The Flex Report

Q4 2024

Flex Index

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About the Flex Report

And you thought return to office policy was settled! For a while, it looked like 2-3 days per week in the office would be the future of work in America.

Yet this quarter has brought significant changes to the landscape. Major companies like **Amazon**, **Dell**, and **The Washington Post** announced their plans for a full return to office. Then came a shift in the political atmosphere, with Trump's victory and potential incoming changes requiring **full-time office work for government employees**.

These developments raise important questions about where workplace flexibility is headed. Are we witnessing the beginning of a broader shift back to Full Time In Office? Is the era of fully flexible work coming to an end? Or is this simply another evolution in how companies structure their workplace policies?

In this report, we dig into US-wide trends to see if the high-profile shifts toward Full Time In Office reflect broader market movement or just isolated cases. We examine how different industries are approaching flexibility, from Technology’s continued embrace to the challenges faced by sectors dependent on physical presence. Plus, we explore the divide in how companies of different sizes approach workplace flexibility. Are we truly heading back to the office full time, or is the future of work more nuanced than the headlines suggest?

Read on for our latest quarterly report!

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. **68% of US firms offer work location flexibility.**
The percentage of US firms requiring Full Time In Office is 32%, roughly flat over the last two quarters despite some high profile company shifts toward Full Time In Office.

2. **Structured Hybrid models continue to grow in popularity.**
43% of US firms now have a Structured Hybrid model. That's up from 38% in Q3 2024 and 20% in Q1 2023. Fully Flexible decreased in popularity quarter over quarter (25% vs. 29%).

3. **The average required time in office per week increased quarter over quarter.**
The average US firm requires 2.78 days per week in the office, up from 2.63 days a quarter ago and 2.49 days two quarters ago. That shift is heavily driven by an increase in the percentage of companies requiring three days per week in office (19% to 28% over the last two quarters).

4. **Financial Services climbs back into the top five most flexible industries.**
Tech and Insurance take two of the top three industry spots, with Financial Services coming in third. Restaurants & Food Services continues to be the most common requirer of Full Time In Office, followed by Education.

5. **Small firms embrace Fully Flexible models, while large firms opt for Structured Hybrid arrangements.**
73% of US firms with 25,000+ employees are Structured Hybrid, compared to 15% of firms with 500 employees or less. Conversely, 70% of US firms with 500 employees or less are Fully Flexible, compared to just 14% of firms with 25,000+ employees.

Spotlight on...

