The Flex Report

Q2 2023

Flex Index
PRESENTED BY scoop

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About the Flex Report

It's been more than three years since the start of COVID-19 when hundreds of millions of people were first introduced to the experience of working remotely. While many parts of life have returned to pre-pandemic norms, where we work continues to be a hotly debated topic.

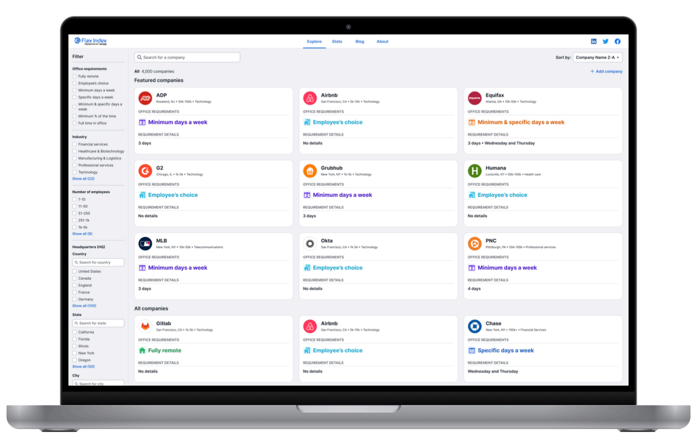
In just the last three months, we've seen a slew of announcements from larger companies shifting their office requirements. Disney increased its Minimum Days/Week per requirement to four days. Starbucks mandated corporate employees come into the office three days a week.

Even the big tech companies -- long viewed as the most remote-friendly large companies -- appear to be moving toward more on site work. Amazon, Google, and Lyft all have announced plans to modify their flexible work policies in a push to bring employees back into the workplace at least half the week, and in some cases more.

So what’s happening? Is Fully Remote work vanishing? Is Full time in Office work becoming the norm? Or are these isolated examples that don’t reflect a larger trend?

Since our inaugural Flex Report in February 2023, we’ve added or edited thousands of companies on the Flex Index. We’re tracking the changes across industries, regions, and company sizes, so as a job seeker, you can better understand what to expect when looking for your next career opportunity.

Read on for the state of flexibility in Q2 2023!



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 The rise of Structured Hybrid

Structured Hybrid models -- where companies set specific expectations for when employees come into the office -- are becoming more popular. 30% of companies now have Structured Hybrid models, compared to 20% in our Q1 2023 Flex Report.

2 Full Time In Office becoming less common

As Structured Hybrid models gain popularity, Full Time In Office is becoming less common. On an industry-weighted basis, Full Time In Office dropped from 49% of companies in Q1 to 42% in Q2. It appears that employers are finding Structured Hybrid to be a better balance between a desire for in-office collaboration and employee pushback on return-to-office mandates.

3 Min Days/Week becoming the dominant Structured Hybrid Model

61% of Structured Hybrid companies have a Minimum Days/Week model. That's a significant increase from the 47% of Structured Hybrid companies in our Q1 Flex Report. The average company with a Min Days/Week model requires employees to come in 2.5 days/week.

4 Even Tech is starting to embrace Structured Hybrid

Technology is still the most flexible industry, with 75% of Tech companies either Fully Remote or Employee's Choice (where employees can choose when or if they work from an office). However, Structured Hybrid is growing in popularity. 17% of Tech companies are now Structured Hybrid, up from 12% in Q1. Amongst large Tech companies (1,000+ employees), 39% are Structured Hybrid compared to 28% in Q1.

Industries with biggest shift to Structured Hybrid

1. Energy
2. Insurance
3. Hospitality
4. Manufacturing & Logistics
5. Real Estate

5 Large companies are the biggest movers to Structured Hybrid

Bigger companies are significantly more likely to be Structured Hybrid. 66% of companies with 50,000 or more employees are Structured Hybrid, compared to 14% of companies with less than 500 employees. Large companies also saw the biggest shift to Structured Hybrid in the last quarter, and the biggest shift away from Fully Flexible models.

6 Oregon keeps its title as the most flexible state in the US

Western states like OR, WA, and CO continue to rank highest for most flexible states this quarter, while the hot job market in the Sunbelt hasn't made the region any more amenable to flexible work. AR, AL, and LA employers remain the least flexible for work.

7 The West continues to lead for flexible work opportunities

Once again, Portland, Boulder, and Austin hold the top spots as the best metros to find Fully Flexible work in Q2 2023. Memphis tops the least flexible list, while newcomer Birmingham, Alabama, grabs the #2 spot.

Spotlight on...

Office Requirements

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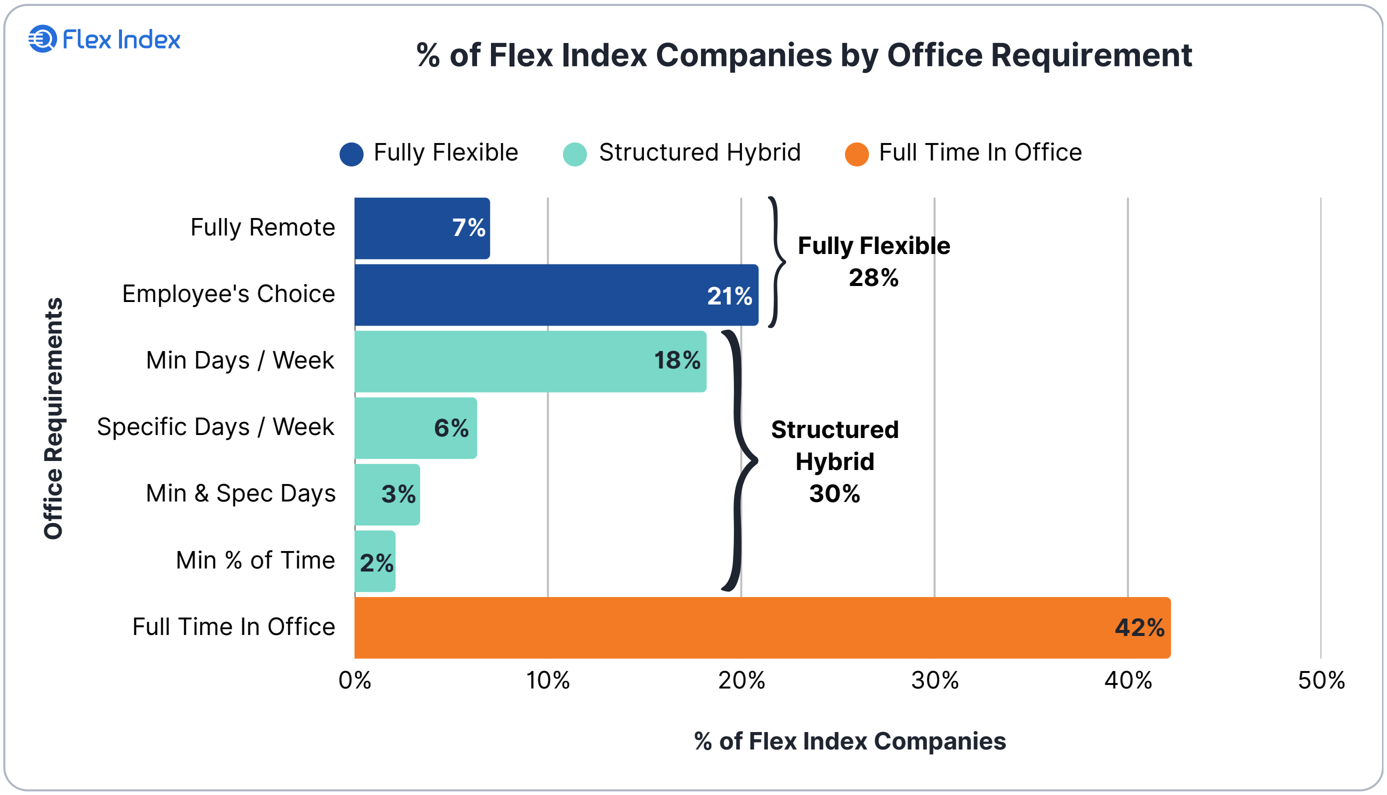
OFFICE REQUIREMENTS

