

 2021 REPORT

The Shift Work Economy

United Kingdom



The Shift Work Economy

David Zinman | Global President, Deputy

80% of the global workforce (2.7B people) are employed with irregular or rotating hours ([Emergence 2020 Report](#)). That's nearly a third of the world's population.

At Deputy, we sit at the heart of the labour market, enabling us to observe and report on the global workforce effectively. In the last year, we've developed the concept of the "Shift Work Economy," defined as workplaces with paid-by-the-hour employees and scheduled shifts on either an agreed, rotating, or irregular basis.

In the United Kingdom, our organisation is tracking businesses across 40 industry sub-sectors and over 356,847 shift workers who fall into this category. Businesses that operate with hourly workforce flexibility expand and contract hours of their employees as consumer demand rises and falls. This positions these businesses as leading indicators of how the economy responds to various trends and events. In essence, by powering the scheduling for over 1 million shift workers, Deputy can see labour demand before it materialises.

Our scheduling software collects information on the hours people are scheduled and work. Deputy's shifts/hours scheduled and shifts/hours worked data provides a key index for how industries with a significant shift worker employee base have performed in the past and will perform in the future. We also collect and analyse granular insights on gender, generations, compliance behaviors, shift worker wellbeing, shift fairness, stability, and more.

At a time like today, where the world is healing from the destruction of COVID-19, this data can help understand the labour market better and identify areas of economic recovery. We can provide valuable, localised insights on how communities are recovering and how they contribute to national economic performance. Together, these components provide a powerful and unprecedented outlook on the health of the Shift Work Economy.



David Zinman
Global President, Deputy



Methodology

The Shiftwork Economy Report 2021 was produced by leading scheduling software platform, Deputy, using Deputy customer data. The report features an industry-focused data analysis of UK shift workers across the hospitality, healthcare, retail, and services industries. Data was collected over January 2019–May 2021 timeline. 356,847 UK-based shift workers were analysed by Deputy, as well as 12,474,594 scheduled shifts and 11,499,257 worked shifts.

Industry Sample Set:

Hospitality

58,101 shift workers, 2,570,948 scheduled shifts, and 2,439,190 worked shifts.

Healthcare

52,224 shift workers, 2,982,061 scheduled shifts, and 2,745,029 worked shifts.

Retail

34,140 shift workers, 1,621,968 scheduled shifts, and 1,428,461 worked shifts.

Services

67,915 shift workers, 1,826,437 scheduled shifts, and 1,520,108 worked shifts.

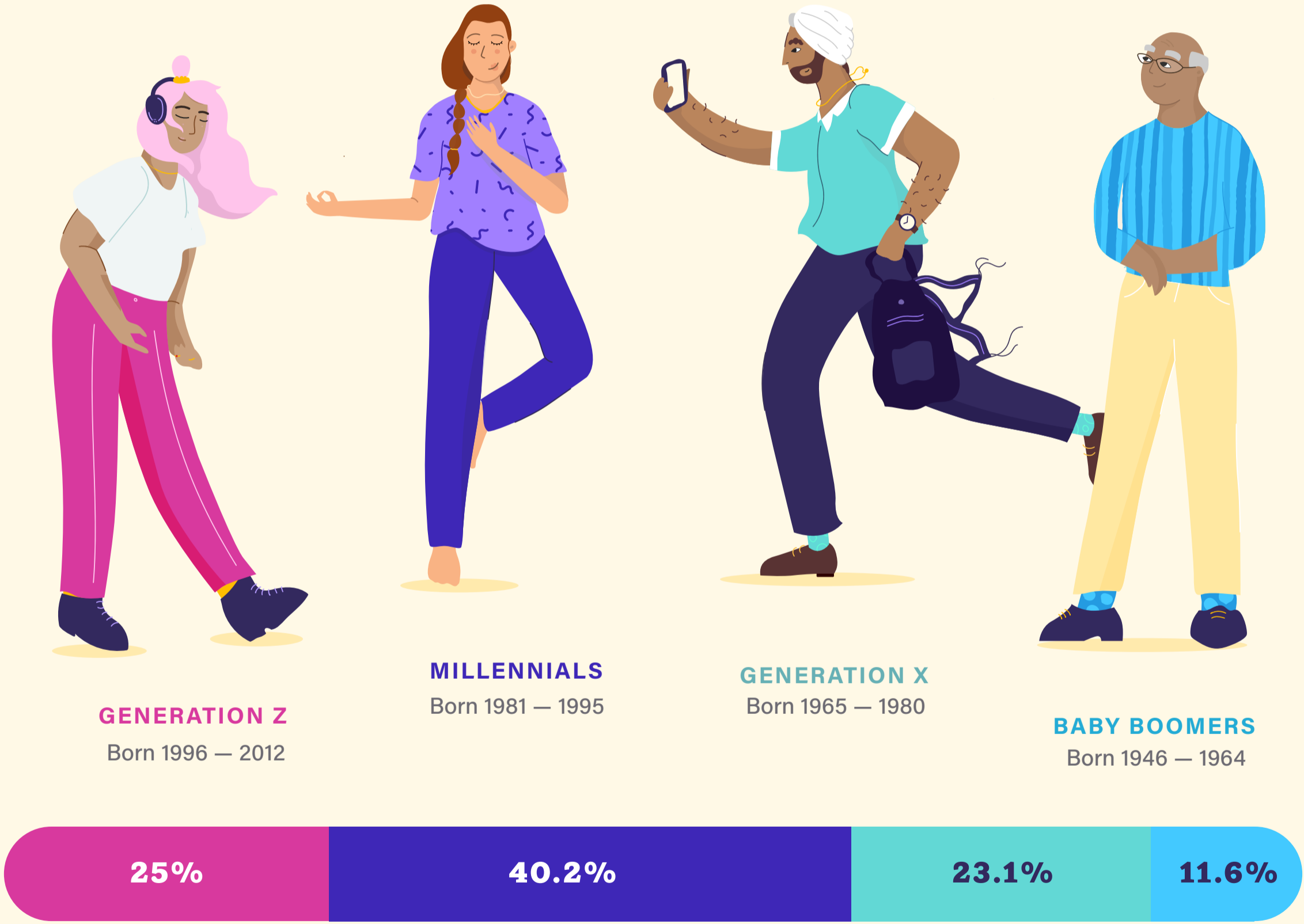
* Industry sample sets will not add up to the overall number of shift workers, this is due to data being analysed from other industries not called out in the report, churn and other events that have occurred between 2019–2021. This data has been normalized to account for seasonality and demand of workforce fluctuations throughout the week (e.g. weekday vs. weekends).



