The Flex Report

Q1 2023

Flex Index
PRESENTED BY scoop

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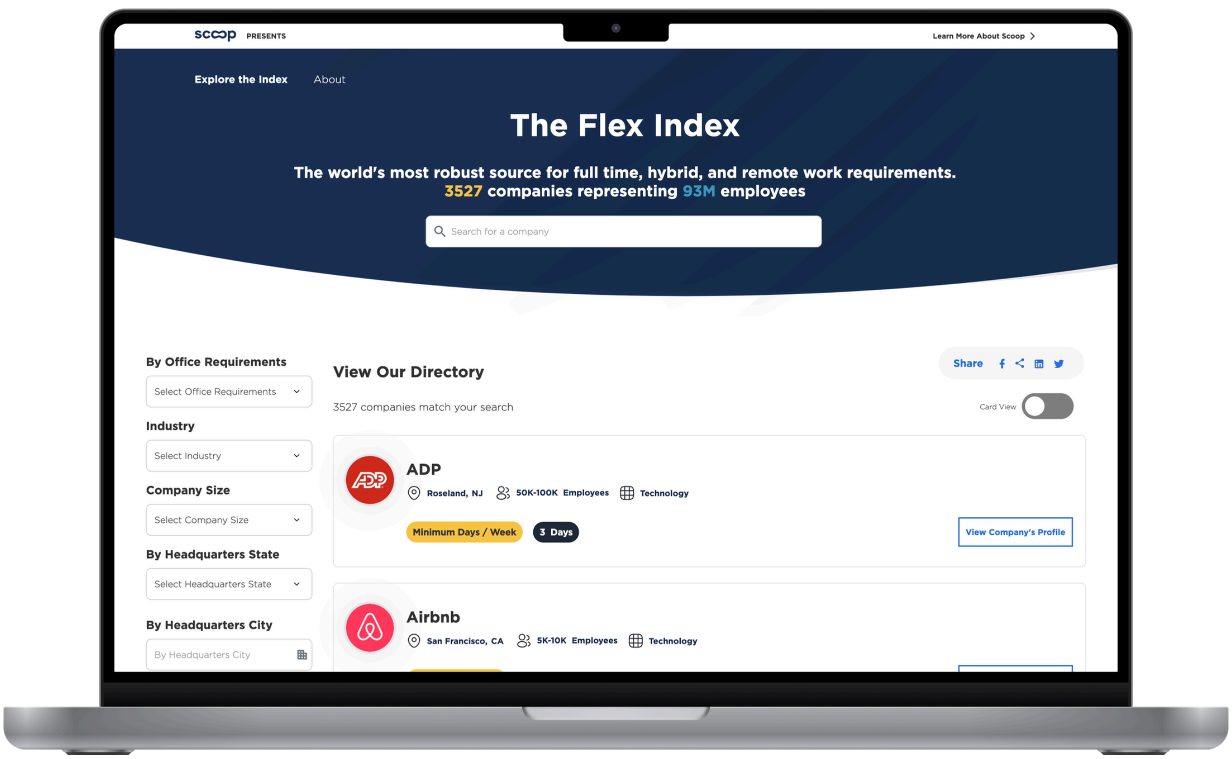
About the Flex Report

Even as demand for flexible work has exploded, there remains a massive insight gap on how work location flexibility varies across critical dimensions such as industries, metros, functions, and more. To make it even harder for job seekers, no two companies describe their approach to flexibility the same.

The Flex Report - powered by data from the [Flex Index] - closes that gap by offering the most comprehensive guide to our flexible world from hybrid to remote to full time in the office. The first of its kind, the Flex Report provides never before collected insights from over 4,000 companies employing more than 100 million people. This report offers the perspective and context every modern employee needs as they pursue a path toward the right version of flexible work for them.



Flexible Work Categories

Fully Flexible

Companies that give their employees a choice over whether to come into an office. Fully Flexible companies have adopted either a Fully Remote or Employee Choice model.

Fully Remote

Companies that do not have physical office space. All employees work remotely.

Employee's Choice

Employees can choose when or if they work from an office.

Structured Hybrid

Companies that have set specific expectations on when employees work from an office. The different Structured Hybrid models are:

Minimum Days

Companies that set a minimum number of days employees must work from the office each week (ex: two days per week).

Specific Days

Companies that set specific days of the week employees must work from the office (ex: Tues/Thurs).

Minimum & Specific Days

Companies that set minimum and specific days per week employees must work from the office.

Minimum Percentage of Time

Companies that set a minimum percentage of time employees must work from the office (ex: 40%).

Full Time In Office

Companies that require employees to work from the office full time.

Key Findings

1 51% Of US Companies Offer Work Location Flexibility

The US is split down the middle on work location flexibility. Nearly ⅓ of companies are Fully Flexible, allowing employees the freedom to choose whether and when to work from the office.

2 Hybrid Employees Should Plan On Commuting Mid-Week

Structured Hybrid companies — where there are set expectations on the amount of time spent in office — most commonly require employees to come into the office 2-3 times a week. Tuesday is the most common required day.

3 Tech Is Going All In On Flexibility

Nearly 80% of Technology companies identify as Fully Flexible, the highest of any industry surveyed. Professional Services, Media & Entertainment, Financial Services, and Insurance round out the top five.

Top 5 Flexible Industries

1. **Technology**
2. **Professional Services**
3. **Entertainment**
4. **Financial Services**
5. **Insurance**

4 The West And Northeast Lead The Way On Flexibility

Companies in the West and Northeast tend to offer more work location flexibility than those in the Midwest and South. However, flexibility can vary quite a bit from metro to metro, even within the same state.

5 The Bigger They Are, The More Structure They Have

Smaller companies tend to offer the most flexible work opportunities. Larger companies are more likely to require full time on site work or choose Structured Hybrid models.