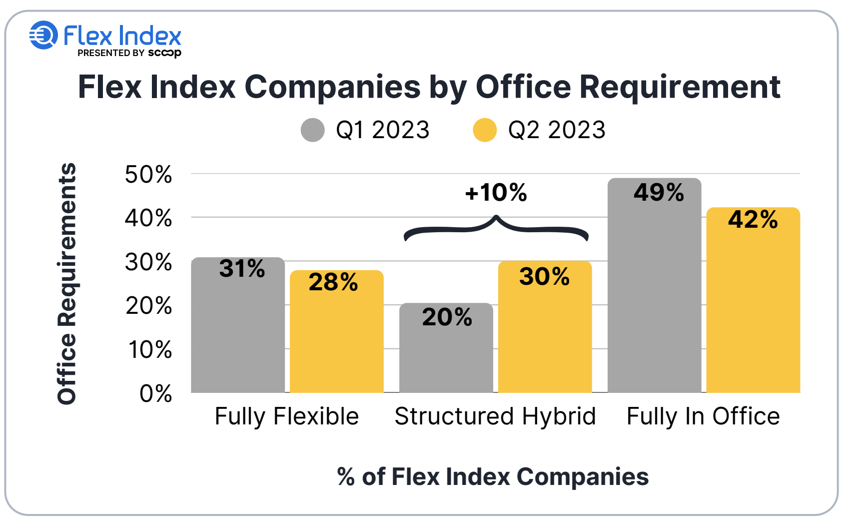
In a significant shift from last quarter, the majority of US companies now offer a hybrid work arrangement (51% of total companies). There has been a marked rise in Structured Hybrid companies; 30% of companies are now Structured Hybrid. Fully Remote has remained relatively constant at 7% of companies.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,885 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).

The percentage of US companies that are Full Time In Office dropped from 49% in Q1 2023 to 42% in Q2 2023.

Will employers continue to require less Full Time In Office work? We will continue to analyze this trend moving forward.



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Spotlight on...

Structured Hybrid

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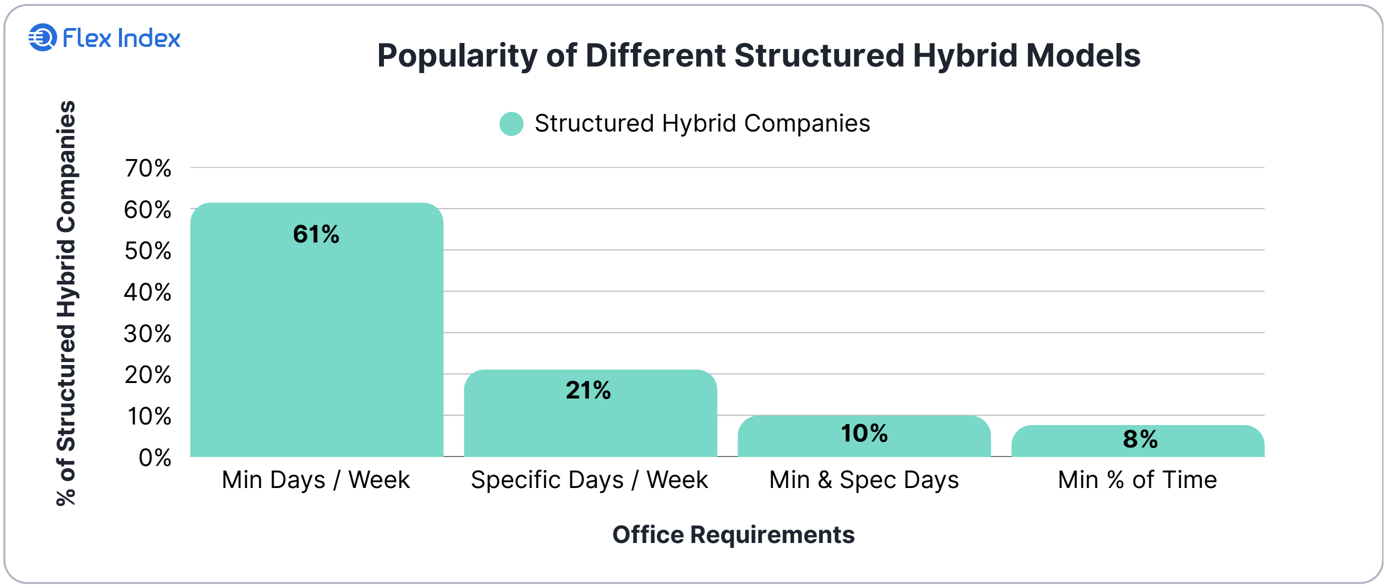
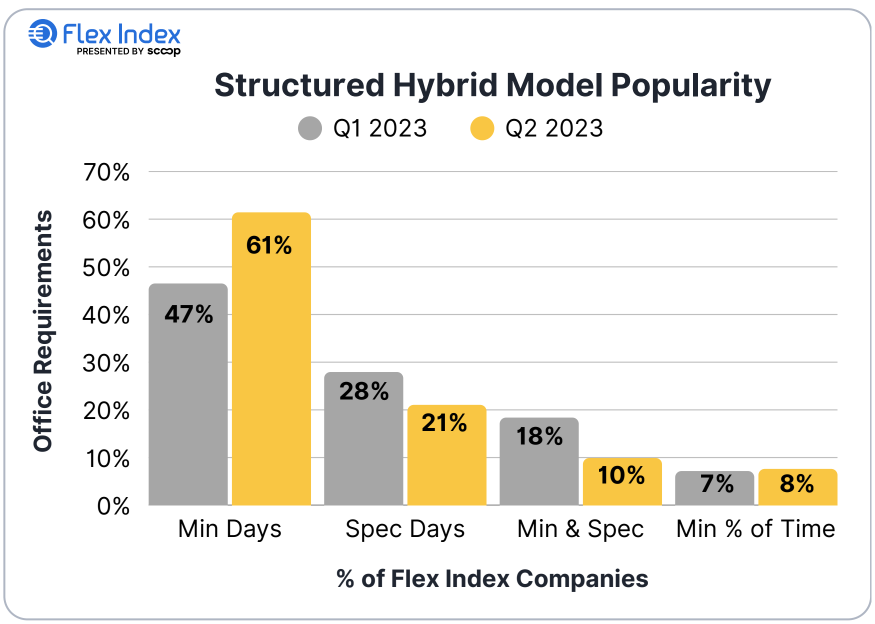
STRUCTURED HYBRID

Minimum Days/Week is quickly becoming the dominant Structured Hybrid model. 61% of Structured Hybrid companies are Minimum Days / Week, compared to 47% in Q1 2023. Specific Days/Week is becoming less popular as employers find a need to allow teams and employees more flexibility to choose the best days to be in office.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on companies with Structured Hybrid office requirements. N = 1,050 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 Structured Hybrid office requirements. N = 1,050 companies. The Flex Index is presented by Scoop (scoopforwork.com).

