The
Flex Report

Q2 2025

Flex Index

by Work Forward

Table of Contents

3 About the Flex Report

4 Flexible Work Categories

5 Key Findings

6 Adoption of Work Location Flexibility

11 Flexibility by Industry

14 Flexibility by Company Size

16 In Closing

18 Appendix

20 Methodology & Citing the Report

About the Flex Report

Headlines would have you believe that CEOs at Amazon, JP Morgan Chase, and Caterpillar, along with the US Federal government, are leading a universal charge back to pre-pandemic office norms.

Not so fast. During our six-month hiatus at Flex Index, the workplace landscape has certainly evolved—but perhaps not in the ways media coverage suggests. We're back to investigate who's truly changing their workplace flexibility policies and who's standing firm.

In this report, we examine US-wide trends to determine if high-profile shifts toward Full Time In Office represent a broader market movement or merely isolated cases.

We've conducted a special deep-dive into the Fortune 500 to see what's changing among America's largest companies—and whether smaller organizations are following their lead. (Spoiler alert: they're largely not.)

We've also partnered with Stanford Professor Nick Bloom and his team to analyze the critical relationship between policy and behavior: exploring the gap between what companies require and how employees actually respond to increased demands for office presence.

Our analysis breaks down how different industries approach flexibility, with the technology industry continuing to hold the lead when it comes to workplace flexibility.

We also explore the significant divide in how companies of different sizes structure their workplace policies. Is the future of work truly a return to full-time office attendance, or is it more nuanced than headlines suggest?

Read on for our latest quarterly report!

P.S. You may be wondering about our hiatus. Scoop Technologies, the former parent company of Flex Index, underwent a transition—but the team behind the Flex Index over the years has worked to bring it back. Flex Index is now part of Work Forward, and we're excited to deliver these insights today and for years to come!

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 Flexibility continues to be the norm

Despite headlines highlighting companies returning to Full Time In Office, only 33% of US firms actually require this—virtually unchanged from Q2 2024. While Fortune 500 companies have shown the largest shifts toward office-centric policies, the majority still maintain hybrid work arrangements.

2 The Fortune 500 shifts toward more time in office, aligning with policies of many mid-size firms

Full Time In Office requirements among Fortune 500 companies jumped from 13% in Q4 2024 to 24% today, with average weekly office requirements rising from 2.3 to 2.9 days. By contrast, mid-sized firms (5-25k employees) barely shifted, with Full Time In Office policies increasing just 1% (from 21% to 22%).

3 Structured Hybrid dominates with three-day policies becoming standard

Structured Hybrid has grown to 43% of US firms, up significantly from 36% in Q2 2024 and 20% in Q1 2023. Meanwhile, Full Time In Office policies increased marginally from 31% to 33%. Among Structured Hybrid companies, 66% now require 3 days in office (up from 53% in Q2 2024), pushing the national average to 2.82 office days weekly—up from 2.49 days a year ago.

4 Policy changes outpace actual behavior

A clear compliance gap exists: while required office days have increased 10% since Q1 2024, while attendance has fluctuated between 1 and 2% higher, based on data from Stanford's Nick Bloom.

5 Company size drives flexibility approach

The size divide remains stark: 70% of large firms (25,000+ employees) use Structured Hybrid models, while 70% of small firms (under 500 employees) offer Fully Flexible arrangements. Only 15% of small companies require Structured Hybrid, and just 12% of large enterprises permit Fully Flexible work.

Spotlight on...

Workplace Flexibility in the Fortune 500

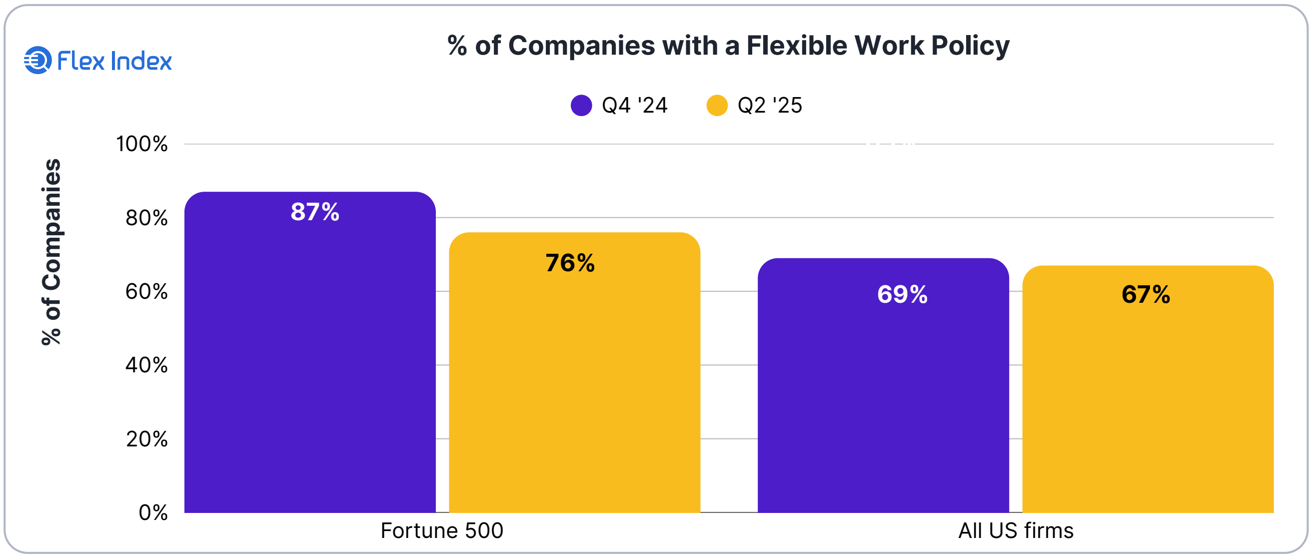
Flex Index

FORTUNE 500 | POLICY SHIFTS TOWARDS OFFICE

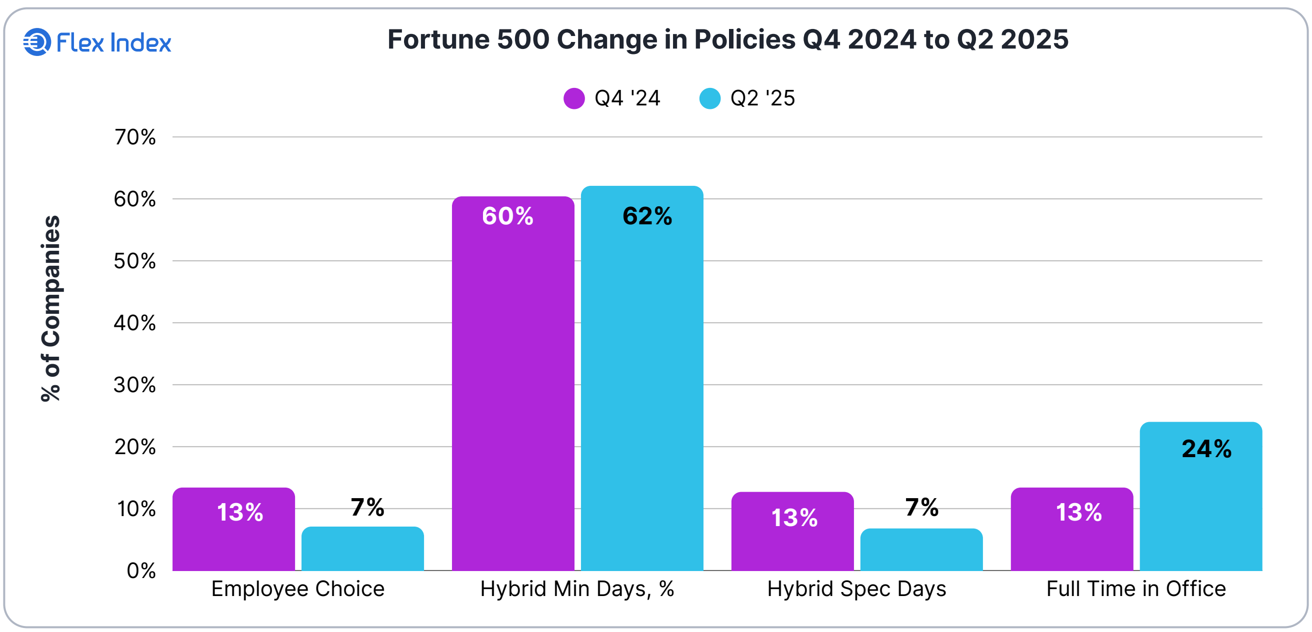
The Fortune 500 saw the most notable shifts in policies. While 87% of Fortune 500 firms took a flexible approach to workplace policy in Q2 of 2024, that decreased to 76% in Q2 of 2025. The Fortune 500 is still more flexible than the average (67%) although the gap has narrowed.

