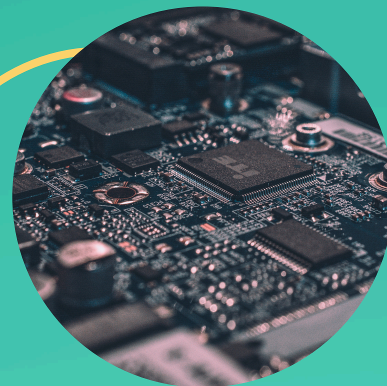
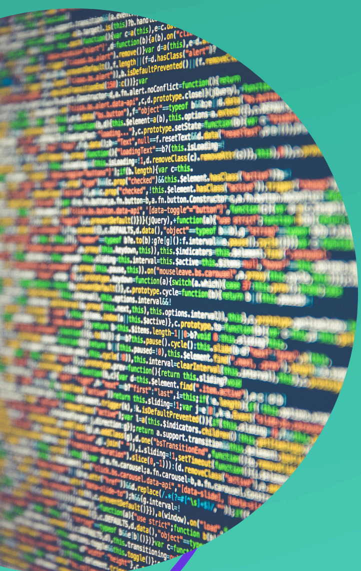
The

Flex Report

Tech Industry Deep Dive

June 2023





Flex Index
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About the Report

Technology companies have long been at the forefront of innovation in many areas — especially the workplace. Google and Amazon are two examples of tech companies that were early to transform their corporate offices into inviting and enjoyable destinations for employees to work in person. That trend spread rapidly to other industries as more and more organizations sought to create more positive and productive office environments.

While tech companies *are* often at the forefront of new trends, not all are sustainable or widely adopted. For example, while free shuttles to the office may have been the norm in the Bay Area at one point, these perks did not saturate the broader national tech culture or become staples at smaller startups.

Not all trends have staying power, and the trend of the moment worth watching is Fully Remote work flexibility. While larger tech companies like Salesforce and Meta made remote work a hallmark of the pandemic era, the tide appears to be shifting.

So what's happening in tech? Is tech on the leading edge of Fully Remote companies becoming the norm, or will tech gradually shift more towards hybrid work as larger companies reevaluate their policies?

In this report we dive into the current state of work location flexibility in tech. We explore how flexibility in tech is evolving, with a particular emphasis on trends by size of company and where Fully Remote work is most popular. From that analysis, we can start to draw some early conclusions on where tech may be headed, as well as identify trends worth watching that will inform what practices tech companies may put in place in the future.

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.

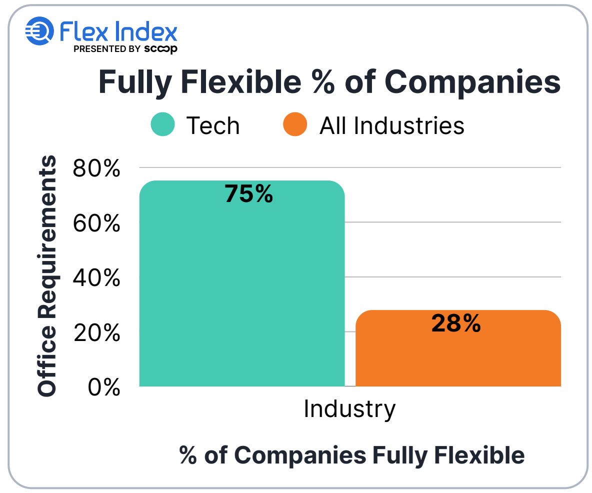
Minimum Percentage of Time

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



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

1 Fully Flexible, but will it last?

75% of tech companies are Fully Flexible, meaning they are either Fully Remote or give Employee's Choice on whether to go into the office. That's higher than any other industry, but a 4% drop from February 2023.

2 Structured Hybrid gaining ground

While the percentage of Fully Flexible companies has decreased, Structured Hybrid -- where companies set specific expectations for when or how often employees come into the office -- is on the rise. Structured Hybrid grew from 12% of tech companies in February to 17% in May.