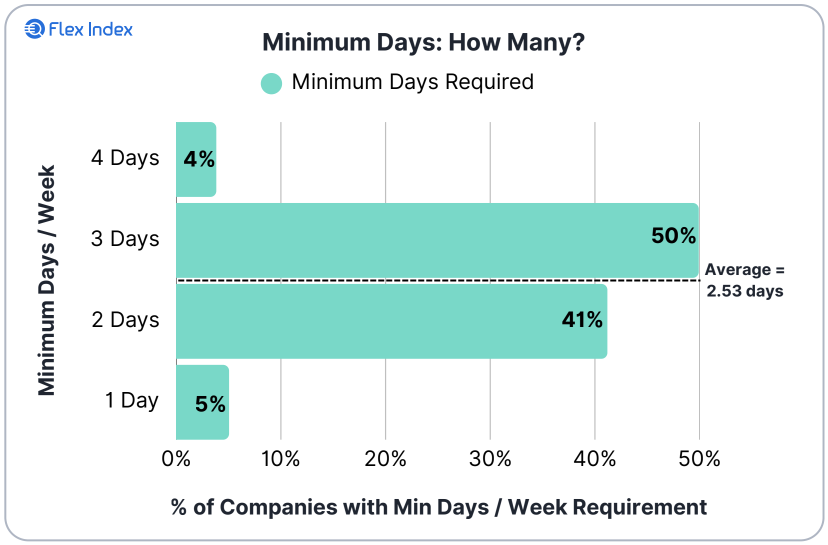
💬 GOOD TO KNOW

With Minimum Days (vs. Specific Days) gaining ground as the preferred Structured Hybrid policy, we're seeing a general shift toward a less prescriptive hybrid model, which may help balance in-office demands with the remote flexibility we know employees value.

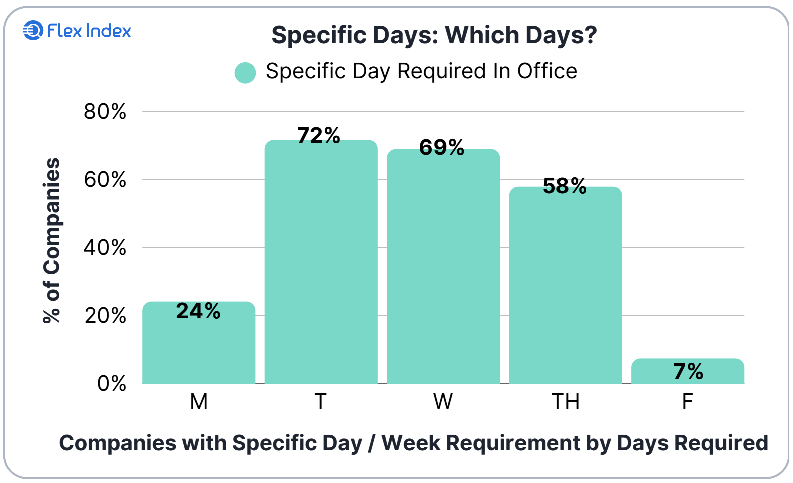
STRUCTURED HYBRID

The typical Structured Hybrid organization requires employees to come into the workplace between 2-3 days a week, with the average clocking in at 2.53 days.

This is a marginal increase from last quarter (2.49), indicating that even as Structured Hybrid becomes more popular, the amount of time spent in office is likely to stay between 2-3 days per week.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on companies with a min day / week office requirement. N = 653 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 = 299 companies. The Flex Index is presented by Scoop (scoopforwork.com).

If you work at a Structured Hybrid company, you're most likely to be in the office in the middle of the week. Only 24% of companies with Specific Days require Monday, and only 7% require Friday.

Looks like summer Friday's are becoming year-round Friday's, at least in terms of time spent in the office!

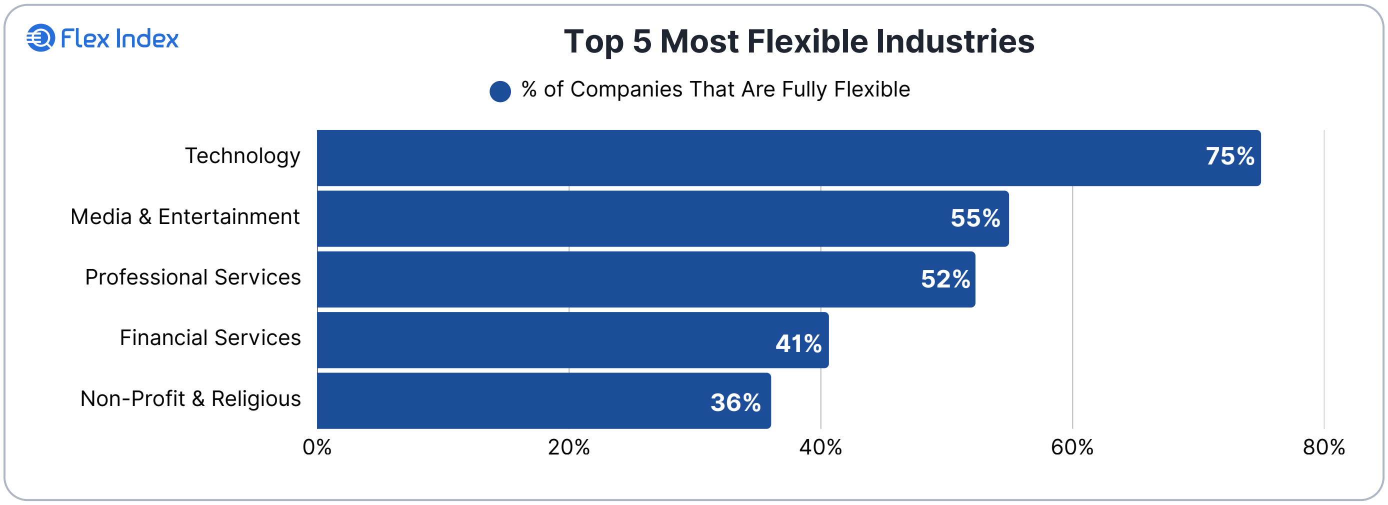
💡 DID YOU KNOW?

Only 4% of Structured Hybrid companies require employees to come into the office four days a week. On the other hand, only 5% of Structured Hybrid companies require one day a week in office.

90%+ of Structured Hybrid companies have a 2 or 3 day a week in office requirement.