6 The "Remote Work" Dictionary Lacks Standardization

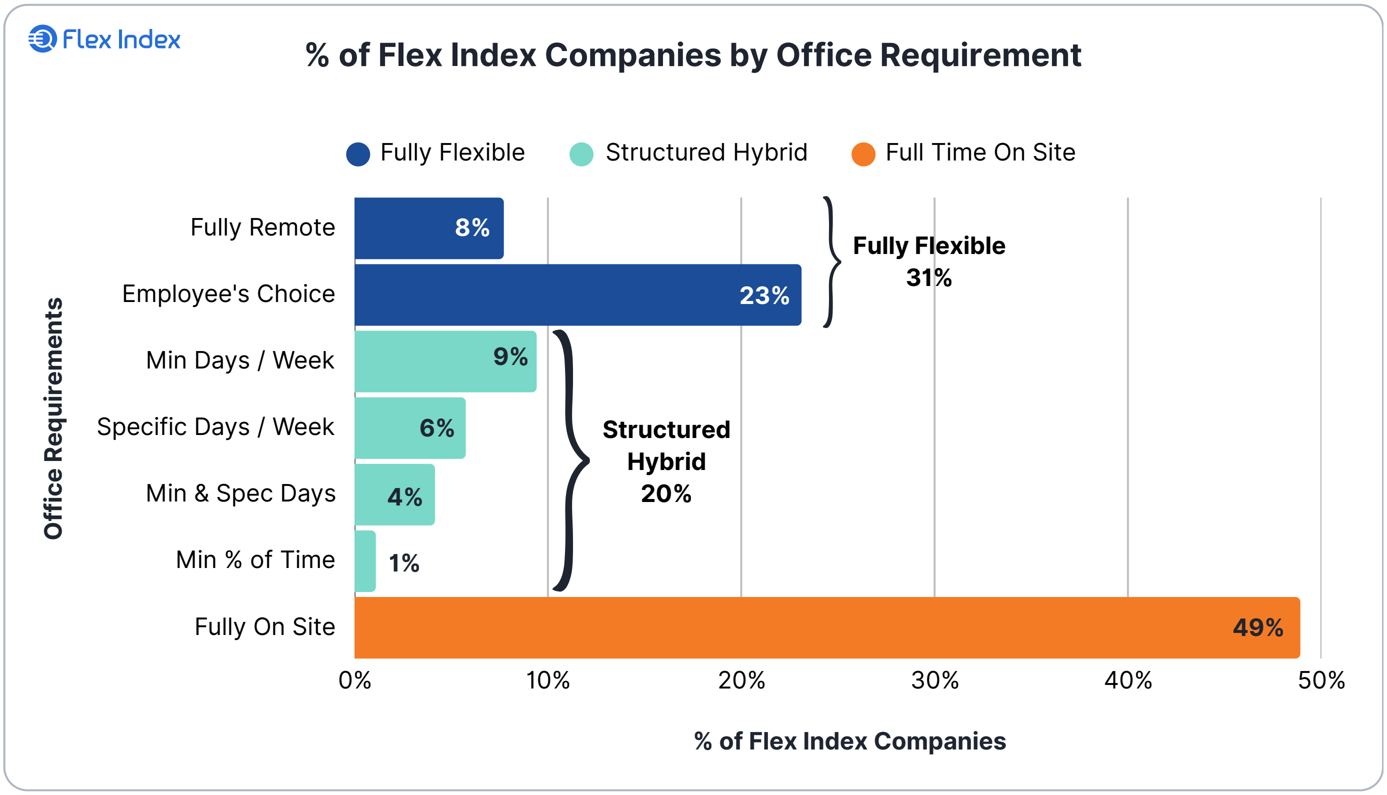
Companies rarely share the same definition of "remote work." This report aims to standardize these terms so companies, industries, and geographies can be compared in a more consistent manner.

Spotlight on...

Office Requirements

OFFICE REQUIREMENTS

US companies are split. 49% require full time in-office work, and 51% offer some work location flexibility. About ⅓ of US companies are Fully Flexible, meaning they give employees control over whether and when to come into the office. 20% of companies are Structured Hybrid.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,128 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population. The Flex Index is presented by Scoop (scoopforwork.com).

WHY IT MATTERS

With 23% of companies adopting an Employee's Choice model, job seekers looking for the autonomy to choose when (or if) they go into an office should have some good options.

🔑 KEY TAKEAWAY

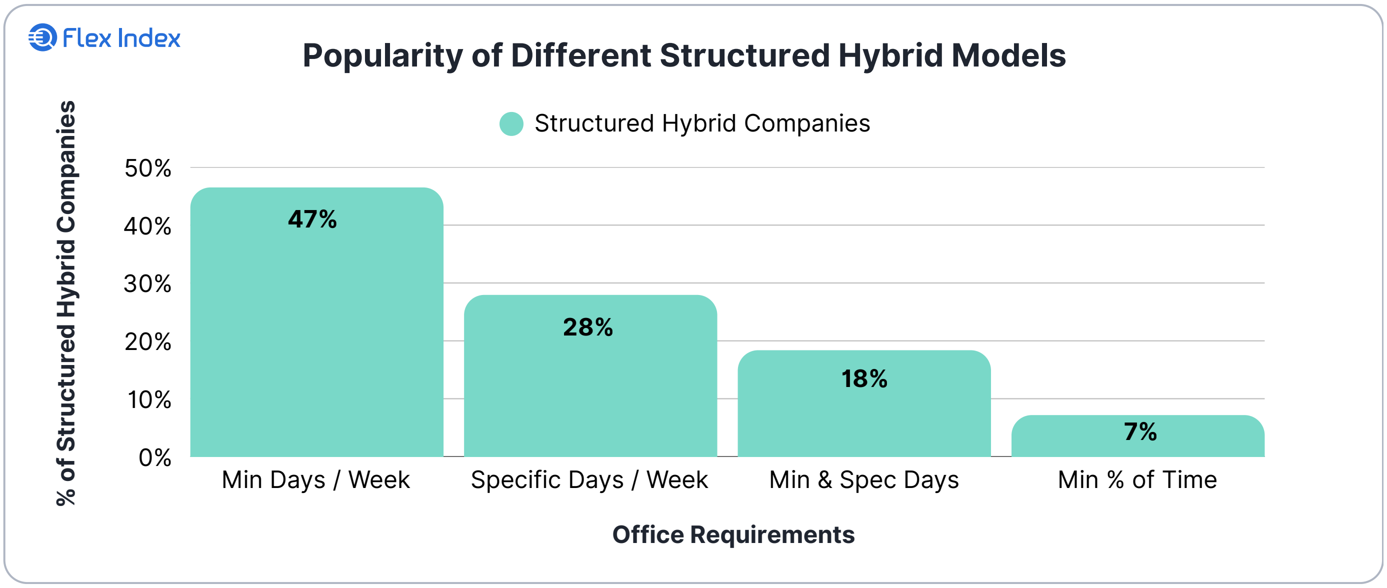
Only 8% of companies are fully remote with no offices. These companies are hard to find and heavily weighted toward specific industries (hint: tech), sizes, and geographies. Considering reports that 50% of applications submitted on LinkedIn are for remote jobs, expect the hiring process for these opportunities to be the most competitive.

Spotlight on...