This has been the result of two key shifts:

- Away from Employee Choice programs down from 13% last year to 7%, and into Structured Hybrid
- Migration out of Structured Hybrid, especially Specific Days, towards Full Time in Office



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies overall, 409 Fortune 500 firms. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

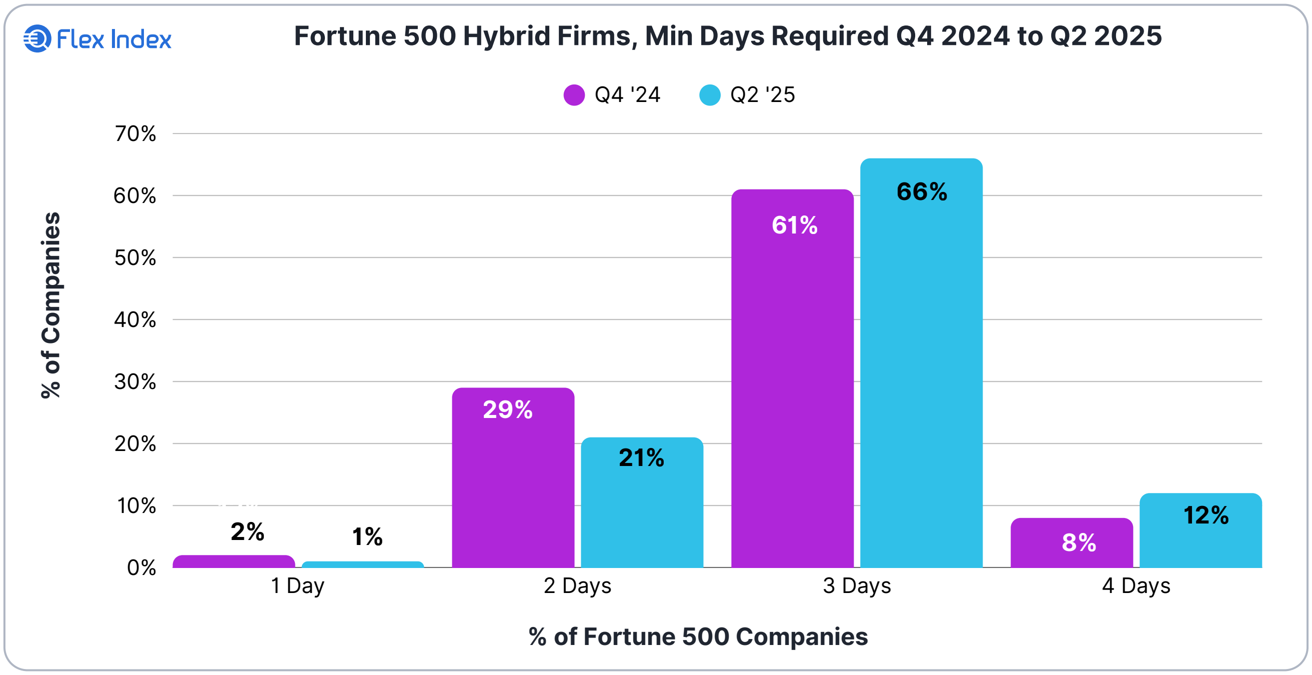


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 409 Fortune 500 companies.

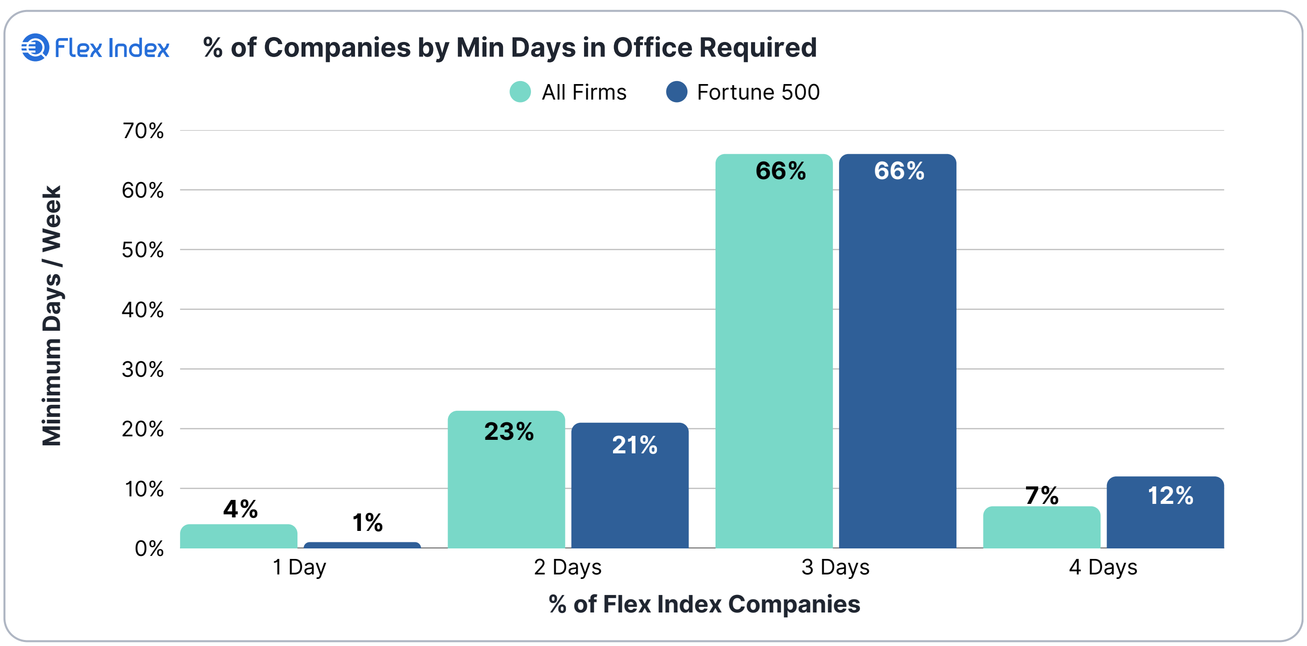
FORTUNE 500 | POLICY SHIFTS TOWARDS 3 DAYS

Within the Fortune 500 there was also a shift towards more days of the week required for those with Structured Hybrid programs

- 3 days per week has become the dominant model: 66% of firms, up 5 percentage points from a year ago.
- 78% of firms now require 3 or 4 days a week, up from 69% in Q2 of 2024, an increase of 9 percentage points from a year ago



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, Fortune 500 Companies with Structured Hybrid programs, N = 243 companies.

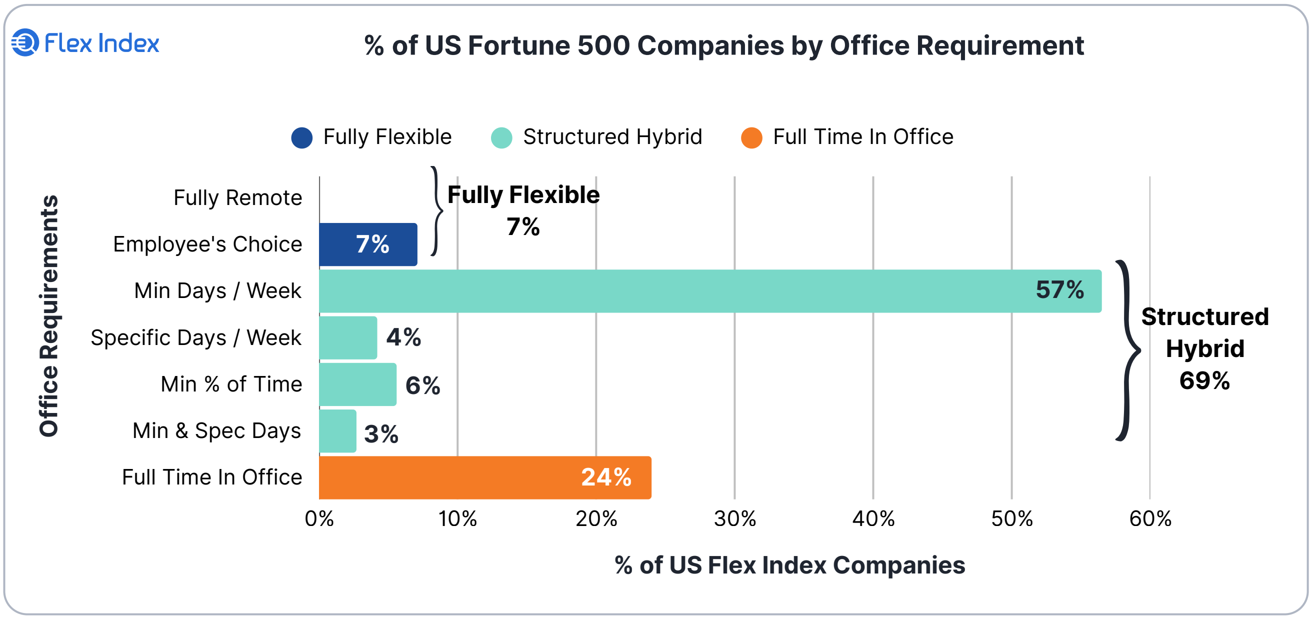


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on companies with headquarters in the US with Structured Hybrid office requirements. N = 2,727 companies.

