

flexibilityworks>

What does hybrid working look like in Scotland?

November 2023



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Setting the hybrid scene

If you believe the media headlines, hybrid working is on its way out. But we prefer hard data to headlines, and the data says hybrid is well used and well liked in Scotland.

We surveyed 1,005 Scottish office workers in July 2023 and 71% are currently offered some form of hybrid working and 60% are using it. Far from being on its way out, hybrid really is the new normal for office-based workers, and the impact on office use is not as severe as some say, with nearly three quarters (72%) of all Scottish office workers spending at least three days a week in the office.

This short report runs through our hard data on where workers in Scotland are actually working, what they've been asked to do by their employer and how they feel about that, as well as the impact hybrid working is having on their sense of connection and company culture. Finally, we report on what workers think the office is useful for.

There were some trends in the data. Not all of them good. Women, for instance, appear to have less control than men over where they work, and are less happy about what they've been asked to do. They're also physically in the office less than men, and could be at risk of being overlooked professionally. If you're an employer, we hope you will read our tips and takeaways section for our recommendations on what employers can do to change this.



There was also a clear message from younger workers (under 25s) who really want more time in the office, and time for social connection in particular.

Finally, our data shows that culture and connection are not dependent on greater time in the office, with hybrid working – especially when workers have complete freedom to decide when to work in the office – having a significantly positive impact.

We hope you will find this report more useful than those headlines.

About our data:

A total of 1,005 Scottish office workers were surveyed online by global research firm Panelbase between 22/6/23 and 5/7/23. The data is representative for age and gender.

How to read this report

If you're in a hurry, simply turn the page (or - more likely - scroll down) for our 'hybrid in a nutshell' section. This is our whistle-stop summary of key takeaways and tips. For more detail, there follows seven short sections answering the questions we think you'll want to know, so you can dip and out as you please.

1. Hybrid in a nutshell – key takeaways and tips

In a hurry? Here's our handy summary of what you need to know (and do next)

1. Hybrid is the new normal

Despite the likes of Tesla's Elon Musk and Goldman Sachs' Simon Rothery making high profile demands for workers to return to the office full time, our data shows hybrid is the new normal.

At least 71% of Scottish office workers are being offered some kind of hybrid arrangement and 60% are using it.

Our Flex for Life 2023 report, published in May 2023, suggests that in general, current levels of flexible working in Scotland will remain stable, or even increase slightly. Musk and Rothery are outliers, not figureheads of what's to come.

2. Hybrid hasn't killed the office

Our research shows there's a wide variety of instructions from employers on where Scottish office workers should spend their time, and the overall average number of days Scottish office workers spend in the office each week is 3.6. Nearly three quarters (72%) of all Scottish office workers are in three or more days a week, and the vast majority (92%) are in the office at least once a week. Among those who've been offered some kind of hybrid working, the average number of days in the office each week is 2.1. It's true that office use has declined since the pandemic but they are still being used and most companies have considered how to adapt them for hybrid use.



3. Bad management of hybrid can disadvantage women – not hybrid itself

Our research shows women are in the office less than men - 45% of men are in full time compared with 35% of women. This in itself isn't a problem. For example, analysis of ONS data by the UK Government's Commission on Hybrid and Remote Work has found that hybrid working has encouraged more women to work full time hours than ever before. But hybrid can become a problem for women if managers give preferential treatment to workers in the office.

Our data also shows women appear to have less control than men over where they work, are less happy than men about where they work and are less likely than men to feel their views have been taken on board.

Hybrid has the potential to improve women's progress at work. But if it's poorly implemented and managed, it will do more harm than good. Employers must do more to canvass all workers' views on working patterns, ensure there's no difference in hybrid arrangements based on gender and train managers to look beyond their own preferences in ways of working and judge workers on the merits of what they deliver, not where they work.

4. Young workers really want to be in the office

Three in five workers aged under 25 want to come to the office more than they've been asked to. The age group's single most important reason to come to the office is for social connection. Employers need to think carefully about how they train and nurture younger workers, making sure they get enough time in the office, and that their experience in the office is positive with enough peers and more experienced colleagues to guide them and give them the social element they crave.

5. Newer recruits have more control

It's perhaps a sign of what's been changing in the jobs market that newer employees – those who've been with their employer less than a year – are more than twice as likely to have complete freedom over when they come to the office, than workers who've been with their employer more than five years. And new recruits are less likely to be asked to work in the office full time too. Flexible working isn't just a topic for new hires. If employers want to retain good staff, proactive conversations about ways of working should be routine. Otherwise, as our data shows, workers will leave and get a better arrangement elsewhere.