Flexibility by Industry

FLEXIBILITY BY INDUSTRY



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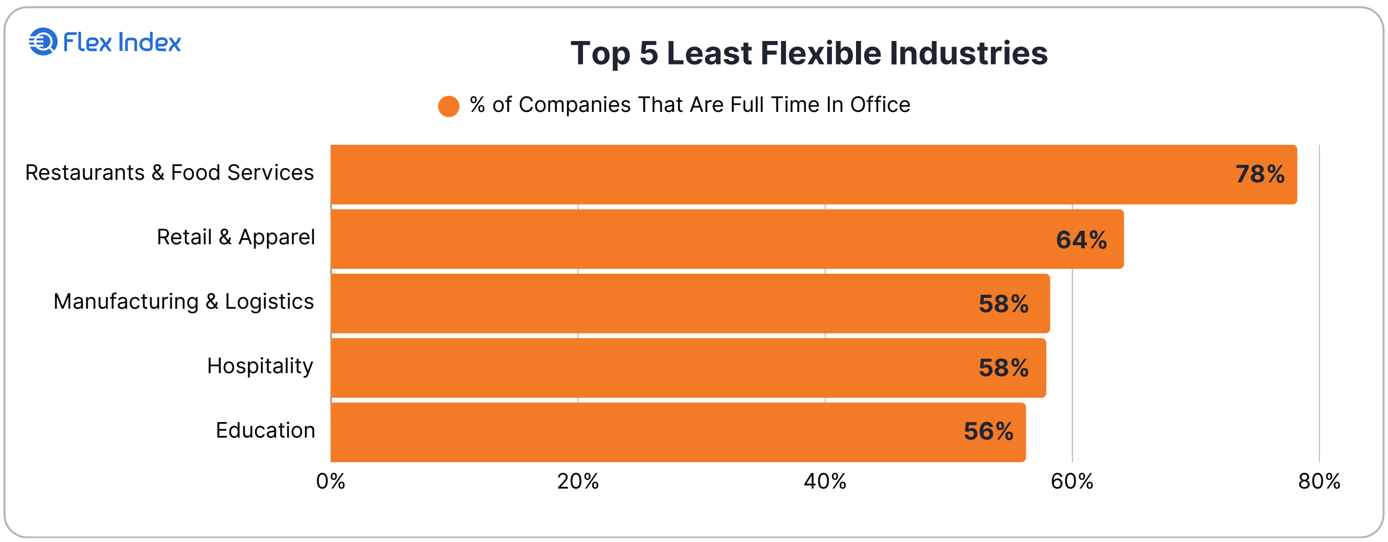


Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,885 companies. The Flex Index is presented by Scoop (scoopforwork.com).

MOST FLEXIBLE

Technology, Media & Entertainment, and Professional Services are the top industries to find remote work opportunities.

Non-Profit & Religious organizations crack the top 5 for the first time, so if you're looking to give back, you can do that with flexibility.

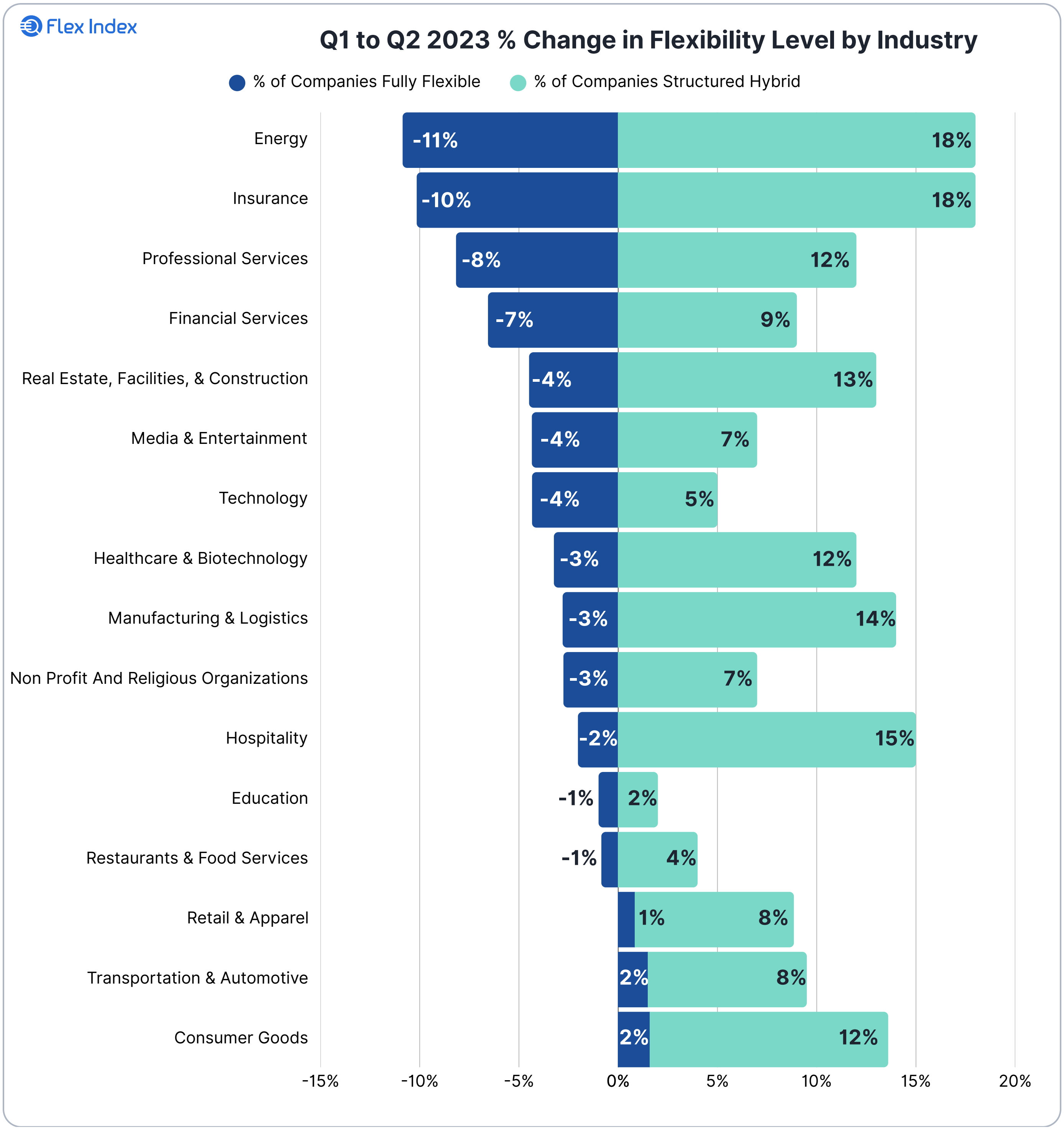
LEAST FLEXIBLE

Unsurprisingly, the industries requiring the most on site work remain those that depend the most on foot traffic to succeed.

Restaurants & Food Services, Retail & Apparel, and Manufacturing have the highest percentage of companies requiring Full Time In Office work.

FLEXIBILITY BY INDUSTRY

Across most industries we track, Fully Flexible work is declining while Structured Hybrid continues to rise. The exceptions are Retail & Apparel, Transportation & Automotive, and Consumer Goods, where both Fully Flexible and Structured Hybrid are growing as a percentage of total companies.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,885 companies. The Flex Index is presented by Scoop (scoopforwork.com).

