The Flex Report

Q3 2025

Flex Index by Work Forward

In partnership with Kadence

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About the Q3 2025 Flex Report

A year ago, most thought the "return to office" wars had settled into hybrid détente. Then Amazon, JP Morgan Chase, and the Trump administration declared flexibility dead, sparking headlines about an inevitable march back to five-day office weeks.

But workplace reality proves more complex than media coverage suggests. We've expanded Flex Index coverage to over 9,000 US firms, with deep-dives into not just policy changes, but actual compliance and business performance.

The data contradicts the narrative. Yes, full-time office requirements increased nearly 2 percentage points over two quarters, but half that increase comes from federal and state government agencies. While Fortune 100 firms have tightened policies, the vast majority still pursue hybrid strategies. Smaller firms – employing half the US workforce – aren't following suit.

More importantly, policy isn't compliance. The gap between mandates and behavior persists even as the job market softens.

And perhaps most importantly, our joint research with BCG reveals that flexible companies are growing 1.7x faster than mandate-driven peers – a growth advantage that holds even after adjusting for industry and size.

The real story isn't about flexibility's death, but its evolution across different segments of the economy.

Two critical questions will shape the workplace over the coming quarters: Will the policy-compliance gaps close as labor markets weaken? And will mandate-heavy large firms find their rigid approaches help or hinder their ability to compete against more agile, flexible competitors – particularly when it comes to leveraging technology and new ways of working?

The answers will determine whether 2025 marks flexibility's retreat or its strategic evolution.

Meanwhile, read on for our latest quarterly report!

- Brian Elliott, Publisher of the Flex Index & CEO of Work Forward

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, with potential on-site activities hosted episodically..

Employee's Choice

Access to offices, but no standardized policy – employees can choose when or if they work from an office, often using team-based norms.

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

Two-thirds of U.S. firms (66%) continue offering location flexibility. Only one-third (34%) require full-time office presence – a 2-point increase from last year driven primarily by federal and state government agencies.

2 Fully Flexible firms outperform mandate-driven peers

Joint BCG research shows Fully Flexible companies grew revenues 1.7x faster than mandate-driven firms from 2019-2024. Even adjusting for industry and size, the growth advantage remains: growth rates 1.3X above peer companies. Flexibility directly impacts business performance.

3 The Fortune 100 is still Hybrid, but tightens requirements

71% of Fortune 100 firms remain flexible, with 3-day hybrid as the most common policy (35%) and 29% requiring Full Time in Office. But 45% now require either 4 *or* 5 days in office, meaning nearly half of Fortune 100 workers are in the office almost daily.

4 Smaller firms maintain a flexibility advantage

67% of companies under 500 employees are Fully Flexible, covering half the US workforce. Even excluding tech firms, smaller employers offer dramatically more flexibility than large enterprises.

5 The mandate-compliance gap persists

Required office time climbed 12% since early 2024, but attendance increased only 1-3%. Policy shifts faster than behavior, but that could change as the job market weakens. Shifts in employment may counteract that trend as smaller, more flexible firms account for nearly all growth in employment in the US.

6 Flexibility is the future for offices

The vast majority of firms provide both access to offices and some form of flexibility: 61% of firms have both flexible policies and provide access to office space – flat with last year.

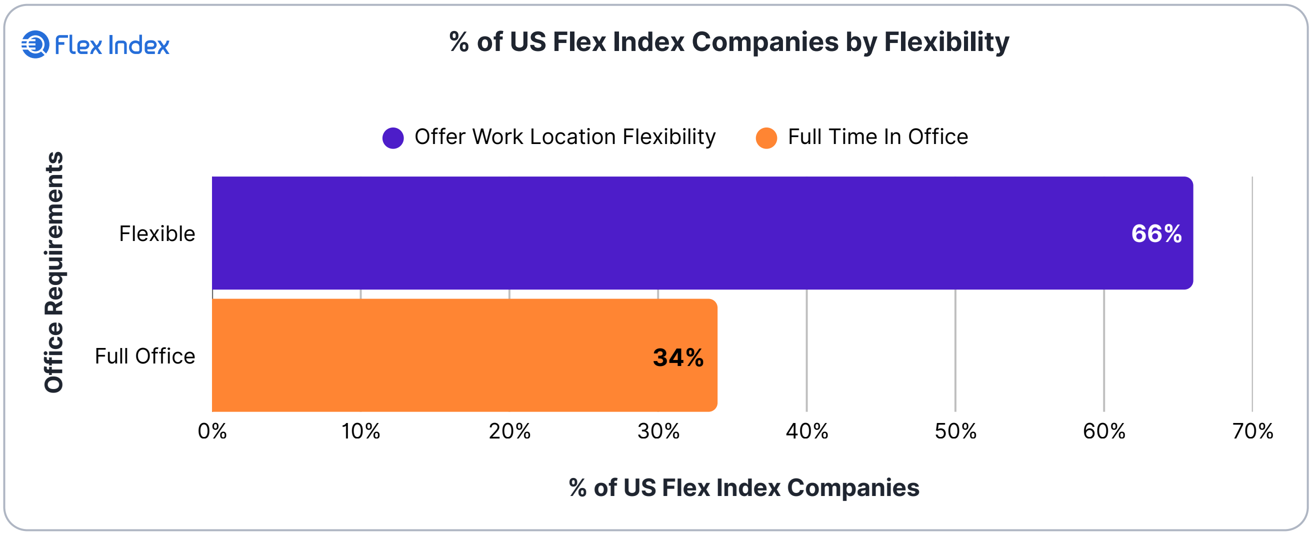
Top level trends...

Adoption of Work Location Flexibility

ADOPTION OF WORK LOCATION FLEXIBILITY

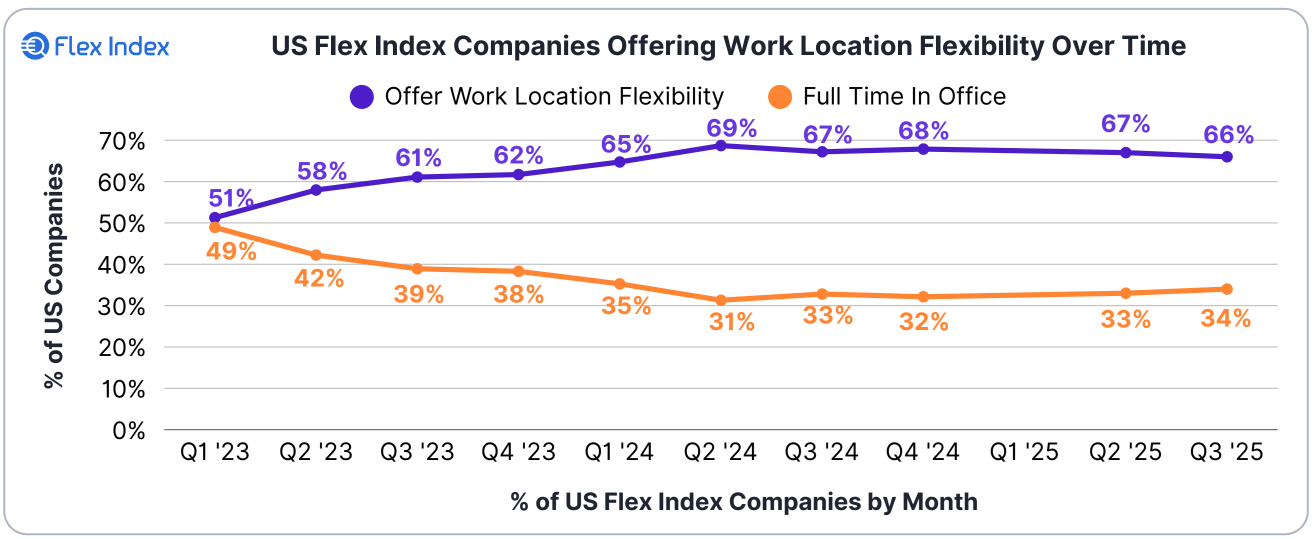
66% of US firms on an industry-adjusted basis offer work location flexibility, meaning they do not require corporate employees to work full time from the office. That represents a 2% decrease from a year ago (Q3 2024) when 68% of US firms offered work location flexibility, but 5% of firms are more flexible than they were two years ago (Q3 2023).

The single biggest driver of change over the past six months in the US have been government agencies, primarily at the Federal level, shifting towards full-time in office. If we look at the data excluding government agencies, they've accounted for half the change over the past year. Notably, some states and agencies have already reversed course.



