



Global Hybrid Working Report 2023





Contents

- 3 Introduction
- 4 Status quo
- 7 Changes
- 10 Challenges
- 12 Dealing with challenges
- 16 The future of teams
- 19 Methodology

Introduction

Going hybrid

Is hybrid working the best of both worlds or a tentative middle ground?

The outbreak of the Covid-19 pandemic forced the global workforce into an unprecedented experiment in working from home. Initially intended as a temporary measure, it soon became clear that the world of work was changing permanently.

As the dust settled in early 2022, it seemed like the working world had truly embraced remote work. Employees reported increased productivity and work-life balance, employers could reduce staff turnover and downsize offices, and experts recommended the “remote work revolution” as the strategy to enhance their key objectives in this new decade.

Then, in May 2022, a tweet surprised the world. Internal Tech News leaked an e-mail from Tesla CEO Elon Musk. “Remote work is no longer acceptable: Anyone who wishes to do remote work must be in the office for a minimum (and I mean *minimum*) of 40 hours per week or depart Tesla.” In a second e-mail, he added: “There are of course companies that don’t require this, but when was the last time they shipped a great new product?”

Was Musk speaking for himself or were his views indicative of an entire contingent of managers who were not quite as keen to embrace remote work as had been reported? Either way, **Elon Musk soured the idea of remote work and ignited fresh debate.**

Throughout this time, many companies saw more than black and white and decided that remote and office-based workplaces need not be mutually exclusive. The hype around hybrid working structures, where teams work partly in the office and are partly remote, accelerated, if not the adoption of hybrid work itself, and a new chapter in the evolution of work began: **the hybrid chapter.**

As we head into the future, the debate continues whether working remotely or hybrid is more or less productive than the office counterpart, and how employees and managers really feel about it.

Based on a survey of 1,750 office and professional workers from seven industrialized countries, this whitepaper traces the everyday work of an average hybrid team. How do the team members currently work and what work structure would they prefer? How do regular employees and managers think and feel about hybrid working—do the benefits outweigh the challenges? What kind of support is needed? And finally: **what does the future of teams look like, and how should companies prepare?**

Chapter 2: Status quo

Hybrid work gains currency

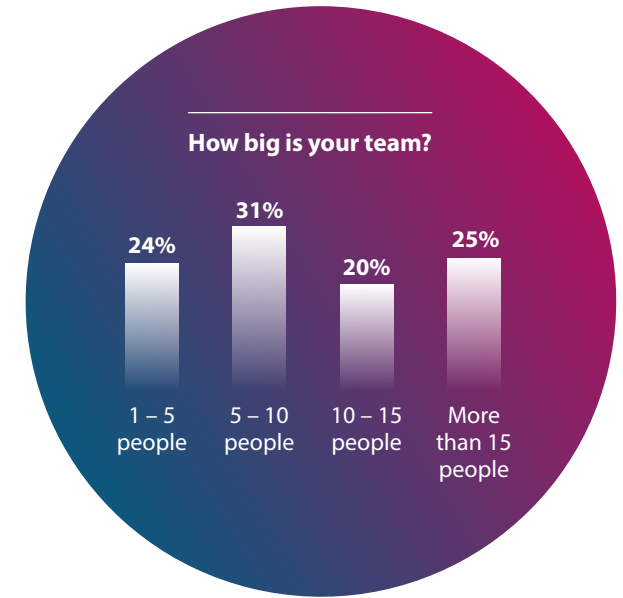
Six in ten employees are part of a hybrid team

Remote work is no longer a preventive necessity, but anyone who had expected work structures to change 'back to normal' was wrong. In a sample of almost 3,000 employees from the USA, the UK, Canada, France, Germany, the Netherlands, and Denmark, only one in four white-collar employees is still or again part of a team that works only from the office—with a significantly larger share in Germany (41%) and lower shares in the USA and France (each 13%).

