH FLEXIBLE JOBS INDEX 2020

An index of the proportion of jobs in Scotland,
that are advertised with flexible working options

INCLUDING
insights into the
impact of the
pandemic

RESEARCH PARTNER:

Gartner

COMMISSIONED BY:



Scottish Government
Riaghaltas na h-Alba
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INTRODUCTION

Flexible hiring – advertising job vacancies as flexible from day one – is a key building block for fair access to work. It is a lifeline for job seekers and employees looking to progress, and a talent-boosting opportunity for employers; at a societal level, it is a tool that can help tackle inequality and raise living standards.

Flexible hiring is so important, to so many, that the Scottish Government has commissioned this report to investigate the flexible jobs market. It is our second Scotland-focused Flexible Jobs Index, and while there is evidence of real progress, with data showing that 24% of jobs were advertised with flexible options by the end of 2020, it is not happening as fast as it could.

You could argue that this counts as a success; it's certainly a change in the right direction. But looked at from the opposite perspective, it still means that 76% of jobs were not advertised with any flexibility at all; not even the remote working that became so commonplace during 2020. And that means a sizeable number of employees and job seekers, who need flexibility to work, still risk getting stuck in whatever entry-level flexible role they can find, or being excluded from the workplace altogether.

THE PANDEMIC CHANGED WORKING PATTERNS, BUT NOT HIRING PRACTICES

It's surprising, perhaps, that the pandemic didn't create a bigger shift in the flexible jobs market, particularly since it did catalyse real change in how people think about flexible work. Objections and barriers came tumbling down in the face of necessity; tasks that supposedly couldn't be done from home, suddenly were.

Research by the CIPD has revealed that employers believe those working from home are as productive as other workers¹. And another study has indicated that, in most European countries, between 70% and 80% of employees were interested in pursuing some element of remote and flexible working, post-Covid².

But the jobs market hasn't adjusted to match, for a number of reasons. Firstly, the shift towards remote working has been a reactive one; employers and their staff acting in response to lockdown, rather than taking a strategic decision to change the company culture. While that may work in the short term, it's not necessarily sustainable; and successful, mutually beneficial flexible working needs to be designed in, not added on.

Secondly, while there's evidence that a high proportion of Scottish employers are expecting more requests to work from home (72%), only 36% are saying they are more likely to grant them³. It's also worth noting that remote working and flexible working are not the same; the former is just one example of the latter, and it is flexible working in general – and part-time, specifically – that people with caring responsibilities or health issues need in order to access the workplace.

So, whilst making remote working more widely available is a positive step, it isn't going to solve the problem. We need Scottish employers to design a range of properly flexible jobs, and to be more proactive about offering them, both to current employees and new hires.

¹ <https://www.cipd.co.uk/about/media/press/home-working-increases#ref>

² <https://www.peoplemanagement.co.uk/voices/comment/remote-and-flexible-working-will-be-the-new-normal>

³ https://www.cipd.co.uk/Community/blogs/b/scotland_the_blog/posts/working-from-home-in-scotland-a-permanent-shift#ref

THE IMPLICATIONS ARE SERIOUS AND WIDE RANGING

And if they don't? The short answer is, inequality will rise. The pandemic is already amplifying the issues for certain groups; women, and people with caring responsibilities or health issues, have been more likely to drop out of work or be furloughed. And low-paid part-time frontline workers in sectors such as retail and hospitality have been unable to work from home – or at all – and are more at risk of losing their jobs. The Scottish Government is particularly concerned to track the impact on six key family types which are at a higher than average risk of child poverty⁴.

So, as we look towards an economic recovery, these individuals must not be left behind. There is a clear need to stimulate more, better, FAIRER flexible work in Scotland, and make it available at the point of hire. And there is an opportunity to do so strategically, and get it right for the long term.

This would give individuals more control on when, where and how much they work, boosting their well-being and work-life balance. It would allow people who need to work flexibly to get back into the workplace, and progress once they are there. And from an employer perspective, it would help tackle skills shortages and develop a more motivated, productive, healthy workforce.

For SMEs in particular, it is also an opportunity to build back slowly; if their budget doesn't allow for a full-time employee, recruiting someone on a part-time basis could allow them to get the skills needed for a lower overhead cost. And for Scotland as a whole, it is a way to build back more fairly, protecting existing jobs and making new ones more accessible.

EMPLOYERS NEED TO TAKE ACTION – AND BE SUPPORTED TO DO SO

But for this to happen, employers need support. Leaders need roadmaps for how to shift cultures and behaviours to genuinely embrace flexibility. Line managers need to be equipped with the skills to design and manage flexible jobs. And resourcing teams need to understand how to advertise roles flexibly, and make sure flex-seeking candidates are treated fairly when applying.

Timewise is working in partnership with a range of leading Scottish organisations to bring this about, supported by the Scottish Government. Firms committed to being agents for change for more inclusive flexible working, which works for both employers and individuals, include the CIPD, CBI Scotland, Scottish Enterprise, Capital City Partnership and Flexibility Works. Between us, we have provided webinars, guidance and support to over 1,000 employers in Scotland, as well as 5,000 individuals.