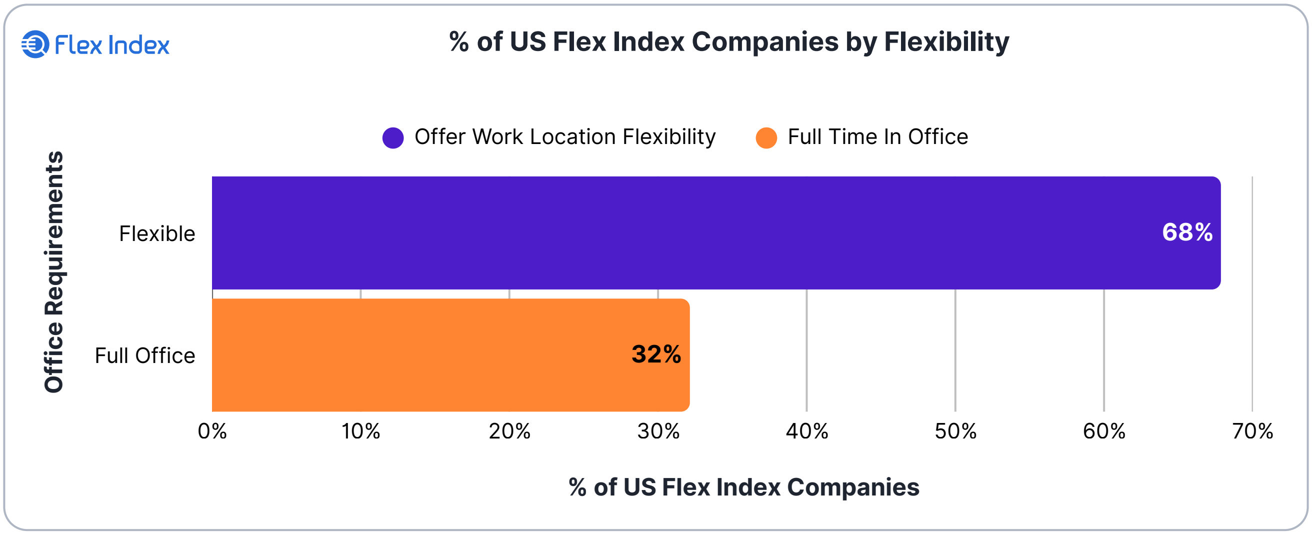
Adoption of Work Location Flexibility

Flex Index

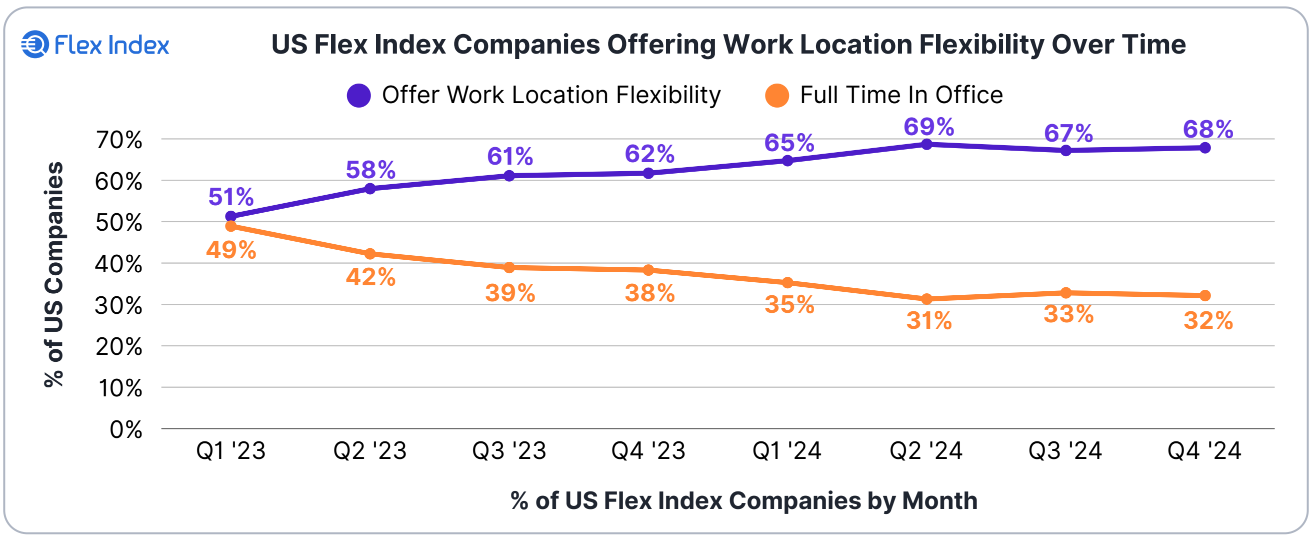
ADOPTION OF WORK LOCATION FLEXIBILITY

68% 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 Q3 2024 when 67% of US firms offered work location flexibility.

The roughly 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 = 8,675 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the US working population.

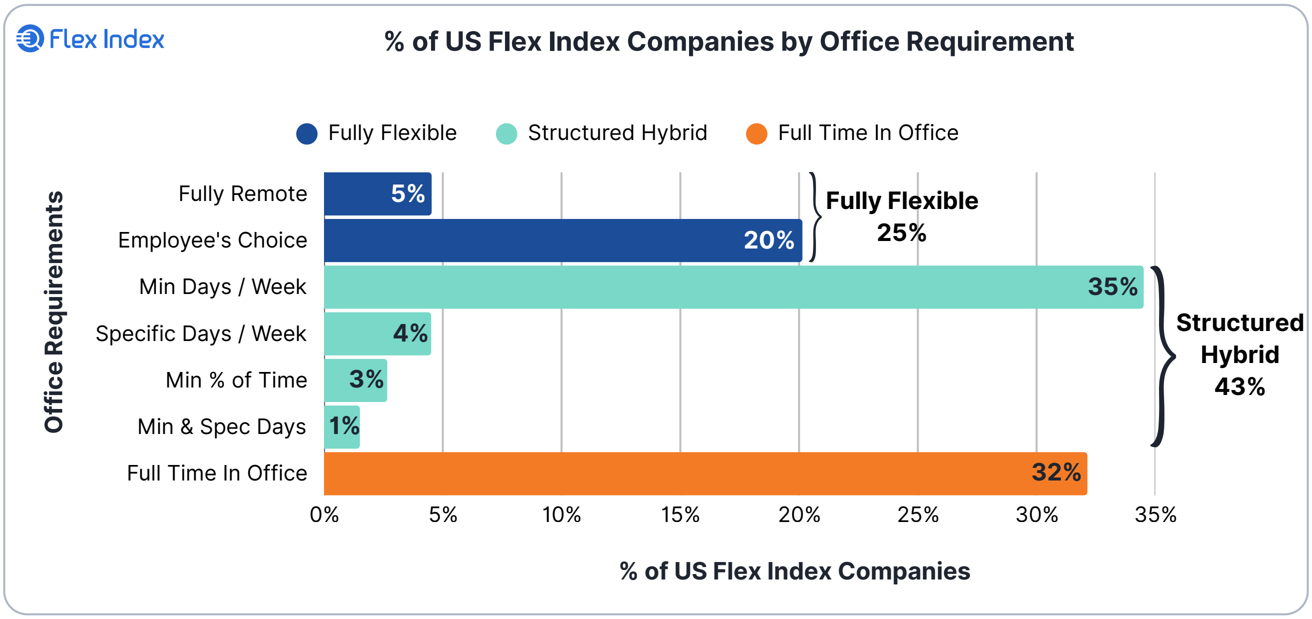


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,675 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the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



