



How Hybrid Working Has Become a More Natural Way of Working

Setting the Context

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Setting the context

- Introducing a working definition
- Exploring prevalence
- Uncovering some variables at play
- Putting ourselves in the shoes of:
 - Employers
 - Workers

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Here is a working definition for us to use

‘Flexible working model where employees work partly in the physical workspace, partly remotely – at home or another workspace.’





Hybrid working has become more prevalent

- Pre-pandemic in 2019:
 - 12% - at least one day at home
 - 5% - mainly from home
- Peak of the pandemic in 2020:
 - 11% - at least one day at home
 - 38% - exclusively from home
- Post-pandemic in 2022:
 - 22% - at least one day
 - 13% - exclusively from home

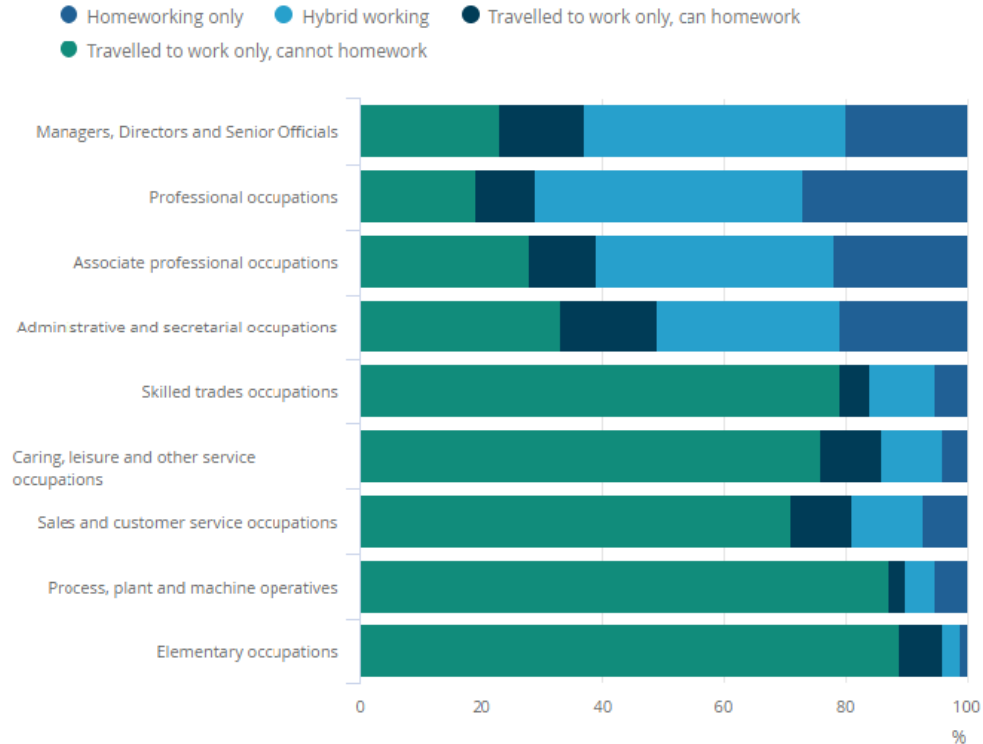
Source: UK Parliament Research Briefing 'The impact of remote and hybrid working on workers and organisations', Monday 17th October, 2022