In the meantime, we hope this report will help catalyse further action, and encourage more employers and industry bodies to champion and deliver flexible working at the point of hire. The result will be a Scotland with a truly flexible working culture, enabling families to thrive and delivering real benefits for business and the economy.

Emma Stewart,
Co-Founder of Timewise

⁴ In 'Every child, every chance. The tackling child poverty delivery plan 2018-2022', the six priority groups identified are:

1. Lone parent families, the large majority of which are headed by women
2. Families which include a disabled adult or child
3. Larger families
4. Minority ethnic families
5. Families with a child under one year old
6. Families where the mother is under 25 years of age

HOW THE INDEX CONTRIBUTES TO JOB MARKET KNOWLEDGE

- The index fills a knowledge gap in Scottish job market statistics by reporting on advertised flexible vacancies, where flexible working is offered as a positive benefit to attract candidates.
- In this first year of the pandemic, we explore the impact on the job market across three periods: pre-pandemic, during the first national lockdown, and during the second half of the year (when variable regional restrictions were in place from time to time). The increase in those working from home is a particular focus.
- The index enables employers to benchmark their flexible recruitment practices against the average in Scotland - by salary, role type, region and types of flexibility offered.

CONTENTS

Summary of key findings	06
Research findings:	
• The slow growth of flexible jobs	07
• Flexible jobs by salary	08
• Which types of flexible working are most common?	09
• Differences in types of flex, by salary	10
• Flexibility varies widely by type of role	11
• Regional variations	12
What the findings mean for the jobs market in Scotland	13

WHAT DO WE MEAN BY A 'FLEXIBLE JOB'?

In this report, 'flexible job' means any advertised vacancy that is either part-time or offers working from home, 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.

METHODOLOGY

The Scottish Flexible Jobs Index 2020 is based on analysis of a total of over 375k Scottish job adverts across 3 periods:

- **01 Jan 2020 to 23 March 2020** (the 3 months before the first lockdown period)
- **24 March to 14 July 2020** (lockdown)
- **15 July to 31 Dec 2020** (during most of this period, all businesses including retail, hospitality and tourism were open, but with some restrictions and regional variations from time to time. From 20 Nov, 11 council areas moved to 'tier 4' level restrictions, with retail/hospitality/tourism businesses closed again; and from 19 Dec this applied across the whole of Scotland).

The data source is an analytics tool powered by the firm 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.

SUMMARY OF KEY FINDINGS

THE OVERALL PICTURE

- The proportion of Scottish job adverts offering flexible working rose slightly to 19% at the start of 2020 (from 18% 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 3 years.
- During national lockdown in Spring 2020, the rate increased to 25%. It then settled back to 24% during the second half of the year, when variable regional restrictions were in place from time to time. Close to 1 in 4 jobs now offer flex.
- Even at this ratio, the proportion still falls well short of the extremely high demand - an estimated 73% of Scottish employees either work flexibly already, or would like to do so⁵.

DIFFERENCES BY SALARY

- The ratio of flexible jobs has increased more rapidly for higher paid jobs since the start of the pandemic. This is because working from home is more easily accommodated for office based roles.
- Nevertheless, jobseekers' access to flexibility remains significantly higher for the lowest paid; for job vacancies paid less than £20k FTE, the ratio of flexible jobs was 30% in the second half of 2020.

DIFFERENT TYPES OF FLEXIBILITY

- Part-time and generic flexible working (full-time roles where unspecified flexible working options will be considered) have historically always been the most commonly offered types of flex, and this was the case at the start of 2020.
- During and since lockdown, all forms of flex increased in the jobs market. But unsurprisingly, the rise was greatest for those working from home, where the ratio more than doubled (from 3% to 7%).

- However, at 7%, the incidence of working from home jobs is astoundingly low given the wholesale change in the workplace. It is still the case that more jobs offer part-time (10%) or generic flexible working (8%).
- A troubling disparity is developing across salary levels: part-time is common amongst the lowest paid jobs but is relatively rare in higher paid roles. Conversely, working from home and flexible working are disproportionately offered at higher salary levels and are rarely offered in low-paid jobs. This unevenness will cause blocks in career progression for people who need flexibility.

FLEXIBILITY BY ROLE CATEGORY

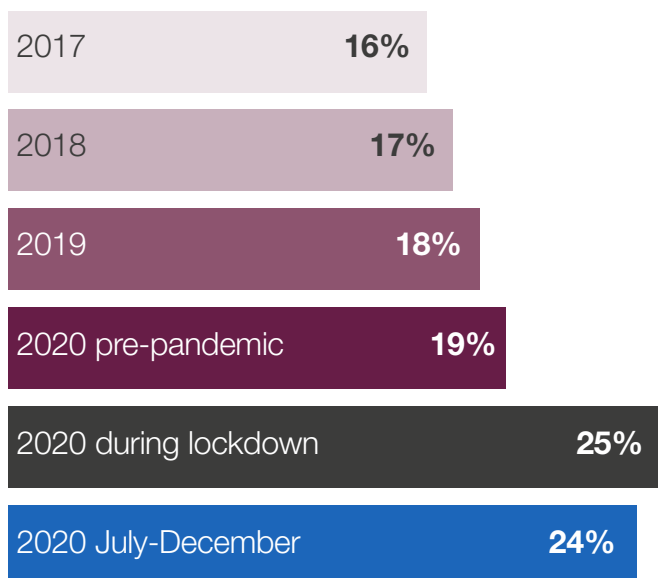
- Availability of flexible jobs varies by role type, with medical/health and social services well ahead of other role categories, possibly partly because so many nurses and care workers are women. Meanwhile male dominated roles such as construction, engineering and manufacturing lag well behind.
- During and since national lockdown, all but one category (operations/logistics) has seen an increase in flexible recruitment. Broadly speaking, office based roles have seen the greatest proportionate increases.