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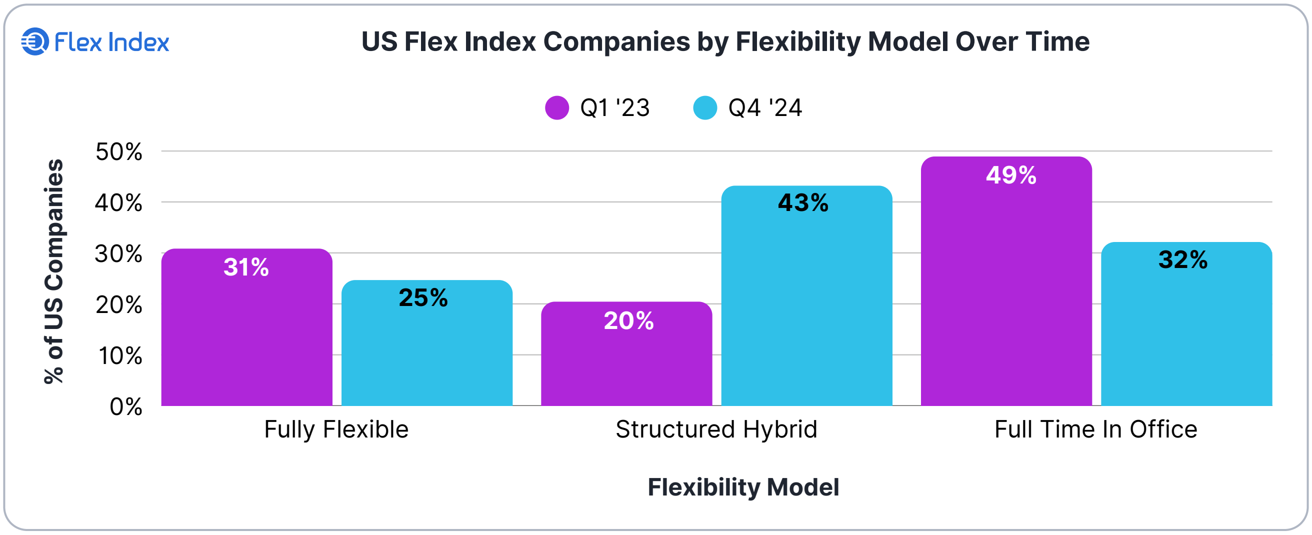
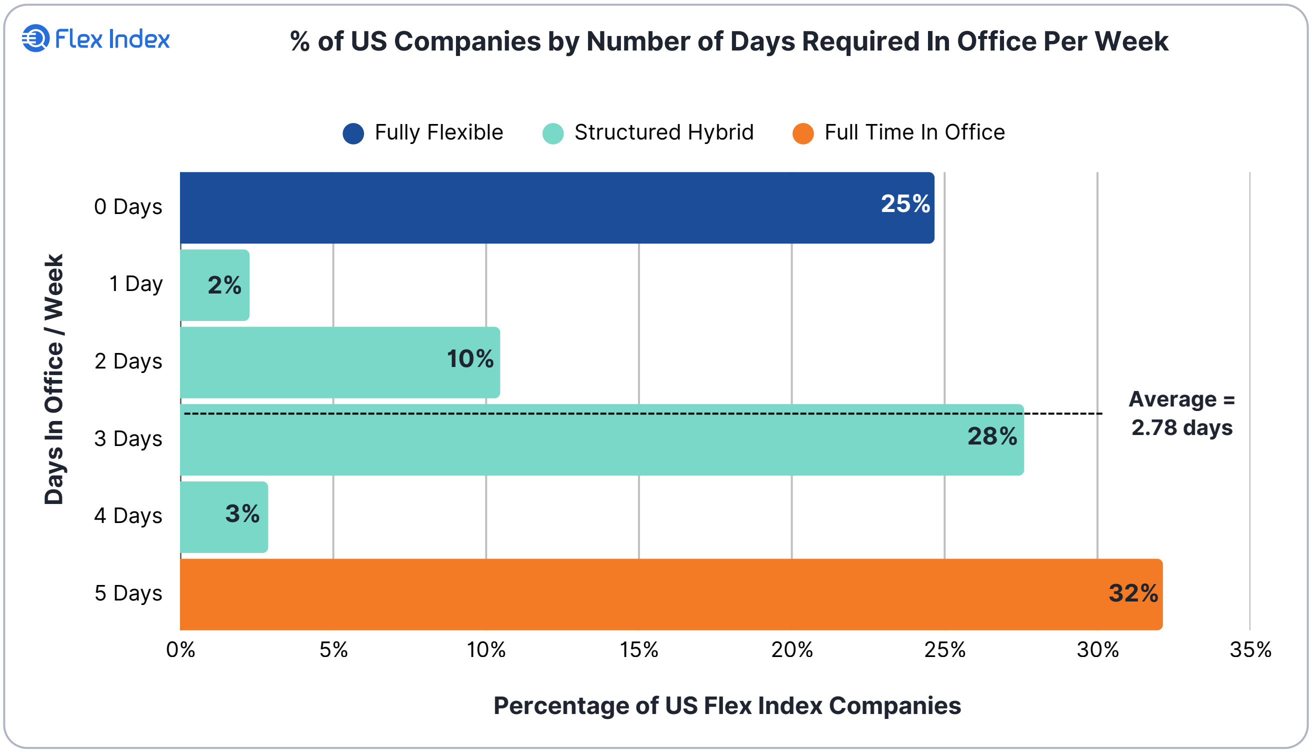


Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 8,675 companies. Flex Index data has been re-weighted using the Current Population Survey industry data to better approximate the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

TIME REQUIRED IN OFFICE

The average US firm requires corporate employees to be in the office 2.78 days per week. 57% of firms have a polarized approach; 32% require Full Time In Office while 25% require no office time at all.

38% of US firms require 2-3 days per week in the office, reflective of the average. It is pretty uncommon for companies to require only one day per week or four days per week in the office; 5% of US firms require one or four days per week in the 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 = 8,675 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 at US companies in 2024.

In Q2 2024, the average US firm required 2.49 days per week in the office. In Q3 2024, that number increased to 2.63 days per week, and now US firms require 2.78 days per week in office. That's a 0.29 day increase over the last six months.

That change is predominately driven by two movements in policy:

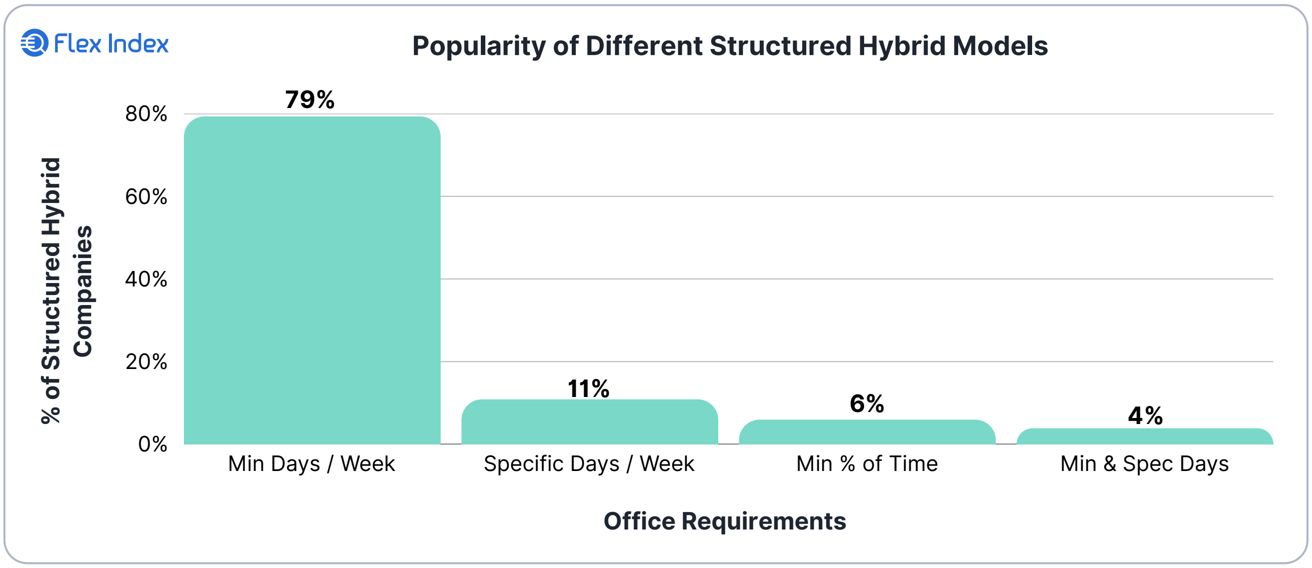
- The percentage of firms requiring 0 days per week in office has decreased from 32% to 25%.
- The percentage of firms requiring 3 days per week in office has increased from 19% to 28%.

These are relatively small changes, but combined are leading to an increase in the average expectation of time spent in office across the United States.