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 = 9,132 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

Headlines may claim an end to flexibility, but shifts in the market are far less dramatic over the past two years. Many firms adopted their policy as far back as fall of 2020 and have not changed.

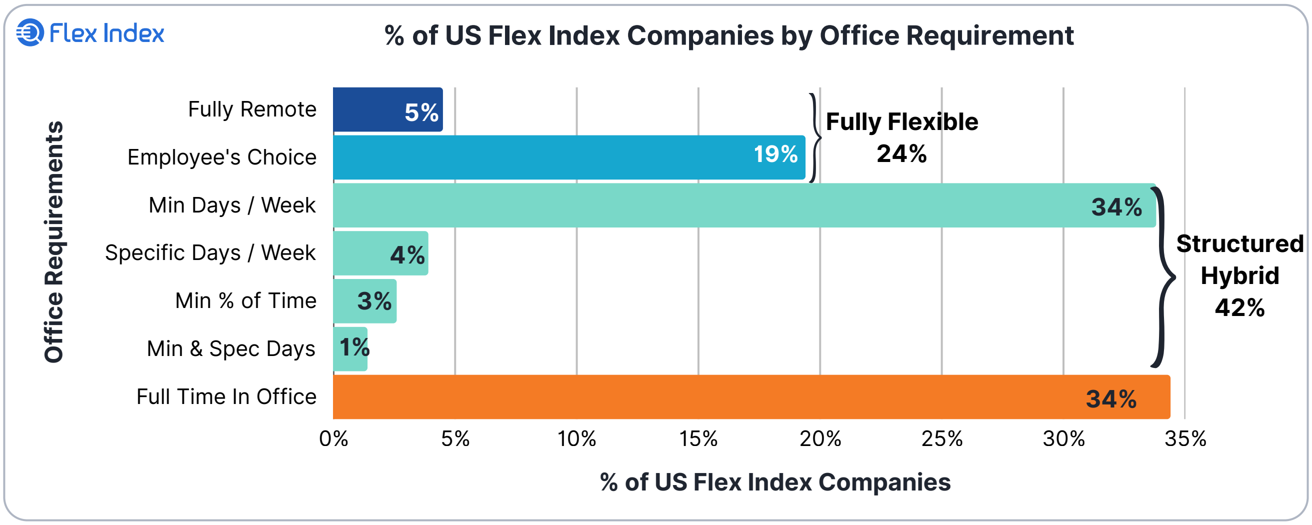


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 9.132 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

OFFICE REQUIREMENTS

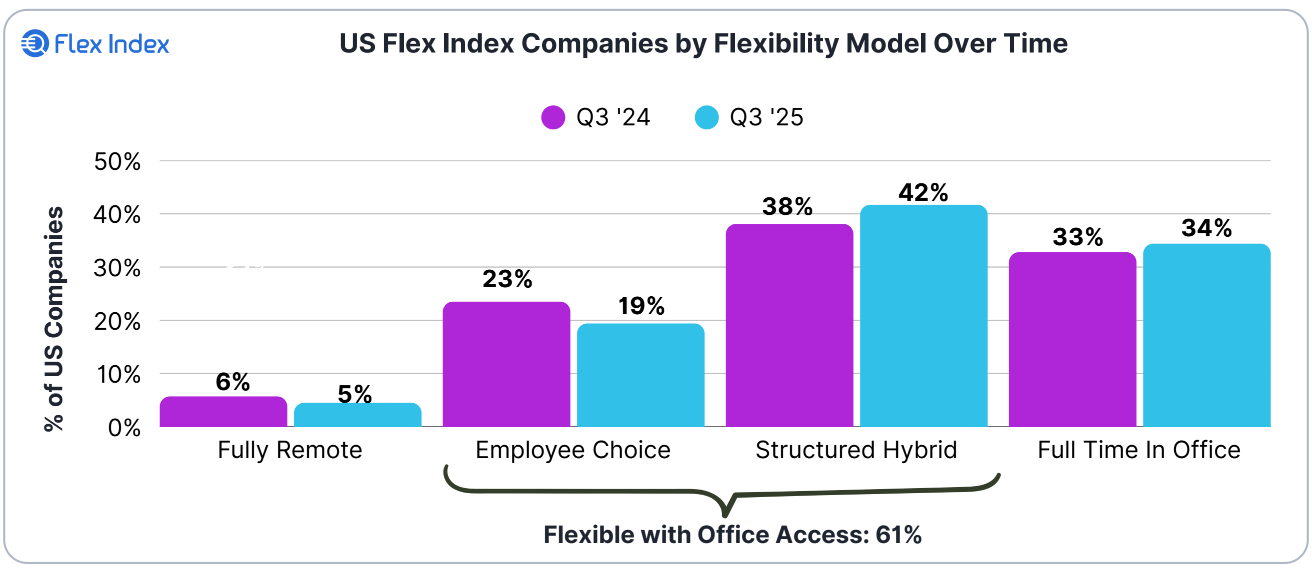
Structured Hybrid remains dominant as the primary work model in the United States. At Structured Hybrid companies, corporate employees are not expected to be in the office full time, but there is a set expectation for how much time employees spend in the office across the organization.

42% of US firms on an industry-adjusted basis are Structured Hybrid, up from 20% in Q1 2023 and 38% in Q3 2024, but for the first time saw a downturn from 43% of firms last quarter. Full Time In Office is the second most common work model, and picked up the one point shift from Q2. Fully Flexible models (no standardized mandate) have dropped in prevalence from 29% of US firms in Q3 ‘24 to 24% of firms today but held steady from Q2 of this year.



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 = 9.132 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

The vast majority of firms provide both access to offices and some form of flexibility. When we look at Employee Choice, which provide employees and teams with access to offices but not org-wide policies together with Structured Hybrid we see that **61% of firms have both flexible policies *and* provide access to office space** – flat with last year. From a Workplace perspective, flexible appears to be the future.



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 = 9,132 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

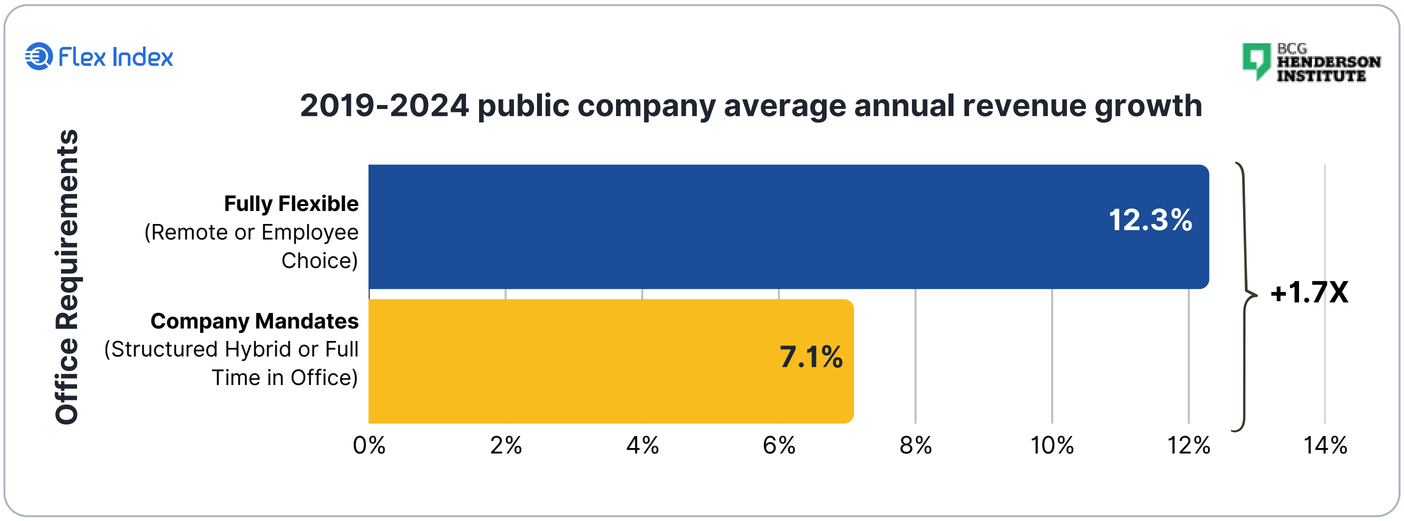
Spotlight on...

Flexibility, Growth and Productivity

WORKPLACE FLEXIBILITY, GROWTH AND PRODUCTIVITY

Our joint research with BCG analyzed 493 public companies from 2019-2024 and found clear evidence that flexible companies significantly outperform mandate-driven peers.