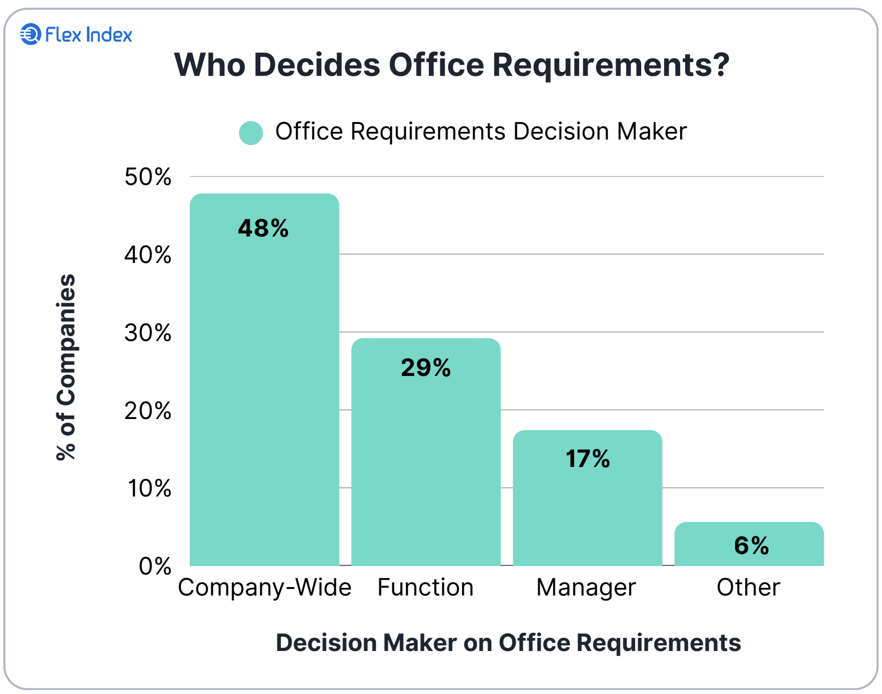
Structured Hybrid

STRUCTURED HYBRID

The most common Structured Hybrid model is Minimum Days per Week (47% of Structured Hybrid companies), followed by Specific Days of the Week (28%).



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on companies with Structured Hybrid office requirements. N = 544 companies. The Flex Index is presented by Scoop (scoopforwork.com).



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ADVICE

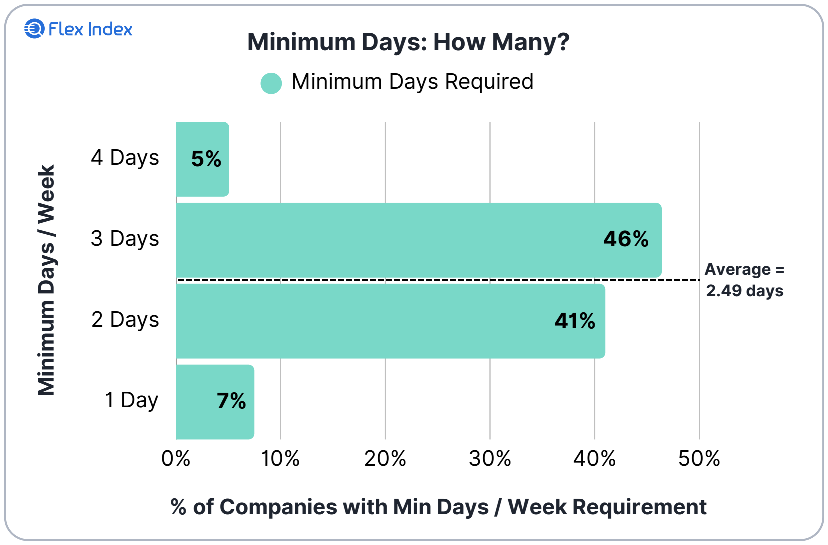
Nearly half of Structured Hybrid companies decide office requirements at the company level.

However, it's pretty common for your job function or your manager to determine office requirements, so it's a good idea to ask who decides this during your interview process.

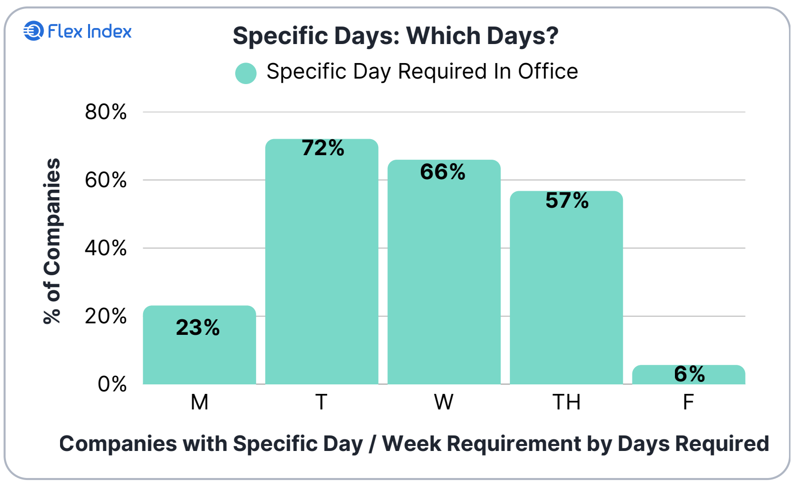
STRUCTURED HYBRID

If you join a Structured Hybrid company, you'll most likely come into the office 2-3 days a week.

The average Structured Hybrid company requires you to spend about 50% of the time in the office.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on companies with a min day / week office requirement. N = 334 companies. The Flex Index is presented by Scoop (scoopforwork.com).



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on companies with a specific day / week office requirement. N = 229 companies. The Flex Index is presented by Scoop (scoopforwork.com).

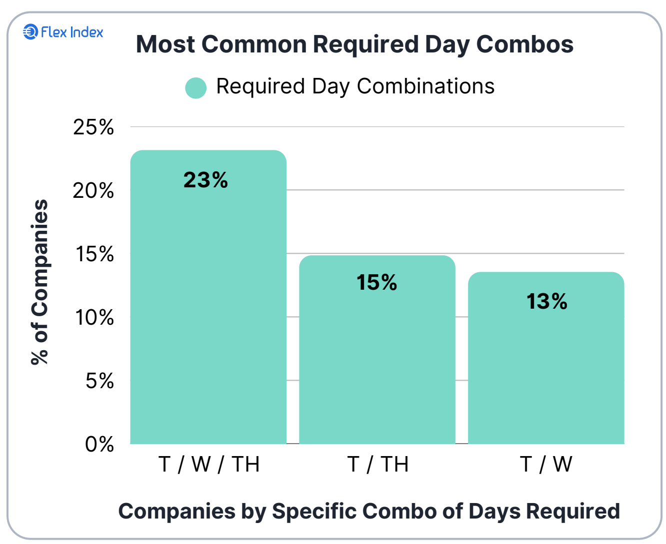
Your Monday mornings and Friday afternoons may remain commute-free, but employees should expect to spend the middle of the week in the office.

Tuesday is the most commonly required office day, followed by Wednesday and Thursday.

💡 DID YOU KNOW?

The most popular combination of required office days is **Tuesday-Thursday**.