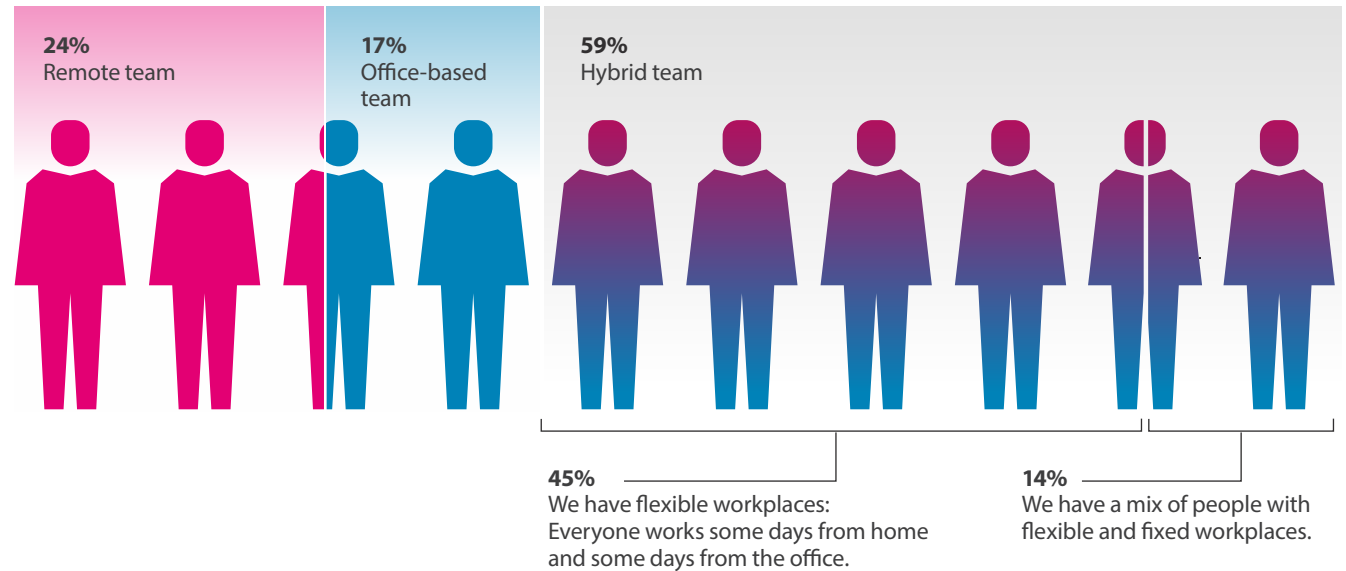
On the other hand, an even smaller number work in a fully remote team: they make up less than 10% in Germany, the Netherlands, and Denmark and one-quarter in Canada and the USA. What about the rest?

These employees—59% overall and at least 50% in every country—are part of a hybrid team. The average hybrid team has ten employees with only flexible workplaces. Every employee is working partly at home and partly at the office. Only one in four teams also has fixed workplaces, either at home or in the

office. On the one hand, hybrid structures address the desire for more flexibility and, on the other hand, guarantee visibility and personal contact. Let's see how hybrid team members deal with it. Where do they work most often?



How is the arrangement of working from home vs. working from the office within your team?



The first question was answered by n = 2,975 employees. All of the following results are based on the sample of hybrid teams only (n = 1,750).