REGIONAL VARIATIONS

- The ratio of flexible jobs also varies widely by council area. In the second half of the year, the ratio ranged from 35% in Argyll and Bute to only 13% in West Lothian.
- Glasgow (25% flexible jobs in the latest period) and Edinburgh (26%) account for around 2 in every 5 jobs in Scotland, and are therefore largely driving Scotland's overall flex ratio of 24%.

THE SLOW GROWTH OF FLEXIBLE JOBS

PROPORTION OF SCOTTISH JOBS ADVERTISED WITH FLEXIBLE WORKING



KEY FINDINGS

- The proportion of jobs offering flexible working as an employee benefit rose to 19% at the start of 2020, before the impact of Covid-19. This represented a very small increase on 2019 (18%) – continuing the steady but painfully slow progress in flexible recruitment over the last few years.
- During the first lockdown period, the rate increased to 25% and settled back to 24% as restrictions eased. Nearly a quarter of jobs were offering flex in the second half of 2020.

TIMEWISE VIEW

Although increasing, the proportion of flexible jobs has remained much lower this year than might be expected. The recruitment market is not mirroring the seismic change that has taken place in the employment market in Scotland, where the proportion of employees who worked from home at least some of the time jumped from 18% pre-pandemic⁶ to 61% during the first lockdown in 2020⁷.

Nor does the recruitment market reflect the normal, ongoing level of flexible working in Scotland: pre-pandemic, 46% of employees were working flexibly in some way⁷; 27% of them worked part-time⁸. And the ratio of flexible jobs falls even further behind the latent demand for flexibility: 73% of people in Scotland either work flexibly already, or would like to do so⁷.

The lag in the market is a problem. 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. 3 in every 4 jobs in Scotland are closed to them.

And with increased unemployment looming, the problem faced by those needing flex will become even more acute. How can flexible workers find their way back into work, if employers do not advertise jobs as being available on a flexible basis?

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 Scottish economy recovers.

⁶ CIPD, April 2020

⁷ Flex For Life, Flexibility Works, March 2021

⁸ Scotland's Labour Market: People, Places, and Regions - statistics from the Annual Population Survey 2019 (published in May 2020)

FLEXIBLE JOBS BY SALARY

PROPORTION OF SCOTTISH JOBS ADVERTISED WITH FLEXIBLE WORKING OPTIONS, BY SALARY LEVEL



KEY FINDINGS

- Pre-pandemic, jobseekers' access to flexible working was significantly higher amongst the lowest paid vacancies (27%), compared to salary bands above £20k FTE (where the range was 17%-19% in the same period).
- Across all salary bands, the proportion of flexible jobs increased during lockdown, when working from home became the default for office based work, and employers changed working patterns and practices to cope with the pandemic.
- Post lockdown, the increases settled back very slightly at some salary levels.
- The gains in flexible job rates during the pandemic have been greater at higher income levels, although jobs paid less than £20k FTE still have the highest rate.