6. Connection and culture isn't dependent on greater time in the office

Our data shows hybrid workers feel more connected with their team, aligned with their organisation's values and are more likely to say their working culture is positive and strong than full time office workers. This is especially the case for workers with complete freedom to decide when to come to the office – 83% of whom say their working culture is positive and strong, compared with 74% of all hybrid workers and 69% of workers who have to be in the office full time. Some employers may instinctively want to pull people in close (back to the office) to boost culture and connection but our data shows that giving workers more choice and control over where they work, not less, is what will deliver cultural improvements.

7. Room for improvement on communication

While the majority of workers are clear about where they can work and think their employer has communicated instructions well, one in six are not clear what's allowed, more than one in five don't feel their employer has communicated well and more than a third don't feel their thoughts were taken on board before their employer set the approach to working from home.

These are significant minorities and show many employers could be much better at communicating - and continuing to communicate - about hybrid working. We encourage employers to regularly communicate about hybrid and other flexible ways of working, whether that's cascaded down through managers to teams, is included in staff newsletters, shared via blogs on the company intranet, or is role modelled by senior managers. We also encourage employers to include staff and actively seek their feedback on ways of working, whether that's via a staff survey, focus groups, using staff networks and groups, or gathering feedback from 1-1s and team meetings.

8. Easy resolution of issues and social connection are most important reasons for workers to go to the office

For all the executive and HR discussions about using the office for specific creative and collaborative tasks, for workers, the most important reason to work in the office is the simple and practical ability to work alongside colleagues and resolve issues quickly. The second is for social time and connecting with colleagues. Many employers have rightly been considering how they use or change their office space, and many have created more spaces for collaboration and creative tasks together.

This is certainly important but, according to our data, so is having enough desks so teams can sit together. Meanwhile, managers need to think about how they can build in social time with office visits. For example, is there a team lunch once a week, or a month? Or a coffee break together? Is there time during team meetings for colleagues to have a short personal catch up before getting down to business? These kinds of social activities will boost wellbeing, and morale, which in turn boosts productivity.

9. Monitor and evaluate

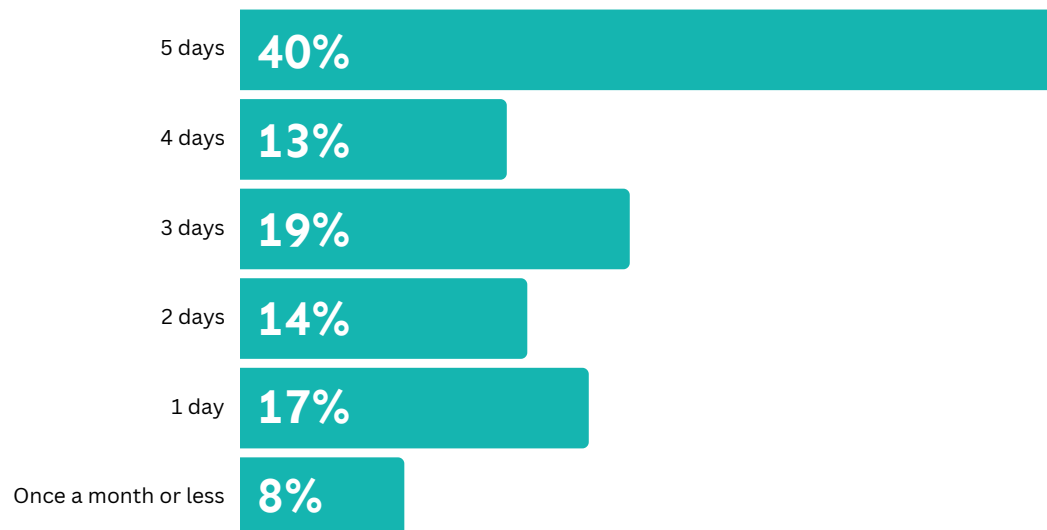
Hybrid is still a relatively new way of working for many organisations and it comes with its own set of opportunities and challenges. Make sure you're monitoring the impact of working differently. Are you still meeting your usual KPIs? Is there any impact on recruitment and staff turnover? What about sickness and absence? This will allow you to evaluate what's working and what's not, and make evidence-based decisions. What's more, hybrid is also only one form of flexible working and there are many others, such as flexible start and finish times, compressed hours and part time and job share roles that might better suit your workforce. If you want more help to get your hybrid right, and/or explore how other types of flexible working could benefit your people and organisation, please get in touch.