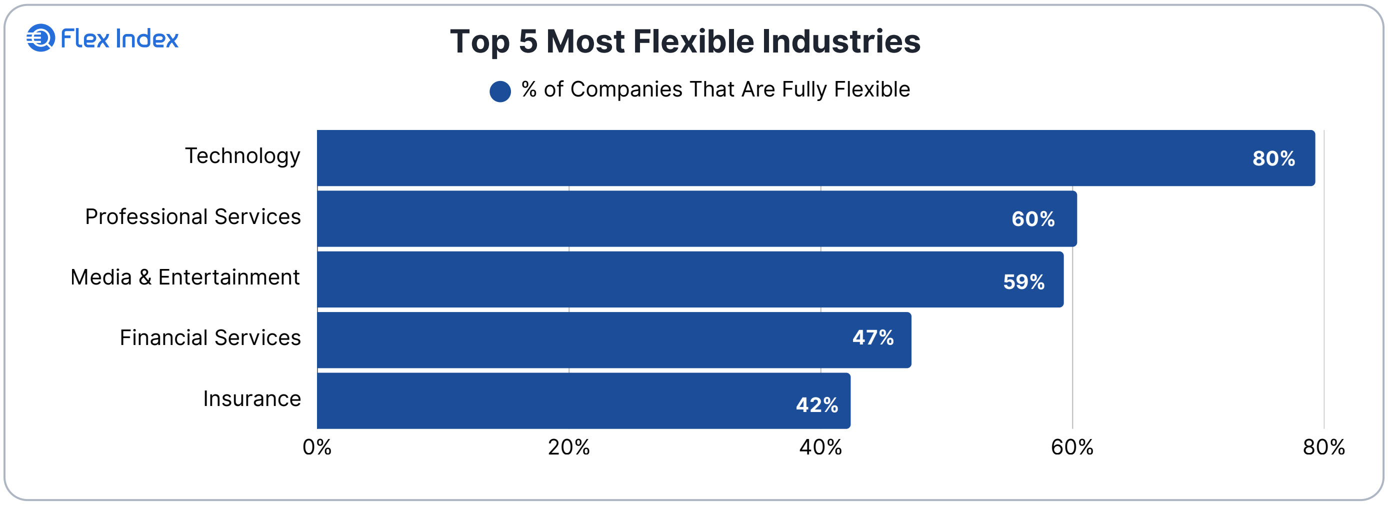
The next most popular combinations are **Tuesday/Thursday** and **Tuesday/Wednesday**.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on companies with a specific day / week office requirement. N = 229 companies. The Flex Index is presented by Scoop (scoopforwork.com).

Flexibility by Industry

FLEXIBILITY BY INDUSTRY



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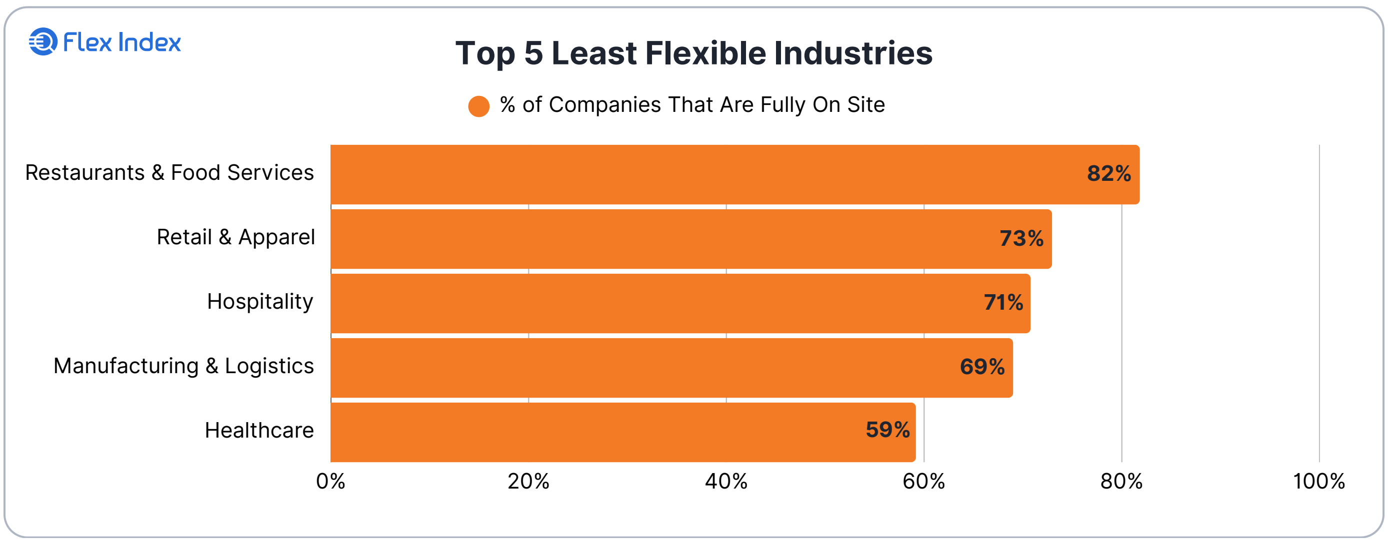


Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,128 companies. The Flex Index is presented by Scoop (scoopforwork.com).

MOST FLEXIBLE

80% of Technology companies identify as Fully Flexible.

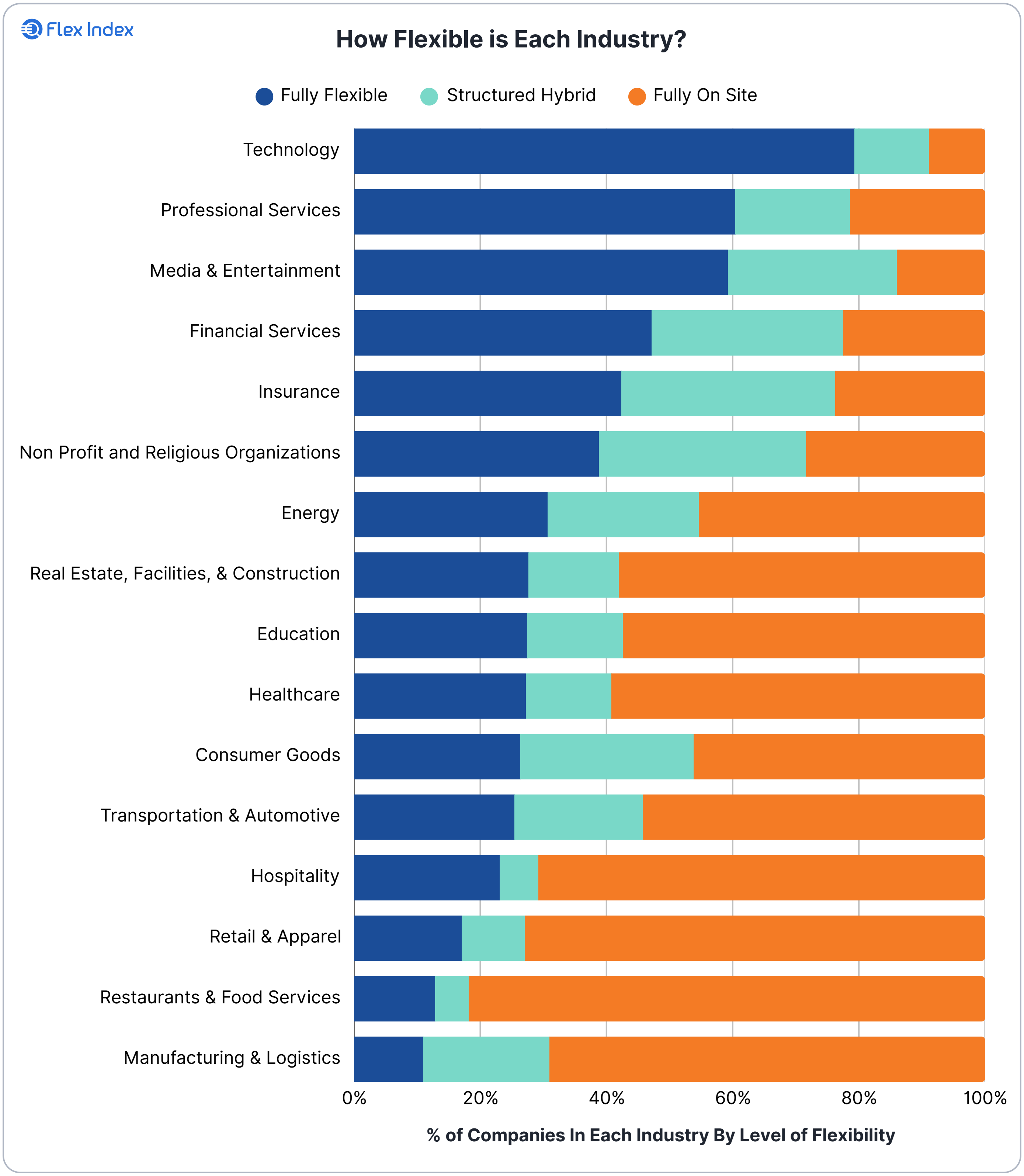
Financial Services is also a top five industry for flexibility, with many smaller investment firms and financial services providers offering fully flexible opportunities.