3 There's a "flexibility divide" emerging between big and small tech

Big tech is shifting quickly to Structured Hybrid. 65% of tech companies with 25k+ employees are now Structured Hybrid, up from 44% in Feb 2023. On the other hand, 88% of tech companies under 500 employees are Fully Flexible. Will flexibility become the top selling point in luring top talent away from big tech?

4 What happens to Fully Remote work as small tech gets bigger?

A whopping 67% of Flex Index tech companies under 100 employees are Fully Remote. That percentage drops quickly as companies get bigger; only 26% of tech companies with 250-500 employees are Fully Remote. 8% of tech companies with 500+ employees are Fully Remote. What happens when the current crop of small startups -- born in the shadow of the pandemic and an abundance of new remote work technology -- grows up?

Top 5 Most Flexible Industries

1. Tech
2. Media & Entertainment
3. Professional Services
4. Financial Services
5. Non-Profit & Religious

Deep Dive

Work Location Flexibility in the Tech Industry

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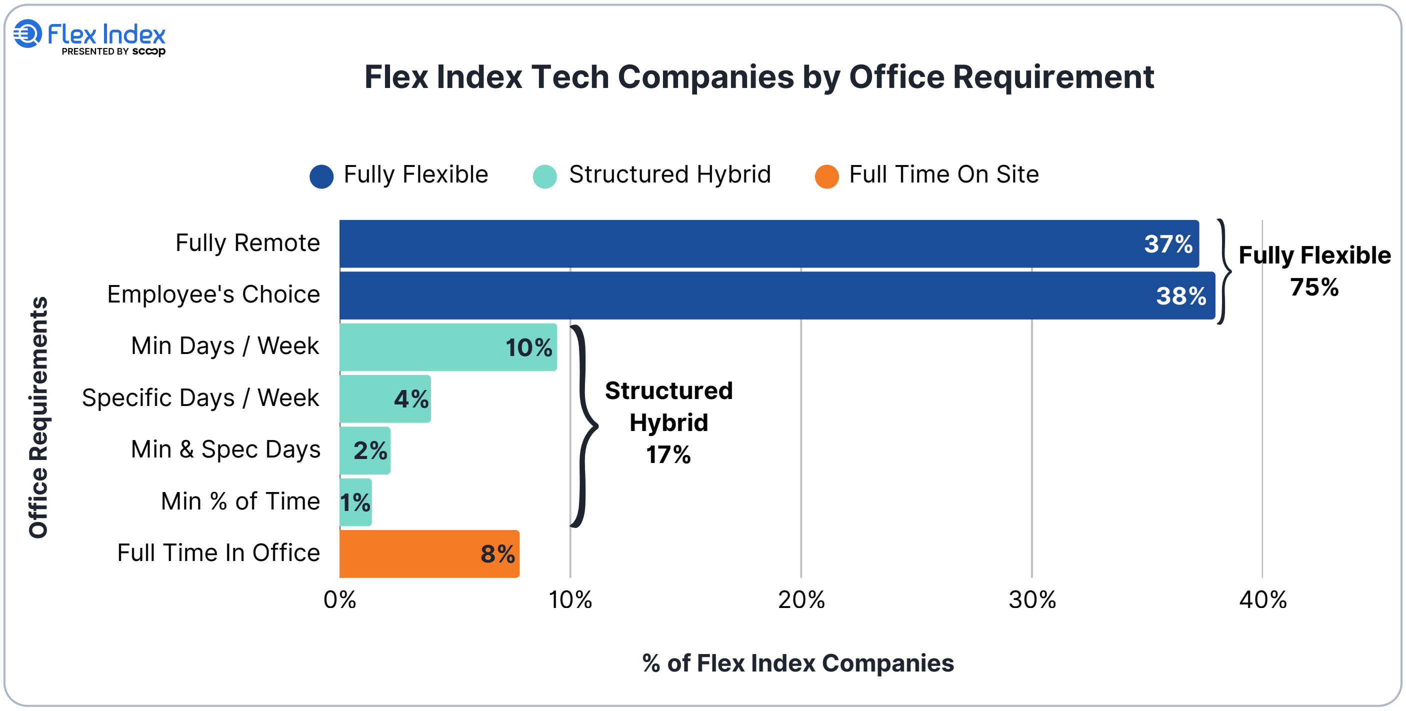
75% of tech companies are Fully Flexible. Fully Flexible tech companies are roughly split between Fully Remote (company does not have offices) and Employee's Choice (where employees choose whether to go into the office).