2. How many days a week do people really spend in the office?

Our data shows Scottish offices are used more than media headlines would have us believe. Nearly three quarters (72%) of all Scottish office workers spend at least three days a week in the office, while 92% are in at least one day a week. We calculated the average number of days in the office each week for all office workers is 3.6. For workers who've been offered hybrid working, the average number of days spent in the office each week is 2.1. Other research suggests the UK average is anywhere from 1.6 to 4 days, while the global average is between 2.5 and 3.5 days a week.

Days a week spent in the office



Men are in the office more than women

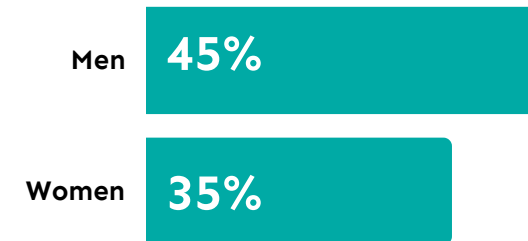
Our data shows men are in the office significantly more than women. This is partly because more women work part time than men (25% v 14%) and is often to accommodate caring commitments. But more women also choose hybrid working compared with men because it's another way workers can balance work with caring responsibilities at home. The burden of childcare and other caring roles still falls disproportionately to women, and while employers may feel they can't resolve societal inequalities around family and domestic duties, employers have a vital role in ensuring women aren't further disadvantaged at work.

In particular, employers need to guard against 'proximity bias' whereby managers (who are often men working in the office) give the best projects and promotions to people they physically see more often (more men working in the office) while women's careers stall because they work from home more often and are less visible. This is also true for seemingly small things, such as asking and answering questions, when some managers prioritise questions from people who are working the same way they are.

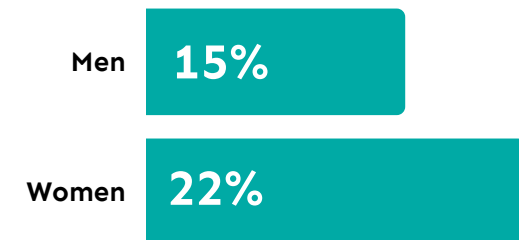
The oldest and the youngest workers are in the office most

Workers aged under 25 and over 65 were the most likely to be in the office, which is largely what we'd expect as young workers often want to learn from more experienced colleagues, and both age brackets are less likely to have childcare responsibilities outside of work.

Proportion of men and women working 5 days a week in the office



Proportion of men and women working 3 days a week in the office



Workers in the office 4 or 5 days a week by age



Newer employees are in the office more than established colleagues

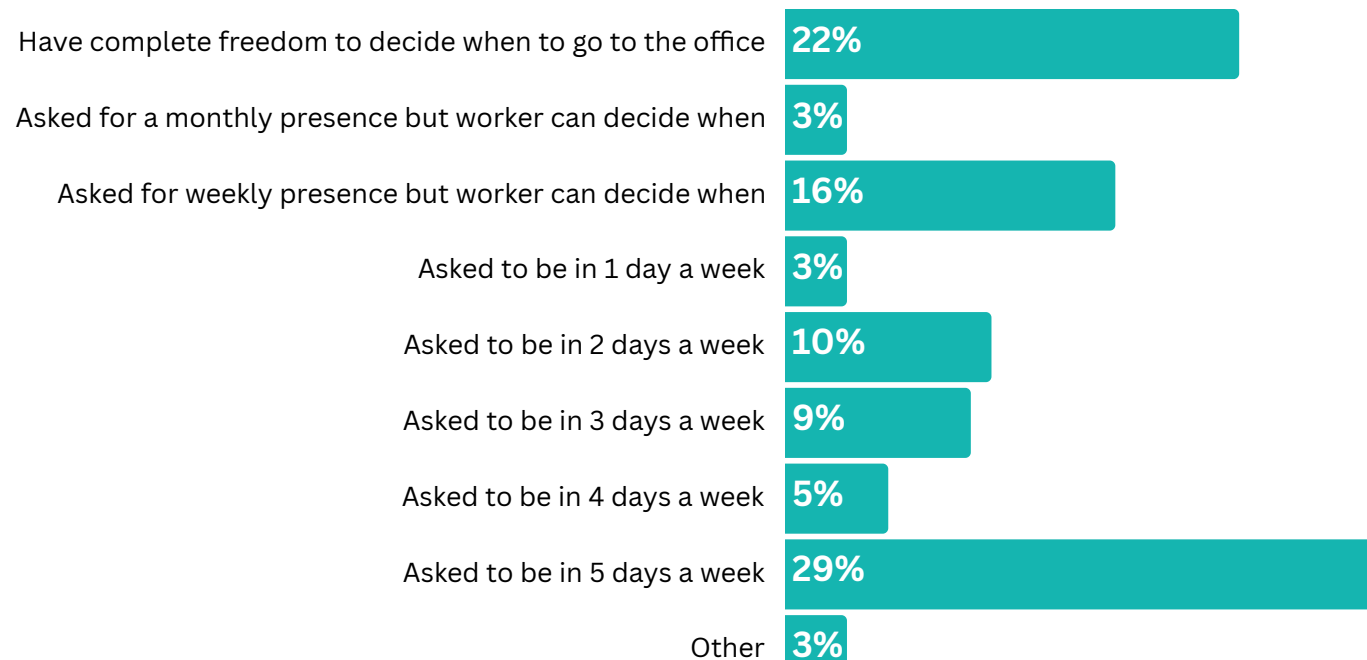
Newer workers, who've been with their employer less than a year, are more likely to be in the office than colleagues who've been employed longer, which is what we'd expect as new workers learn their role and settle in to a new organisation.