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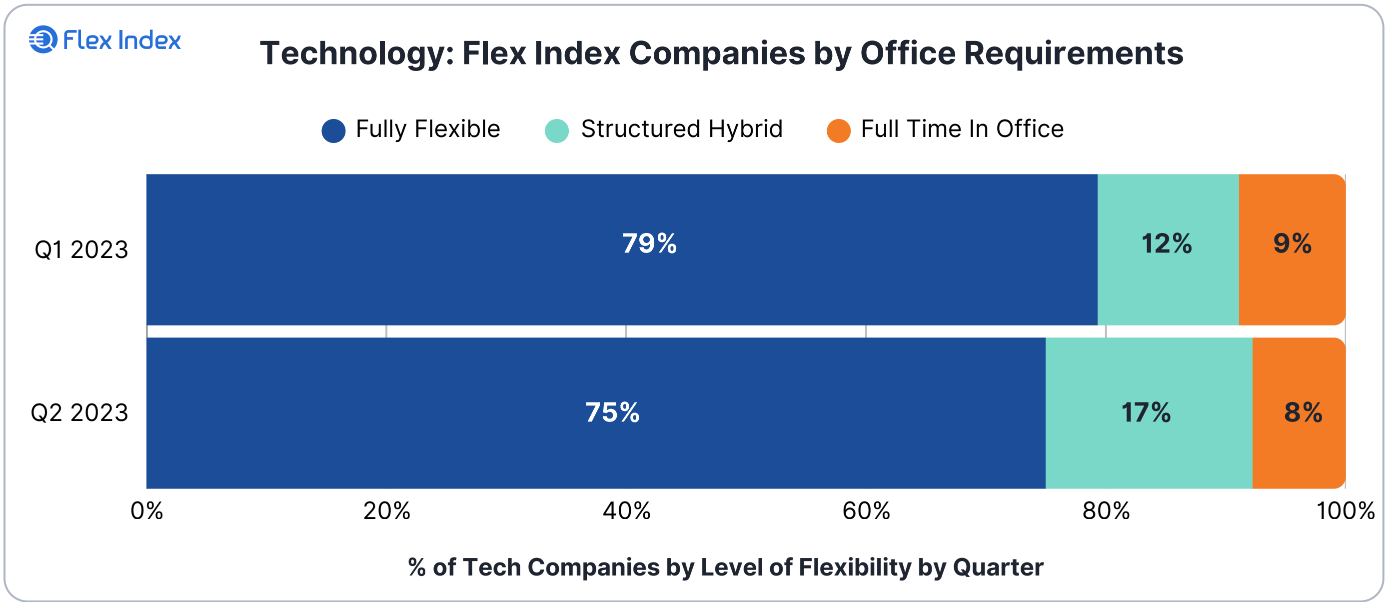
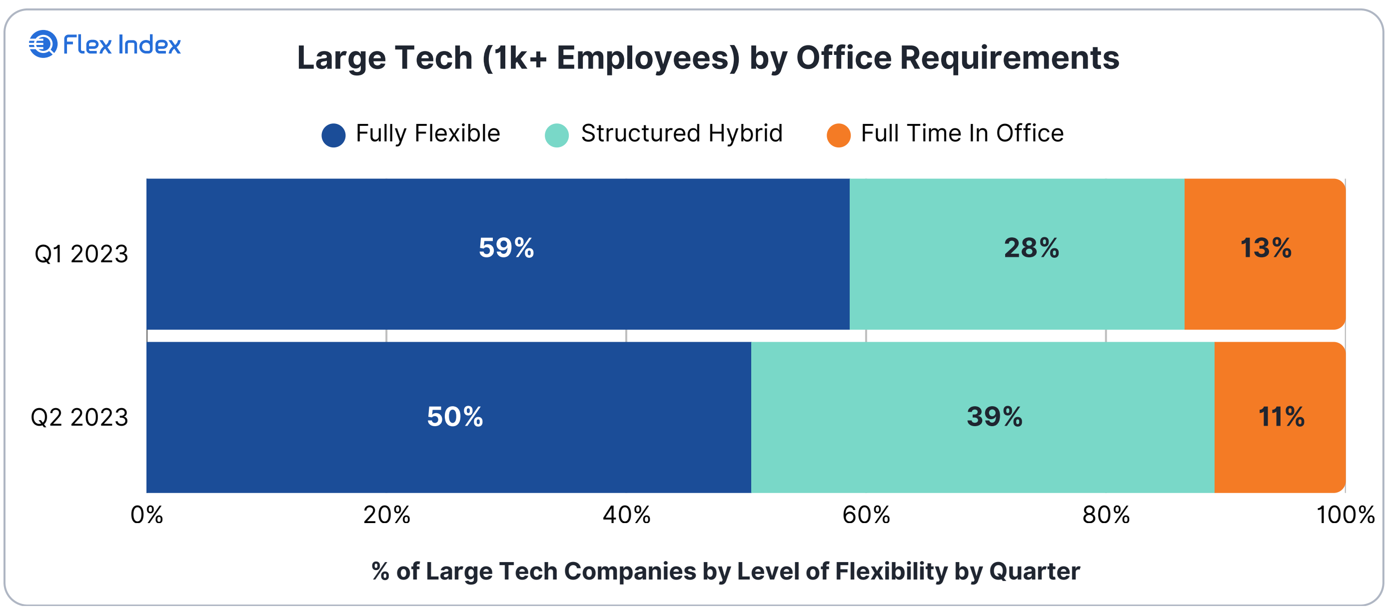
FLEXIBILITY BY INDUSTRY

Tech is the most flexible industry, but Structured Hybrid is starting to grow as a percentage of total, especially in larger tech companies.

The overall share of technology companies adopting Structured Hybrid grew from 12% to 17%. Within large tech employers (over 1,000 employees), the overall share of companies adopting Structured Hybrid grew from 28% to 39%. Prominent companies like Amazon, Apple, Google, and Salesforce have all leaned into a 3 days/week Structured Hybrid model as their new standard.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 863 companies. The Flex Index is presented by Scoop (scoopforwork.com).



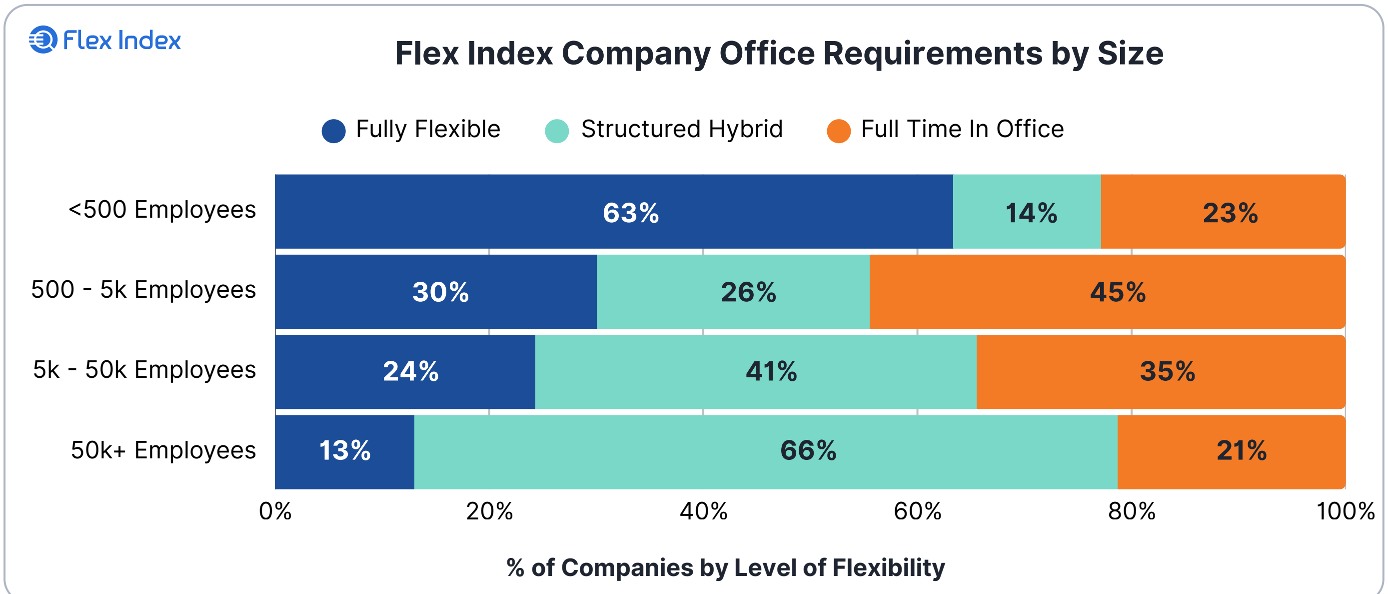
Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 253 companies. The Flex Index is presented by Scoop (scoopforwork.com).