LEAST FLEXIBLE

The industries requiring the most on site work are also the industries that depend the most on foot traffic to be successful.

More than 70% of firms in Restaurants & Food Services, Retail & Apparel, and Hospitality require their employees to work on site full time.

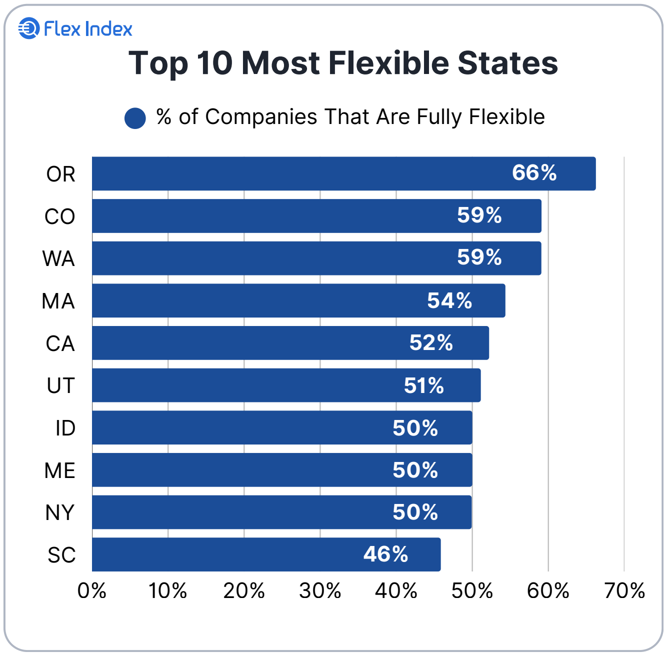
FLEXIBILITY BY INDUSTRY



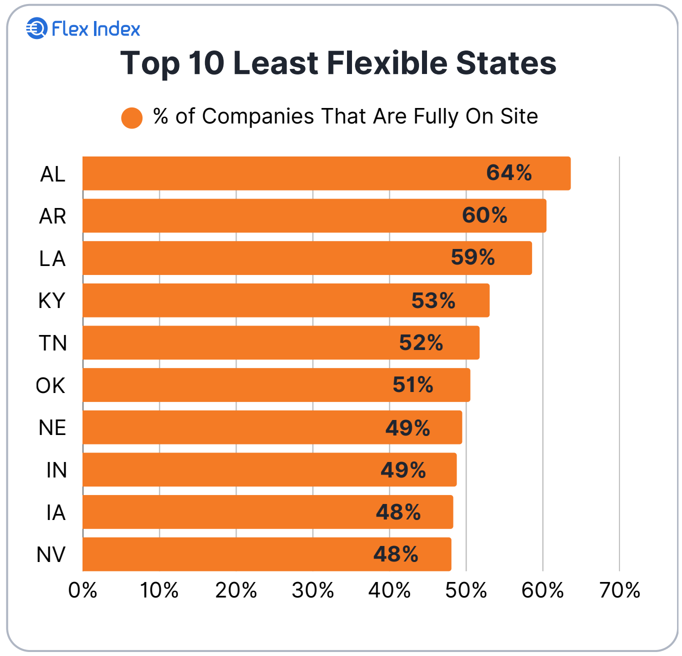
Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,117 companies. The Flex Index is presented by Scoop (scoopforwork.com).

Flexibility by State & Metro

FLEXIBILITY BY STATE & METRO



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements; People Data Labs data on firm employment by metro. N = 17,945 State data points.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements; People Data Labs data on firm employment by metro. N = 17,945 State data points.

You might have expected California to be the most flexible state, given the high number of technology companies.