47% of workers who've been with their employer less than a year work 5 days a week in the office, compared with **38%** - who've been with their employer longer.

3. What have employers asked workers to do? And are workers doing it?

Workers have been given varied instructions from their employer about how much time they should spend in the office. More than four in ten (43%) have been asked for some kind of presence each week but are not expected in the office full time, while 22% have complete freedom to decide if and when they work in the office and 29% have been told to work in the office full time. Compared with our data from summer 2022, 7% more employers are asking staff to work in the office full time. But the majority of employers have maintained their hybrid offer.

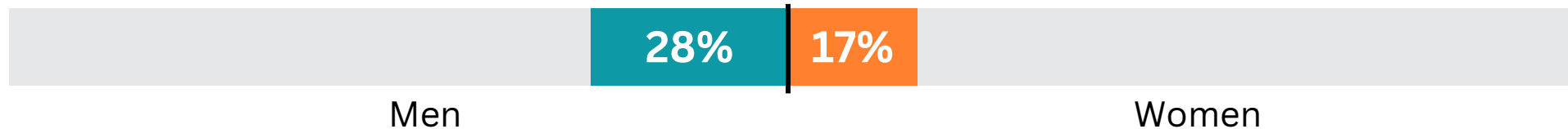
Employer instructions to workers for time in the office



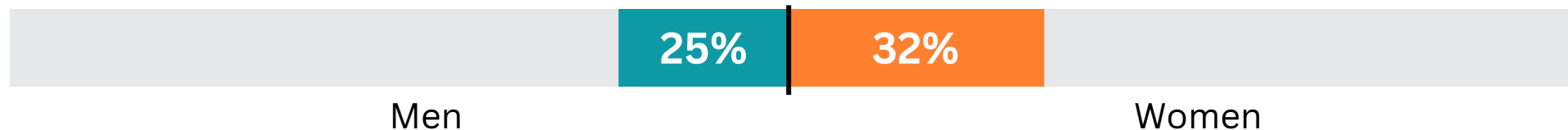
Men and women treated differently

Men appear to have a lot more freedom than women, while more women than men have been asked to work in the office full time. We can't tell from our data why this is the case. There's no significant difference in age between men and women in our research cohort and we had very similar levels of men and women saying they were line managers. It might be that the men and women in our cohort do different types of office jobs, or have interpreted instructions differently but we don't have the data to explore this. It's concerning that men appear to have more freedom than women and we'd encourage all employers to think carefully about what kinds of flexible working are possible in every role.