Flexibility by Company Size

FLEXIBILITY BY COMPANY SIZE

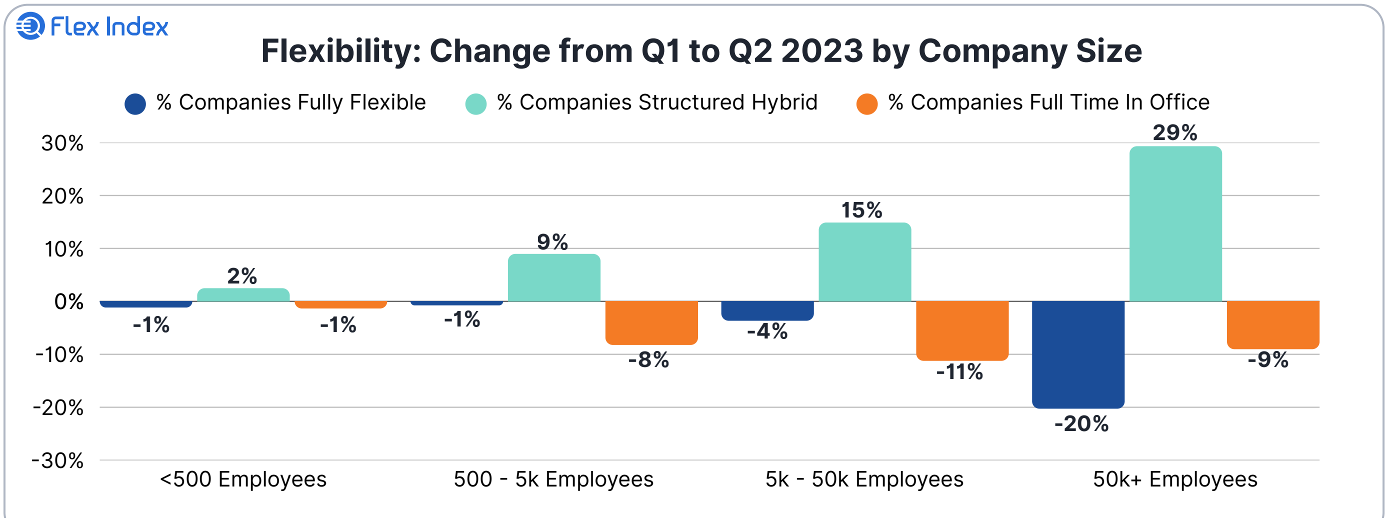
Bigger companies are significantly more likely to adopt Structured Hybrid models.

63% of companies under 500 employees are Fully Flexible vs. 14% Structured Hybrid. The percentages are almost the opposite for the companies with 50k+ employees. 13% of companies with 50k+ employees are Fully Flexible vs. 66% Structured Hybrid.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,868 companies. The Flex Index is presented by Scoop (scoopforwork.com).

Big companies are also the fastest-rising adopters of Structured Hybrid work. The percentage of companies with 50k+ employees adopting Structured Hybrid increased by 29 points vs. Q1!



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 3,868 companies. The Flex Index is presented by Scoop (scoopforwork.com).

Flexibility by State & Metro

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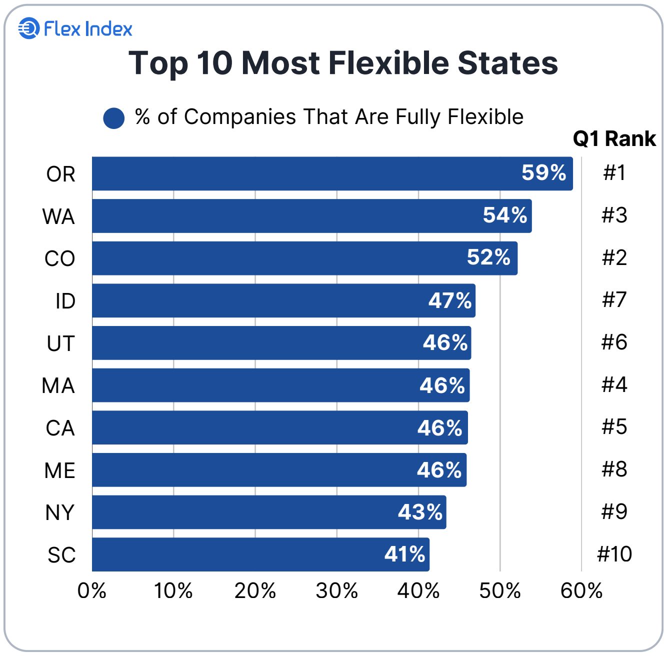
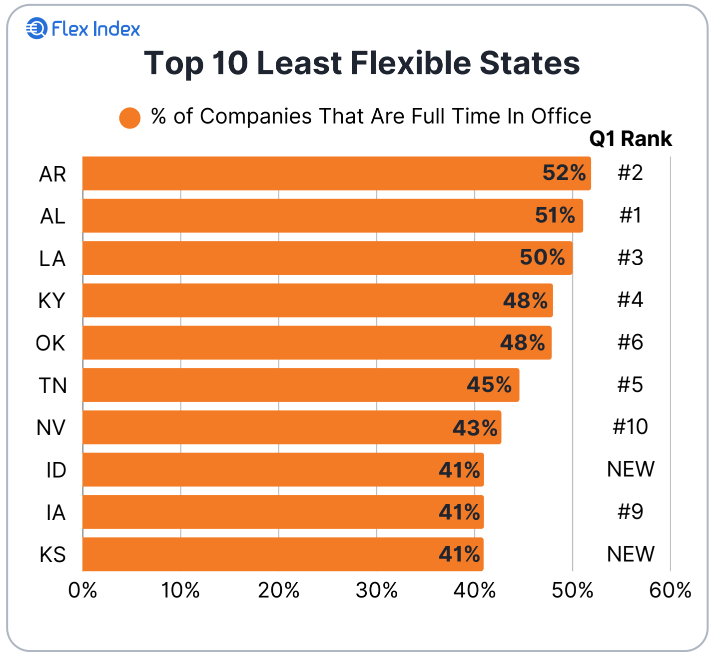
FLEXIBILITY BY STATE & METRO



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 = 22,646 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 = 22,646 State data points.

Western states like Oregon, Washington, and Colorado continue to hold the top rankings for most flexible states.