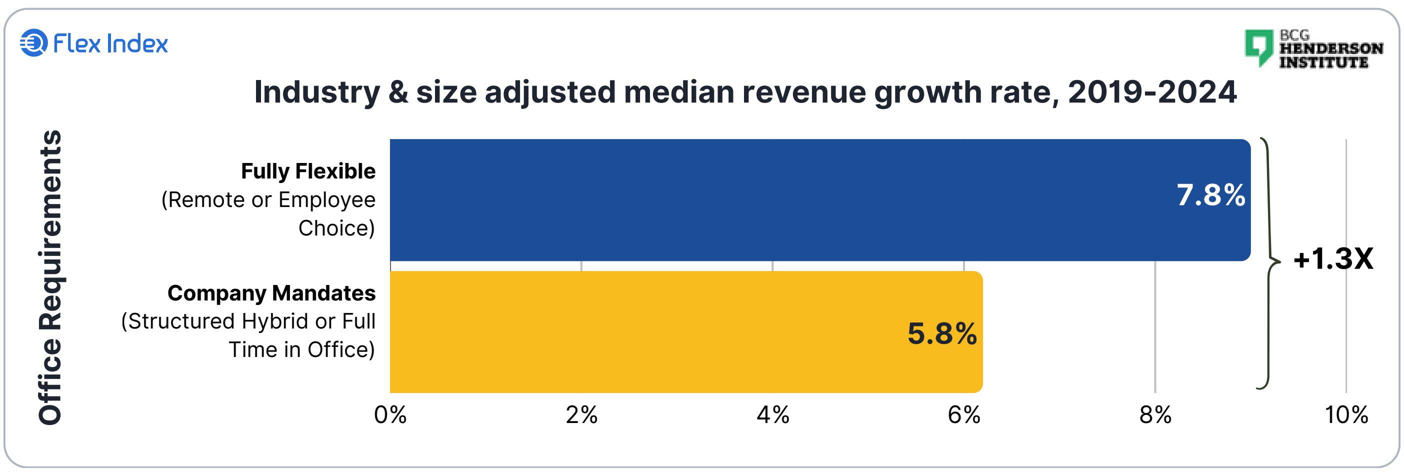
Fully Flexible public companies grew at 1.7X the rate of those with a mandate.



Source: Flex Index (flexindex.com) employee surveys and publicly available data on public company office requirements. Boston Consulting Group analysis on Flex Index public company revenue performance from 2020-2024. n=493 public companies.

Some of that difference can be attributed to higher growth industries and smaller firms.

Adjusting for industry and size, the advantage remains: growth rates 1.3X higher than peer companies. The pattern suggests flexibility enables the agility and talent access that drive business performance.



Source: Flex Index (flexindex.com) employee surveys and publicly available data on public company office requirements. Boston Consulting Group analysis on Flex Index public company revenue performance from 2020-2024. n=493 public companies. Median quantile regression on industry, revenue size and employee size yields a 2.01 median percentage point higher growth rate for Fully Flexible companies, p=0.026

💡 Key Insight

Does flexibility enable growth, or does growth require flexibility for the needed talent?

"Flexible work policies are a sign of organizational cultures that trust employees, measure impact over input, and recognize that different people need different conditions to do their best work."

– BCG Managing Director and Sr Partner Debbie Lovich

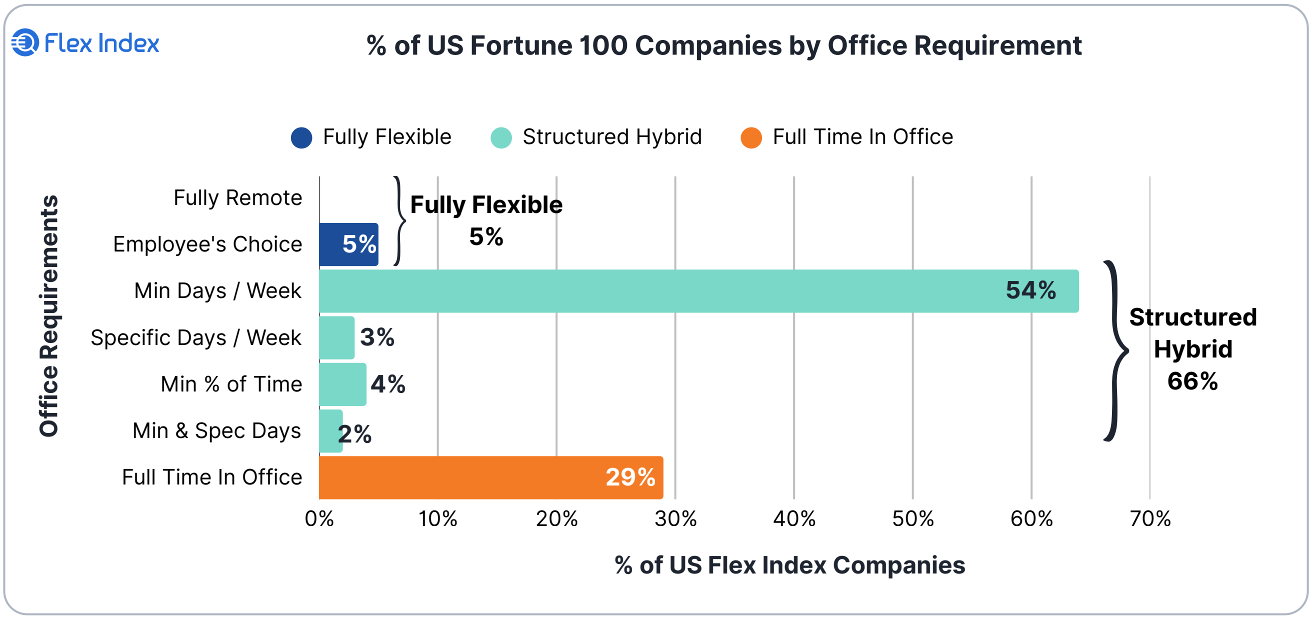
Spotlight on...

Workplace Flexibility in the Fortune 100

Flex Index

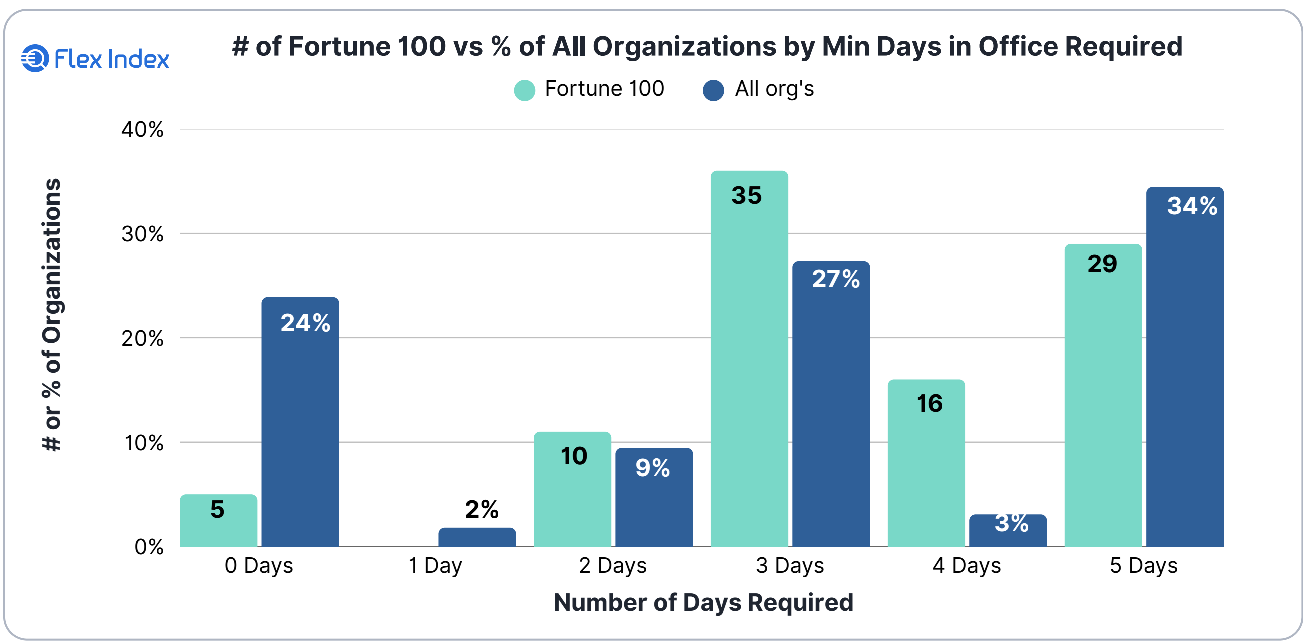
FORTUNE 100 | POLICY SHIFTS TOWARDS OFFICE

Fortune 100 companies are less flexible than the overall market, but headlines claiming a 'return to full-time office' miss the mark. **71% of Fortune 100 firms still offer flexibility.** 66% of the Fortune 100 have a Structured Hybrid policy, and 29% are 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, Fortune 500 companies. N = 99 companies (Berkshire Hathaway allows portfolio companies to set their own policies).