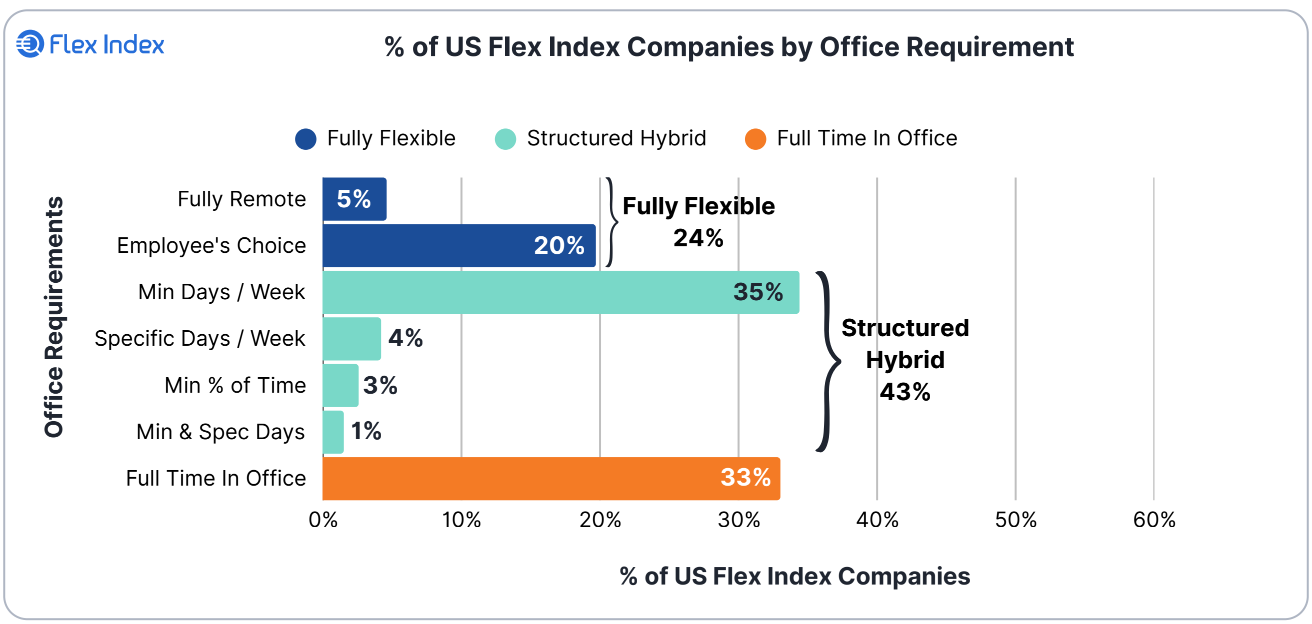
FORTUNE 500 | POLICY SHIFTS

Structured Hybrid continues to be the dominant policy model in 67% of Fortune 500 companies:

- 83% of those with a Structured Hybrid program continue to have a Minimum Days approach, letting teams determine which days work best
- 24% of Fortune 500 firms have a Full Time in Office policy, still somewhat lagging the 33% of firms overall
- No Fortune 500 firms are fully remote, but some are "remote-first": 7% of the Fortune 500 have a Fully Flexible policies favoring employee choice: providing access to office space for individual and team needs



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, Fortune 500 companies. N = 409 companies.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

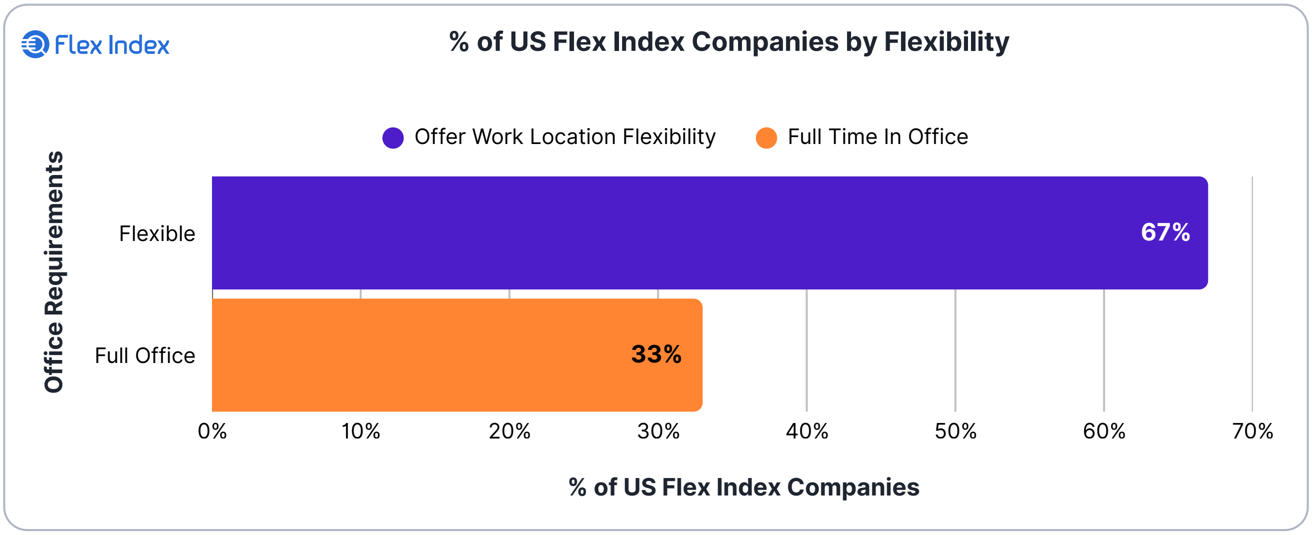
Spotlight on...

Adoption of Work Location Flexibility

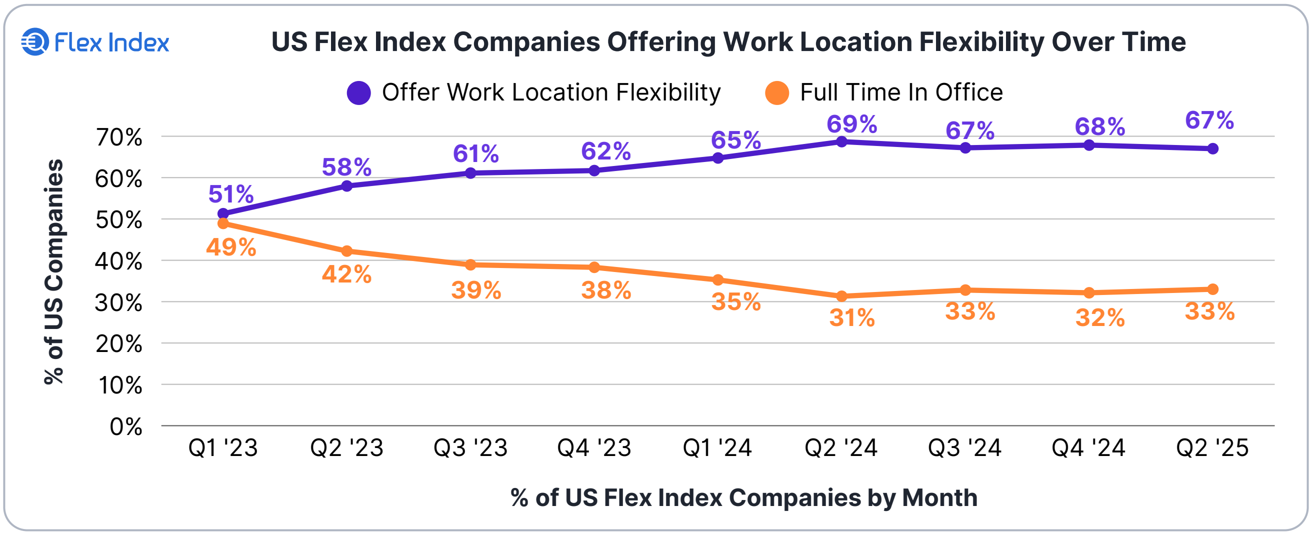
ADOPTION OF WORK LOCATION FLEXIBILITY

67% of US firms on an industry-adjusted basis offer work location flexibility, meaning they do not require corporate employees to work full time from the office. That represents a slight increase from a year ago (Q2 2024) when 69% of US firms offered work location flexibility.