Shift workers by generation

Generation Z & Millennials make up majority of UK shift workers

- Millennials form the majority of shift workers in the United Kingdom, with a 15% lead on Generation Z. In other countries analysed the distribution was more balanced with a 1% difference in the US and 5% in Australia.
- We predict that this gap will continue to close as more of Generation Z enter the workforce. However this will happen at a much slower rate than other developed nations where Generation Z will surpass Millennials as the majority of employees in the Shift Work Economy in the next 12-24 months due to the generation facing a tougher job market and recovery in the UK.



Shift workers by generation

Alarming workloads across all sectors



GENERATION Z

22

Average age

7.4h

Average shift length

139

Average hrs/month

18

Average shifts/month



MILLENNIALS

31

Average age

8h

Average shift length

213

Average hrs/month

26

Average shifts/month



GENERATION X

47

Average age

8.2h

Average shift length

239

Average hrs/month

28

Average shifts/month



BABY BOOMERS

61

Average age

8.2h

Average shift length

253

Average hrs/month

30

Average shifts/month

- Baby boomers have the highest monthly average due to the exceptional hours being worked by those in healthcare.
- Other sectors saw their hours reduced with baby boomers in hospitality working 160 hours per month on average — less than the full time equivalent.
- Staff shortages, high absentee rates and burn out are now an acute problem in the healthcare sector.



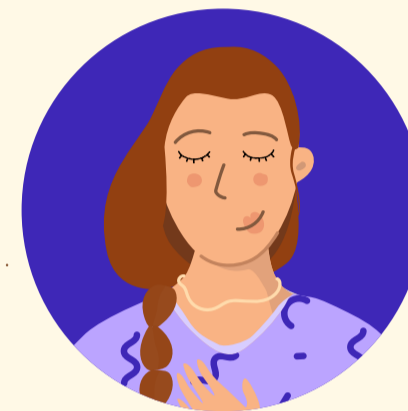
Scheduled vs worked hours by generation

Shift workers face volatile and unpredictable work schedules

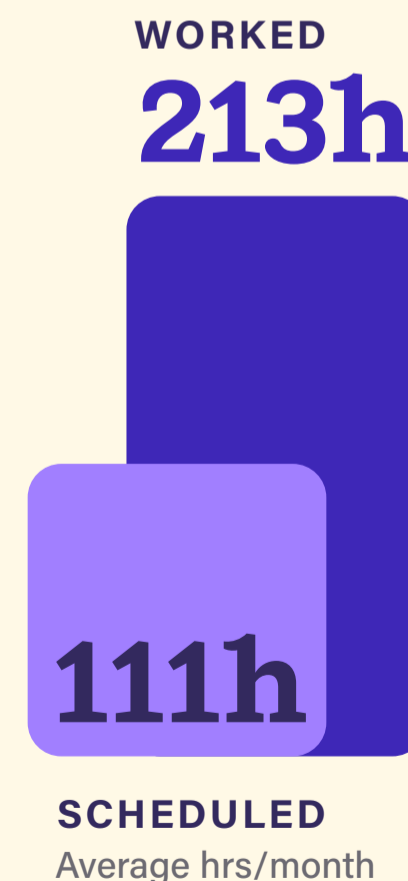
- Although the government completed a consultation on regulation providing more protection and predictability for employees the legislation has not yet been implemented. The absence of stability and chaotic last minute scheduling changes can contribute to financial, emotional and family stress.
- The gap between hours scheduled (predictable) and hours worked is significant meaning workers lack stability and control over their work lives. Eg. 'On average a Generation Z worker in hospitality has 59 hours scheduled but works almost double their scheduled hours (113 hours). Significantly lower than the full time equivalent, these average figures indicate underemployment in the sector and a workforce dependent on overtime and last minute shifts to keep food on the table.