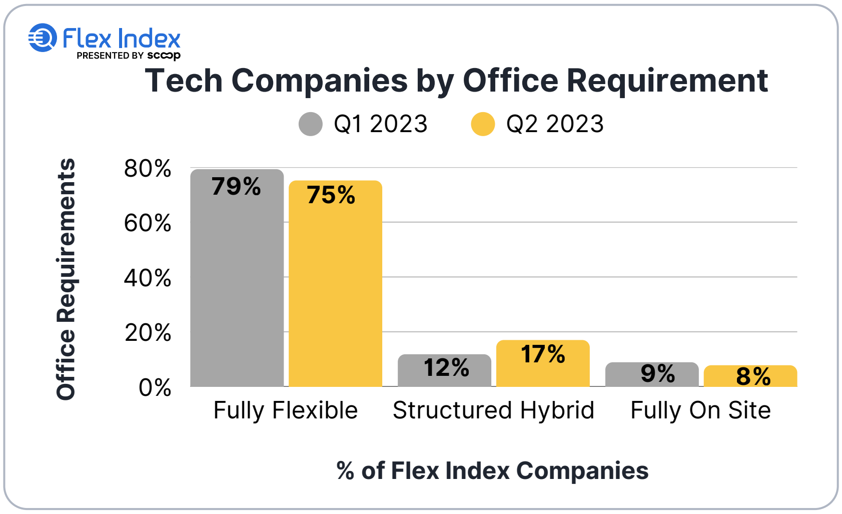
Only 8% of tech companies require Full Time In Office, the lowest across all industries. The remainder of tech companies are Structured Hybrid.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 859 companies. The Flex Index is presented by Scoop (scoopforwork.com).

While tech is the most flexible industry, the percentage of companies that are Fully Flexible decreased from 79% in Feb 2023 to 75% in May.