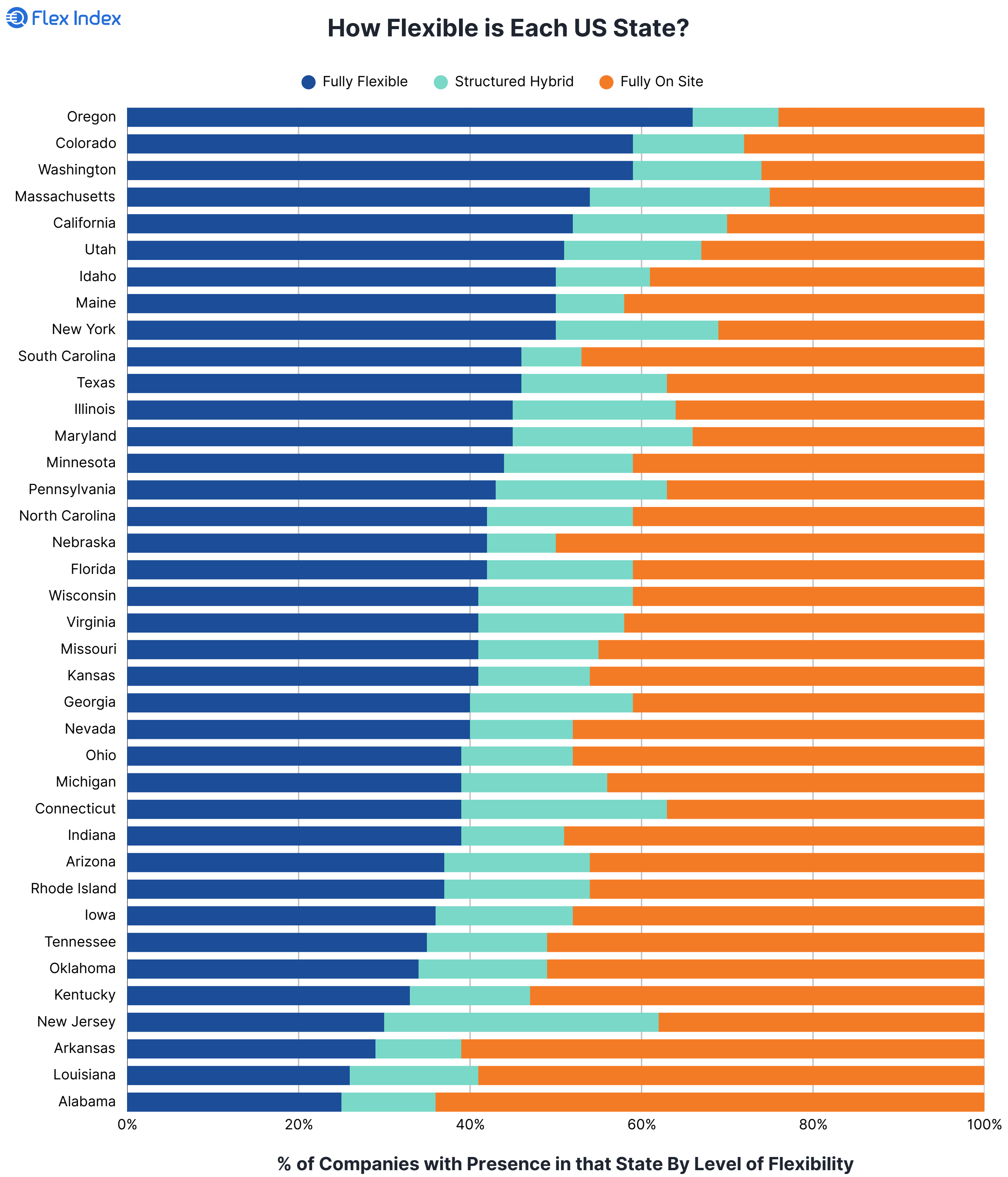
But Oregon is the winner at 66% of companies offering full flexibility. The remaining top spots went primarily to states located in the West and Northeast regions of the US.

Companies in the South and Midwest more frequently require full time office work.

💡 DID YOU KNOW?

South Carolina found its way onto the top 10 most flexible states list, with 46% of companies offering full flexibility.

FLEXIBILITY BY STATE & METRO



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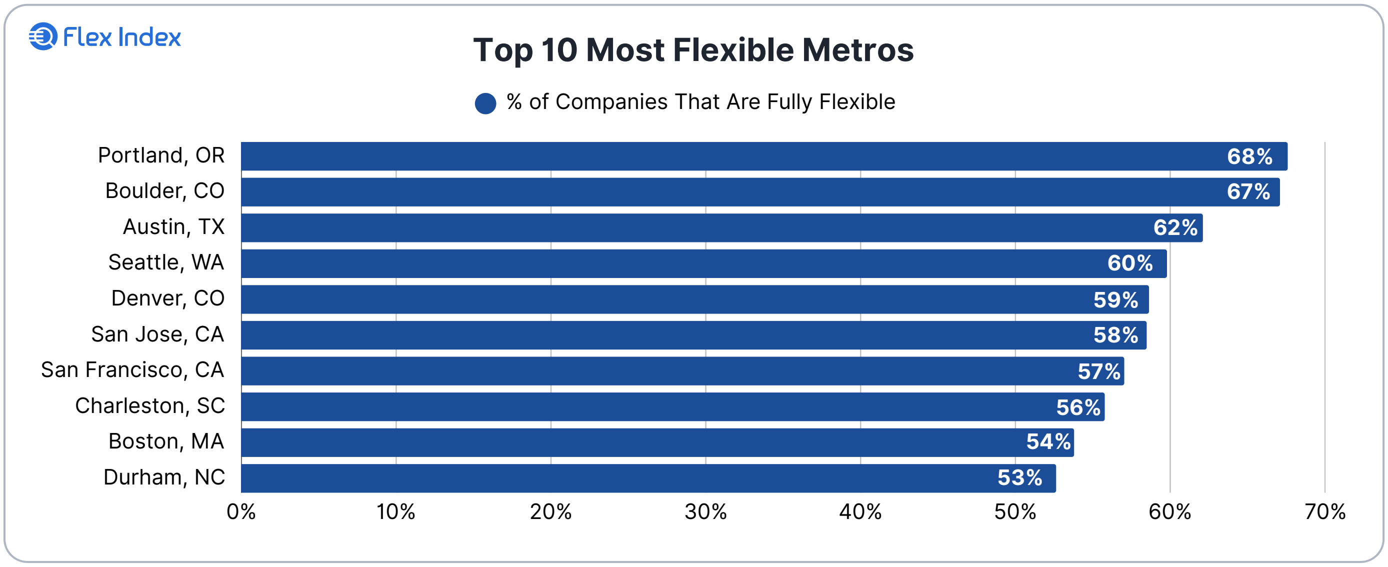
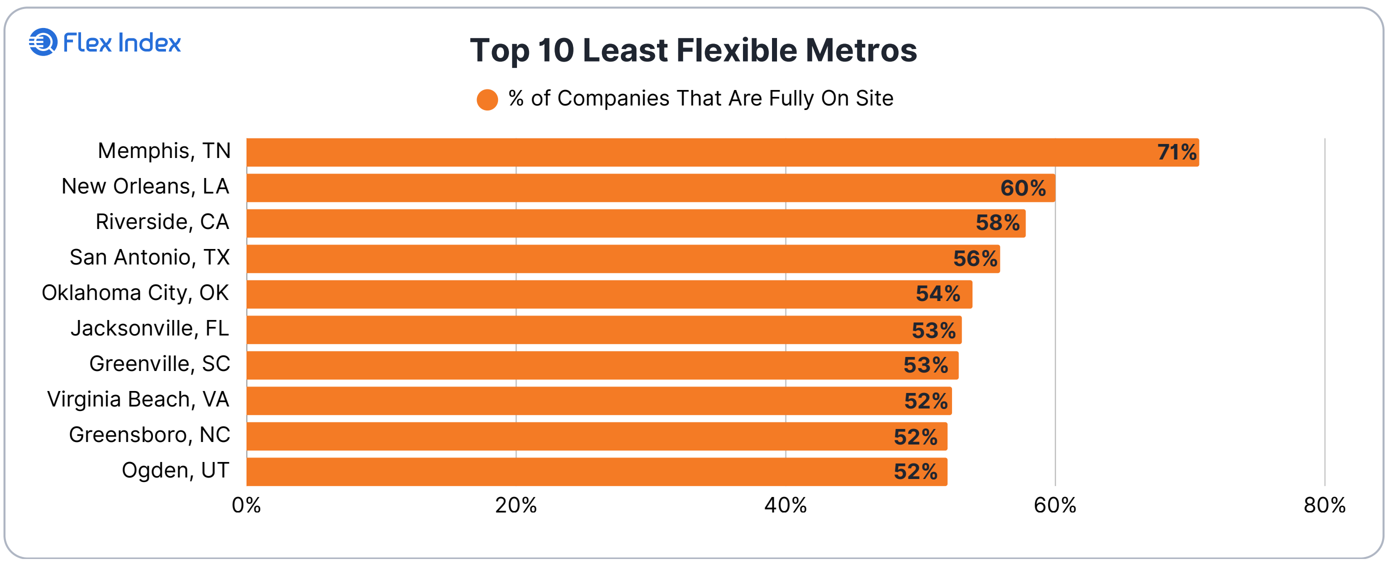
FLEXIBILITY BY STATE & METRO



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements; People Data Labs data on firm employment by metro. N = 24,799 metro data points. The Flex Index is presented by Scoop (scoopforwork.com).