The two-thirds / one-third split on work location flexibility is a big shift from the first Flex Index quarterly report in Q1 2023. At that time, the split was about 50/50; 51% of US firms offered work location flexibility, and 49% required Full Time In Office for corporate employees.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

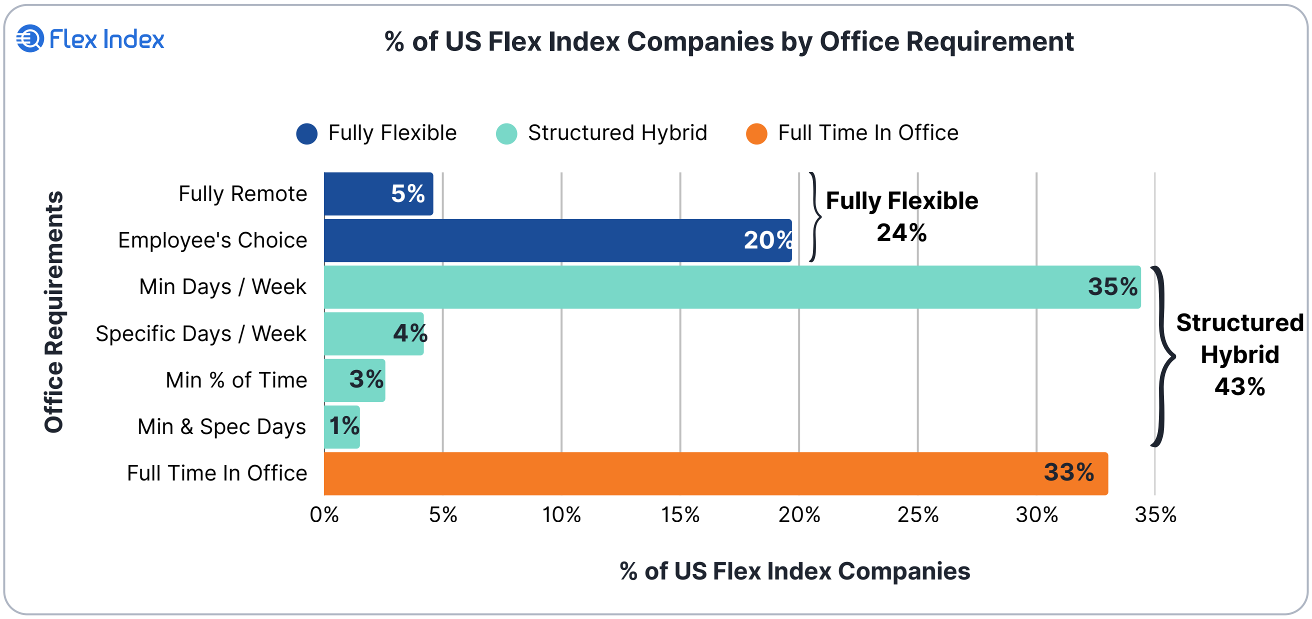


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,675 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

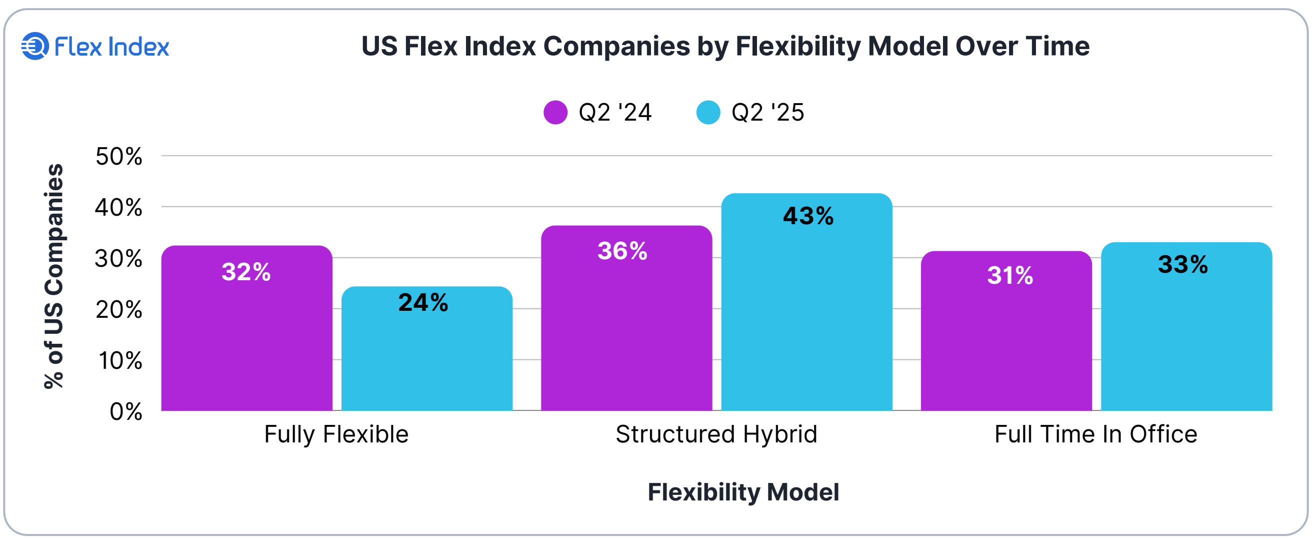
OFFICE REQUIREMENTS

Structured Hybrid is becoming increasingly dominant as the primary work model in the United States. At Structured Hybrid companies, corporate employees are not expected to be in the office full time, but there is a set expectation for how much time employees spend in the office.

43% of US firms on an industry-adjusted basis are Structured Hybrid, up from 20% in Q1 2023 and 38% in Q3 2024. Full Time In Office is the second most common work model. Fully Flexible models — where employees do not have any required office time — have dropped in prevalence from 31% of US firms in Q1 2023 to 25% of firms today.



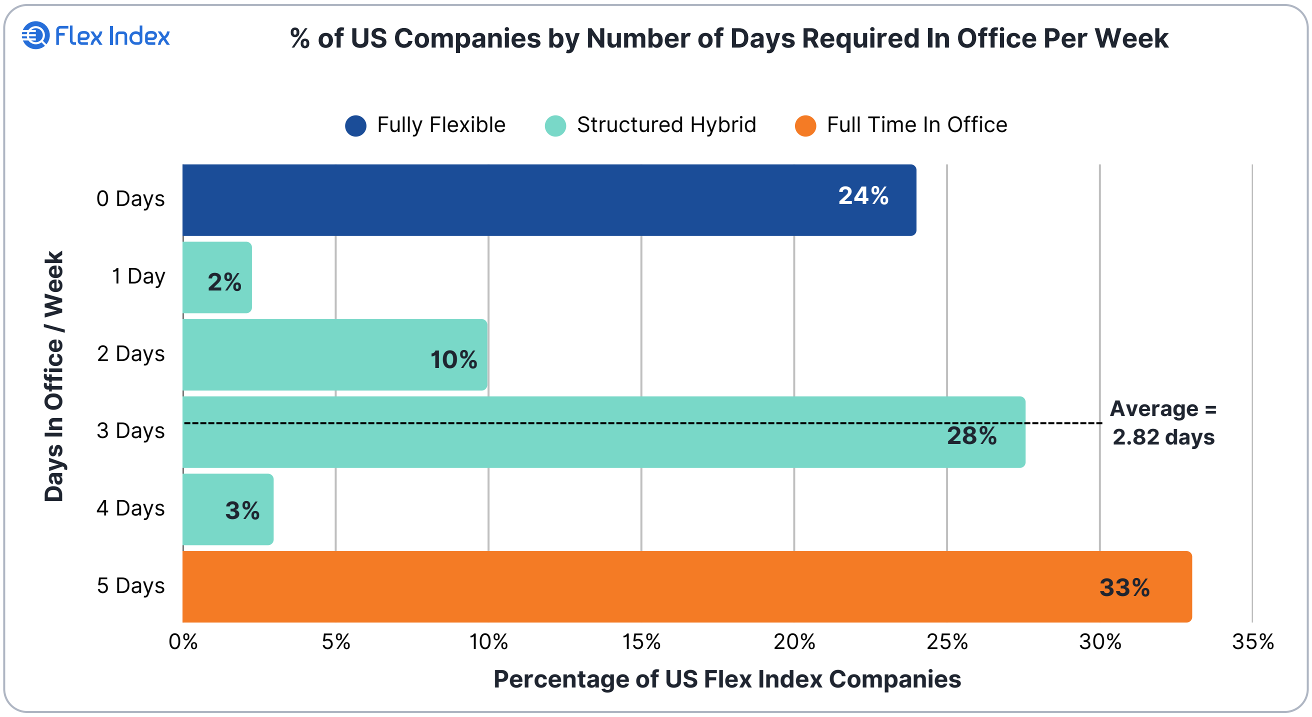
Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.



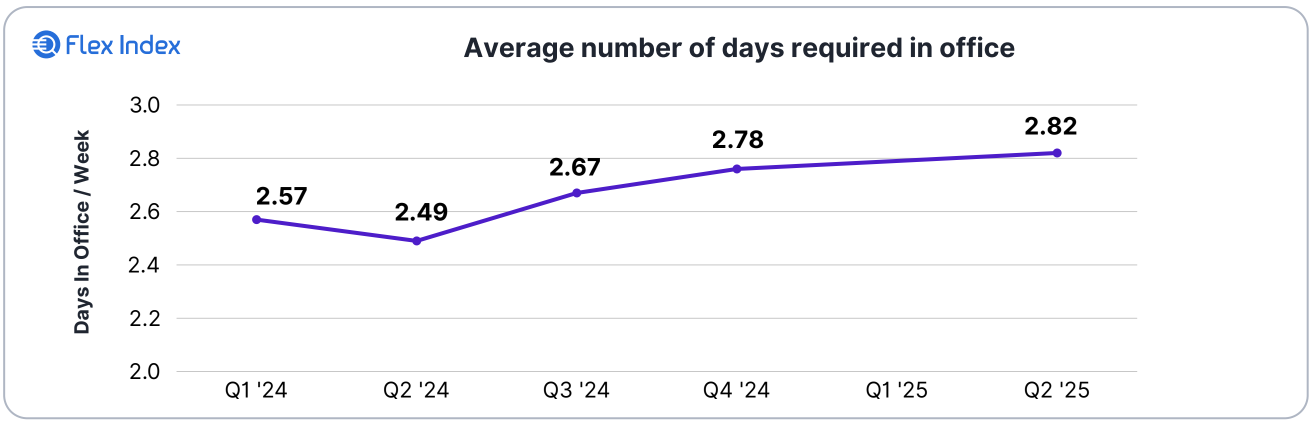
Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