The real shift: toward office-heavy hybrid. While only 29% require Full Time in Office. another 16% require 4 days—meaning 45% of Fortune 100 workers are in the office almost daily. That compares to an overall average of 3% of firms with a 4 day Structured Hybrid policy.



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 = 99 companies.. (Berkshire Hathaway allows portfolio companies to set their own policies) and two firms currently utulize % of Time models at 50%.

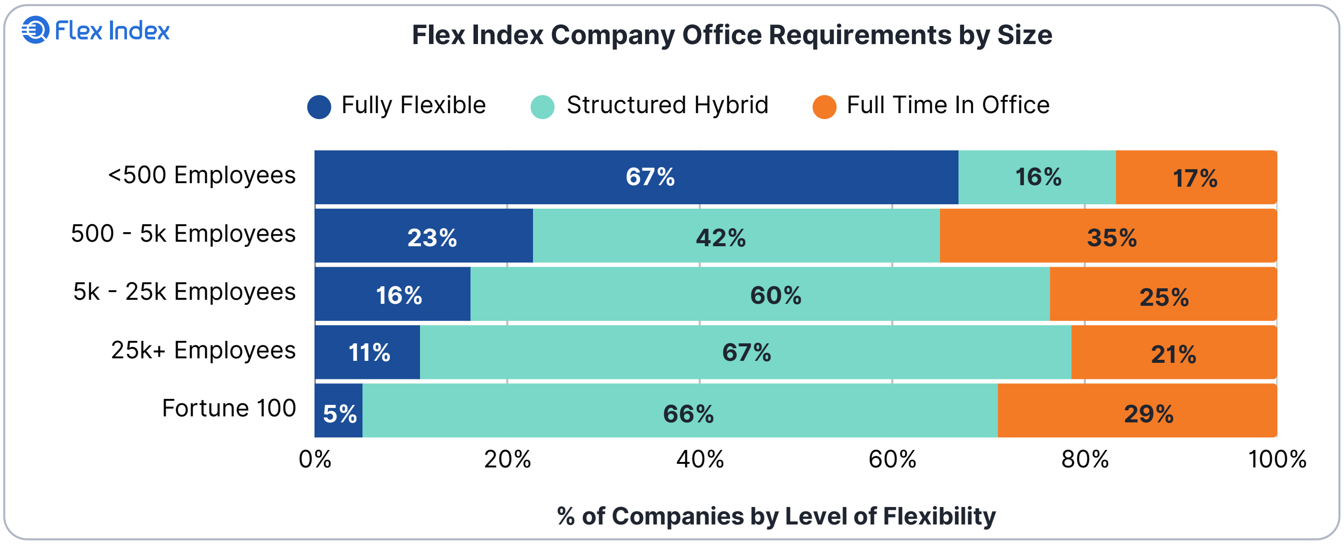
Flexibility by Company Size

Flex Index

FLEXIBILITY BY COMPANY SIZE

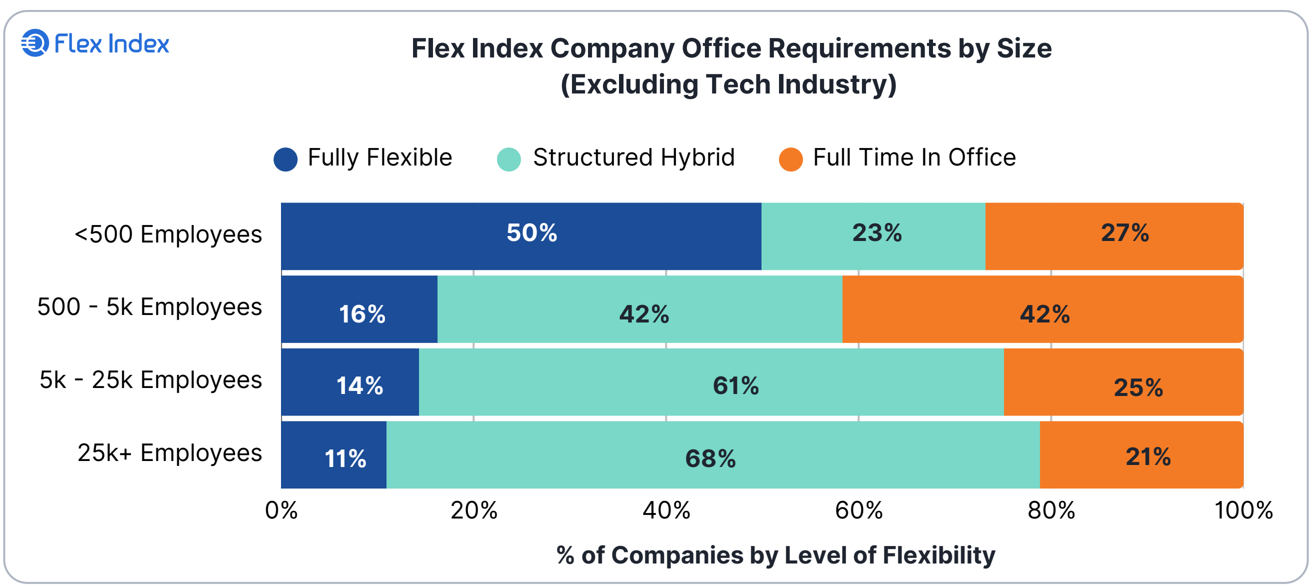
There continues to be a significant distinction in flexible work approach between smaller firms and larger enterprises. **67% of companies with less than 500 employees are Fully Flexible**, while just 11% of enterprises with 25,000+ employees are Fully Flexible. **Large firms are much more likely to be Structured Hybrid:** 67% of 25,000+ employee companies vs 16% of firms with 500 employees or less.

Over half of all US workers are in a firm that is far more likely to afford them more flexibility than the Fortune 100. While firms with 500 or less employees may sound small, Bureau of Labor Statistics data shows that 51% of US workers are employed in those small firms, 83% of whom have a flexible policy.



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 = 9,132 companies.

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.



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 = 6,631 companies.

Spotlight on...

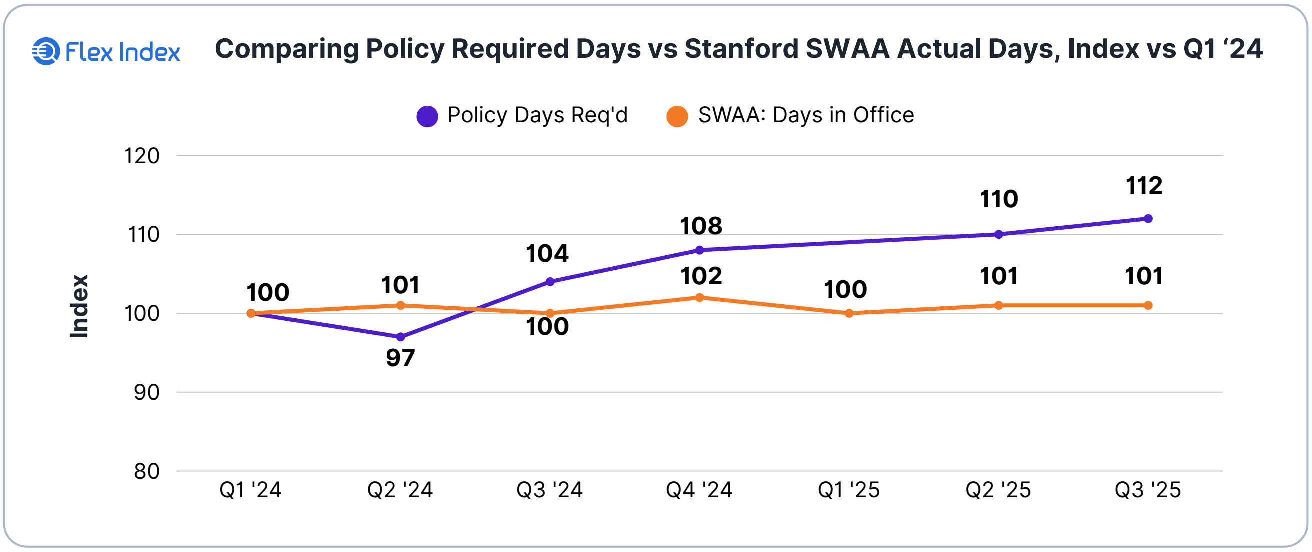
Policy versus Compliance

POLICY VERSUS COMPLIANCE

While employers demand more office time, employees aren't fully complying.