TIMEWISE VIEW

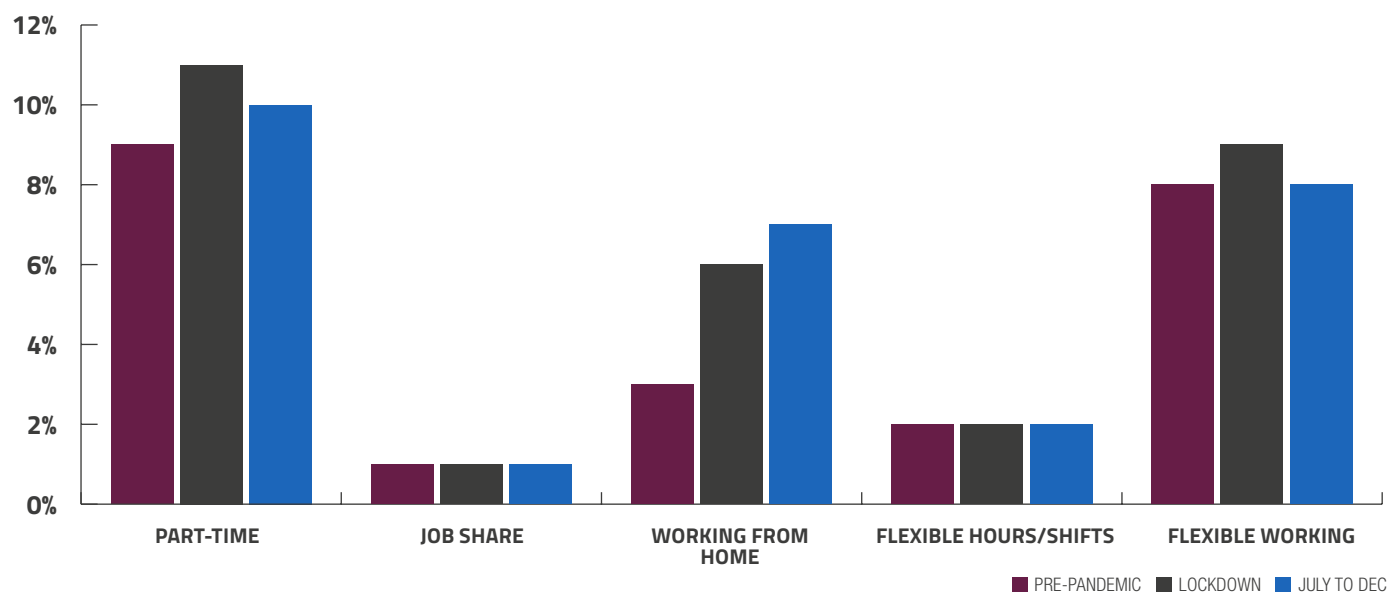
Timewise has always called for even access to flexibility for all. So, on the surface, it is encouraging to see that the concentration of flex in lower-paid jobs has diminished a little.

However, it's important to remember that the proportion of flexible jobs, across all salary levels, falls well short of candidate demand for flexible working (7 in 10 people want to work flexibly⁹).

Additionally, our analysis of flex types and role categories (to follow on the next few pages) highlights some sharp divisions between higher-paid office jobs that can be done from home, and frontline jobs that can't.

WHICH TYPES OF FLEXIBLE WORKING ARE MOST COMMON?

PROPORTION OF SCOTTISH JOB ADVERTS OFFERING SPECIFIC TYPES OF FLEXIBLE WORKING



KEY FINDINGS

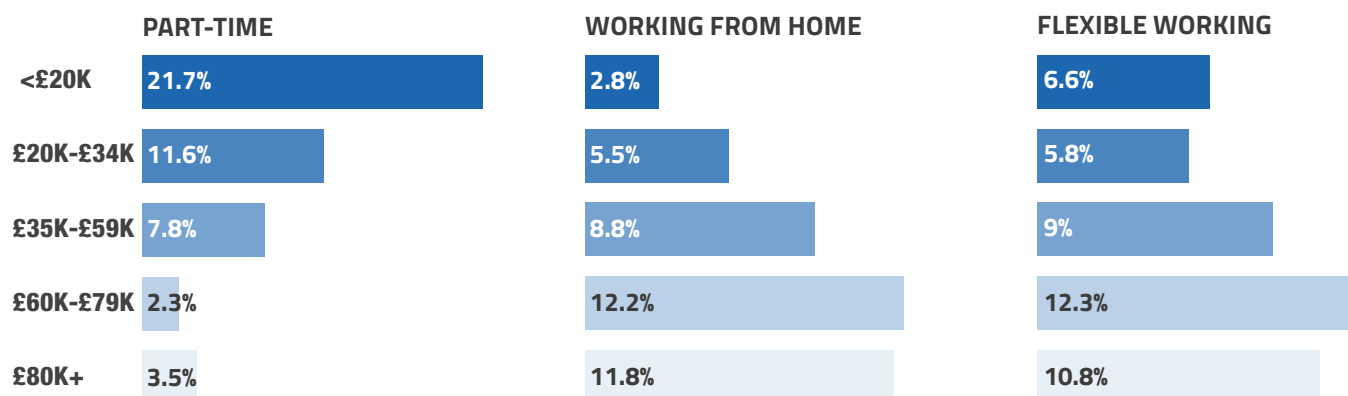
- Pre-pandemic, as in recent years' index reports, part-time and generic flexible working were by far the two most commonly offered types of flex. (Most jobs offering 'flexible working' are full-time jobs where the employer is open to unspecified variations to working pattern, by negotiation with the candidate.)
- During lockdown, offers of all forms of flex increased in the jobs market. Working from home is of particular interest, given the requirement for people to work from home when possible. Its ratio more than doubled from 3% pre-pandemic to 6% in lockdown.
- As businesses opened up again (with variable regional restrictions at times), working from home continued to increase slightly, to 7%. The ratios for all other forms of flex fell back a little, in some cases reverting to their pre-pandemic level.
- Nevertheless, working from home jobs (7%) still remain fewer than part-time jobs (10%) or those offering generic flexible working (8%).

TIMEWISE VIEW

The increase in jobs offering working from home is actually astoundingly low, given the wholesale shift away from offices since the start of the pandemic. The massive impact of covid on working patterns has barely touched the world of recruitment, as 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 THE LAST 6 MONTHS OF 2020



KEY FINDINGS

- Looking at snapshots of the three main types of flex during the final period of variable restrictions, a startling picture emerges of disparity across salary levels:
 - Part-time is common amongst the lowest paid jobs (21.7%), but falls by almost half above £20k FTE (to 11.6%) and is offered in less than 4% of job adverts at £60k or more.
 - Conversely, both working from home and flexible working are disproportionately offered at higher salary levels. Working from home 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 at different salary levels. Part-time (a form of flexible working that is dominated by female workers) 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 nation's talent pool and workplace inclusivity.