Workers who have complete freedom to decide when to work in the office



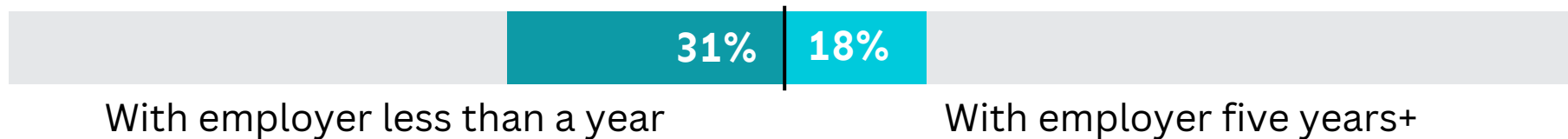
Workers who have been asked to work in the office full time



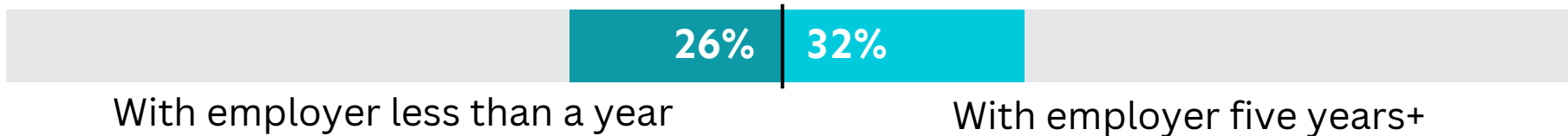
New recruits have more choice

New members of staff, who've been with their employer less than a year, are almost twice as likely to have complete freedom over when they work in the office compared with workers who've been with their employer five years or more. New recruits are also much less likely to have been told to work in the office full time than longer-term colleagues. This likely reflects the recent recruitment landscape where many employers have been tackling skills shortages and record vacancies and have offered more flexible ways of working to entice more candidates.

Workers who say they have complete freedom



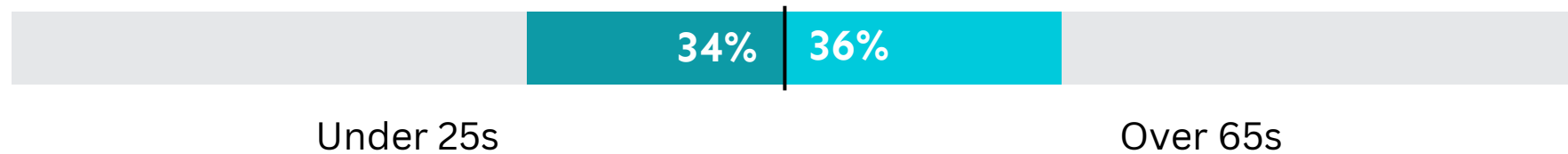
Workers who have been asked to come in full time



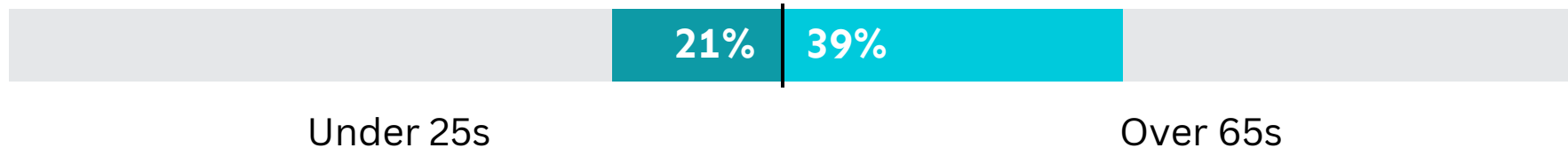
Differences by age

The youngest workers (under 25s) had some of the highest levels of complete freedom and were least likely to have been asked to work in the office full time. The oldest workers (65+) were the most likely to have complete freedom but conversely they were also the age group most likely to be asked to work in the office full time.

Workers who say they have complete freedom



Workers who have been asked to come in full time



Are workers following employers' instructions?

Reassuringly for employers, the vast majority of workers (seven in ten) are following employer instructions exactly as requested. Nearly one in five workers are going in more than requested – it's worth highlighting here the difference between the number of workers choosing to work 5 days in the office (40%) compared with those asked to work 5 days in the office (29%). Just under one in ten workers are going in less than requested.

Number of workers going to the office as requested by their employer

70% exactly as requested

19% more than requested

9% less than requested

The youngest workers (under 25s) were the most likely to go into the office more than requested (25%). Workers aged 25 to 44 were the most likely to go in the office less than requested (13%). There was a small gender difference with 10% of women going in less than requested compared with 8% of men. But our data showed age was a more critical factor.

4. Are workers happy with what their employer's proposed on where to work?

On the surface, Scottish office workers seem fairly happy with what their employer's proposed, with 71% saying they're happy or very happy. Men along with the youngest and oldest workers reported the highest happiness levels, while women and workers aged 25 to 34 were the least happy with where they've been asked to work. It's also worth highlighting that people who could work hybrid were happier than workers who'd been told to be in the office full time, and that among hybrid workers, those with the most freedom and control were the most happy.