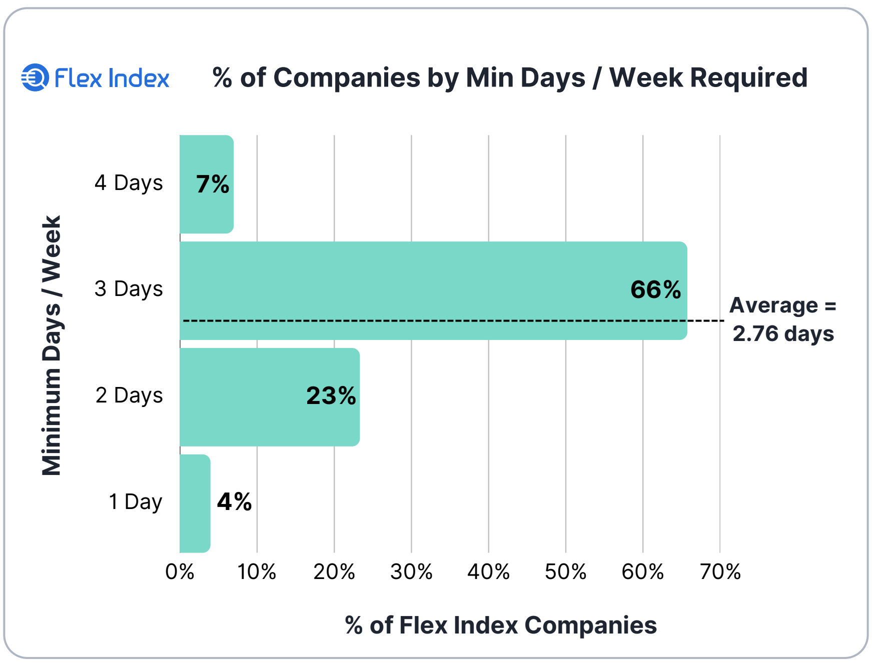
STRUCTURED HYBRID: DAYS / WEEK REQUIRED

Minimum Days / Week is becoming increasingly dominant for companies choosing a Structured Hybrid approach to the office. 79% of Structured Hybrid companies in the United States have a Minimum Days / Week model, up from 74% in Q3 2024.

More broadly, minimums are a popular approach. 89% of Structured Hybrid companies have some type of minimum (either measured in 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

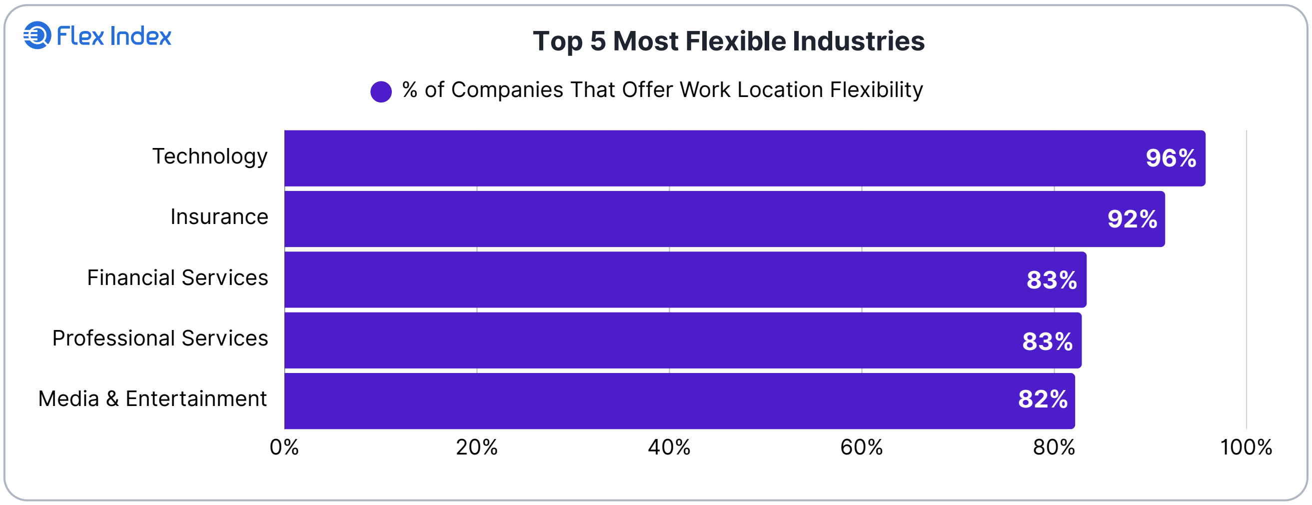
The average company with a Minimum Days / Week policy requires employees in the office 2.76 days per week.

That's up from 2.63 days per week in Q3 2024, a 0.13 days per week increase.