TIME REQUIRED IN OFFICE

The average US firm requires corporate employees to be in the office 2.82 days per week. 57% of firms have a polarized approach: 33% require Full Time In Office while 24% have no weekly minimum. It is uncommon for companies to require only one day per week (2%) or four days per week (3%)



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

💡 Key Insight

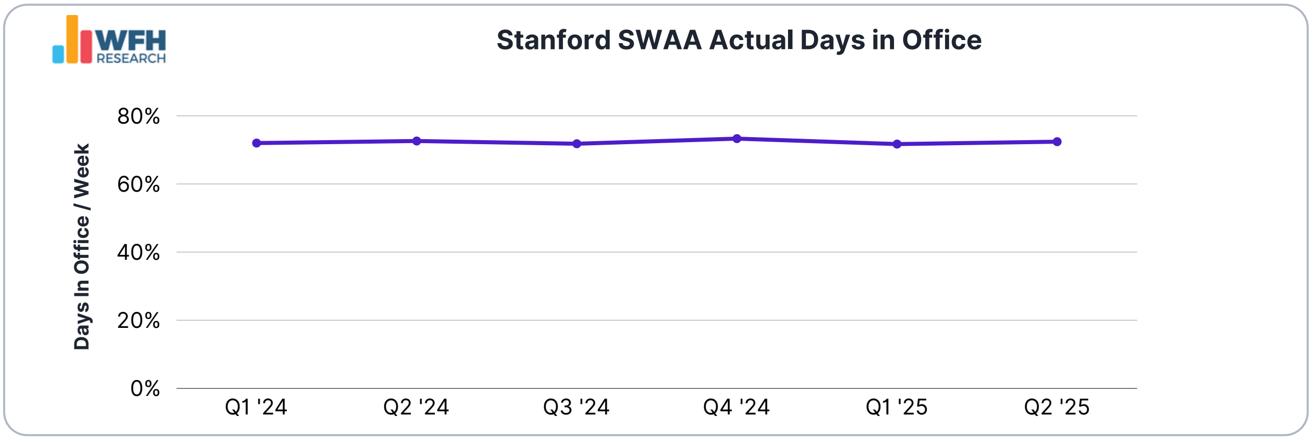
There has been a steady shift upward in required office time from 2.49 days per week in the office in Q2 2024 to 2.82 days per week in Q2 2025, driven by two shifts:

- The percentage of firms requiring 0 days per week in office has decreased from 32% to 24%.
- The percentage of firms requiring 3-4 days per week in office has increased from 21% to 31%.

These relatively small changes combine to increase the average expectation in the US by 13% overall over the past year.

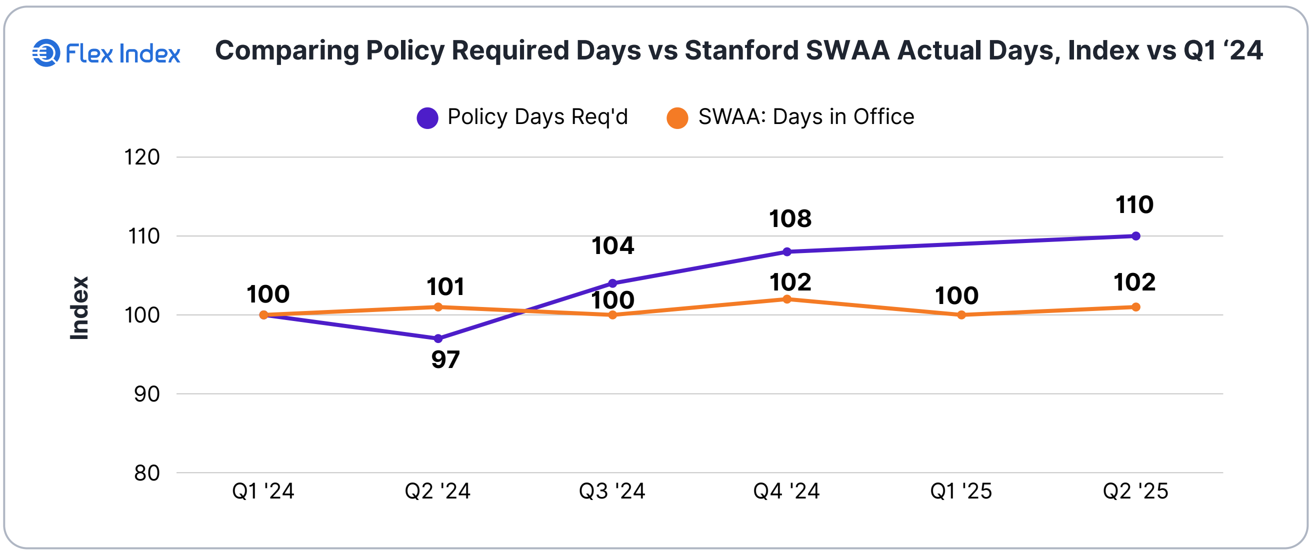
POLICY VERSUS COMPLIANCE

While the average number of days required for US employees has increased by 13% in the last year, full time days worked from home have remained fairly stable, according to data collected by both Stanford's Survey of Working Arrangements and Attitudes (SWAA) and the Census Household Pulse Survey. As Stanford Professor Nick Bloom puts it, "flat as a pancake." *Note: data includes frontline!*



Source: Source: Barrera, Bloom & Davis Survey of Working Arrangements and Attitudes (SWAA), Full Time employee reported actual days WFH; see www.wfhresearch.com

If we create an index using Q1 2024 as the origin point for both the SWAA data and Flex Index data on the number of days required, we can see the growing gap between policy and compliance.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

💡 Key Insight

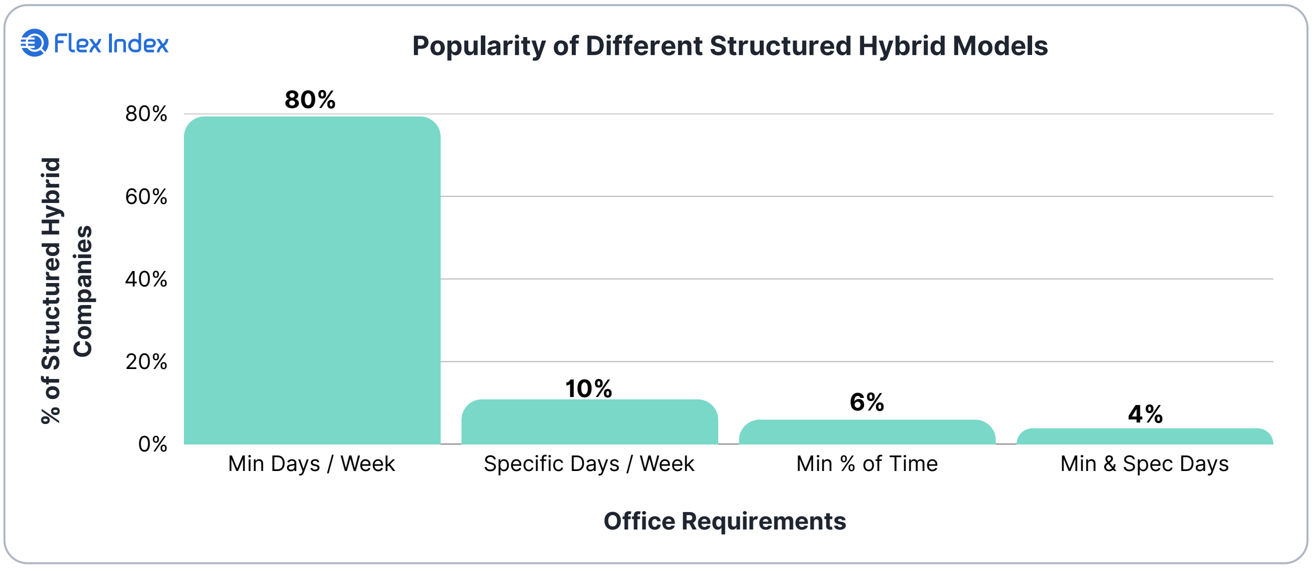
While employers may be demanding more time in office, employees are not fully complying: the average days required of employees under US policies has gone up an average of 10% since Q1 of 2024, while attendance has fluctuated between 1 and 2% higher each quarter.

The relative delta in trends between the Flex Index and SWAA data are also borne out by data produced by Kastle Systems and Placer.ai. Even prior to the pandemic, where a 5 day a week policy might have been assumed, most badge-based occupancy averaged 50% to 65% of days, according to data from Cushman & Wakefield and JLL.