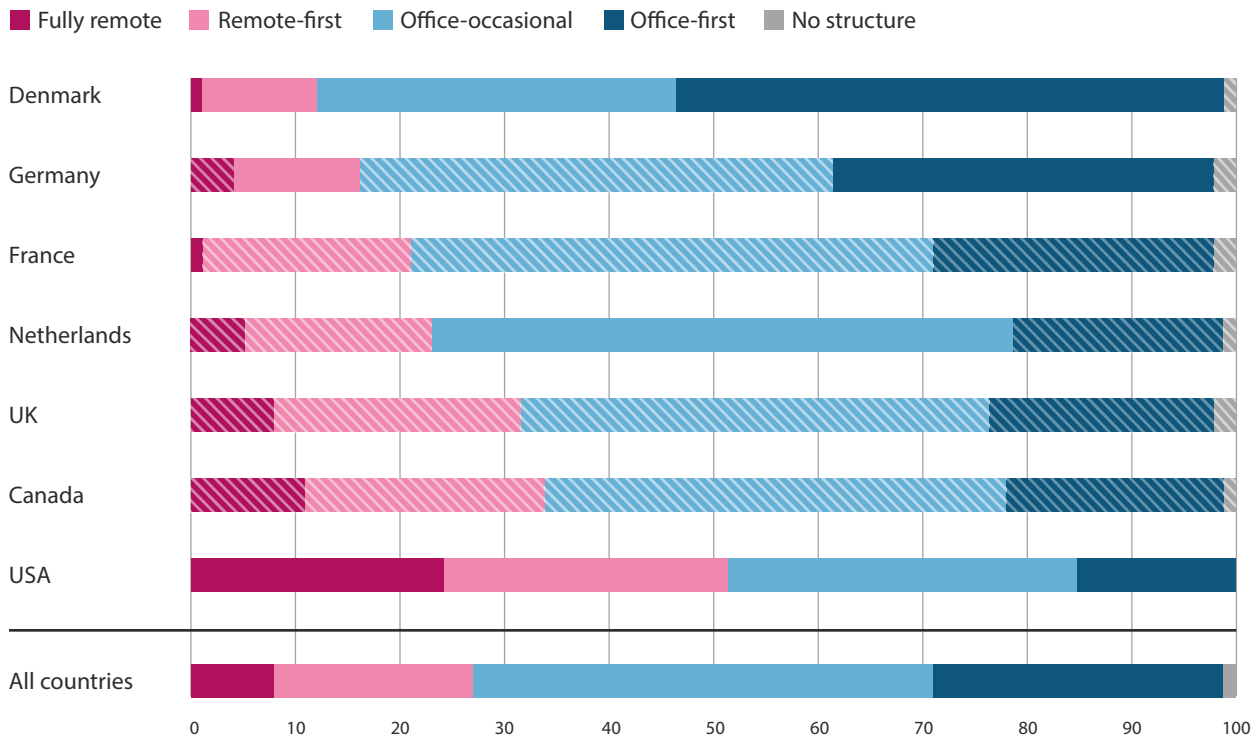
Chapter 2: Status quo

Working structures

Seven in ten employees visit the office regularly

What is your current work structure?

Results in %



Shaded bars indicate that the share of employees does not deviate significantly from the average across all countries ($p < 0.05$).
Remote-first = working close to fully remote; *office-occasional* = required or encouraged to be in the office somewhat regularly;
office-first = working mainly in the office but allowed to work remotely.

Office work is not out of fashion. **Not even three in ten members of hybrid teams work entirely or almost fully remote.** Only in the US is their share significantly higher: every second member of a hybrid team from America works completely or almost completely from home or somewhere other than the office. In Denmark and Germany, it is not even one in six. Consequently, Denmark and Germany have the largest shares of hybrid teamers who work mainly or occasionally in an office (86% and 81%).

The occasional visit to the office is the most common way of working in a hybrid team.

44% of employees (or four of our average hybrid team) are doing this voluntarily or because their employer expects or encourages them to be present a certain number of days per week. The same holds for the 27% of people who work mainly in the office with permission to work remotely. To gain insights into these differences, we need to compare the current work structure with employee preferences at an individual level. Anyone who operates according to model A—says *office-first*—but prefers model B, C, or D—*fully remote*, *remote-first*, or *office-occasional*—, is most likely not allowed to choose independently.