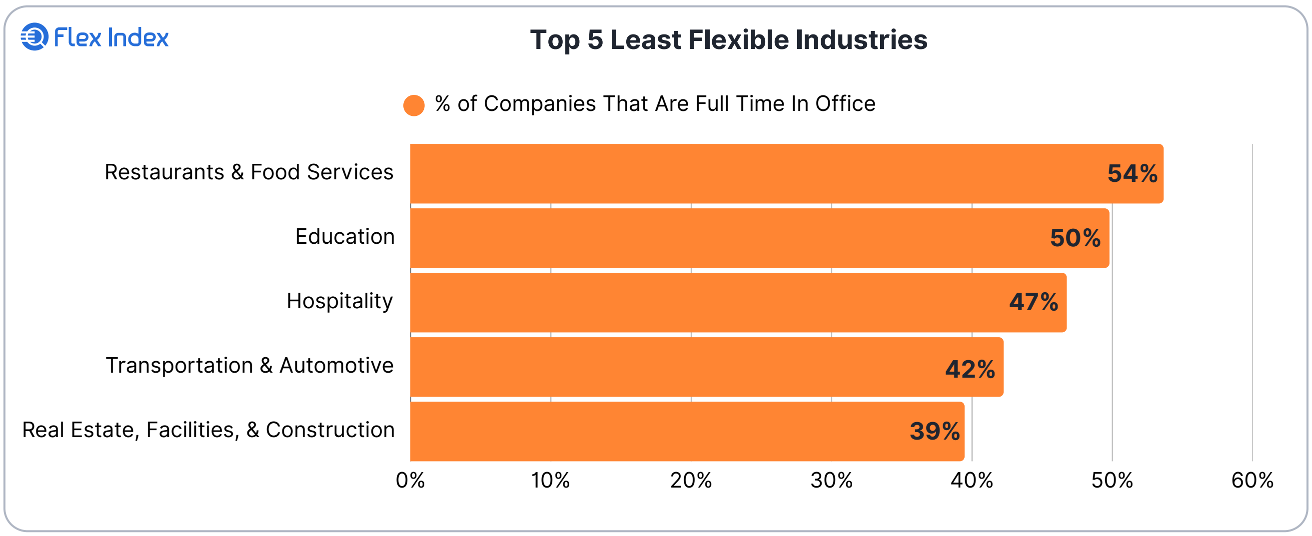
Flexibility by Industry

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. 96% of US Tech firms offer work location flexibility, along with 92% of US Insurance firms.

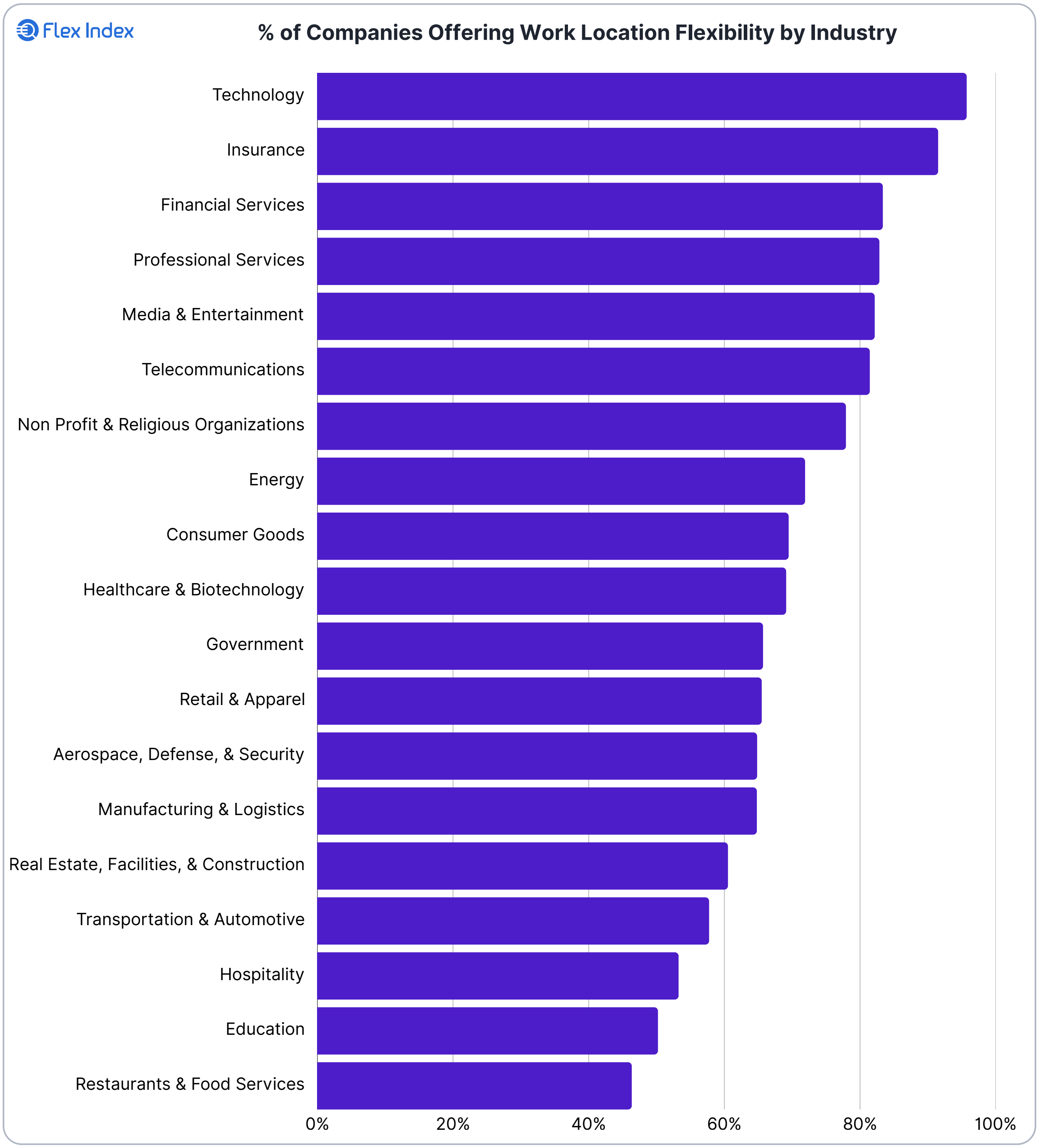
Financial Services comes back into the top five with 83% of firms offering work location flexibility. Professional Services and Media & Entertainment round out the list, despite the Washington Post moving to Full Time In Office.