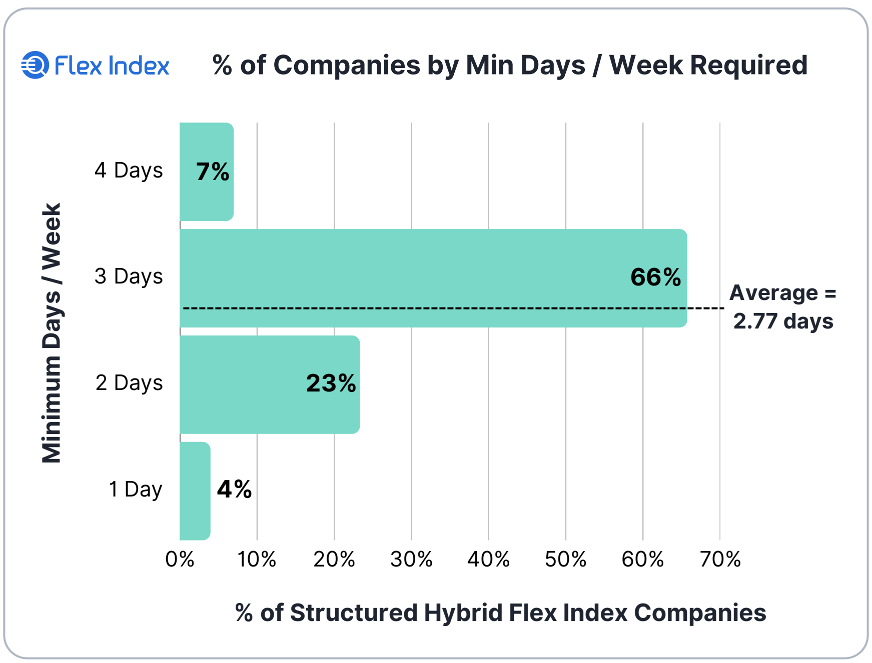
STRUCTURED HYBRID: DAYS / WEEK REQUIRED

Minimum Days / Week is increasingly dominant for companies choosing a Structured Hybrid approach to the office. 80% of Structured Hybrid companies in the United States have a Minimum Days / Week model, up from 71% in Q2 2024.

Specific days of the week has declined in popularity, dropping from 17% in Q2 2024 to only 10% in Q2 of 2025, replaced by minimum number of days or percentage of time.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on companies with headquarters in the US with Structured Hybrid office requirements. N = 3,298 companies.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on companies with headquarters in the US with Structured Hybrid office requirements. N = 2,727 companies.

💬 Good to Know

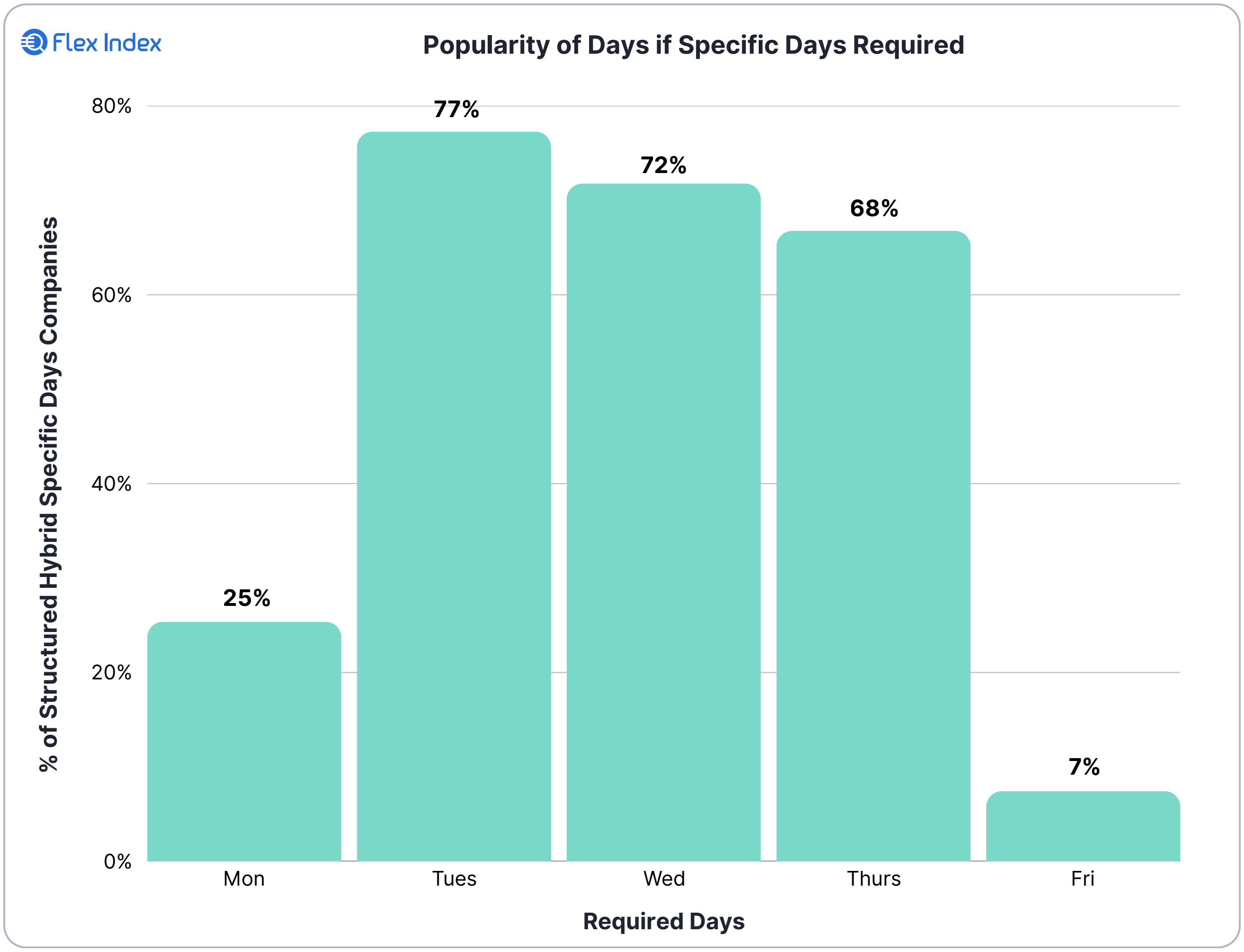
The average company with a Minimum Days / Week policy requires employees in the office 2.77 days per week.

That's up from 2.59 days per week in Q2 2024, a 0.18 days per week increase.

STRUCTURED HYBRID: MOST COMMON DAYS

Tuesday through Thursday remain the most common days for Structured Hybrid firms with a Specific Days (or Minimum Percentage and Specific Days of the week) policy. Fridays are the least common, with only 7% of these firms requiring Friday attendance.

Out of all firms with a Structured Hybrid approach, only 1% require Friday attendance (7.4% of 16.5% of Structured Hybrid firms requiring Specific Days).

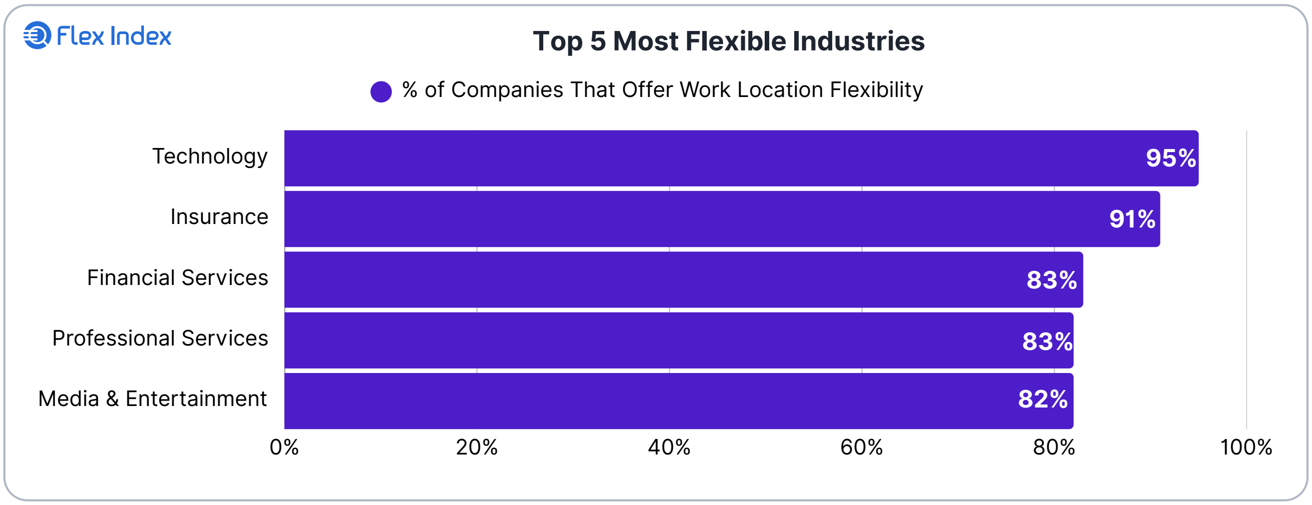


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on companies with headquarters in the US with Structured Hybrid and specific days office requirements. N = 412 companies.