Chapter 2: Status quo

Workplace preferences

The majority of employees agree with their current work structure

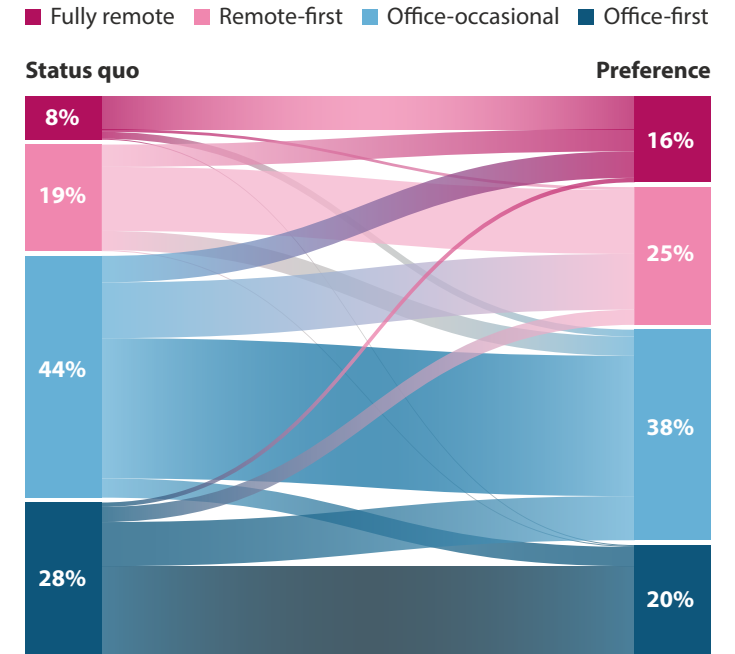
Current work structure and preferences usually match: **in our average hybrid team, six out of ten employees prefer the structure in which they already work.** At country level, this share is highest in the Netherlands (70%) and lowest in France (54%). Many companies seem to be aware of their employees' needs and establish a hybrid model that fits best.

Working fully remote is the most satisfying:

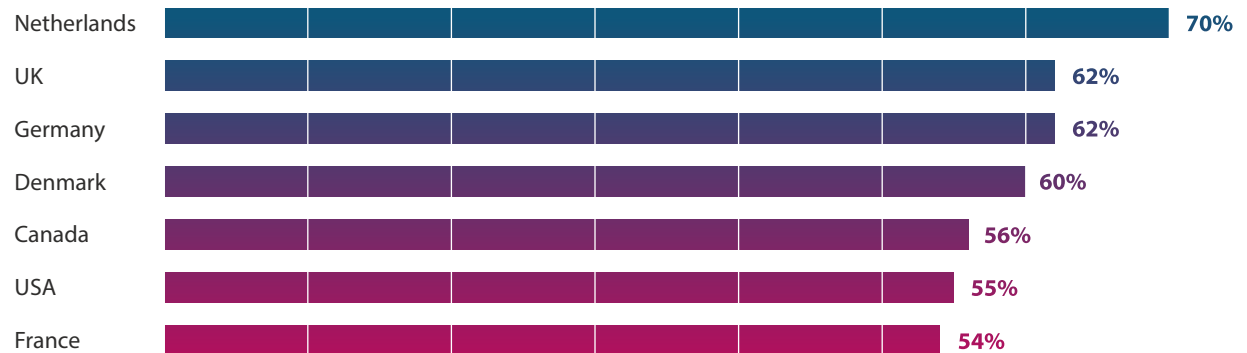
three-quarters of employees who never work in an established office would also prefer it if they could choose (or already chose) this structure. Only one-quarter of them miss the opportunity to work in the office. The other structures are equally satisfactory: 60% would stick with them, the rest would prefer to switch to another. In at least 30% of companies, employees must go to the office regularly, even if they don't want to.

Office-first is the least attractive structure: only 10% of currently dissatisfied employees would prefer to switch to an office-based workplace. The other options are more attractive: about one-third of dissatisfied employees would prefer to work mostly from home or occasionally in the office, respectively, and another quarter would choose a fully remote workplace. Not long ago, that would have been unthinkable.

What is your current work structure and what kind of structure do you prefer?