Least Flexible

Restaurants & Food Services companies are most likely to require Full Time In Office for corporate employees. The Education and Hospitality industries round out the top three.

Not surprisingly, the broader Real Estate industry also makes the top five in requiring Full Time In Office. Transportation & Automotive comes in at fourth most likely to require Full Time In Office.

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.

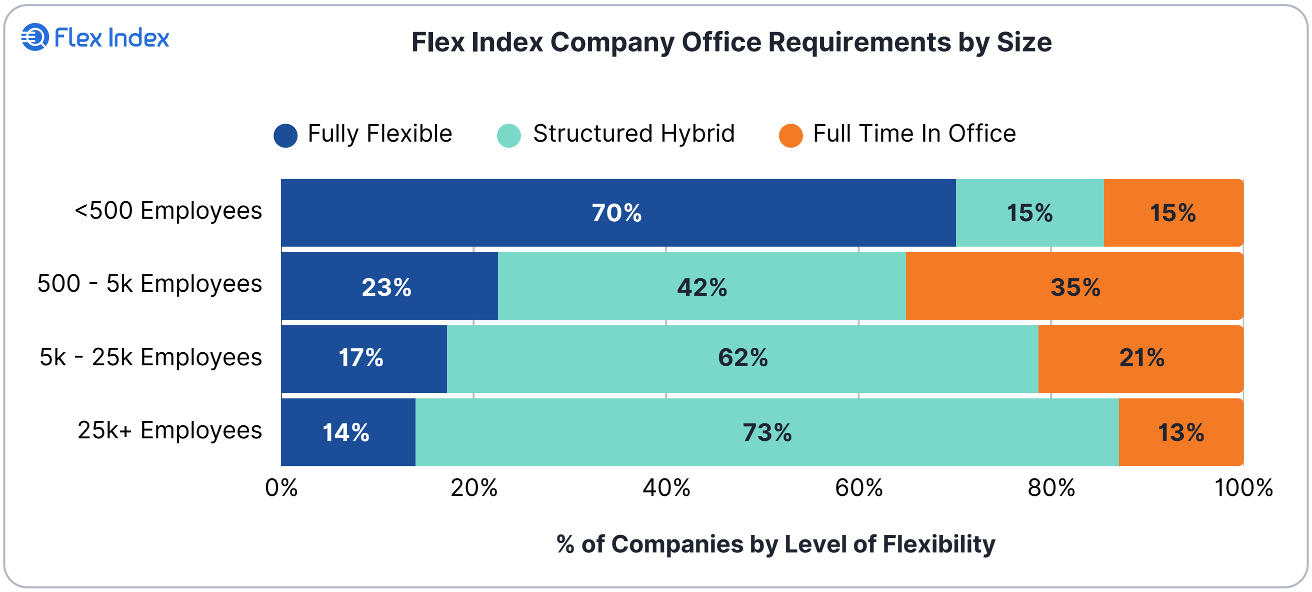
Flexibility by Company Size

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 14% of enterprises with 25,000+ employees are Fully Flexible.

On the other hand, large firms are much more likely to be Structured Hybrid. 73% of 25,000+ employee companies are Structured Hybrid compared to just 15% of firms with 500 employees or less.

When excluding the Tech industry, US firms follow a similar pattern by company size. The majority of non-tech US firms under 500 employees are Fully Flexible, compared to 16% or less across all larger size segments.