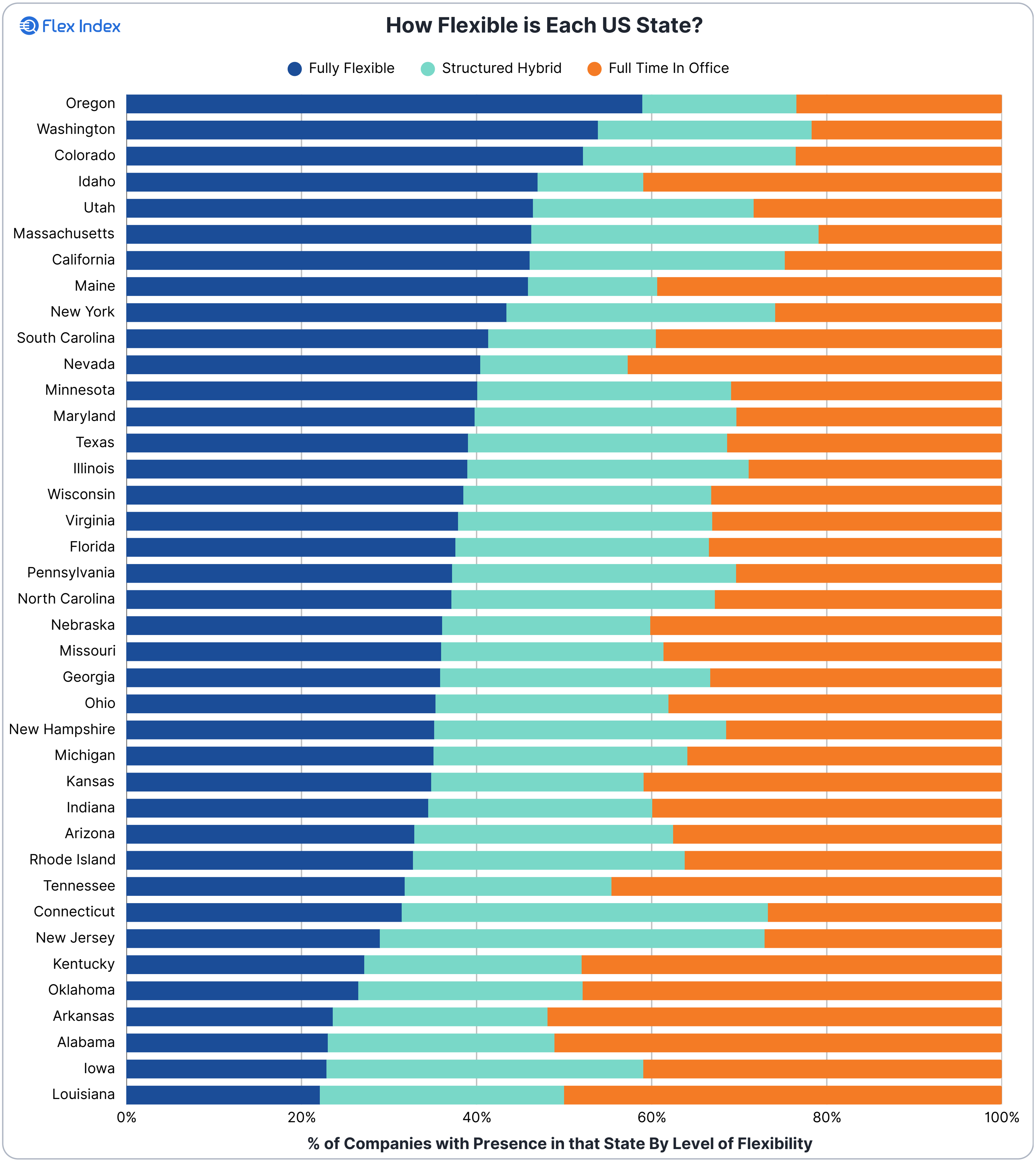
South Carolina continues to crack the top 10, the only state in the South making the most flexible states list.

Arkansas took the top spot from Alabama for least flexible state in Q2 2023.

Idaho shows up on both the most and least flexible states lists! Employers in Idaho are very polarized, either offering Fully Flexible work or Full Time In Office work. Fewer employers in Idaho are Structured Hybrid.

💡 DID YOU KNOW?

Across the board, even in the states that are lowest-ranked for flexibility, we saw a consistent decrease in Full Time In Office requirements. Is this shift gaining momentum or reaching equilibrium? We will continue to track it over the next quarter and beyond.



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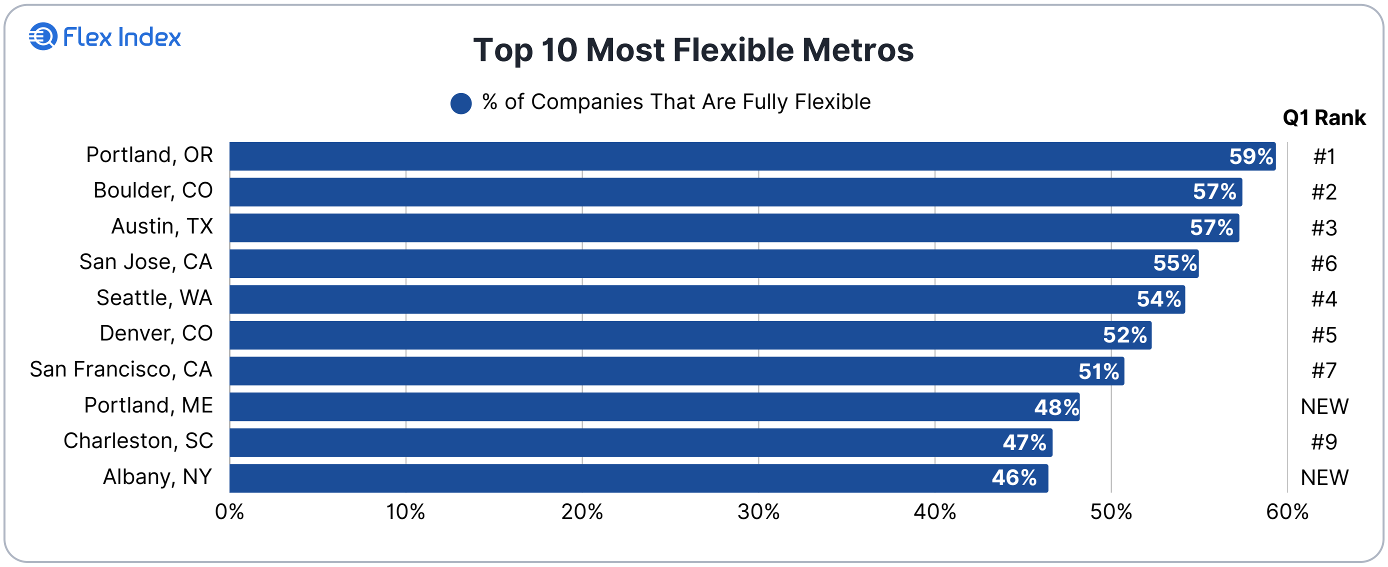
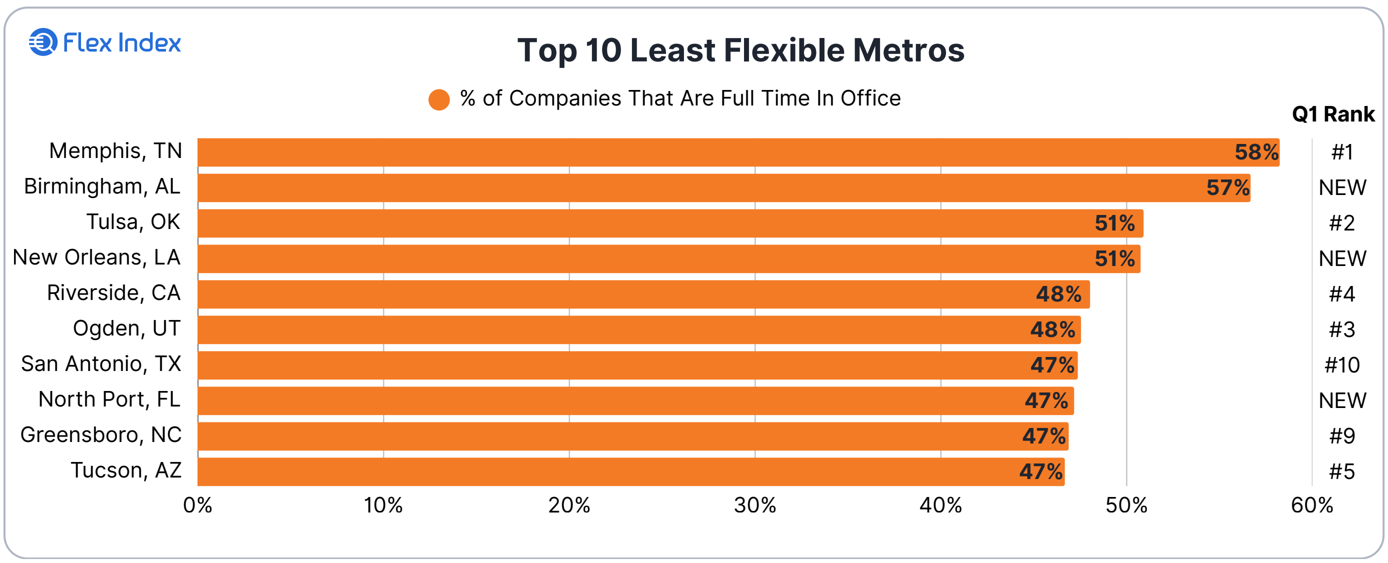
FLEXIBILITY BY STATE & METRO