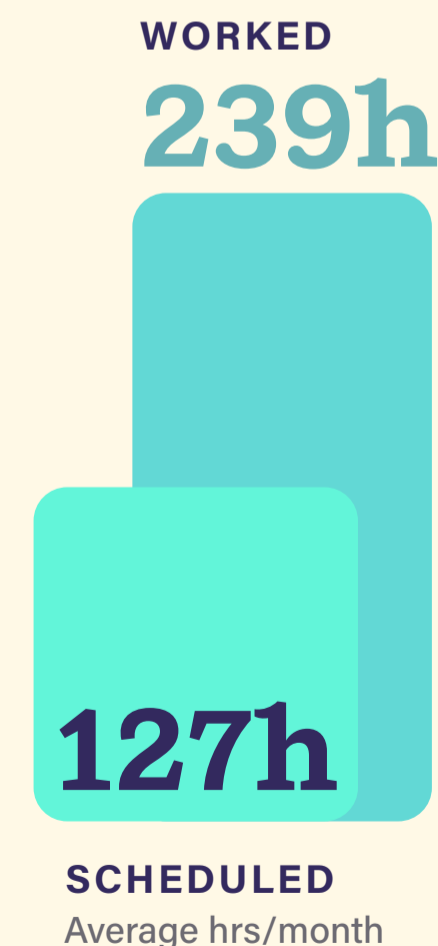
GENERATION Z



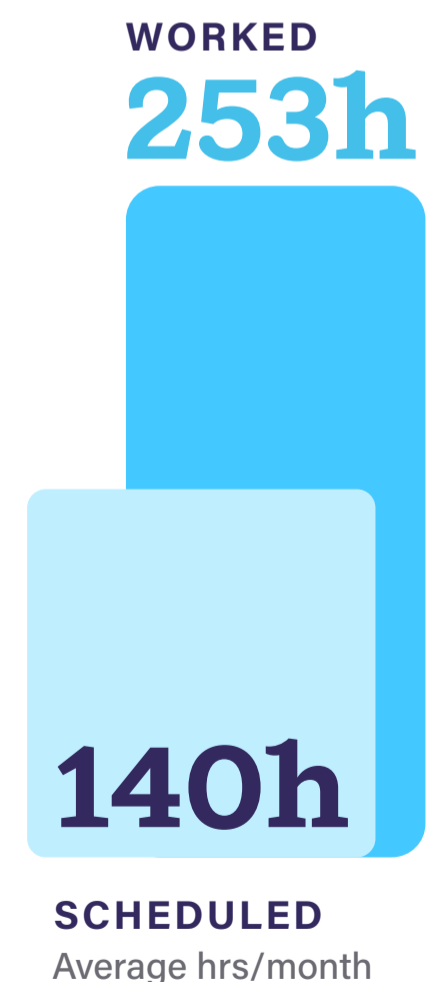
MILLENNIALS



GENERATION X



BABY BOOMERS



Female vs male shift workers

Gender equality not a stand out issue



FEMALE



MALE

40.2
Average age

7.5h
Average shift length

54.9%
of all shiftworkers

WORKED
168h

94h
SCHEDULED
Average hrs/month

WORKED
210h

104h
SCHEDULED
Average hrs/month

40.3
Average age

7.8h
Average shift length

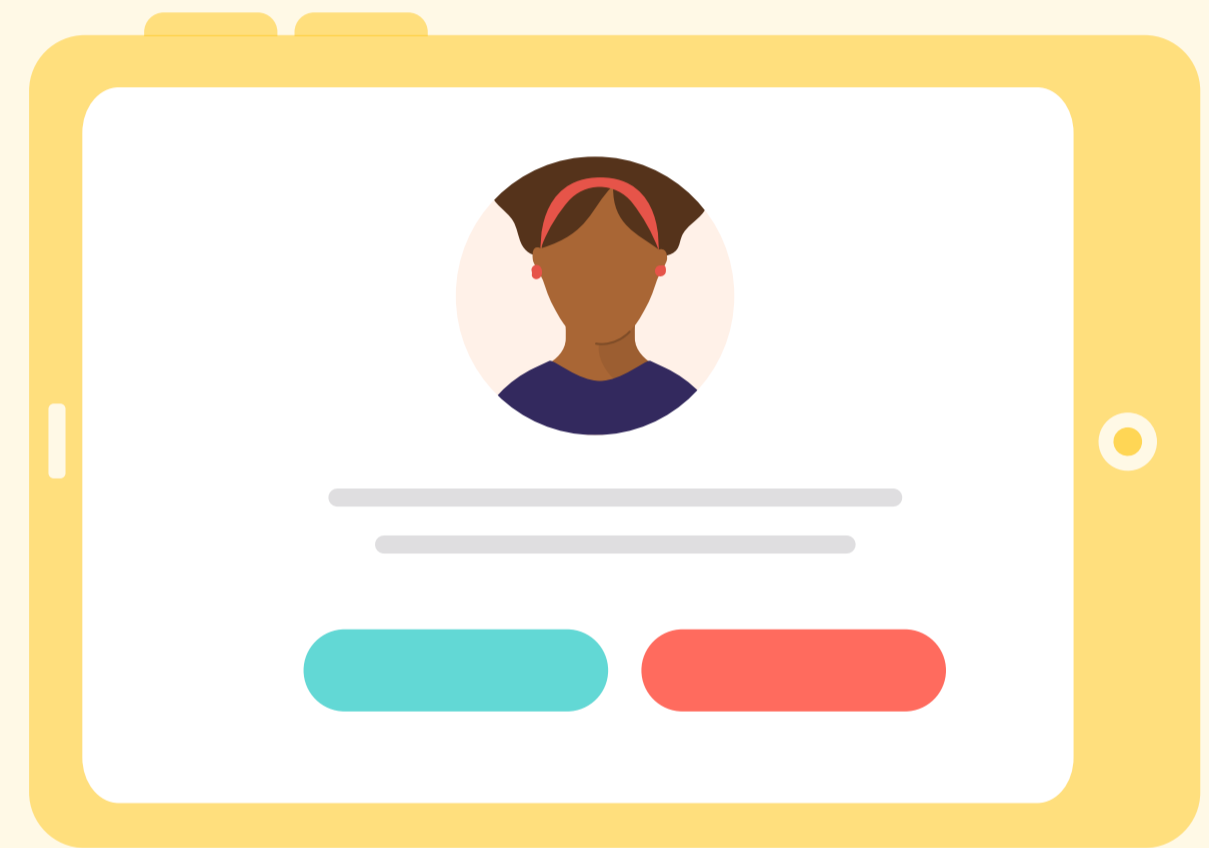
45.1%
of all shiftworkers

● Female workers are scheduled on average 10% fewer hours per month and work 20% fewer hours than Male shift workers.



The average shift in United Kingdom

Majority work morning and afternoon shifts



AVERAGE SHIFT LENGTH

7.7 hrs.

AVERAGE CLOCK ON

7:00 am

AVERAGE CLOCK OFF

4:24 pm



The pandemic 2020/2021

How COVID-19 has impacted shift workers in the UK

- Shifts and hours worked, declined sharply in April 20 (~10%).
- Over 350.000 conversations have taken place on the Deputy News feed about COVID-19/ the pandemic since December 2019 between UK managers and shift workers.
- The initial lockdown in March 2020 saw the lowest number of hours worked in April 2020.
- The sharpest reduction of hours was in hospitality (80%) followed by retail (50%). Services experienced the strongest recovery post April 2020. This is due to the lockdown restrictions on dining and non-essential retail, with the recovery fuelled by increasing demand from consumers.
- Shift workers in the United Kingdom were more impacted by COVID-19 than other regions Deputy operates, closely followed by Australia (driven by harder lockdown requirements). They are also experiencing a less stable recovery than those in Australia, who have enjoyed less volatility in the last 12 months.