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements; People Data Labs data on firm employment by metro. N = 24,799 metro data points. The Flex Index is presented by Scoop (scoopforwork.com).

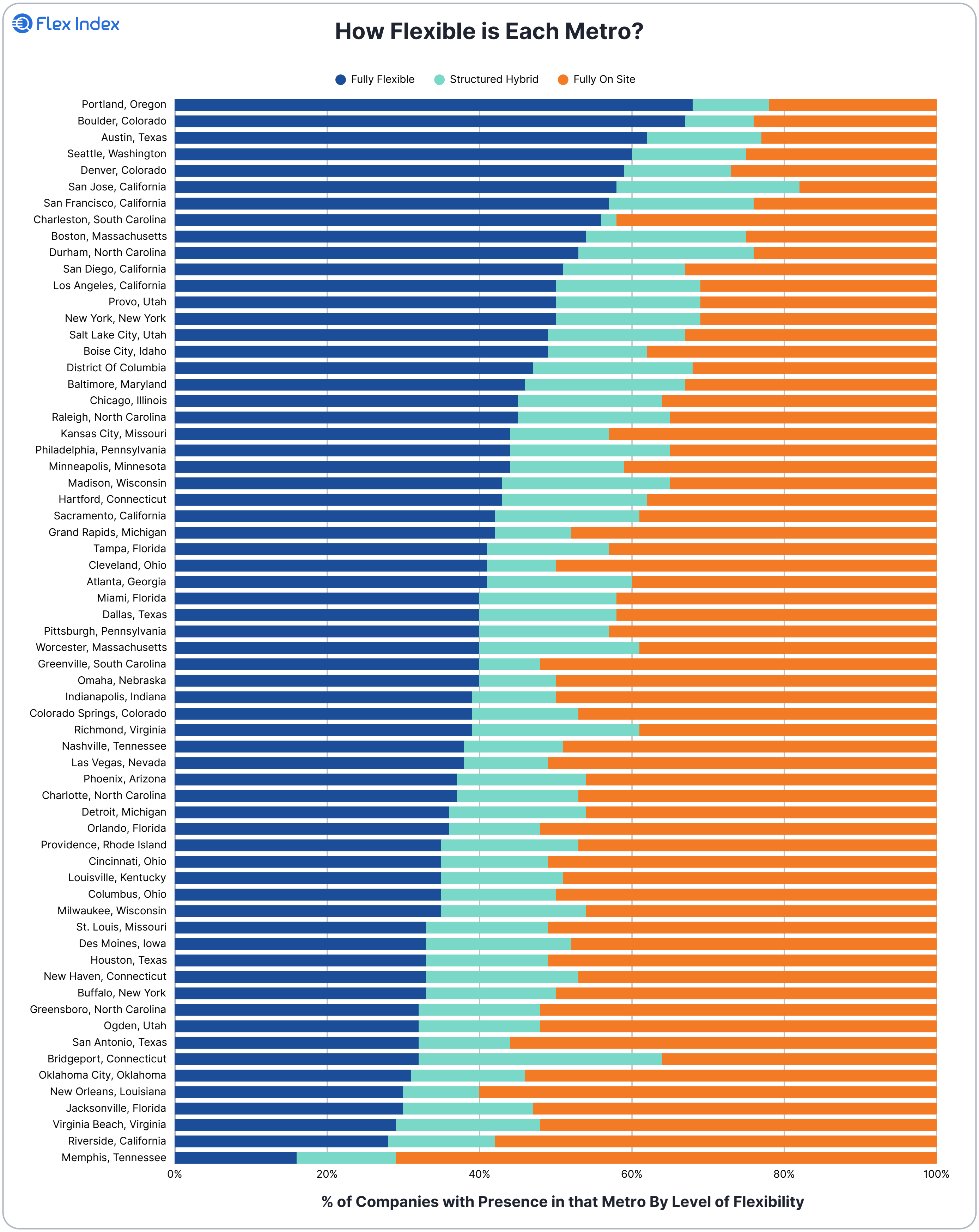
Portland takes the top spot in flexibility (68%). At the same time, California saw two cities make the top ten: San Jose (58%) and San Francisco (57%).

Speaking of tech hubs, emerging hubs in Austin (62%), Seattle (60%), and Denver (59%) most likely contributed to their inclusion on this list.

Southern metros make up most of the top 10 metros requiring fully on site work, with Memphis in the number one spot (71% of companies).

Some metros within the same state show up on both lists. Charleston, SC, and Durham, NC, are two of the top 10 most flexible, while Greenville, SC, and Greensboro, NC, are both on the least flexible list.

FLEXIBILITY BY STATE & METRO



Flex Index PRESENTED BY scoop

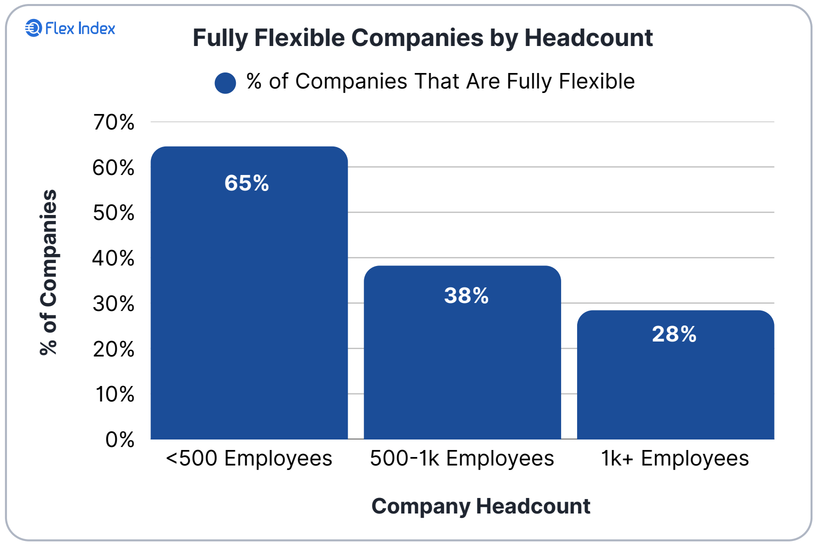
Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements; People Data Labs data on firm employment by metro. N = 24,799 metro data points. The Flex Index is presented by Scoop (scoopforwork.com).