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 = 31,207 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 = 31,207 metro data points. The Flex Index is presented by Scoop (scoopforwork.com).

Once again, Portland, Boulder, and Austin check in as the top 3 most flexible metros in the United States.

San Jose jumped up to #4, knocking Denver out of the top 5 for Q2 2023.

Memphis continues to be the least flexible metro in the United States.

We have a few newcomers this quarter!

Portland, ME and Albany, NY made the most flexible list. Birmingham, AL debuted at #2 on the least flexible list.

Tulsa is an interesting inclusion to the top 5 least flexible list to watch, given the city's recent campaign to attract more in-demand talent with its Remote Worker Relocation Program and grants. Will it influence local businesses to adopt more flexible policies to attract talent?

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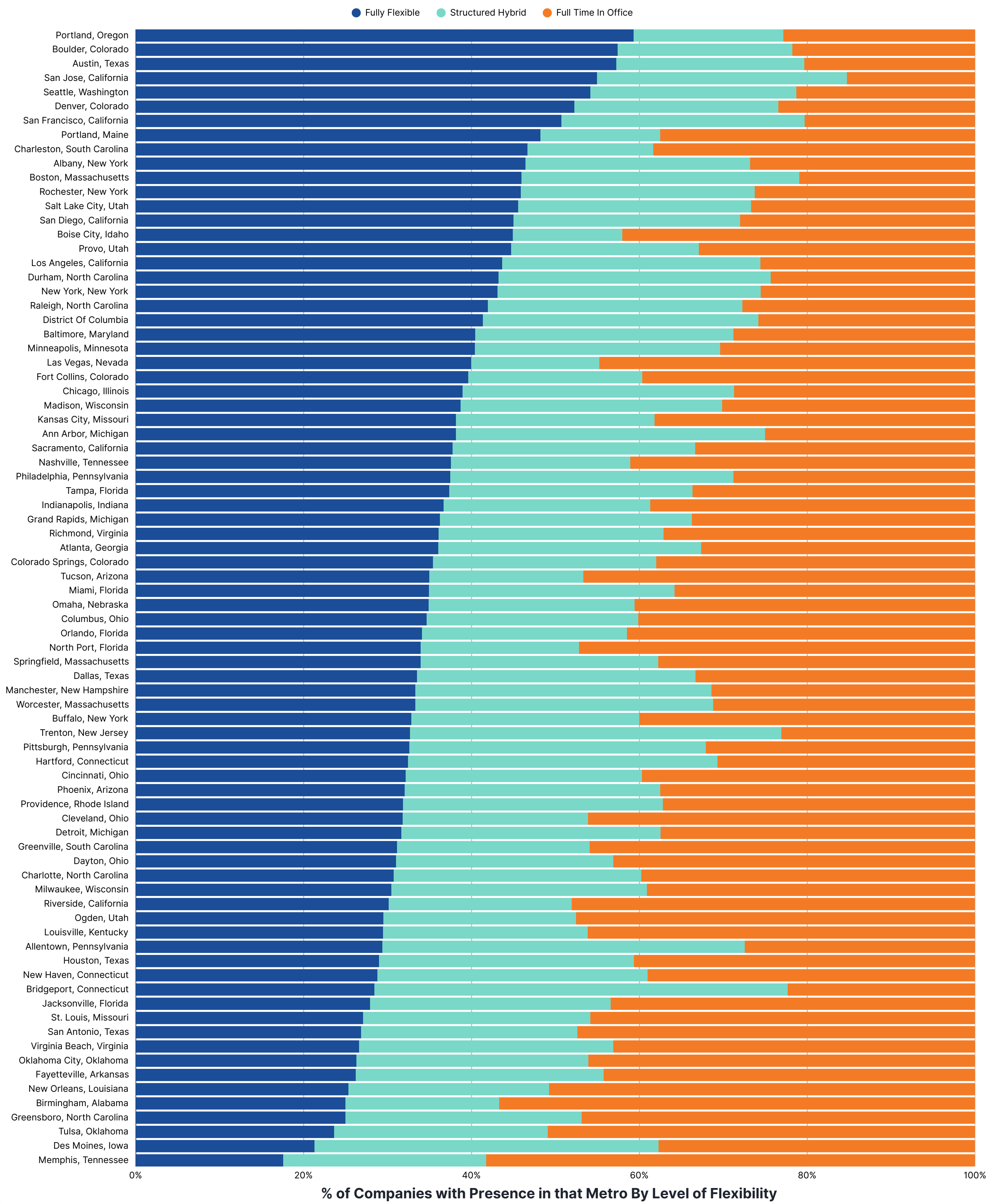
How Flexible is Each Metro?



In Closing

In Closing

More companies are offering work location flexibility than ever before! But when you're looking for your next job, you're increasingly likely to find your prospective employer has a Structured Hybrid model.

If you're looking for Fully Flexible work, you're most likely to find it in Technology, Media & Entertainment, or Professional Services. Financial Services and Non-Profits round out the top five.

You're also most likely to find Fully Flexible work opportunities at small companies. 63% of companies with under 500 employees offer Fully Flexible work vs. just 30% of companies with 500 - 5k employees. It only gets less flexible from there. Thinking about joining a large multinational with 50k+ employees? Expect to be working onsite at least half the week, as only 13% of organizations that size offer Fully Flexible work.

If you join a Structured Hybrid company, how often should you expect to be on site? Most likely 2-3 days per week. The most common schedule is Tuesday through Thursday onsite, which means you can still likely enjoy those summer Fridays year-round (at least in terms of office attendance).

On the flip side, if you're working at a company that requires Full Time In Office work, there are an increasing number of competing flexible work options available to you. Perhaps it's only a matter of time before it comes to your workplace, too!

What does the future hold? Wherever we head, the Flex Index will continue to track the latest so you get the vital information you need to find opportunities that match the right level of flexibility for you.

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, 30,000+ 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 30,000 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 April 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 full time in office, 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

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Citations: Please cite "The Flex Index (flex.scoopforwork.com), Q2 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:

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