WORST MONTH

April '20

BEST MONTH

October '20

PANDEMIC-RELATED MESSAGES

354,776

sent via News feed



Pandemic impact vs recovery

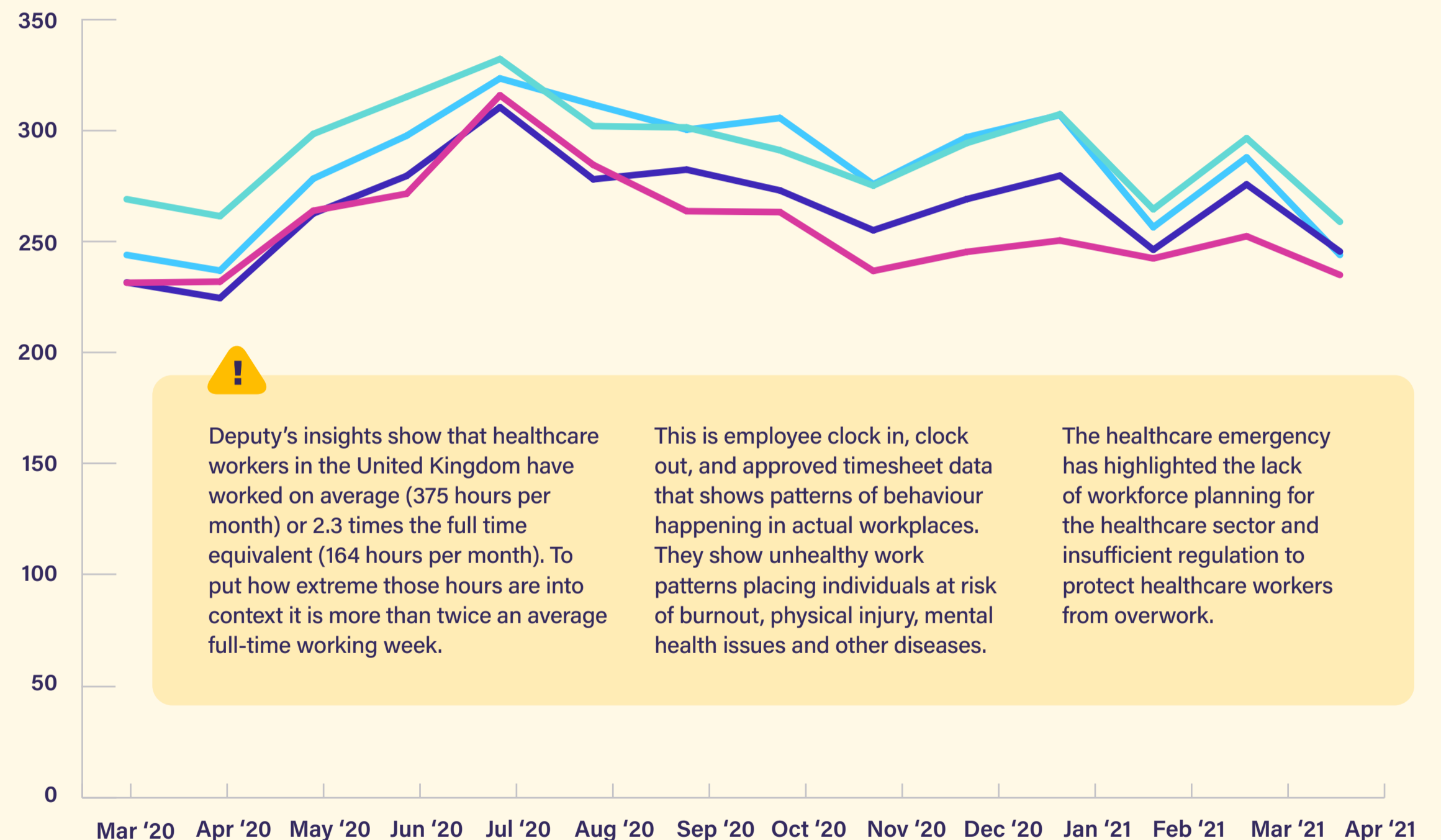
How COVID-19 has impacted generations by industry

AVERAGE MONTHLY HOURS WORKED

Healthcare

- **Baby Boomers** 72% increase in hours worked at the beginning of the pandemic (March 2020) not yet back to pre-COVID levels.
- **Generation X** 64% increase in hours worked at the beginning of the pandemic (March 2020) not yet back to pre-COVID levels.
- **Millennials** 28% increase in hours worked at the beginning of the pandemic (March 2020) not yet back to pre-COVID levels.
- **Generation Z** 15% increase in hours worked at the beginning of the pandemic (March 2020) not yet back to pre-COVID levels.

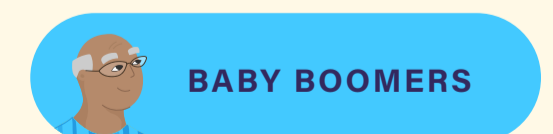
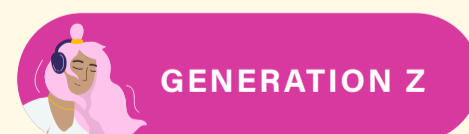
Healthcare workers have been expected to work at this level from the very beginning of the pandemic to date. The hours being worked are not only unsustainable, but highlight the lack of protection in place for shift workers in the UK.



Deputy's insights show that healthcare workers in the United Kingdom have worked on average (375 hours per month) or 2.3 times the full time equivalent (164 hours per month). To put how extreme those hours are into context it is more than twice an average full-time working week.

This is employee clock in, clock out, and approved timesheet data that shows patterns of behaviour happening in actual workplaces. They show unhealthy work patterns placing individuals at risk of burnout, physical injury, mental health issues and other diseases.

The healthcare emergency has highlighted the lack of workforce planning for the healthcare sector and insufficient regulation to protect healthcare workers from overwork.