Share of employees with a satisfactory work structure



Chapter 3: Changes

Pandemic effects

Building relationships became difficult

Unsurprisingly, teams today are significantly more hybrid than they were before the Covid-19 outbreak. With 12% and 11%, Denmark and the US have the largest—but still small—proportions of teams that have previously worked hybrid. In Canada, however, only 3% of current hybrid teams have been hybrid before. Overall, many teams drastically changed the way they work in the blink of an eye. This is hardly possible without affecting the daily routine.

Almost every second employee declares that building relationships has become more difficult due to the ‘hybridization’ of their team. It is by far the most impacted aspect and together with team connectivity the only one with an evident negative development. We might have expected the same for collaboration and communication and related aspects like staying informed about the business, receiving support, and sharing ideas or feedback. Still, changes to these are rated quite similarly as both “harder”

What has changed since your team started working hybrid?

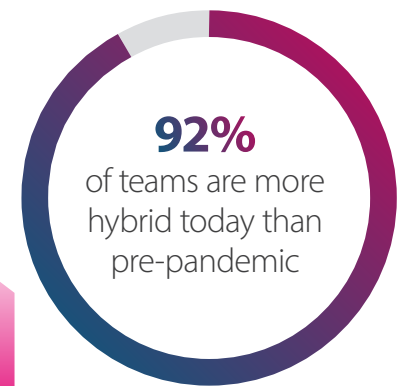
Results in %



Changes were rated only for teams that haven't been hybrid before the pandemic's outbreak (n = 1,604). Distance to 100% = share of respondents who answered with “no difference”.

and “easier” after teams started working hybrid—and between 40% and 60% of employees see no changes at all. **On the other hand, learning and development, and especially delivering objectives, became more often easier than more difficult.**

In the end, any daily routine needs a solid foundation: a shared commitment to common goals. Can the shift to hybrid structures shake this foundation?



Chapter 3: Changes

Hybrid team building

Culture and identity need re-development

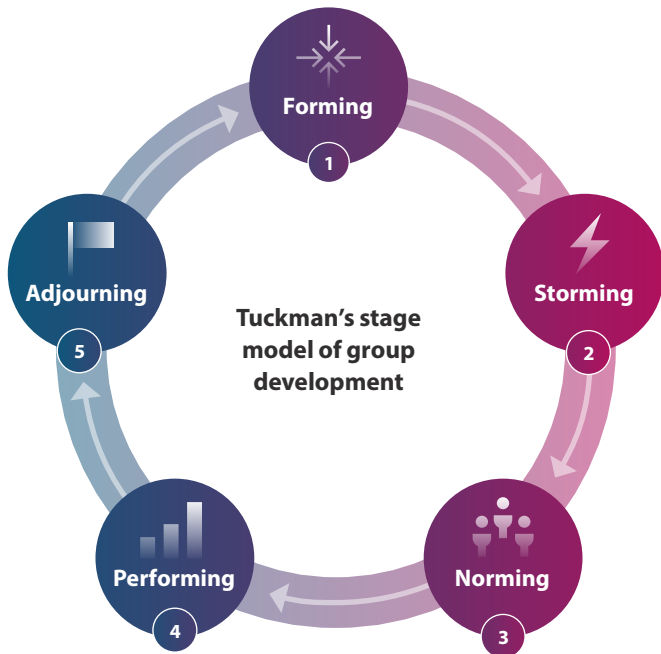
In 1965, the American psychological researcher Bruce Tuckman proposed a stage model for group development: *forming*, *storming*, *norming*, and *performing* are inevitable for a team to grow and function. In the late 1970s, he added a final stage to the model: *adjourning*, that involves dissolution but also

restructuring or reallocation, after which a team must start a new development cycle. Tuckman certainly wasn't thinking about hybrid teams, but hybridization could be one of the critical changes triggering an adjournment process. Does the average hybrid team have to go through the first four stages again?

To answer this question, we asked for the influence of working hybrid on team identity (that has been *formed*), team agility (that has been *stormed*), team culture (that has been *normed*), and team performance (that has been ... well, *performed*). If these aspects are negatively affected, the teams are well-advised to re-work them.