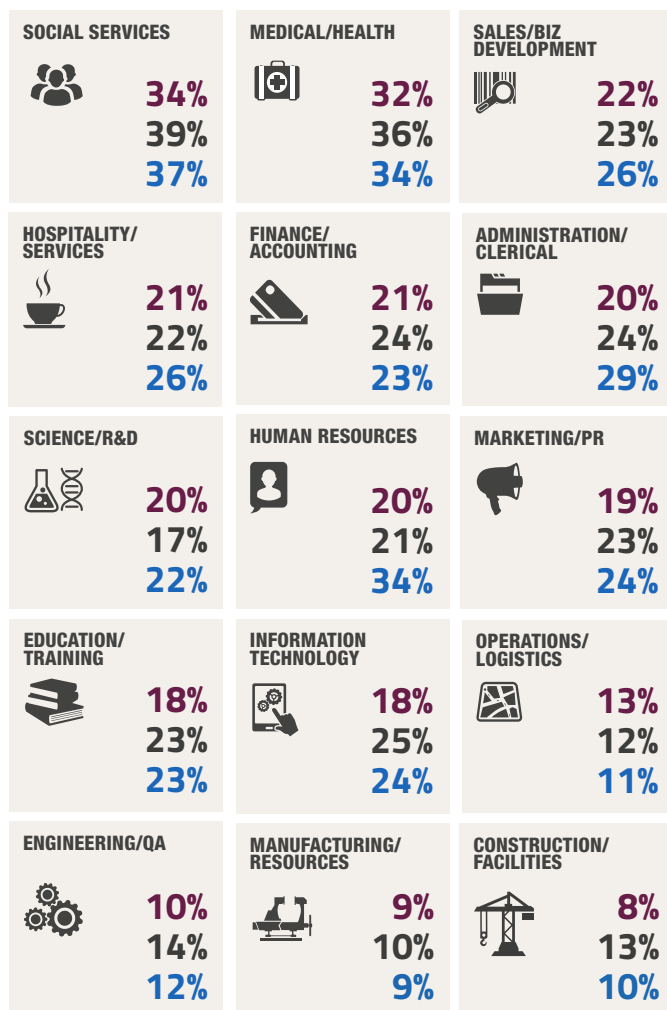
Working from home, on the other hand, is the preserve of higher-paid roles.

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.

FLEXIBILITY VARIES WIDELY BY TYPE OF ROLE

PROPORTION OF SCOTTISH JOBS ADVERTISED WITH FLEXIBLE WORKING, BY ROLE CATEGORY



■ PRE-PANDEMIC ■ LOCKDOWN ■ JULY TO DEC

KEY FINDINGS

- With ratios consistently above 30%, social services and medical/health are well ahead of all other categories for flexible recruitment, 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 construction, manufacturing and engineering may also stem from gender issues.
- During lockdown, all but two categories (science/R&D and operations/logistics) saw an increase in flexible recruitment. In July to December, when variable regional restrictions were in place, the ratios increased a little further for some sectors, but fell back for others.
- Comparing the most recent period of variable restrictions to the initial pre-pandemic period, the following role types have seen the greatest proportionate increases in flexible jobs: HR, admin, IT, marketing and education. Most of these are, of course, office-based roles that can easily be worked from home. HR, notably, has joined medical and social services roles with a flex ratio above 30%.
- The jobs with the lowest proportionate increases in flex are predominantly 'frontline' roles: operations/logistics, manufacturing/resources, medical/health and social services.