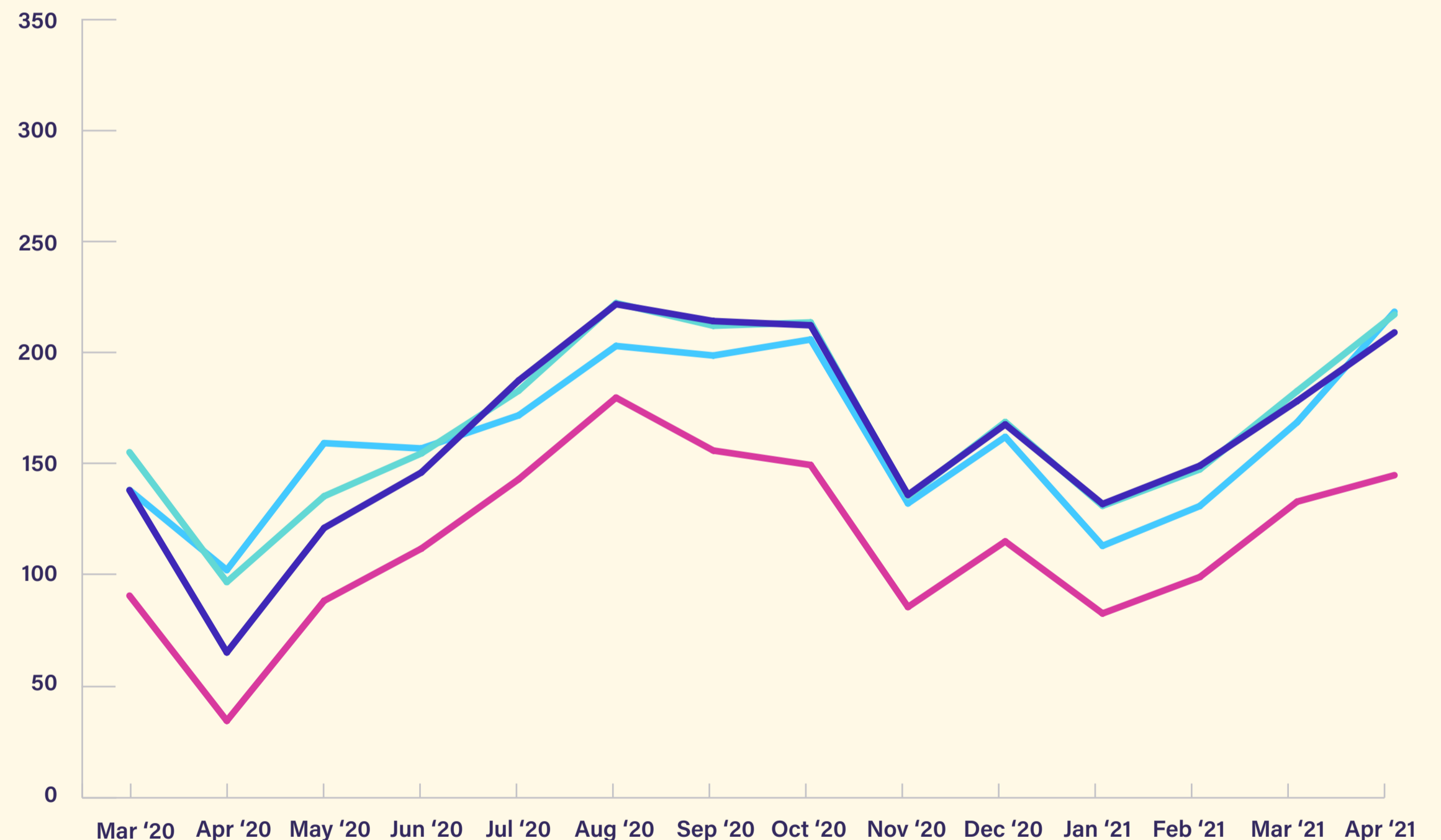
Pandemic impact vs recovery

How COVID-19 has impacted generations by industry

AVERAGE MONTHLY HOURS WORKED

Hospitality

- **Baby Boomers** 28% decrease in hours worked at the beginning of the pandemic (March 2020) leading into the first lockdown. Initial recovery cut short (Jan 2021) resulting in a second lockdown and 30% decrease in hours worked. Hours reached pre-COVID levels in April 2021.
- **Generation X** 37% decrease in hours worked at the beginning of the pandemic (March 2020) leading into the first lockdown. Initial recovery cut short (Jan 2021) resulting in a second lockdown and 22% decrease in hours worked. Hours reached pre-COVID levels in April 2021.
- **Millennials** 52% decrease in hours worked at the beginning of the pandemic (March 2020) leading into the first lockdown. Initial recovery cut short (Jan 2021) resulting in a second lockdown and 21% decrease in hours worked. Hours reached pre-COVID levels in April 2021.
- **Generation Z** 62% decrease in hours worked at the beginning of the pandemic (March 2020) leading into the first lockdown. Initial recovery cut short (Jan 2021) resulting in a second lockdown and 27% decrease in hours worked. Hours reached pre-COVID levels in April 2021.