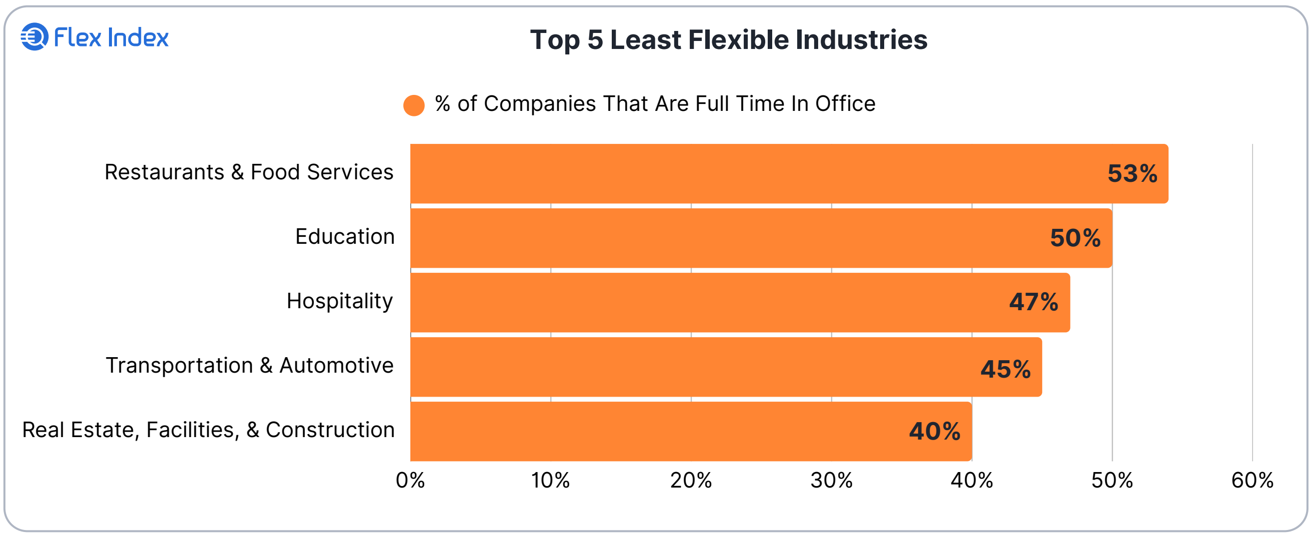
Flexibility by Industry

Flex Index

FLEXIBILITY BY INDUSTRY



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,561 companies.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,561 companies.

Most Flexible

Technology and Insurance continue to be the top two industries for flexibility in the United States. 95% of US Tech firms offer work location flexibility, along with 91% of US Insurance firms.

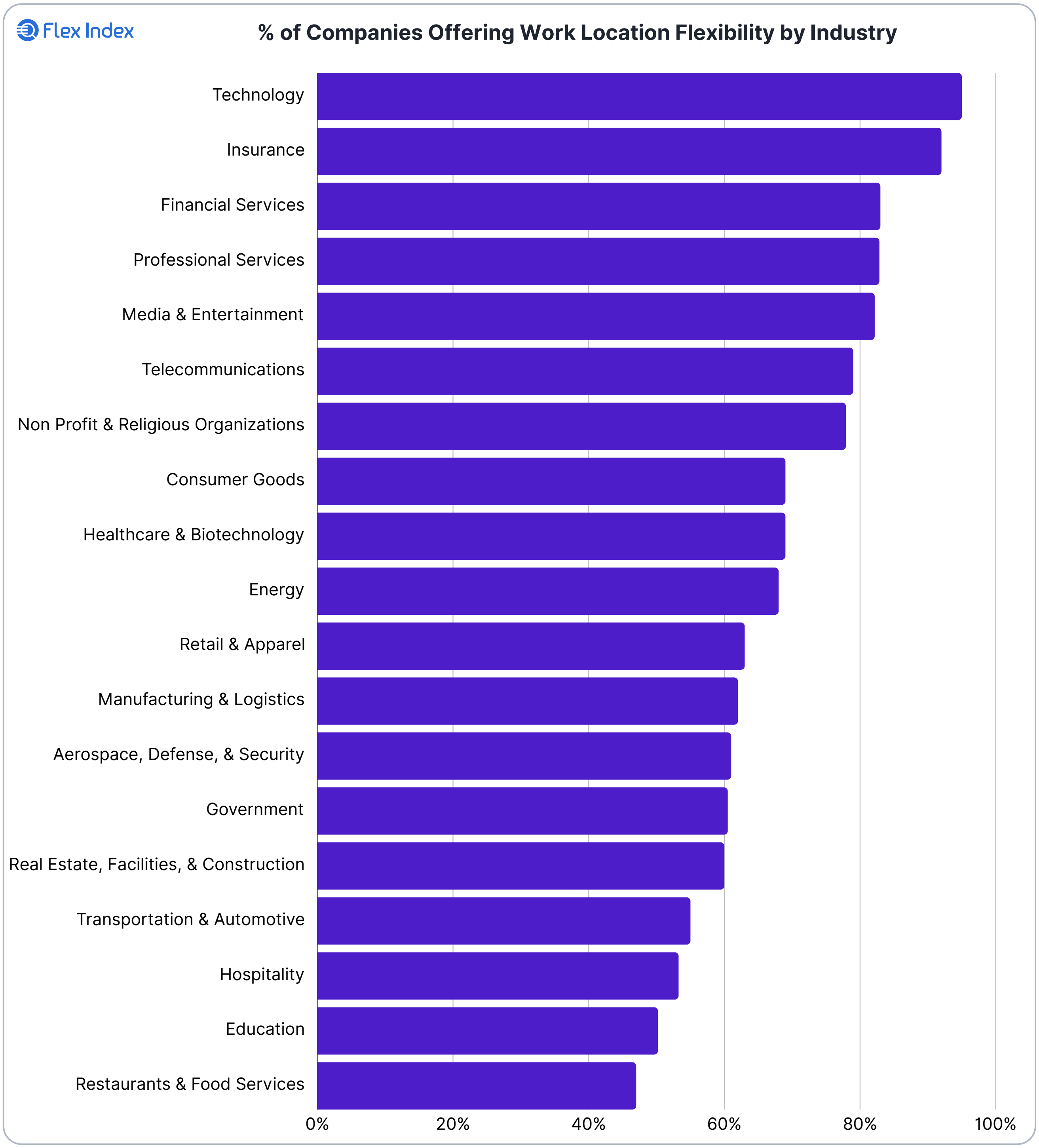
Financial Services comes back into the top five with 83% of firms offering work location flexibility. Professional Services and Media & Entertainment round out the list, despite the Washington Post moving to Full Time In Office.

Least Flexible

Restaurants & Food Services companies are most likely to require Full Time In Office for corporate employees. Along with Education, they are the only industries where half or more of firms are Full Time in Office.

Not surprisingly, the broader Real Estate industry also makes the top five in requiring Full Time In Office. Importantly, Government just missed moving into that position, largely driven by changes at the Federal level in the US.

FLEXIBILITY BY INDUSTRY



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,561 companies.