Since Q1 2024:
- **Required office days is up 12%** (2.57 to 2.87 days)
- **Actual attendance is up 1-3%** based on multiple data sources

This growing gap persists despite a softening job market, suggesting employees retain some leverage in high-performing roles – and that managers are unwilling to terminate solid performers on the basis of policy 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 = 9.132 companies. Barrera, Bloom & Davis Survey of Working Arrangements and Attitudes (SWAA), Full Time employee reported actual days WFH including frontline employees (those without workplace flexibility); see www.wfhresearch.com

Data from the Survey of Working Arrangements & Attitudes (Barrera, Bloom and Davis) consistently shows a roughly unchanged mix of work from home days. Or as Stanford's Nick Bloom has said, "flat as a pancake."

Other data sources are showing single-digit increases in the past year.
- Placer.ai tracks cell phone activity and shows a 0% increase in Q1 '25 vs the year prior but a 3.1% increase in Q2 '25
- Kastle Systems data on badge swipes has consistently shown a 2-3% increase over the past year.

More recent reports, like Placer.ai, are showing an upward trend – perhaps an indicator of further shifts to come in a softer jobs market.

FLEXIBILITY BY COMPANY SIZE

Employment growth, or the lack of it, is the other key factor in office utilization.

As Stanford's Nick Bloom has pointed out, one of the reasons why their data shows that work from home levels are fairly flat while headlines are dominated by RTO announcements is the Composition Effect: the firms demanding more days in office aren't growing, while smaller, more flexible companies are increasing net employment.

Using Bureau of Labor Statistics data, for the first half of 2025 **nearly all of the net change in employment in the US came from firms with under 1,000 employees.**

Establishment size (# empl)	Added (Hires)	Laid off	Quits	Total separations	Net change
<1,000 *	28,240,000	7,840,000	19,070,000	27,261,000	979,000
1,000–4,999	1,624,000	577,000	1,049,000	1,671,000	-47,000
5,000+	464,000	130,000	276,000	412,000	52,000
TOTAL	30,328,000	8,547,000	20,395,000	29,344,000	984,000

Source: BLS JOLTS data YTD (Jan-Feb, Mar-Jun) aggregate of BLS reports; <1,000 aggregates establishments with 1–9, 10–49, 50–249, and 250–999 employees

The growth differentials are stark when compared to who is most likely to be demanding stricter return to office standards. Based on Flex Index data for Q3:

- 45% of the Fortune 100 are now asking employees to be in the office 4 or 5 days a week.
- 67% of firms with <500 employees are Fully Flexible.

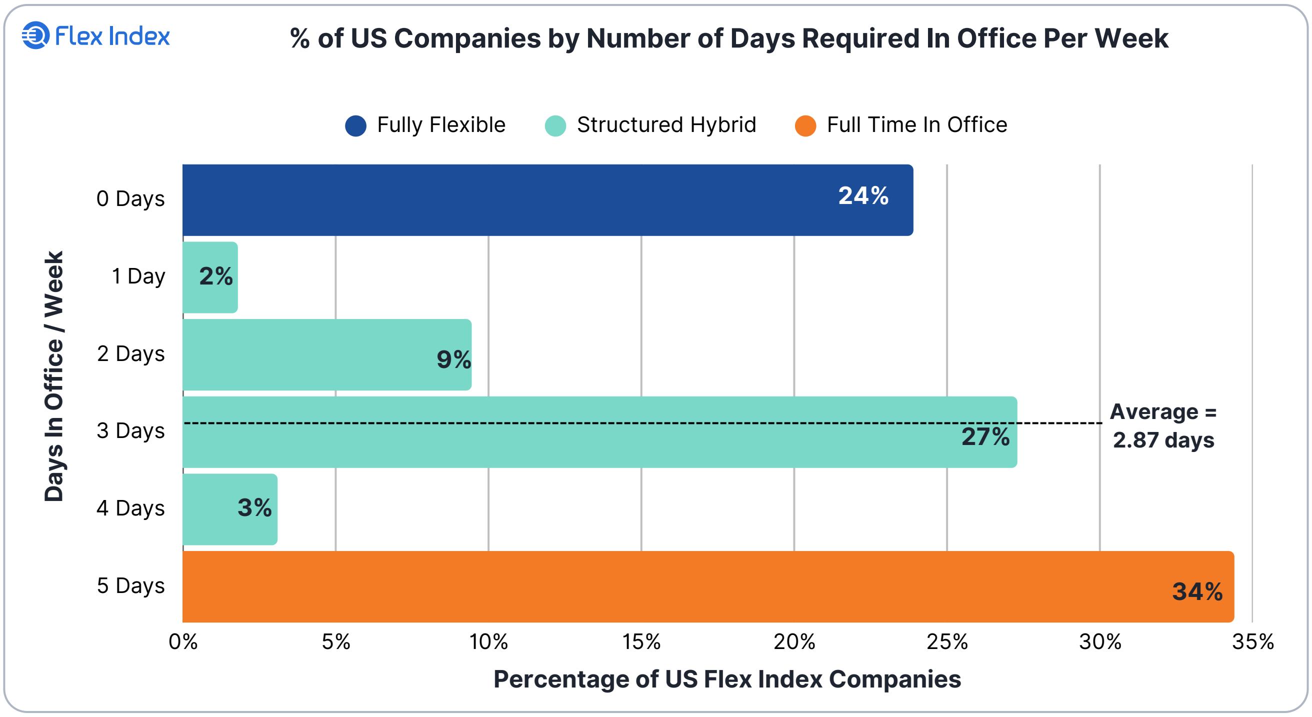
The starkest contrast comes in the Federal government, where agency demands to return to 5 days a week in the office were pared with headcount reductions.

Changes in Policy Days Required

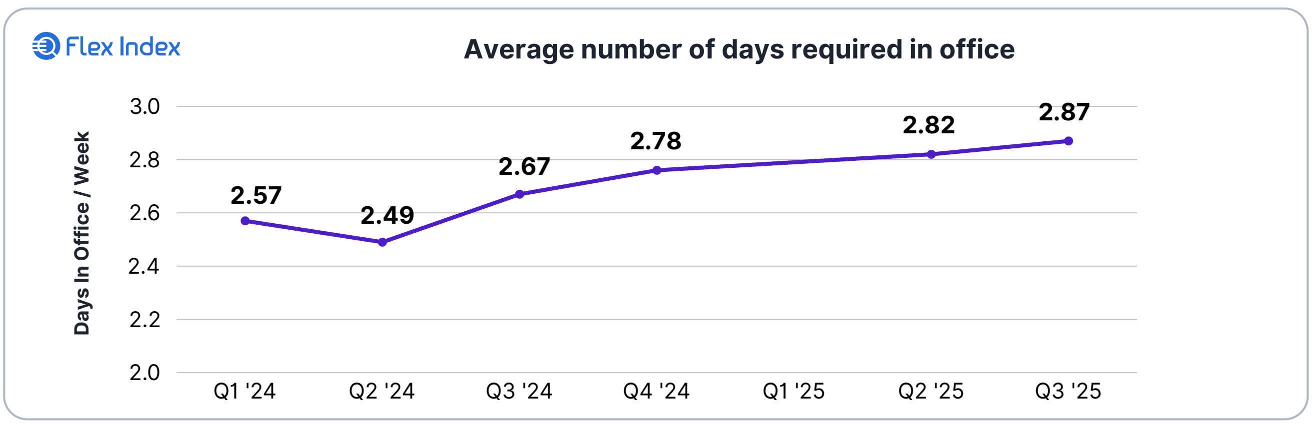
Flex Index

TIME REQUIRED IN OFFICE

The average US firm requires corporate employees to be in the office 2.87 days per week. 58% of firms have a polarized approach: 34% 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**