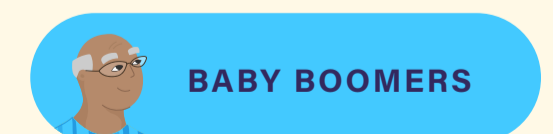
GENERATION Z



MILLENNIALS



GENERATION X



BABY BOOMERS



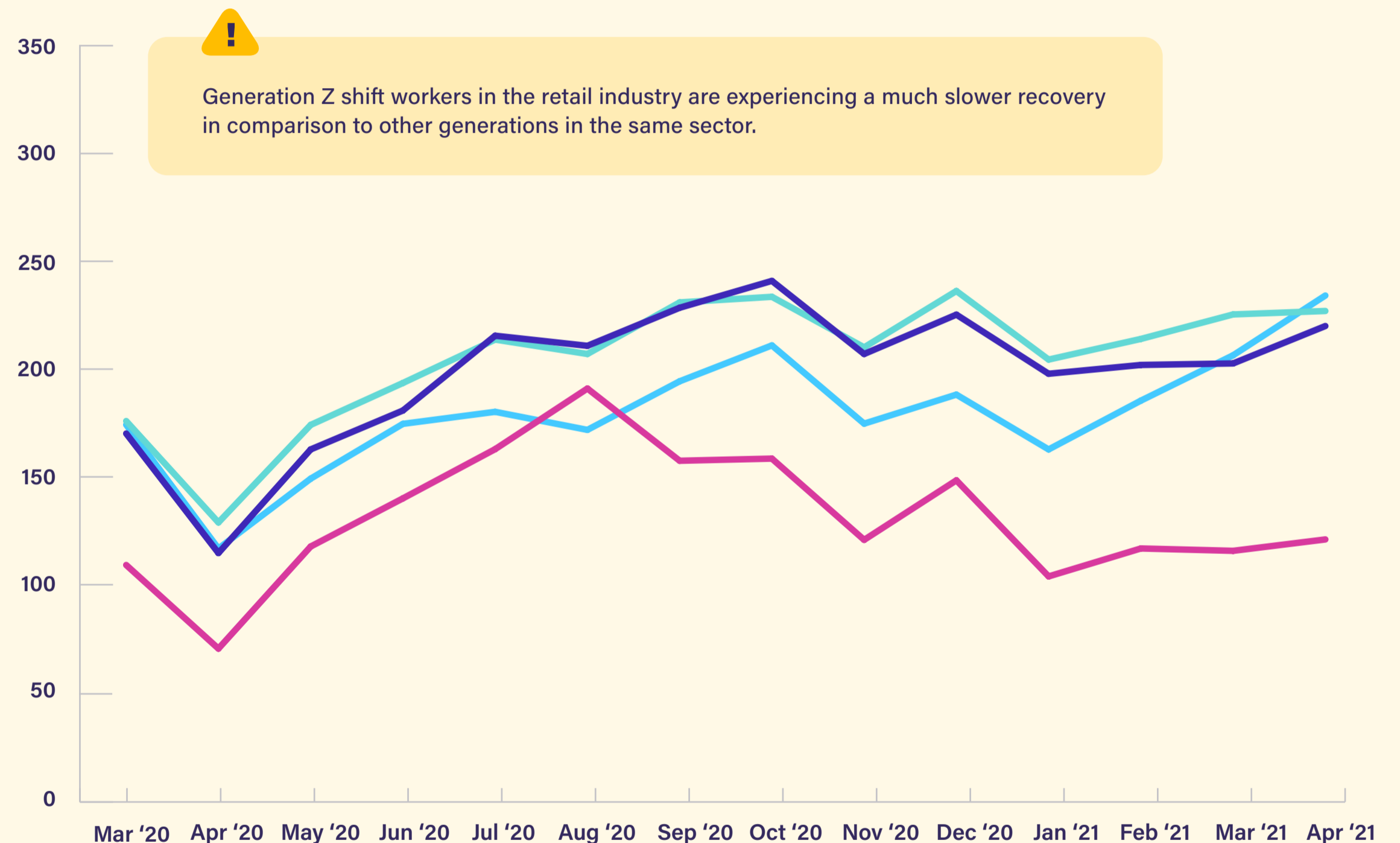
Pandemic impact vs recovery

How COVID-19 has impacted generations by industry

AVERAGE MONTHLY HOURS WORKED

Retail

- **Baby Boomers** 33% decrease in hours at the beginning of the pandemic (March 2020) leading into the first lockdown. Hours bounced back to pre-COVID levels in Feb 2021.
- **Generation X** 27% decrease in hours at the beginning of the pandemic (March 2020) leading into the first lockdown. Hours bounced back to pre-COVID levels in July 2020.
- **Millennials** 32% decrease in hours at the beginning of the pandemic (March 2020) leading into the first lockdown. Hours bounced back to pre-COVID levels in April 2021.
- **Generation Z** 35% decrease in hours at the beginning of the pandemic (March 2020) leading into the first lockdown. Hours are still yet to bounce back to pre-COVID levels.