Flexibility by Company Size

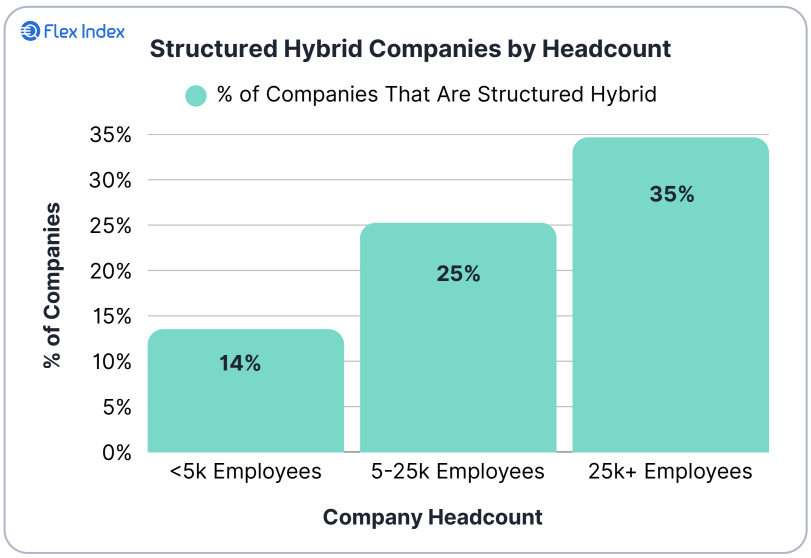
FLEXIBILITY BY COMPANY SIZE

If you're looking for more flexible work, you're more likely to find it at a smaller company.

Companies under 500 employees are more than twice as likely to be Fully Flexible compared to companies with more than 1,000 employees.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,113 companies. The Flex Index is presented by Scoop (scoopforwork.com).



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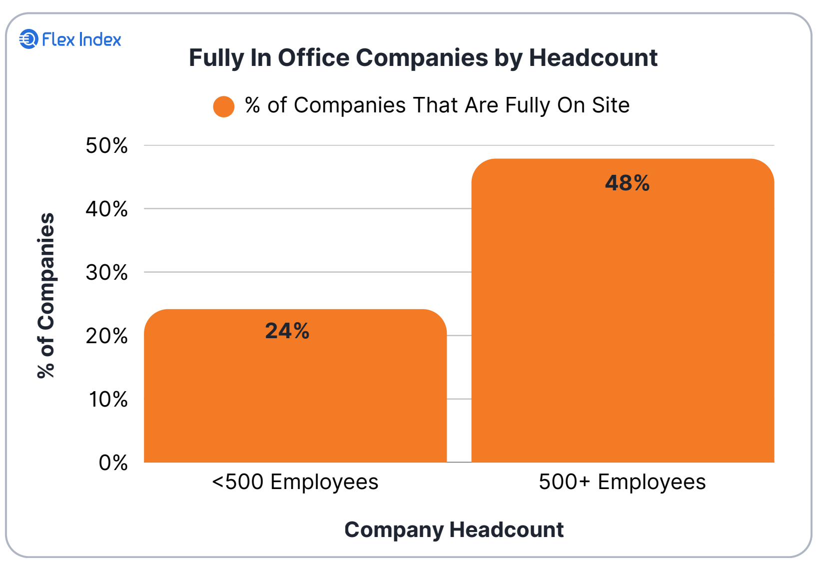
Structured Hybrid models are significantly more common at large companies.

Companies with 25,000+ employees are 2.5x as likely to be Structured Hybrid compared with those with less than 5,000 employees.

One hypothesis: larger companies find it more challenging to operate without the greater schedule structure.

Companies with 500+ employees are twice as likely to require Full Time On Site work compared with companies with less than 500 employees.

This could be due to companies starting in the last few years (after the onset of COVID-19) that began with greater location flexibility.



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In Summary

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The world has changed dramatically over the last three years. In 2019, it would have been unthinkable for the majority of US companies to offer some level of flexibility on where employees work. This increase in work flexibility will prove to be one of the longer-lasting impacts of the global pandemic.

Yet, flexibility varies dramatically across industries, geographies, and company sizes. Job seekers have different access levels to flexible work opportunities based on where they live and what they do.

One thing is clear - the United States, and the world at large, is still very early in this flexible work journey. The Flex Index will be a resource to shine a light on trends in flexibility, focused on enabling job seekers to find opportunities that match the right level of flexibility for them.

You can contribute to the breadth and quality of the Flex Index by adding your company information here.

Appendix

Appendix

About the Flex Index

The Flex Index by Scoop is the world's most robust source of company in-office requirements, from fully in-office to remote work and everything in between. The Flex Index represents ~4,000 companies, 25,000 office locations, and 100 million people.

About Scoop

Scoop is the fastest way to plan your next great office day. With Scoop, employees get more out of going in, with easily scheduled in-office days and invites. For HR and workplace leaders, Scoop provides insights on work location trends, office usage, and additional workplace solutions to get the most out of hybrid work.

Contribute to the Flex Index

There are two ways to add your company depending on your role:

Short Survey

For any company employee.

This survey asks for only the most basic information about your company's office requirements and takes one minute to complete.

+ Add your company

Detailed Survey

For company representatives that are familiar with more detailed aspects of the company's policy.

Companies that complete this survey will have a ***verified*** *check mark displayed on their company page and be sorted to the top of search results.*

+ Add your company

You can also visit: **flex.scoopforwork.com** to contribute.

Methodology

The Flex Index collects firmographic and office requirements information on more than 4,000 companies. These companies collectively have more than 25,000 office locations and employ more than 100 million people.

Company office requirements are generated through a combination of online survey and manual entry of publicly available information. All surveys must be submitted by an employee of the company with an accompanying work email address to verify their employment. All surveys contributing to this Flex Report were conducted between October 2022 and January 2023. Once a company is incorporated into the Flex Index, company representatives are contacted to inform them of their inclusion. Companies can add or update their information on the Flex Index at any time.

Company office requirements reflect the most common office requirements for corporate employees. Companies can add detail to their company page to reflect job functions, roles, or geographies where there are different office requirements from the corporate policy. This includes opportunities for fully remote work, roles that are required to be fully on site, or other hybrid work arrangements.

Our partner People Data Labs provides the data on top employment locations for each company on the Flex Index. This data is used to inform state and metro flexibility analysis.

Contacts & Contributors

For questions and press inquiries, please reach out to:

Rob Sadow
CEO & Co-founder, Scoop
✉ rob@takescoop.com

Citations: Please cite "The Flex Index (flex.scoopforwork.com), Q1 2023 Flex Report"

Further Research: Subscribe to the Flex Index newsletter for research and insights.

Many thanks to the following people for their help in contributing to The Flex Report:

Michael Samuels
VP, Go To Market
Scoop

Rob Sadow
CEO and Co-Founder
Scoop

Kate Walsh
Marketing Lead
Scoop

Jon Sadow
CPTO and Co-Founder
Scoop

Sam Peniak
Lead Product Designer
Scoop

Nick Bloom
Stanford Economics
Professor & Scoop Advisor
Stanford University