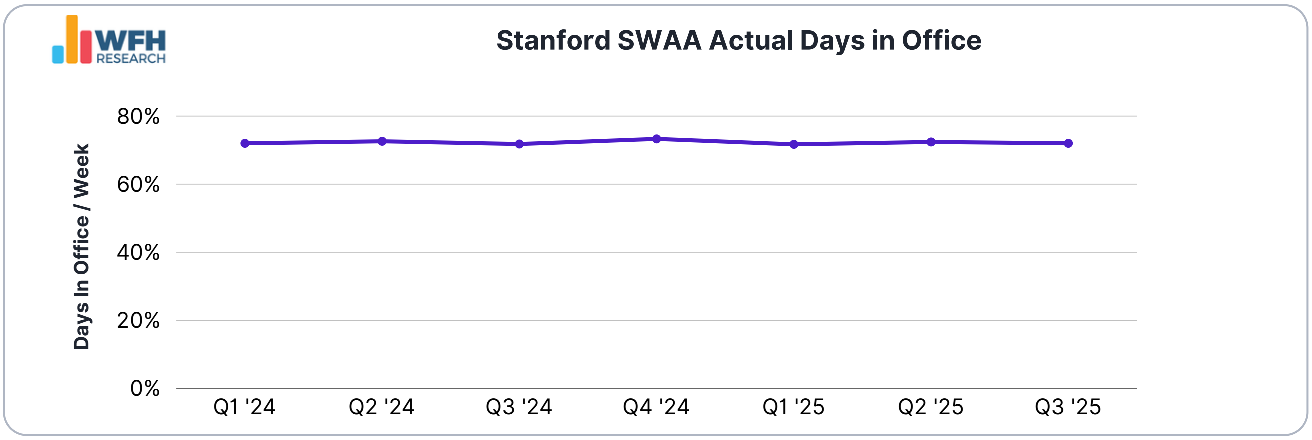
There has been a steady shift upward in required office time from 2.49 days per week in the office in Q2 2024 (the low point in our data) to 2.87 days per week in Q2 2025, driven by two shifts:

- 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 30%.

These relatively small changes combine to increase the average expectation in the US by 9% vs Q3 of last year and 12% from the start of 2024.

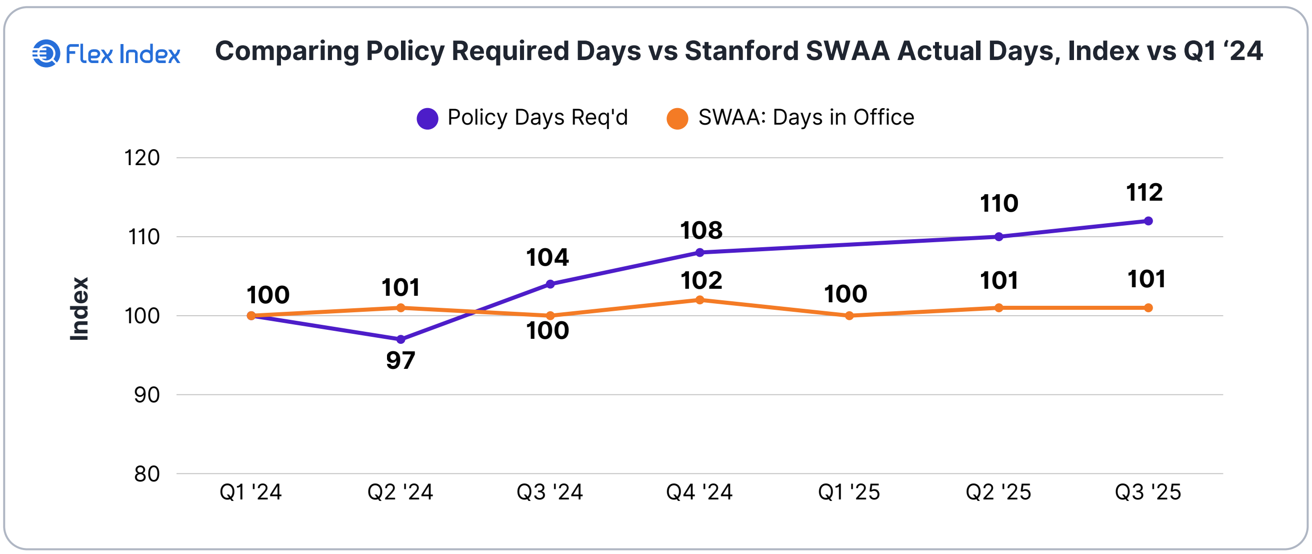
POLICY VERSUS COMPLIANCE

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 US Census data.



Source: Source: Barrera, Bloom & Davis Survey of Working Arrangements and Attitudes (SWAA), Full Time employee reported actual days WFH including frontline employees (those without workplace flexibility); see www.wfhresearch.com

Indexing both data sets against Q1 2024, 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 = 9.132 companies. Barrera, Bloom & Davis Survey of Working Arrangements and Attitudes (SWAA), Full Time employee reported actual days WFH including frontline employees (those without workplace flexibility); see www.wfhresearch.com

Data from Placer.ai tracking cell phone activity showed a 0% increase in Q1 '25 vs the year prior but a 3.1% increase in Q2 '25, and Kastle Systems data has consistently shown a 2-3% increase in badge swipes over the past year – perhaps an indicator of further shifts to come.

💡 **Key Insight**

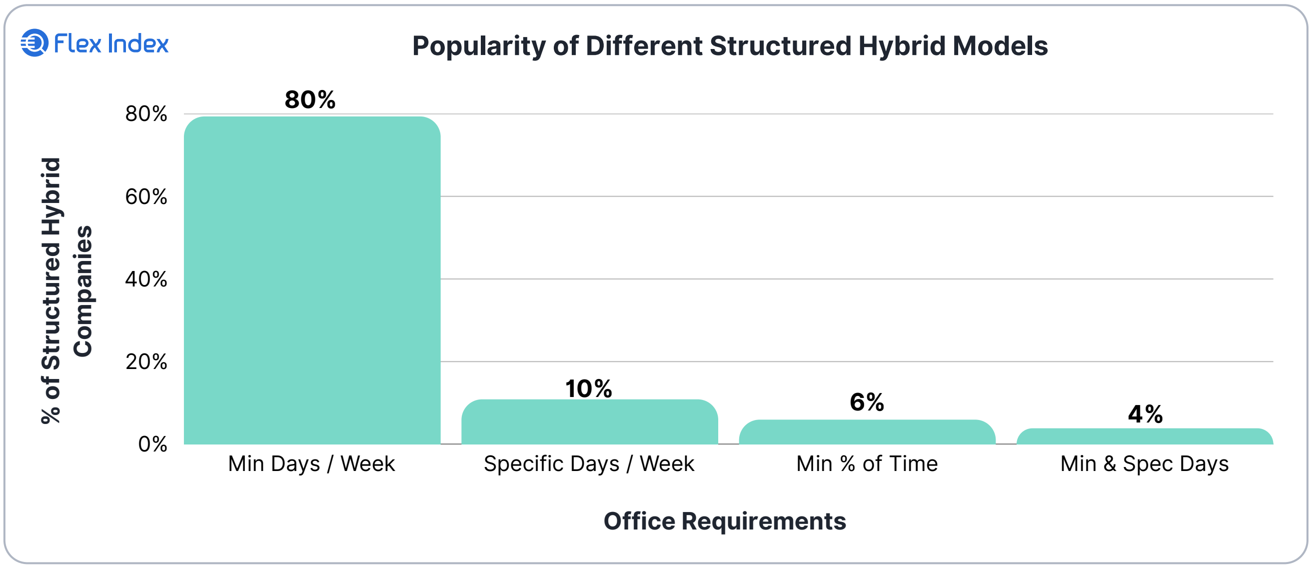
While employers may be demanding more time in office, employees are not fully complying: the average days required of employees under US policies has gone up an average of 12% since Q1 of 2024, while attendance has fluctuated between 0 and 3% higher each quarter.