Variables

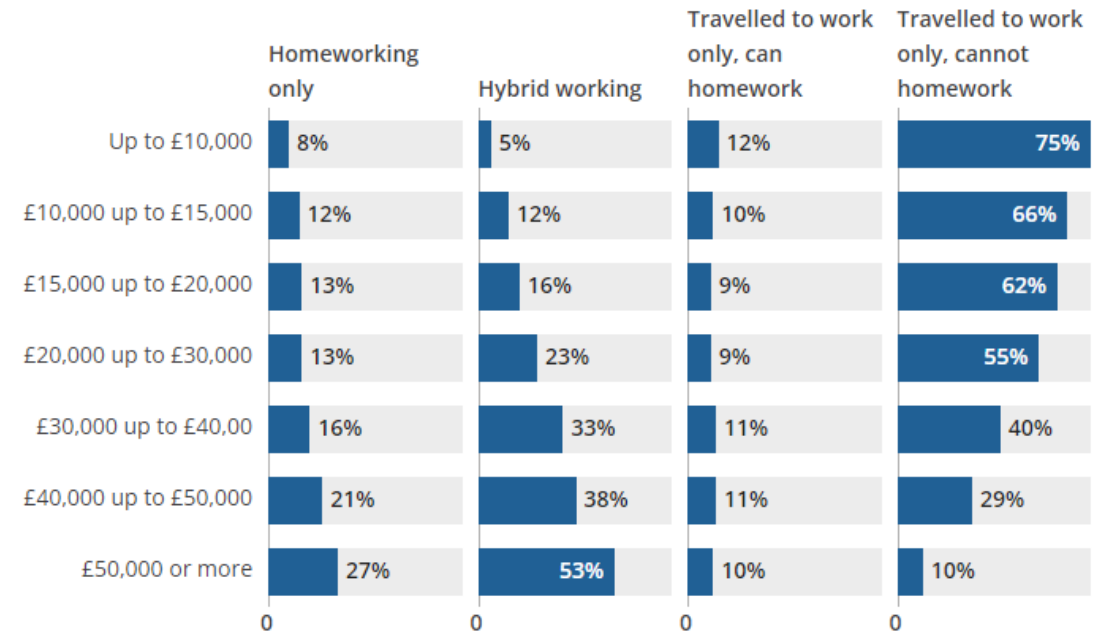


There are many variables at play...

Proportion of working adults in Great Britain, September 2022 to January 2023



Proportion of working adults in Great Britain, September 2022 to January 2023



...including nature of work and wage levels

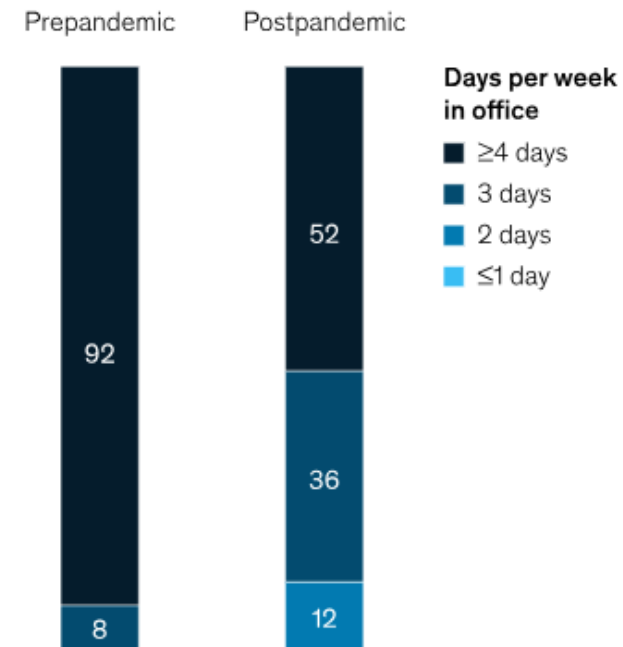


Perspective of employers

Putting ourselves in the shoes of employers

- Ready to go back to significant in-person presence, similar to pre-pandemic
- Expect employees to go back 3+ days per week
- Recognise that the pandemic hurt the organisational culture and the sense of belonging
- Beginning to understand that:
 - Hybrid working is more complex to manage than fully remote working
 - They are a long way off knowing how it best works
 - It will take years to learn and establish
 - There are many unanswered questions

Average share of workdays in office reported before and expected after COVID-19 pandemic, % of C-suite respondents (n = 504)¹



¹Based on responses from 504 C-suite executives.
Source: McKinsey CxO Survey on Return to Workplace, May 2021

Source: McKinsey Quarterly 'It's time for leaders to get real about hybrid', Friday 9th July, 2021



Perspective of workers

Putting ourselves in the shoes of workers

- **Not** ready to go back to significant in-person presence, similar to pre-pandemic
 - 75% want to work from home 2+ days per week
 - 50% want to work from home 3+ days per week



Source: McKinsey Quarterly 'It's time for leaders to get real about hybrid', Friday 9th July, 2021

- Feel a complex array of emotions and thoughts:
 - Sensing a pandemic fatigue
 - Aware that their social network has deteriorated
 - Sense a disconnection from their employer and a weakening sense of organisational belonging
 - Feel wealthier, and more connected to their homes, families and lives

40% of workers globally considering leaving their employers by the end of the year



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