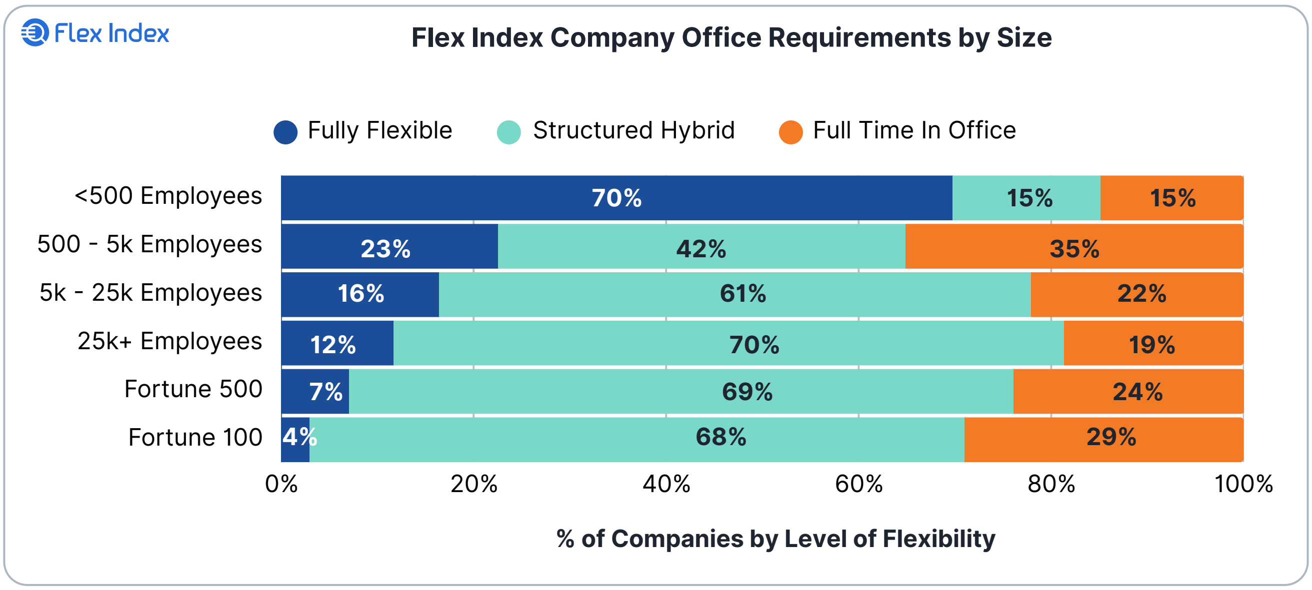
Flexibility by Company Size

FLEXIBILITY BY COMPANY SIZE

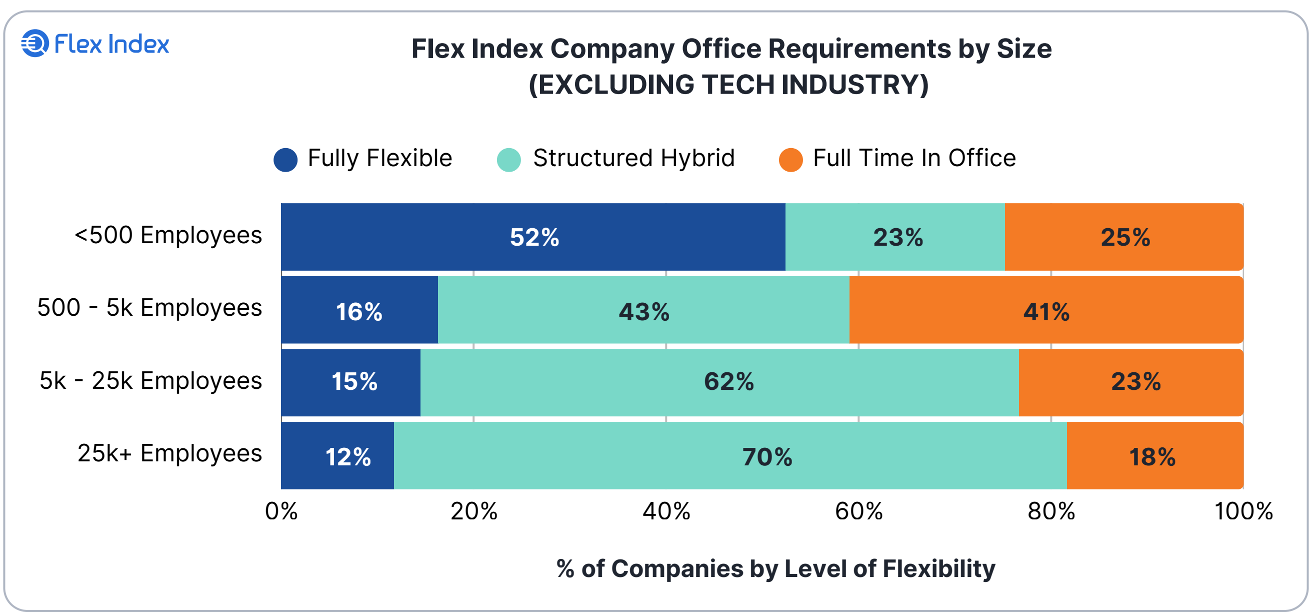
There continues to be a significant distinction in flexible work approach between smaller firms and larger enterprises. 70% of companies with less than 500 employees are Fully Flexible, while just 12% of enterprises with 25,000+ employees are Fully Flexible. Large firms are much more likely to be Structured Hybrid: 70% of 25,000+ employee companies vs 15% of firms with 500 employees or less.

Excluding the Tech industry, US firms follow a similar pattern by company size. Just over a majority of non-tech US firms under 500 employees are Fully Flexible, compared to 12% of firms 25k+ employees.

What's evident in the data is that Big Tech now looks like Big Enterprise: Tech firms with 25k+ employees have shifted away from Fully Flexible and selectively to Full Time in Office to reach parity.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies.

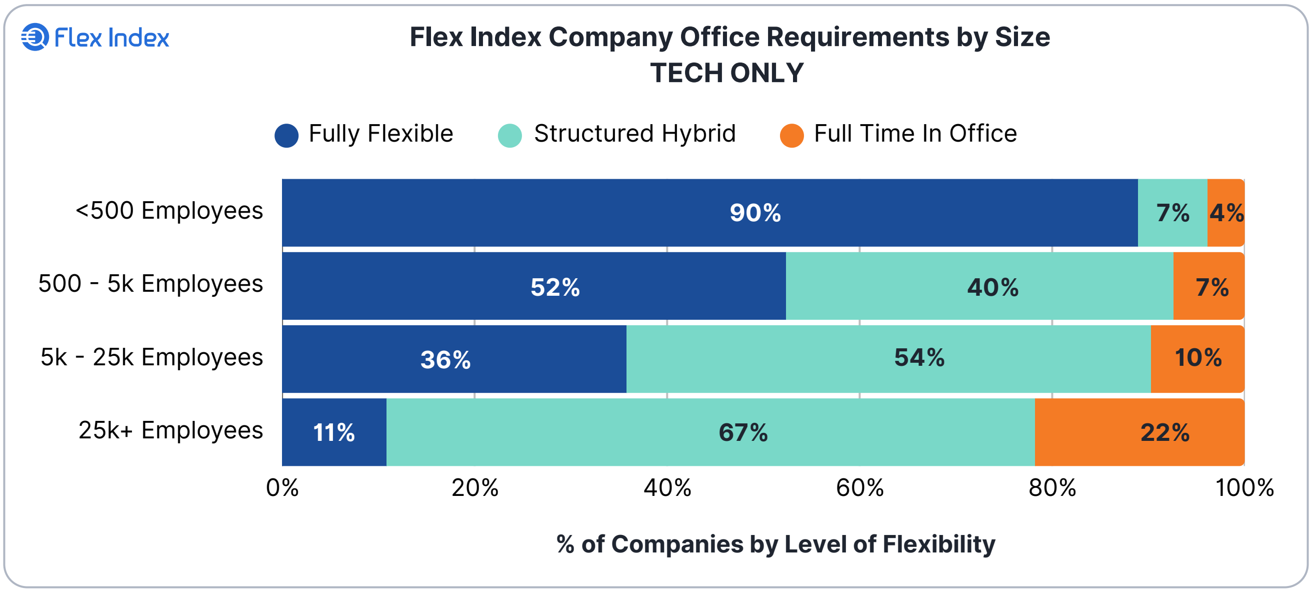


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 6,436 companies.

FLEXIBILITY BY COMPANY SIZE

What's evident in the data is that Big Tech now looks like Big Enterprise: Tech firms with 25k+ employees have shifted away from Fully Flexible and selectively to Full Time in Office to reach parity.

Meanwhile, small and mid-size technology firms remain more flexible: 52% of those with 500 to 5k employees are Fully Flexible, as are 90% of those with less than 500 employees.



Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,709 companies.

In Closing

In Closing

Despite high-profile shifts by companies like Amazon, Dell, JP Morgan Chase, and the Federal government toward office-centric policies, the impact has been less dramatic than headlines suggest. Only 33% of US firms require Full Time In Office for corporate employees, remaining relatively flat over the past year.

The most notable changes have occurred in two areas: large enterprises and a steady migration toward Structured Hybrid models. Currently, 43% of US firms have adopted Structured Hybrid approaches, up from 36% a year ago. In parallel, the average time employees are expected in office has increased gradually from 2.5 to 2.8 days per week, a 13% rise over the last year.

Fully Flexible programs have declined from 32% of firms a year ago to 24% today, but remain dominant among small and mid-sized technology companies, where 78% of firms with 5,000 or fewer employees continue to offer either Fully Remote or Employee Choice models.

Within the Fortune 500, there has been some movement toward Full Time In Office requirements—now at 24%, up from 13% in Q4 2024—but this matches the rate seen in companies with 5,000-25,000 employees. Structured Hybrid remains the preferred model at 70% of large firms, though the average required office time has increased significantly from 2.3 to 2.9 days, a 27% jump.

It's important to note that policy doesn't always reflect behavior: while required days in office have increased 10% since Q1 2024, actual attendance remains "flat as a pancake" as Stanford Prof. Nick Bloom puts it, based on Stanford and US Census data.

The size divide continues to be striking. Smaller firms consistently offer greater flexibility, with 52% of non-tech companies with fewer than 500 employees maintaining Fully Flexible policies. This stands in stark contrast to larger firms, which overwhelmingly favor Structured Hybrid arrangements.

The remainder of 2025 promises to be a fascinating period for workplace flexibility. Will we see the more dramatic shift toward office-centric models that many headlines predict? Or will companies continue to meet in the middle? We're excited to track these changes and share the latest insights in our upcoming Flex Reports.

Appendix

Appendix

About Flex Index

Flex Index is the world's most robust source of company in-office requirements, from fully in-office to remote work and everything in between. Flex Index represents 13,000+ companies, 100,000+ office locations, and 120 million people.

Flex Index is part of Work Forward, a leading advisory firm for

Contribute to Flex Index

To contribute to Flex Index, visit flexindex.com to create your user profile to either edit an existing company listing or create a new one.

Methodology

Flex Index collects firmographic and office requirements information on more than 13,000 companies. These companies have more than 100,000 office locations and employ more than 120 million people worldwide.

Company office requirements are generated through a combination of publicly available information and statements as well as company submissions from current employees. All data contributing to this Flex Report was collected between October 2022 and November 2024. Once a company is incorporated into Flex Index, company representatives are contacted to inform them of their inclusion. Companies can add or update their information on 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.

For a full breakdown of Flex Index methodology, please read our Flex Report: Flex Index Methodology.

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

Contacts & Citations

For questions and press inquiries, please reach out to:

Brian Elliott
CEO, Flex Index
✉️ brian@flexindex.com

Citations: Please cite "Flex Index (flexindex.com), Q2 2025 Flex Report"

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