How do office workers feel about their employer's instructions?



Workers offered hybrid are happier with employer instructions

87% of workers with complete freedom to decide when to work in the office were happy

74% of all hybrid workers were happy

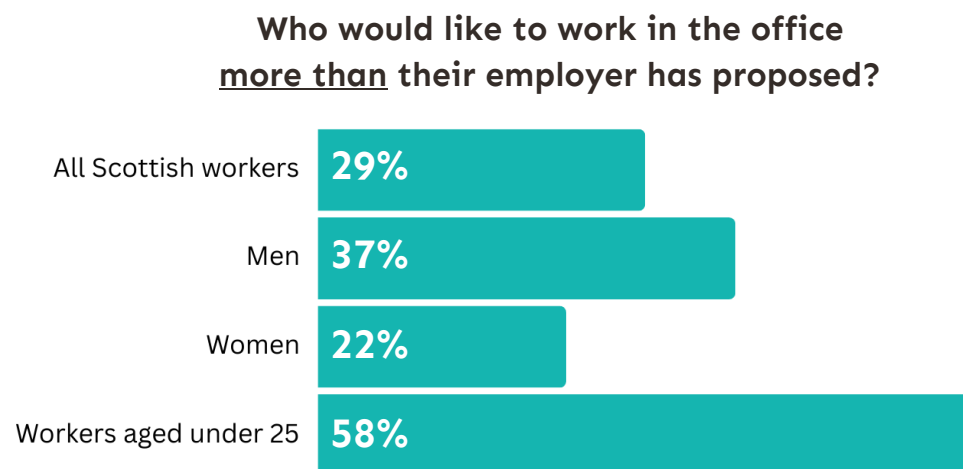
65% of workers asked to be in the office full time were happy



Who would like to spend more time in the office?

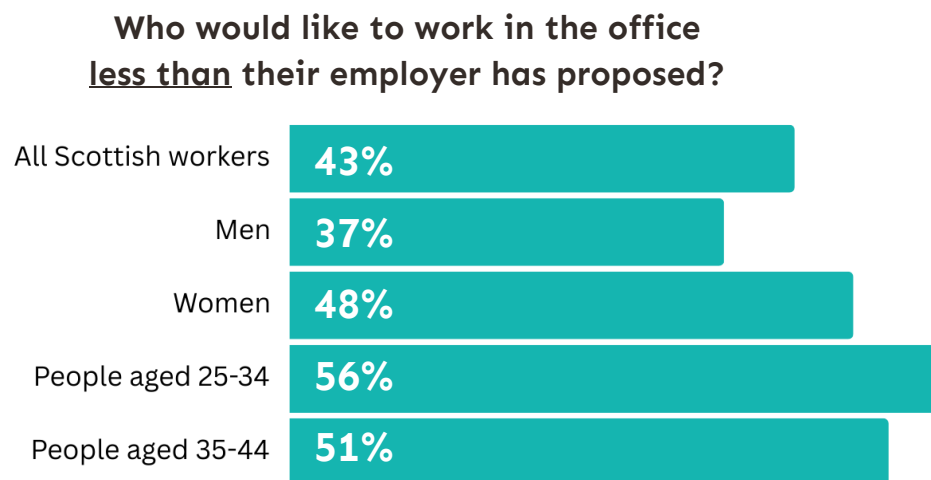
Despite the fact 71% of Scottish office workers initially said they were happy, when we asked specifically if people wanted to work in the office more or less than they'd been asked to, we got a different response.

Nearly three in ten people wanted to work in the office more than their employer has proposed. The youngest workers (under 25s) were the group overwhelmingly in favour of this. A total of 58% of under 25s wanted to work in the office more than requested. In every other age group the proportion in favour was 28% or lower. Employers should take note and think carefully about the office 'experience' young workers are seeking. For example, are more experienced colleagues there to guide them? And is there enough social interaction to deliver the connection young workers want?



Who wants to spend less time in the office?

More than four in ten people wanted to work in the office less than their employer has proposed. This was highest among workers aged 25 to 44 and for women. We didn't ask workers in our research cohort if they were parents but the fact it's women and workers aged 25 to 44 who want to work in the office the least suggests this is about mothers in particular. Employers that want to attract and retain talented women need to be aware of these preferences.