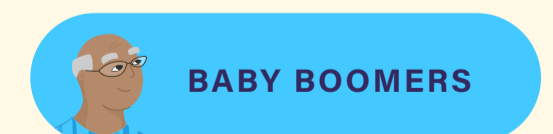
GENERATION Z



MILLENNIALS



GENERATION X



BABY BOOMERS



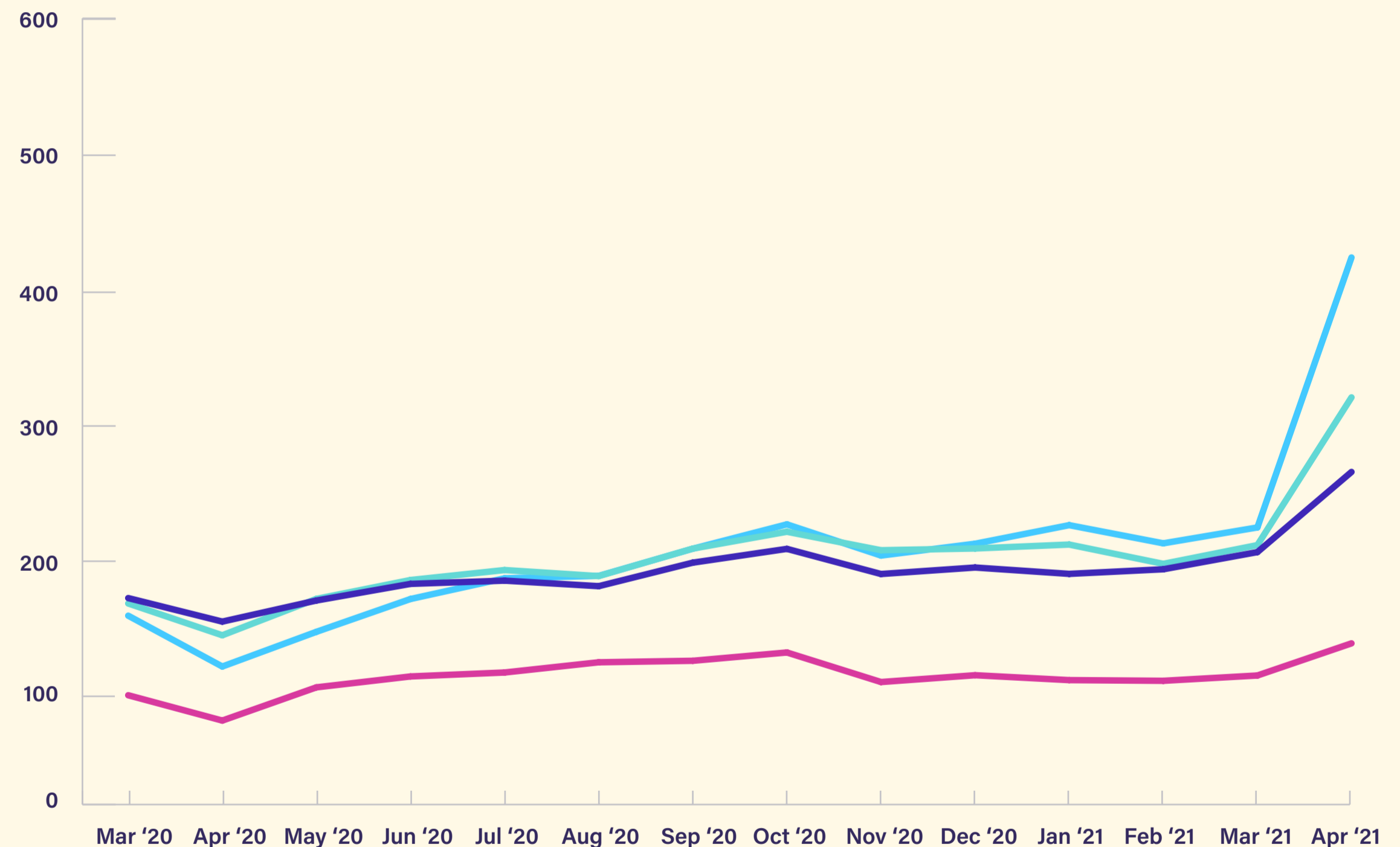
Pandemic impact vs recovery

How COVID-19 has impacted generations by industry

AVERAGE MONTHLY HOURS WORKED

Services

- **Baby Boomers** 19% decrease in hours at the beginning of the pandemic (March 2020) leading into the first lockdown. Hours have bounced back to 40% above pre-COVID levels.
- **Generation X** 14% decrease in hours at the beginning of the pandemic (March 2020) leading into the first lockdown. Hours have bounced back to 25% above pre-COVID levels.
- **Millennials** 10% decrease in hours at the beginning of the pandemic (March 2020) leading into the first lockdown. Hours have bounced back to 54% above pre-COVID levels.
- **Generation Z** 19% decrease in hours at the beginning of the pandemic (March 2020) leading into the first lockdown. Hours have bounced back to 15% above pre-COVID levels.



GENERATION Z



MILLENNIALS



GENERATION X



BABY BOOMERS



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