TIMEWISE VIEW

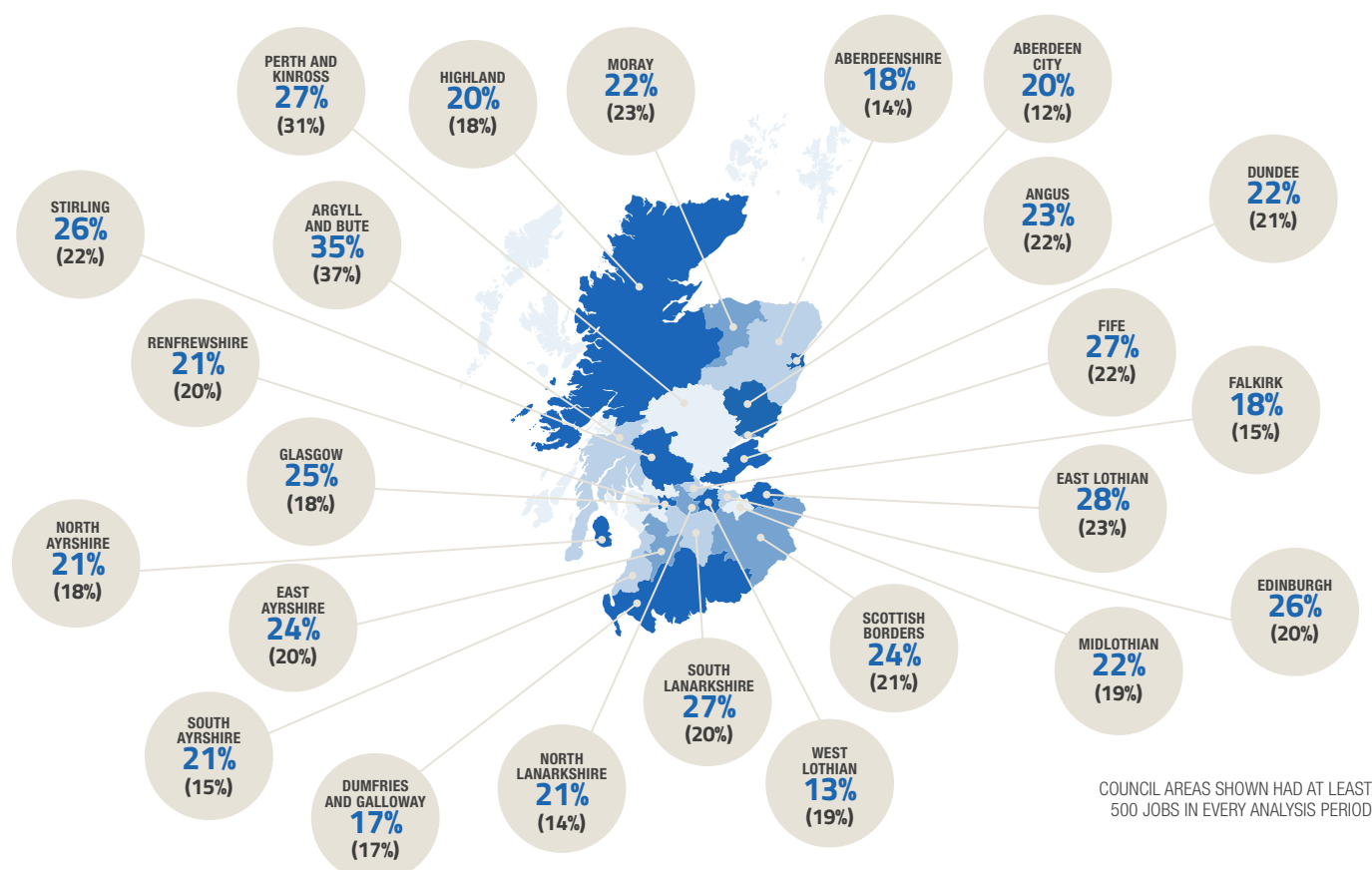
As noted in our analysis of flex by salary level, a two-tier jobs market is emerging. For role categories where working from home is easy to implement, rates of flexible recruitment have risen more steeply. The ratio remains particularly low for four role categories where (in addition to working from home being problematic) gender inequality may be at play:

manufacturing, construction, operations/logistics and engineering.

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

REGIONAL VARIATIONS

PROPORTION OF SCOTTISH JOBS ADVERTISED WITH FLEXIBLE WORKING, BY COUNCIL AREA
LATEST RATIO DURING JULY TO DEC (COMPARED TO BRACKETED RATIO FOR THE PRE-PANDEMIC PERIOD)



KEY FINDINGS

- In the most recent analysis period (of variable restrictions), the availability of flexible jobs varies widely across the Scottish council areas, from 35% in Argyll and Bute to only 13% in West Lothian.
- Glasgow (25% flexible jobs in the latest period) and Edinburgh (26%) account for around 2 in every 5 jobs in Scotland, and are therefore largely driving Scotland's overall flex ratio of 24%.
- Aberdeen City has a below-average flex ratio (20%), perhaps a reflection of its strong energy sector.
- In four council areas, the ratio of flexible jobs has reduced rather than increased: Argyll and Bute, Perth and Kinross, West Lothian, and Moray. More granular analysis would be needed to try to identify the reasons for this.

TIMEWISE VIEW

The wide regional variations may reflect the prevalence of different industry sectors in the council areas. Or they may reflect different attitudes to flexible working, for example at city based employers compared to smaller towns and villages.

When looking at investment in job creation, as part of recovery strategies, policy makers and business groups need to consider these disparities in flexibility and seek to redress them. In areas where there is projected growth but low rates of flexible jobs, they could try to raise awareness of the importance of flexibility to a fair jobs market, and encourage or incentivise employers to unlock more roles to flex.