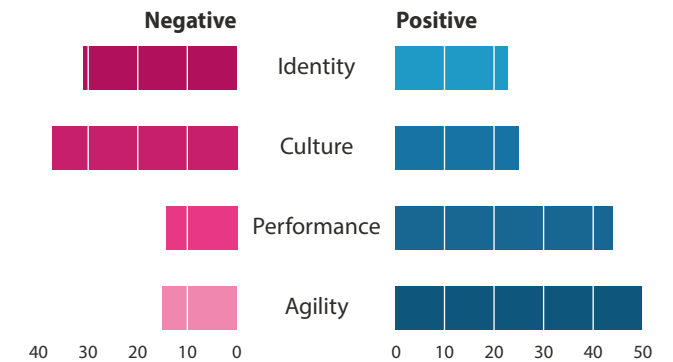
Around three in ten employees claim that working hybrid makes it “a bit harder” to establish a team identity, while two see a positive effect and five see none at all. The result for team culture is similarly indifferent. Developing identity and culture from the ground level is therefore not necessary for existing teams, but assessing improvement needs clearly is. Imagine a team that initially favored in-

person interactions with whiteboarding in the office as the most common practice. Going hybrid without adjusting this culture could quickly result in a clique of office-based teammates who maintained it and remote workers who were excluded. **The agility and performance of teams, in contrast, have often benefited from hybridization.** If this is due to advantages such as better time prioritization or focus remains to be seen.



How does working hybrid impact the following?

Results in %



Distance to 100% = share of respondents who answered with "no difference".

Chapter 3: Changes

Benefits of hybrid teams

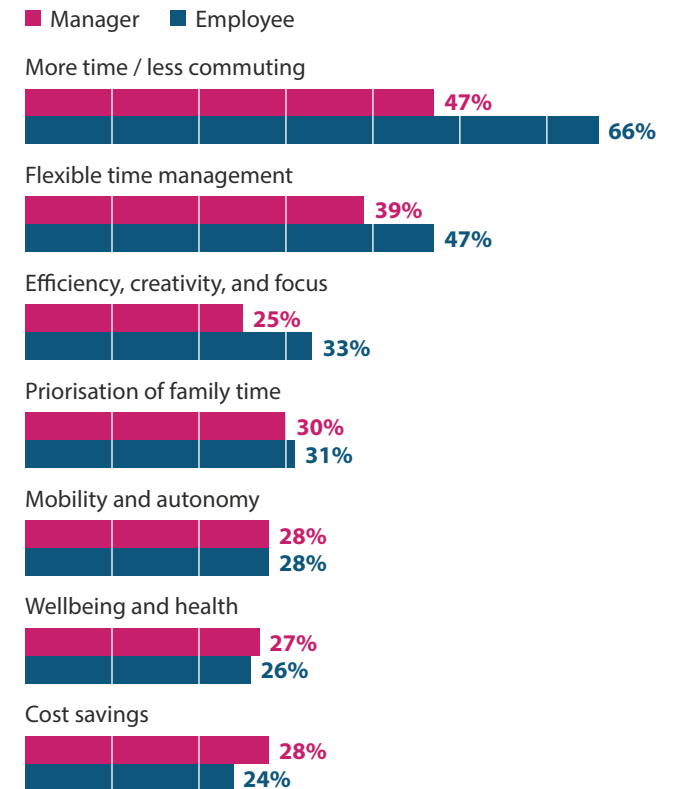
Saving time is the main advantage

The benefits of hybrid teamwork must be regarded from two perspectives: for a manager, working hybrid must be economically justified in the long run, whereas regular employees may put more emphasis on modern convenience. Do the responses confirm this? Well, partially.

Four of the top five benefits of hybrid teams are the same for both management and labor. **Both groups mainly mentioned reduced commuting time and flexible time management.** However, the share of regular employees that profit from time savings and flexibility is significantly larger than the share of managers, although they don't work more often in the office. Other convenience benefits, like better handling of family matters, mobility, autonomy, or well-being and health, are similarly beneficial for regular employees and managers.