Overall we need to be sensible in interpreting this data and remember the majority of office workers initially said they were happy with what they'd been asked to do. But employers can and should be much more proactive in asking people about their ways of working. As our data shows, workers may not report any issues but if you ask more direct and probing questions, they're likely to be more open about how they really feel.

5. Are employers communicating hybrid clearly?

Broadly, the majority of workers are clear on what they're 'allowed' to do in terms of working from home and feel their employer has made a good job of communicating expectations.

"I'm clear what's allowed with remote working"



However, our data shows one in six are not clear on what's allowed, and more than one in five don't feel their employer has communicated well. Added to this, more than a third (36%) do not feel their thoughts were taken on board before their employer set the approach to working from home.

"My employer has made a good job of communicating where to work"



This shows considerable room for improvement for employers around how they seek and consider feedback from staff, and communicate instructions and expectations.

“My employer has taken on board my views about where I work best before setting their approach”



Unsurprisingly, workers who've been told to work full time in the office feel less listened to than other workers. Just 47% of workers who have to work in the office full time feel their views were taken on board, compared with 83% of workers who have complete freedom to decide when to work in the office.

Length of service also impacted how much staff feel listened to. Workers who've been with their employer less than a year were the most likely to say they felt their views had been taken on board (68%), compared with those employed more than five years who were least likely to say so (59%). This matters because employers that fail to actively discuss working patterns risk losing good staff to new jobs elsewhere, where flexibility is now more routinely offered and discussed up front.

It's also worth noting that women felt less listened to than men. A total of 60% of women felt their employer had taken their views on board, while one in six women (17%) disagreed. This compares with 67% of men who agreed, and 11% who disagreed. We know women feel less happy than men about where they've been asked to work; not being listened to is likely to be a factor in that.

6. How is hybrid impacting company culture and sense of connection?

Maintaining company culture and workers' sense of connection has preoccupied many employers since home working was enforced at the start of the Covid pandemic. Many people still believe these are dependent on workers being physically present in an office, though our data suggests that, according to workers, hybrid is in fact improving company culture and connection.

Hybrid workers were more likely than workers told to be in the office full time to say they felt connected to their team and wider organisation, were aligned with their organisation's values and felt their working culture was positive and strong.

There is an important distinction here though. Our data shows that workers with complete freedom to decide when to work in the office had – by far - the highest levels of connection, alignment with values and positive company culture.

Our data shows that, in general, offering hybrid is better than asking staff to work in the office full time if you want to improve company culture and connection. But to really make a positive impact, employers should give workers as much choice and control as possible over where they work. This then unlocks other business benefits, such as greater motivation, focus and productivity from staff, as well as better retention and reduced sickness absence.



“I feel connected with my team and wider organisation”

Workers told to work in the office full time

77%

All hybrid workers

80%

Hybrid workers with complete freedom to decide when to work in the office

86%

“I feel aligned with my organisation’s values”

Workers told to work in the office full time

69%

All hybrid workers

70%

Hybrid workers with complete freedom to decide when to work in the office

85%

“My working culture is positive and strong”

Workers told to work in the office full time

69%

All hybrid workers

74%

Hybrid workers with complete freedom to decide when to work in the office

83%

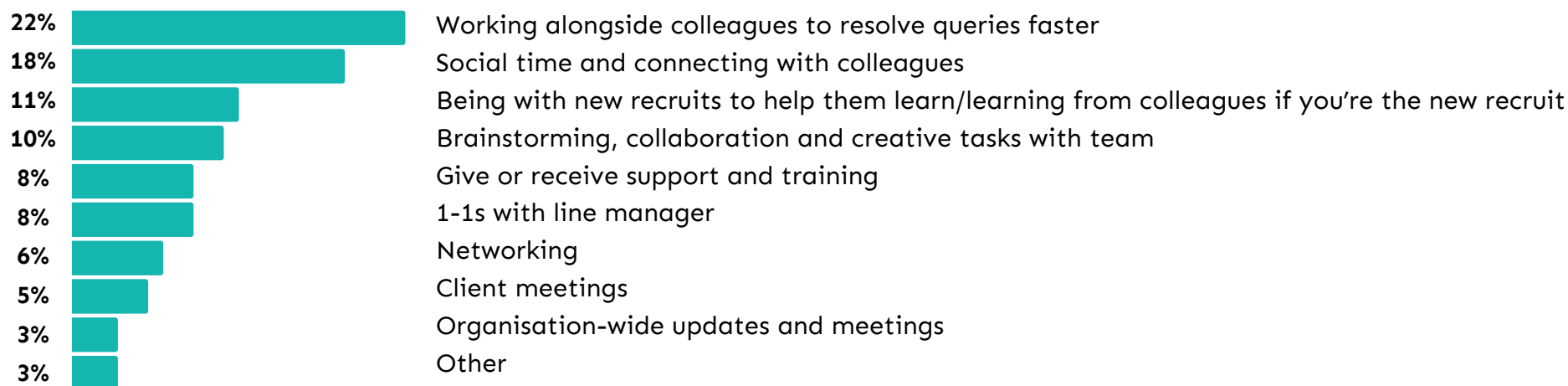
7. What do workers think the office is useful for?