WHAT THE FINDINGS MEAN FOR THE JOBS MARKET IN SCOTLAND

IMPLICATIONS FOR FLEXIBLE WORKERS

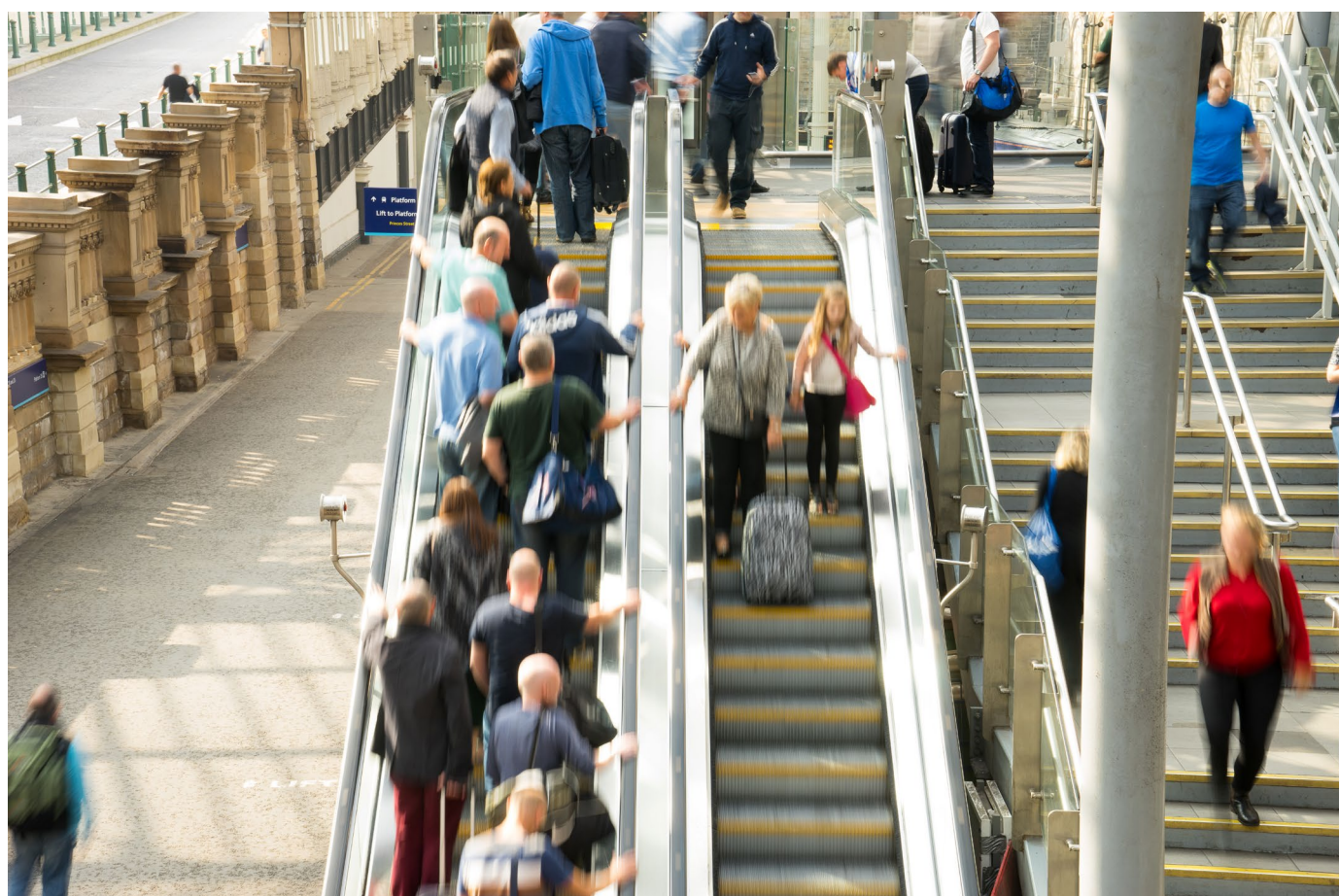
- People who work flexibly, particularly part-time, often get 'stuck' in their current roles, because only 1 in 4 jobs in Scotland offer flexibility of any kind, and it might not be the type of flexibility they need. Even at their current employer, it's hard for flexible workers to progress, as roles 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?