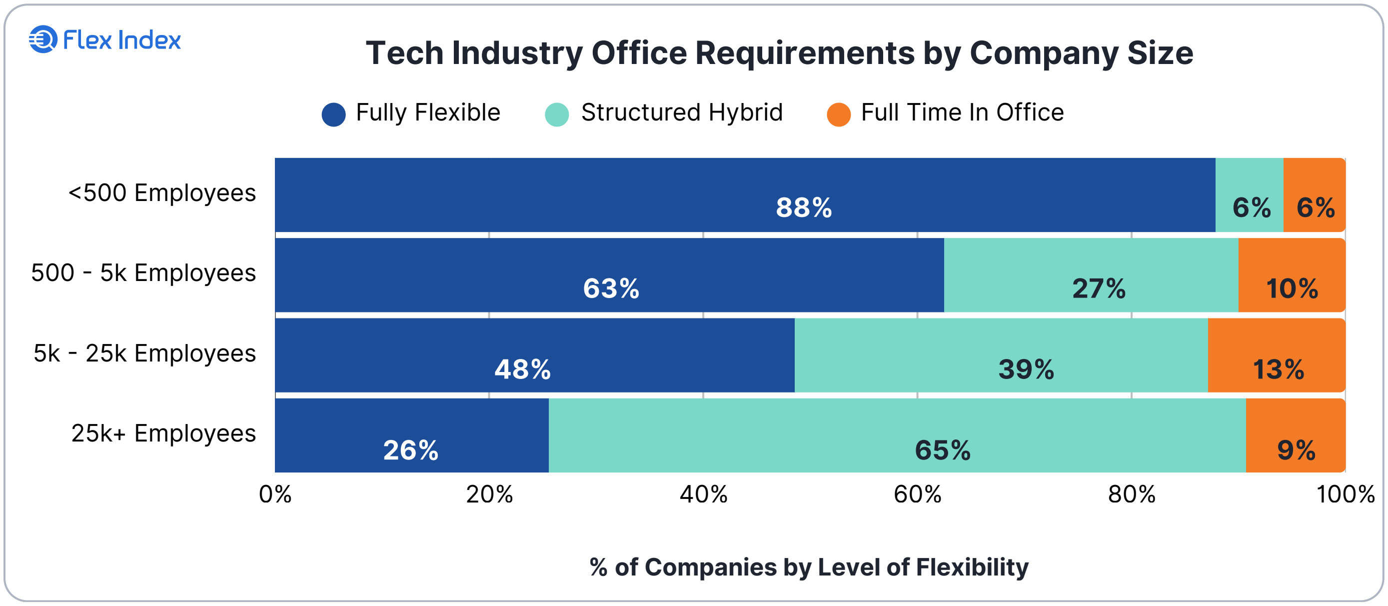
The fastest rising model has been Structured Hybrid, where companies set a specific expectation on when or how often employees come into the office.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on company office requirements. N = 859 companies. The Flex Index is presented by Scoop (scoopforwork.com).

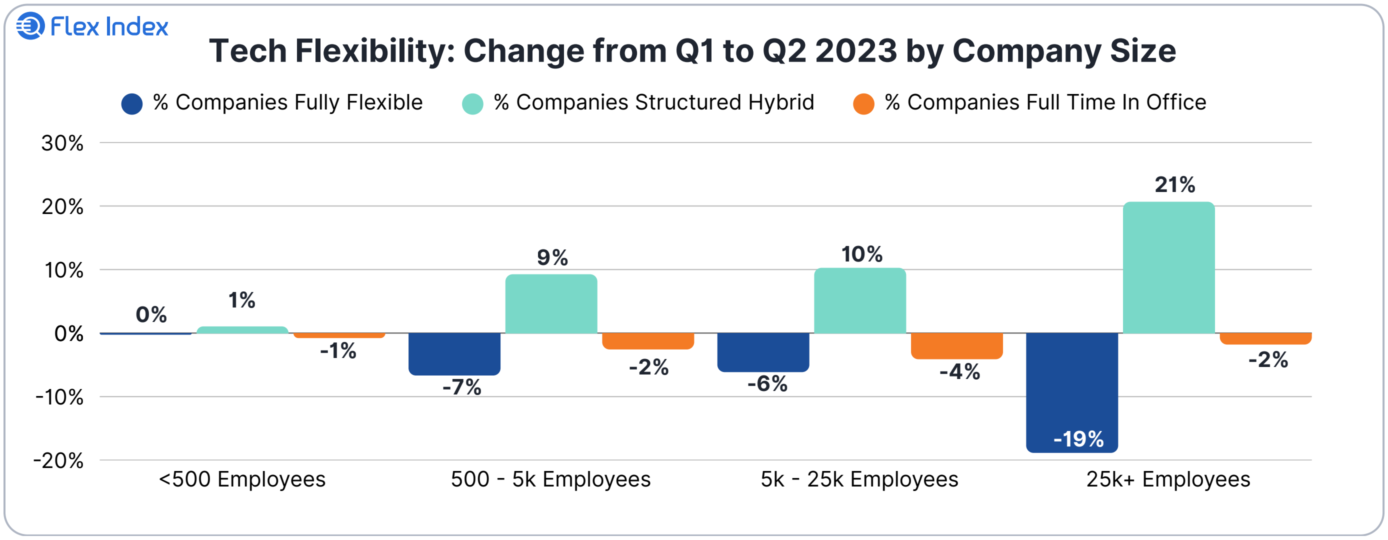
There's a significant "flexibility divide" emerging between big and small tech companies. Companies with fewer than 500 employees are almost 3.5x more likely to be Fully Flexible compared to tech companies with 25k+ employees.