We asked people where was best for a range of work activities. The office usually received the highest score. But it's worth noting that only onboarding new recruits, and ensuring staff learn from more experienced colleagues prompted very strong preferences for the office. Workers' preferences for some activities were very finely balanced, such as personal creativity and productivity. The most successful hybrid arrangements include being very clear and intentional about what tasks people need to come together for, so we hope this is helpful insight for managers.

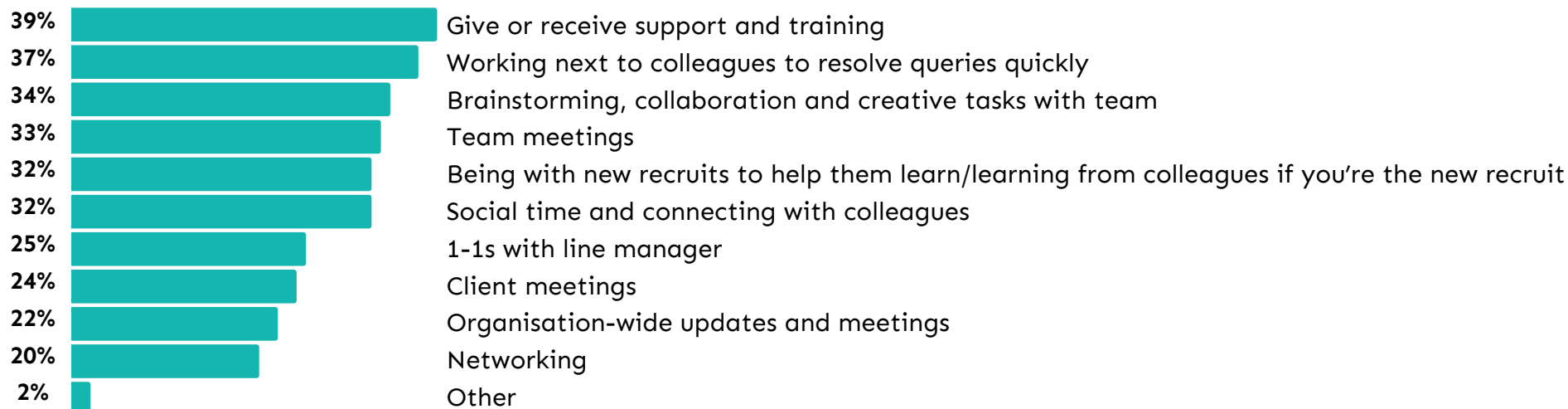


We also asked for workers to highlight their single most important reason to go to the office and their next three most important reasons. Working alongside colleagues to resolve queries faster was the biggest single reason, followed by social time and connecting with colleagues. Training and brainstorming or collaborative and creative tasks were some of the most common other reasons workers selected.

Single most important reason to go to the office:



Next three other most important reasons to go to the office:



What next?

We hope this data helps you benchmark your own organisation's approach to hybrid working, and that our insights are useful as you make decisions on the future. And if you need extra support, we're always happy to help so please do get in touch.

Flexibility Works is a boutique consultancy and training organisation founded by Lisa Gallagher and Nikki Slowey. We provide practical tools, support and resources to help employers create a successful flexible working culture.

Crucially, we're a social business born from our own personal experiences and belief that a lack of flexible working not only negatively impacts people, but also our economy and society.



As Scotland's leading experts in flexible working, we bring a depth of knowledge and years of practical experience to help businesses and individuals thrive.

And we work closely with the Scottish Government and policy makers to drive forward the flexible working agenda.

Lisa & Nikki

Contact us on:

www.flexibilityworks.org

hello@flexibilityworks.org

0141 378 8330



flexibilityworks>

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