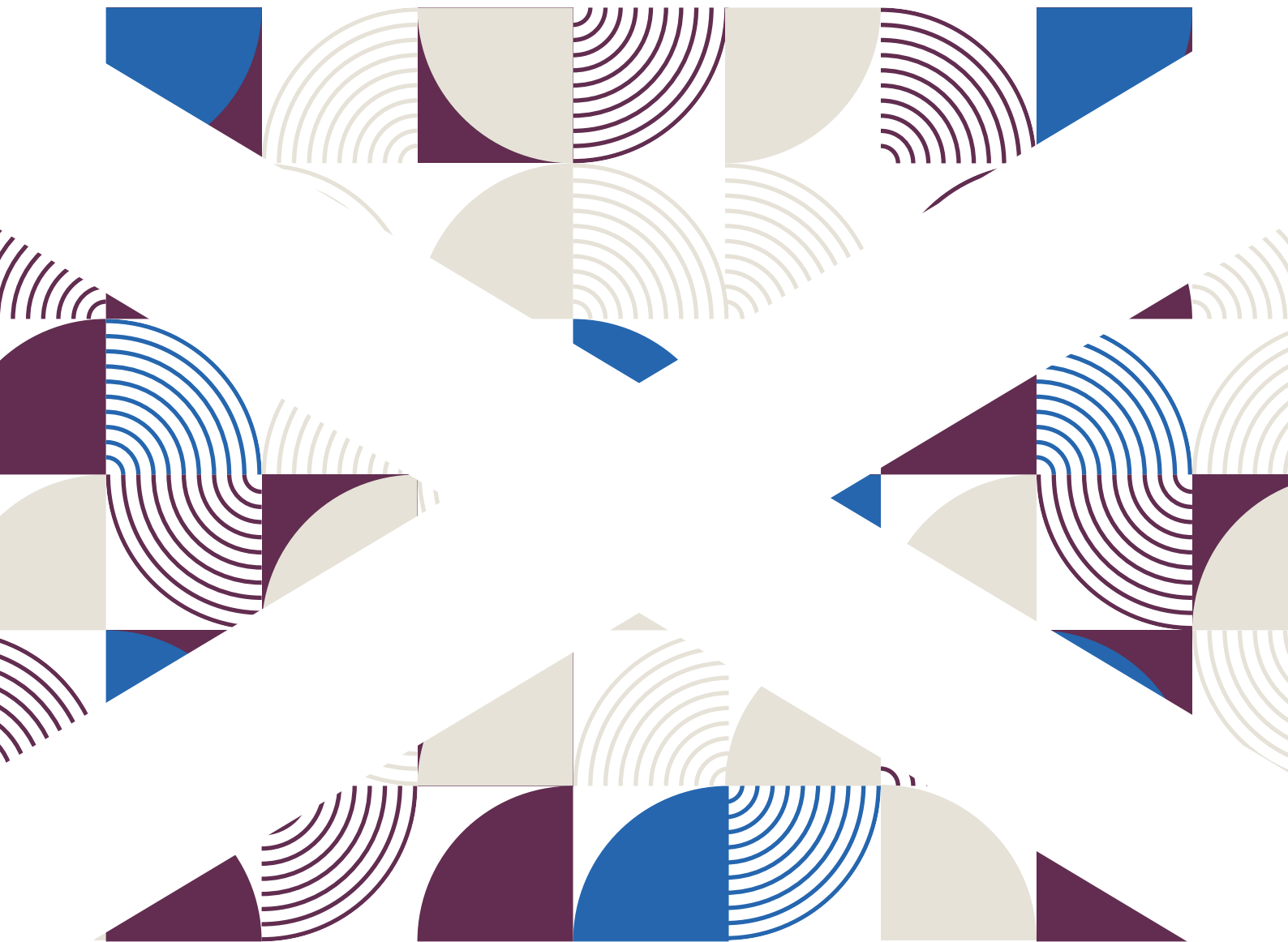
IMPLICATIONS FOR EMPLOYERS, AND WHAT THEY CAN DO ABOUT IT

- The gap between the proportion of people who want to work flexibly (73%) and the availability of flexible opportunities at the point of hire (24%) causes a talent bottleneck. Skills shortages and access to quality talent remain an issue for many firms in Scotland, yet employers are missing out on a proportion of the candidate market, by not offering flexible working in their recruitment advertising. These 'lost' candidates also reflect wider groups that employers aim to attract and support through equality, diversity and inclusion strategies (women, older workers, people with disabilities and health concerns).
- 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.
- Levels of flexible working are high in workplaces - for example, 27% of employees in Scotland work part-time, and many more work flexibly in other ways (particularly working from home since the pandemic started). 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), working from home (or a blend of home-based/workplace), flexible shifts, flexible start and finish times, or other options such as compressed hours or annualised contracts. By considering all forms of flexible working, employers in Scotland will be able to attract diverse candidates across a wide range of industries that have skills shortages, gender inequalities and wider challenges attracting diverse talent such as manufacturing and construction.
- Flexible working must continue to feature in employers' inclusion and diversity plans; additionally, it should be built into wellbeing and hybrid working strategies, in recognition that how work is designed needs to be a key business priority post pandemic.
- Employers who have been hit badly by covid-19, in particular SMEs, may benefit by using part-time and working from home arrangements to build business back at more manageable cost. This could be to transition from the government's furlough scheme, or as a key consideration in future recruitment strategies.
- When developing their action plans for flexible working, employers need to consider management training on job design, and how best to manage post-pandemic dispersed and hybrid working teams.

WHAT SHOULD POLICY MAKERS DO?

- Continue to promote the importance of flexible working through the Fair Work agenda in Scotland. In particular, as part of Fair Work First, encourage employers to consider flexible working for all job vacancies at the point of hire, and to state their approach.
- Signpost employers to practical 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. This could be embedded through Scottish government programmes such as the Women Returners Programme and the Workplace Equality Fund.
- Protect flexible workers who become unemployed, by promoting and supporting the creation of new flexible roles through schemes such as Fair Start Scotland.
- Continue to encourage employer groups, employability intermediaries and recruitment firms to promote fair flexible working and hiring to businesses across Scotland as has been piloted through the Timewise Change Agent programme, to ensure a targeted approach by sector and region.
- Provide 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

TALENT THROUGH FLEXIBILITY

Timewise works to unlock the flexible jobs market. 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 Flexible Jobs Index. We also run Timewise Jobs, a jobs board for roles that are part-time or open to flexibility.