On the flip side, 65% of tech companies with 25k+ employees are Structured Hybrid, compared to only 6% of companies with less than 500 employees. Very few tech companies of any size are Full Time In Office.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on tech company office requirements. N = 848 companies. The Flex Index is presented by Scoop (scoopforwork.com).

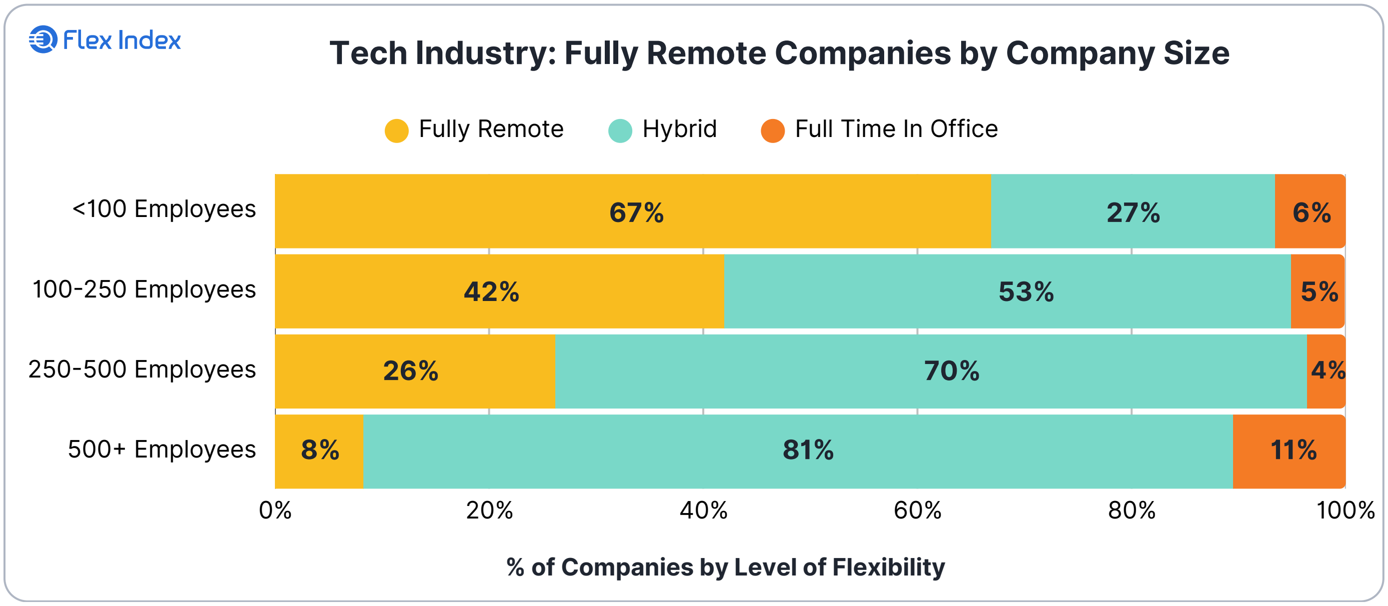
Big tech companies are also moving toward Structured Hybrid models rapidly. Tech giants like Apple, Google, Amazon, and Meta have all either implemented or announced plans to implement Structured Hybrid in the near future, which contributes to the 21% move in companies with 25k+ employees. Over the next quarters we'll be watching to see if smaller tech companies follow in the footsteps of big tech in this regard.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on tech company office requirements. N = 848 companies. The Flex Index is presented by Scoop (scoopforwork.com).