Assumptions that "full time in office" meant 5 days pre-pandemic are also incorrect. 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

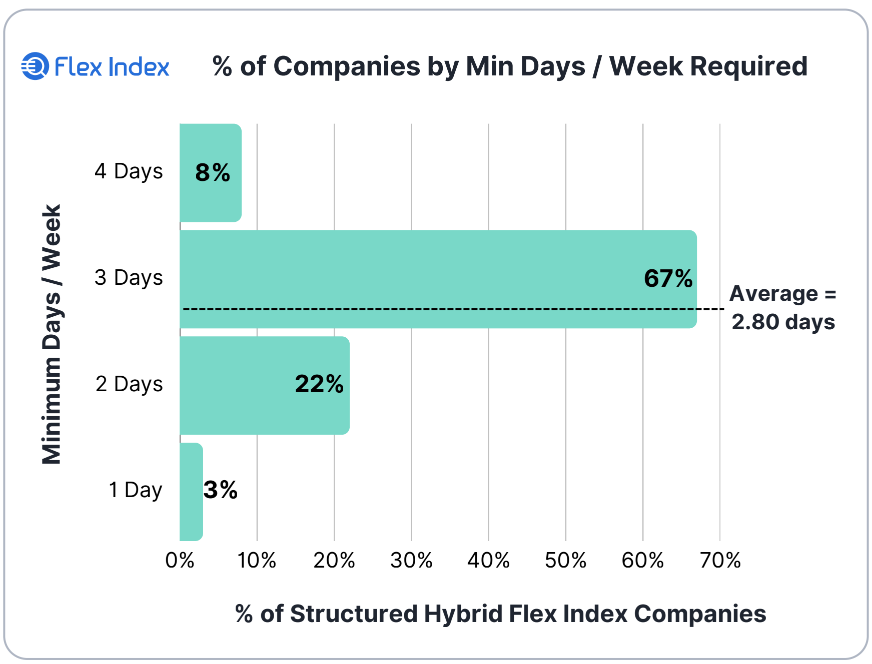
Minimum Days / Week continues to be the dominant model of Structured Hybrid approaches to the office. 80% of Structured Hybrid companies in the United States have a Minimum Days / Week model, up from 74% in Q3 2024.

Specific days of the week has declined in popularity, dropping from 16% in Q3 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 = 3.400 companies.

Among Structured Hybrid firms, there's been a notable shift towards 3 and 4 day a week policies, up from 62% of firms in Q3 '24 to 75% of firms this quarter. The vast majority of that shift has been towards 3 days a week, up to 67% from 56% last year.



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 = 2.859 companies.

💬 Good to Know

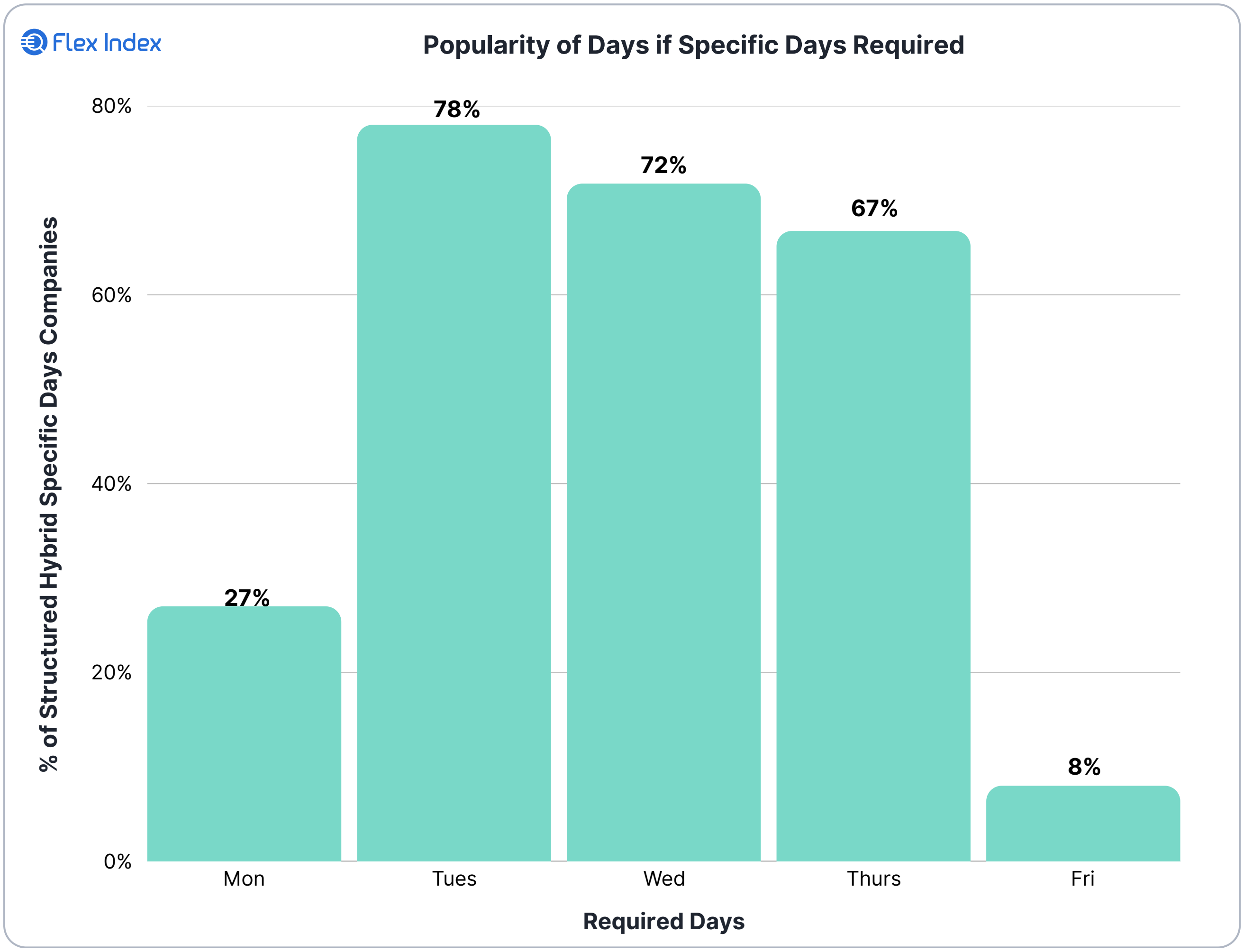
The average company with a Minimum Days / Week policy requires employees in the office 2.8 days per week.

That's up from 6% from 2.63 days per week in Q3 2024.

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 8% of these firms requiring Friday attendance.

Out of all firms with a Structured Hybrid approach, only 1% require Friday attendance (7.7% of 15.6% of Structured Hybrid firms requiring Specific Days).

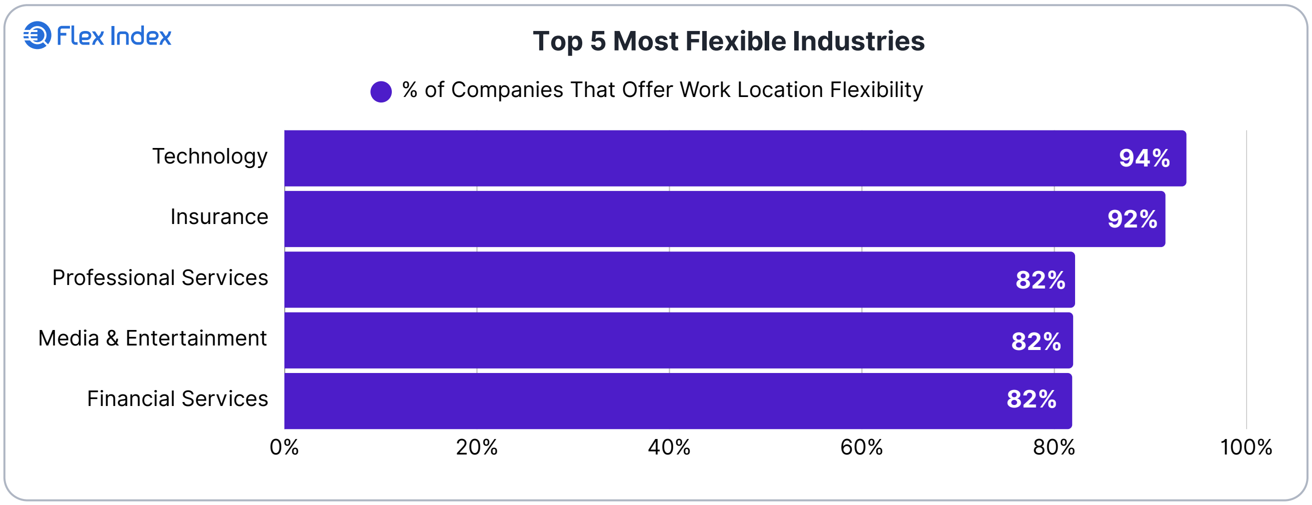


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on companies with headquarters in the US with Structured Hybrid and specific days office requirements. N = 401 companies.