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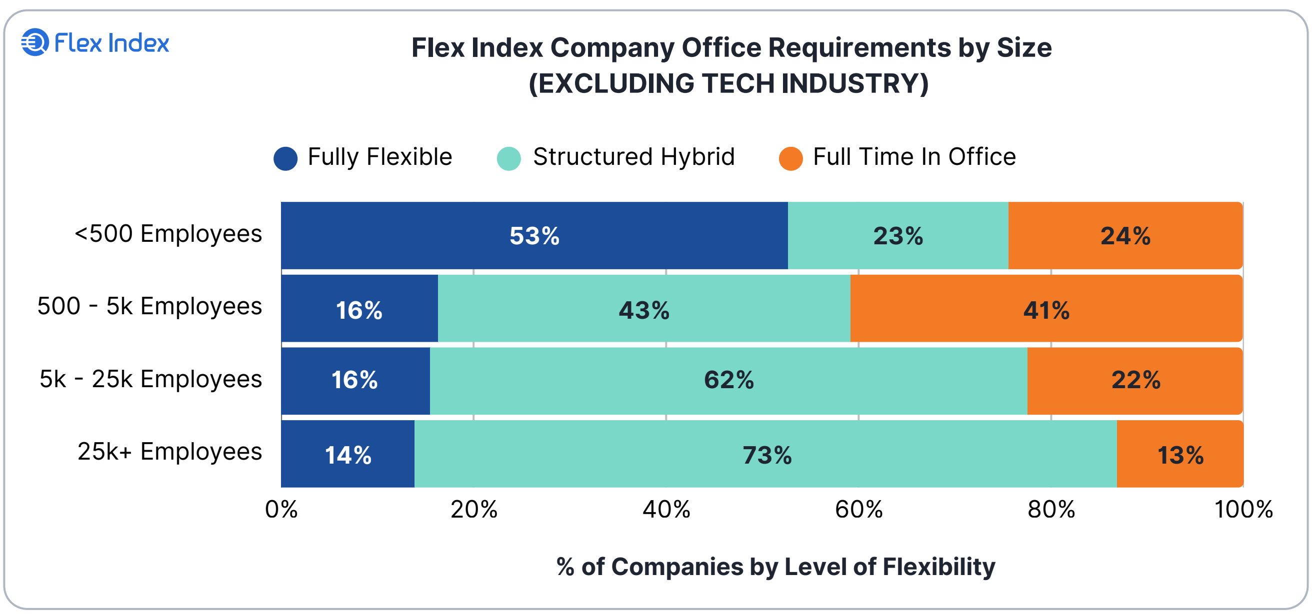

Source: Flex Index (flexindex.com) employer-provided policy data and publicly available data on company office requirements for companies with headquarters in the US, N = 6,409 companies.

In Closing

In Closing

While large and important brands like Amazon, Dell, and Washington Post have announced an intention to move toward Full Time In Office, the vast majority of US firms still offer work location flexibility. Only 32% of US firms require Full Time In Office for corporate employees, roughly flat over the last two quarters.

At the same time, it is clear that Fully Flexible models are becoming less popular, and Structured Hybrid models are increasing in prevalence. 25% of US firms are Fully Flexible, representing a decrease from 29% one quarter ago and 31% at the start of 2023. Conversely, 43% of US firms are now Structured Hybrid, representing a significant increase from 38% one quarter ago and 20% at the start of 2023.

In line with that shift toward Structured Hybrid, the average US firm is requiring more time in office. Employees of US firms should now expect to spend 2.78 days per week in the office on average. That's a significant increase from 2.63 days one quarter ago, and 2.49 days two quarters ago. It increasingly looks like three days per week in the office will become the dominant model for most US firms.

Industry variation in policy continues to be significant. Tech firms continue to lead on offering work location flexibility, despite some high profile shifts toward Full Time In Office. Insurance is a close second, with Allstate increasingly serving as the Insurance poster child for flexible work arrangements. On the flip side, firms that depend on foot traffic (Restaurants, Education, Hospitality, Real Estate) continue to be the most office-centric, even for corporate employees.

The small firm / large firm divide on policy is a topic we continue to watch. The majority of firms with 500 employees or less are Fully Flexible. That's a big difference compared to larger firms that are overwhelmingly Structured Hybrid. It remains to be seen whether smaller firms continue to embrace Fully Flexible models, or start to put in place paradigms that are more similar to their larger counterparts.

2025 promises to be a fascinating year for work location flexibility! Will the US shift more toward Full Time In Office? Or will Structured Hybrid become increasingly dominant as the preferred work model? We're excited to track the changes and share the latest insights in our 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.

About Office Benchmarks

Flex Index's Office Benchmarks is the only solution combining unique policy and office metrics to enable leaders to accurately assess their position relative to peers. As a result, leaders are empowered to optimize their real estate portfolio and flexible policy decisions with confidence. Get started with Office Benchmarks here.

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

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Citations: Please cite "Flex Index (flexindex.com), Q4 2024 Flex Report"

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