Fully Remote companies are most prevalent by far within the tech industry. At the same time, there is a huge variation in adoption of Fully Remote by employee count.

67% of tech companies under 100 employees are Fully Remote. That percentage drops to 42% for tech companies with 100-250 employees, and 26% for tech companies with 250-500 employees. Only 8% of companies over 500 employees are Fully Remote; 81% of 500+ employee companies offer hybrid work (either Employee's Choice or Structured Hybrid).



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on tech company office requirements. N = 848 companies. The Flex Index is presented by Scoop (scoopforwork.com).

💡 BIG QUESTIONS

Perhaps the most intriguing question raised by the variation in adoption of Fully Remote work by company size:

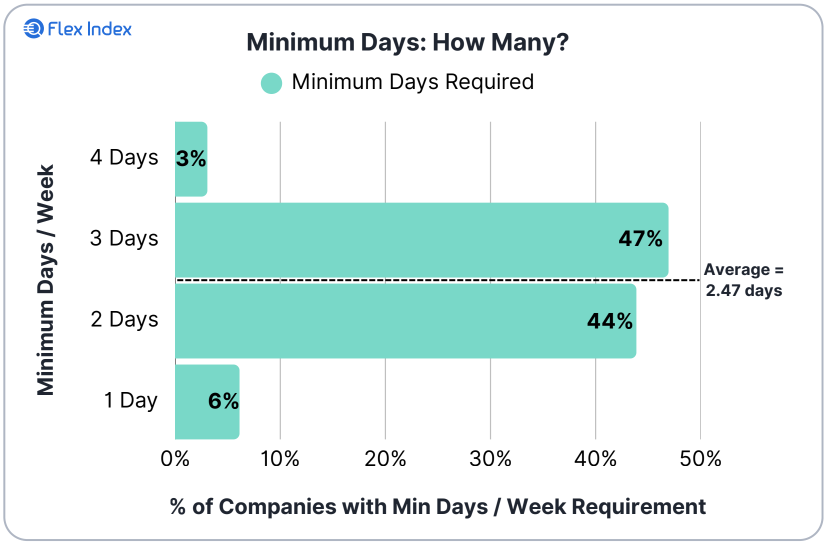
What happens when the smaller tech companies grow up?

Do these smaller tech companies feel a need for more regular, frequent in person interaction as they grow? Do larger, more complex companies inherently feel a need for more office time for on-boarding, mentorship, and cross-company collaboration?

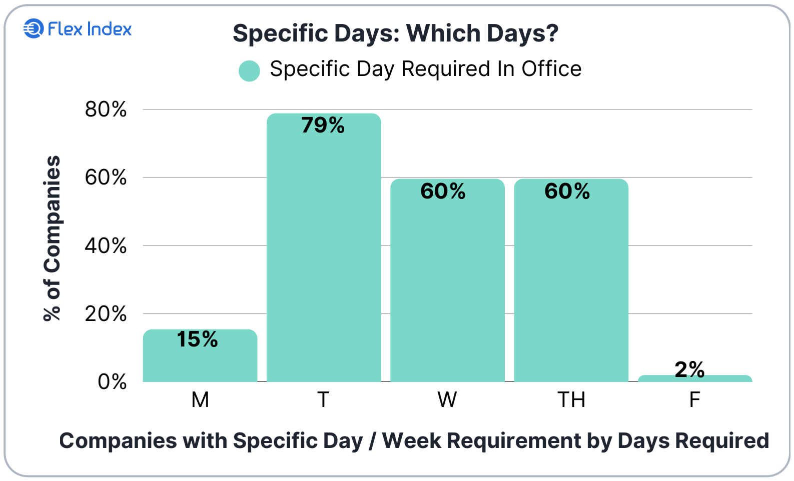
Or, will these companies -- born in the shadow of the pandemic alongside significant improvements in remote work technology -- stay Fully Remote as they scale?