Flexibility by Industry

Flex Index

FLEXIBILITY BY INDUSTRY



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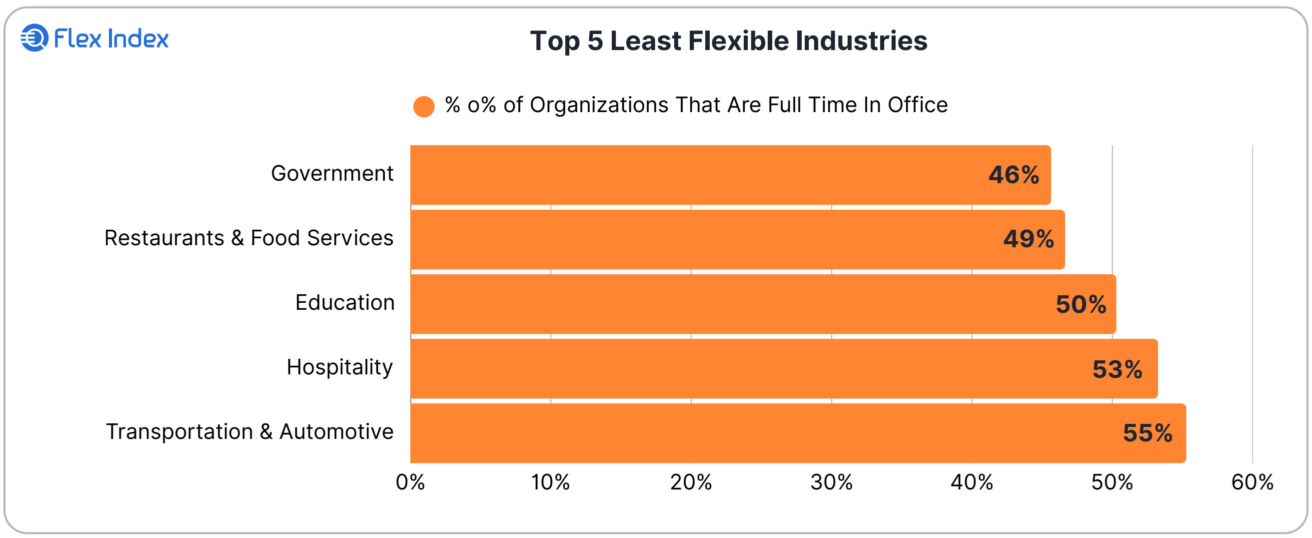


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 9,132 companies.

Most Flexible

Technology and Insurance continue to be the top two industries for flexibility in the United States. 94% of US Tech firms offer work location flexibility, along with 92% of US Insurance firms.

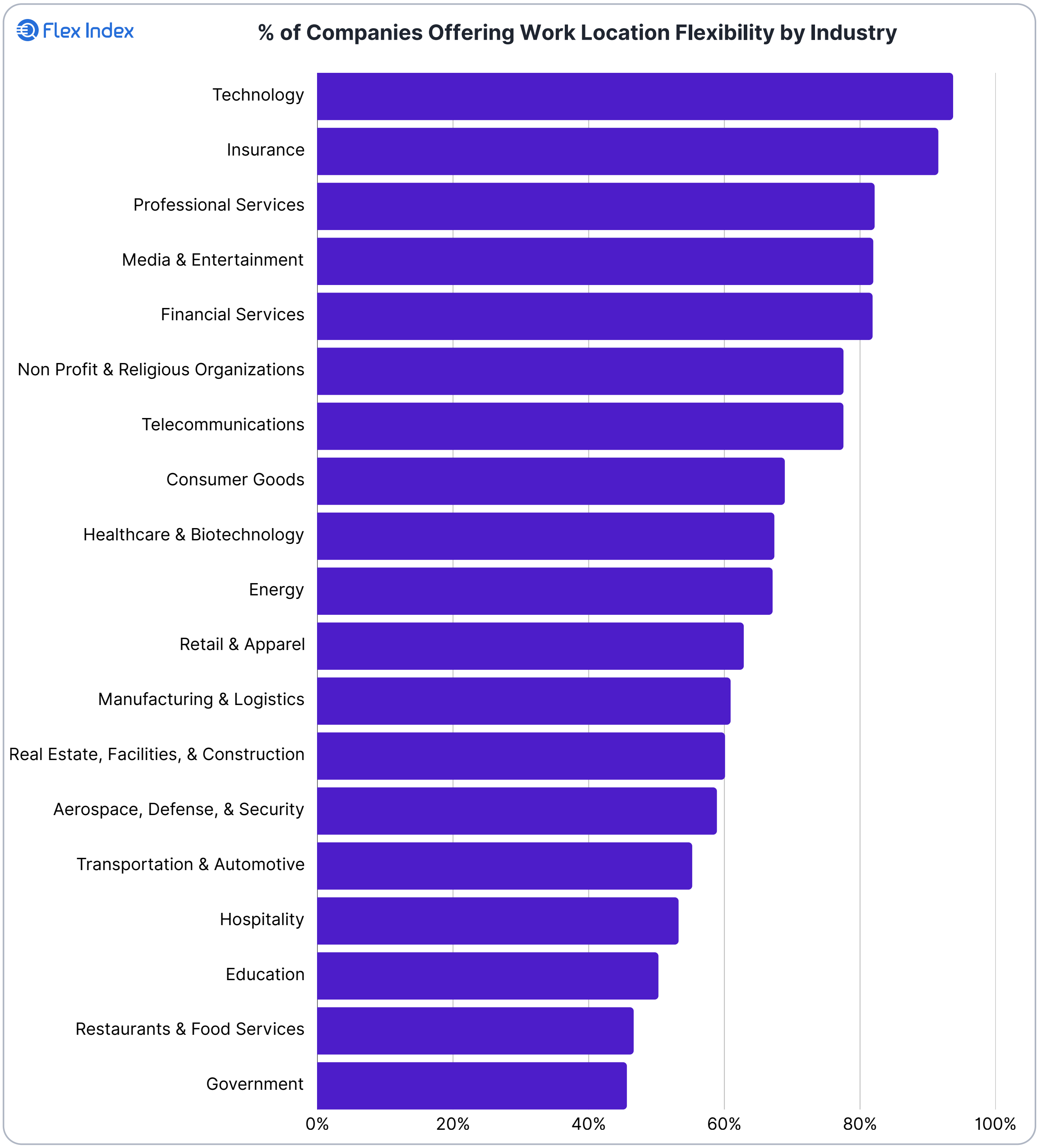
Headlines aside, Financial Services remains the top five with 82% of firms offering work location flexibility. Professional Services and Media & Entertainment round out the list.

Least Flexible

Government has exhibited the most significant shift: a 23% downturn in the number of entities providing flexibility at the Federal level as well as some state and local agencies. A year ago, Government was at the average of all industries.

Transportation & Automotive also shifted away from flexibility (down 6%) as did Education (down 3%). Restaurants & Food Service along with Hospitality were nearly flat year on year.

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.

In Closing

In Closing

Despite high-profile shifts by some Fortune 100 companies and the Federal government toward office-centric policies, the impact has been less dramatic than headlines suggest. Two-thirds of US firms still offer flexibility, with only 34% requiring full-time office presence.

The most significant changes have occurred among large enterprises and in the migration toward Structured Hybrid models. Currently, 42% of US firms use Structured Hybrid approaches, while average required office time has increased from 2.57 to 2.87 days per week – a 12% rise since early 2024.

But our joint research with BCG reveals why this shift may be counterproductive: Fully Flexible companies grew revenues 1.7x faster than mandate-driven firms between 2019 and 2024. Even after adjusting for industry and size, flexible companies maintain a 34% growth advantage. This isn't just about employee satisfaction: flexibility and business performance are linked.

The data also shows policy doesn't equal compliance. While required office days increased 12%, actual attendance rose only 1-3%, suggesting employees retain leverage even in softening job markets.

The size divide remains striking. Small firms – employing half the US workforce – offer dramatically more flexibility, with 67% maintaining Fully Flexible policies. This means your workplace experience depends heavily on company size, not just industry.

Fortune 100 companies illustrate this tension: 71% still offer flexibility, but 16% of those are now at 4 days a week versus 3% for firms overall. Larger organizations appear to be more dependent on in-person management – while at the same time proclaiming an AI-enabled future.

The remainder of 2025 will reveal whether companies double down on mandates despite the performance data, and whether employee compliance rises in the face of a weakening job market.

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 think tank and advisory group that helps leaders navigate the future of work through data and dialog

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.

Contacts: For questions and press inquiries, please reach out to:

Brian Elliott
CEO, Work Forward and Publisher, Flex Index
✉ brian@flexindex.com

Citations: Please cite "Flex Index (flexindex.com), Q3 2025 Flex Report"

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

Methodology

Flex Index collects firmographic and office requirements information on more than 14,000 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 August 2025. Once a company is incorporated into Flex Index, 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.