Structured Hybrid tech companies have very similar practices to Structured Hybrid companies in other industries.

91% of Structured Hybrid tech companies require 2-3 days per week in office, with an average of 2.47 days. That's just below the 2.53 day average across all industries.



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on tech companies with a min day / week office requirement. N = 98 companies. The Flex Index is presented by Scoop (scoopforwork.com).



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on tech companies with a specific day / week office requirement. N = 52 companies. The Flex Index is presented by Scoop (scoopforwork.com).

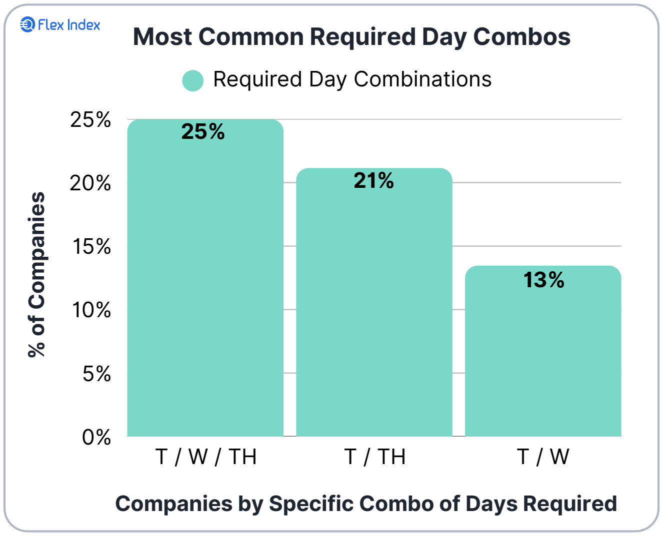
If you work at a Structured Hybrid tech company, you're most likely to be in the office in the middle of the week. Tuesday is the most common required day, followed by Wednesday and Thursday.

Only 15% of Structured Hybrid tech companies require Monday's in office, even less than the all-industry average (24%).

💡 SUMMER FRIDAYS...FOREVER?

With Friday in-office requirements at tech companies clocking in at a minuscule 2%, what will downtown areas look like in major tech hubs?

What other knock-on effects will this cause for local economies as spillover business from tech employers is effectively nonexistent an entire extra day of the week?



Source: Flex Index (flex.scoopforwork.com) employee surveys and publicly available data on tech companies with a specific day / week office requirement. N = 52 companies. The Flex Index is presented by Scoop (scoopforwork.com).

In Closing

It's clear that the tech industry is still the epicenter of flexible work. 75% of tech companies embrace Fully Flexible office requirements, more than any other industry we track. However, there are signs that the larger players are moving increasingly toward Structured Hybrid, where bigger teams (and more real estate obligations) may be applying pressure for more in-office time. At 17%, Structured Hybrid is still a relatively small percentage of tech companies, but it's worth watching over the coming quarters.

Conversely, we're seeing smaller companies continue to adopt Fully Flexible work arrangements. If you're looking for full flexibility, consider exploring opportunities at tech companies with fewer than 500 employees, where an astonishing 88% offer Fully Flexible work arrangements. On the other hand, if you prefer more face-to-face interaction and collaboration in the office, look for companies with more than 500 employees, where the standard working model is now a hybrid one (81%).

These trends in the tech industry raise important questions about the future of work that will be very important for job seekers. As smaller tech companies "grow up," will they embrace the Structured Hybrid trend or remain Fully Flexible? That would be an important warning sign for job seekers who join small tech companies expecting to be Fully Remote. Or will small tech companies thrive remotely, and embrace flexibility to attract talent from larger, more structured companies?

Whatever happens in tech - and every industry - we'll be here tracking the trends. 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 4,500+ 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 4,500 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 report were conducted between October 2022 and May 2023. Once a company is incorporated into the Flex Index, company representatives are contacted to inform them of their inclusion. Companies can add or update their information on the Flex Index at any time.

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

Contacts & Contributors

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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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