Increased efficiency would be economically beneficial. **But while one-third of regular employees feel they work more efficiently, creatively, and focused in their hybrid team, it's not among the top five benefits for managers.** The discrepancy can stem from a partial underestimation of efficiency by the managers. Still, it's also possible that they mainly rated their own efficiency, which has not increased with the beginning of hybrid teamwork. **After all, almost 30% of them see a financial advantage in it.**

What are the main benefits of working in a hybrid team?



Chapter 4: Challenges

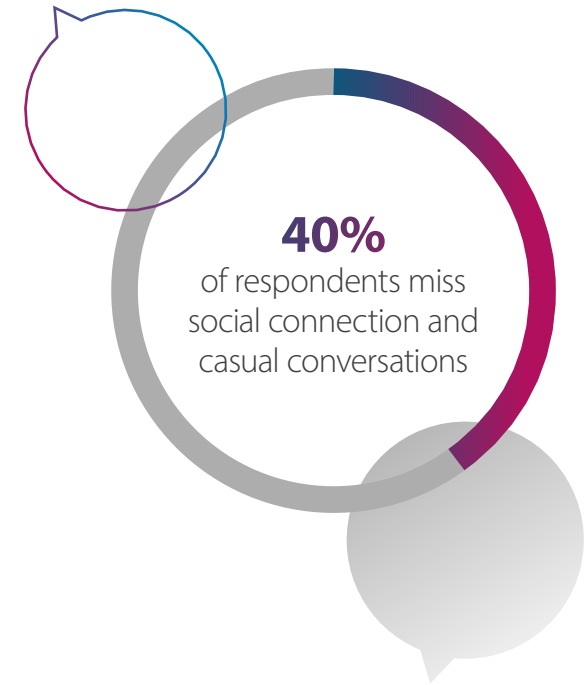
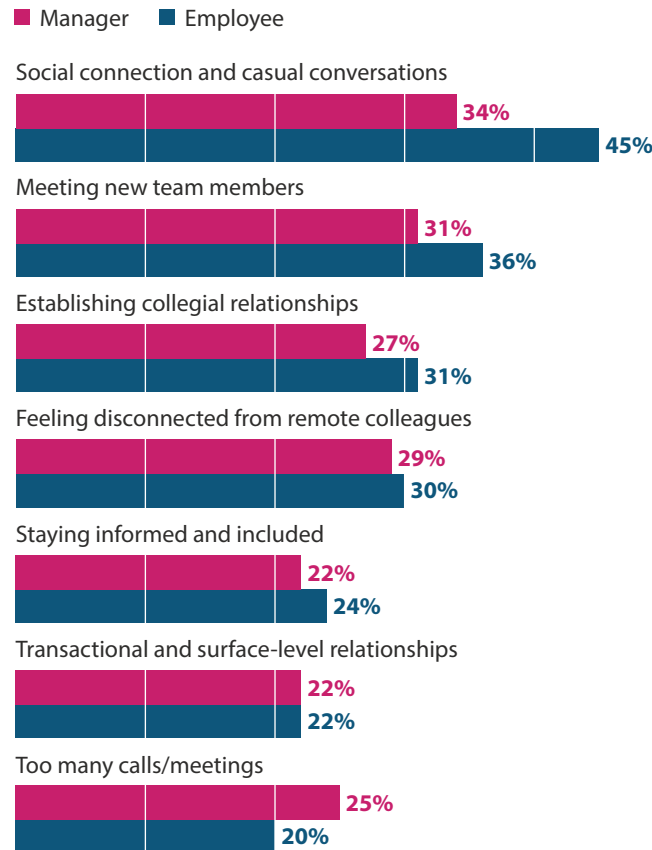
Challenges of hybrid teams

Social ties suffer the most

Alongside its benefits, hybrid teamwork comes with challenges; **a lack of social connection and casual conversation is the biggest.** Imagine a typical office routine: Coffee breaks, hallway chats, and a joint lunch break will be part of it, but not so in the home office. Aspects like difficulty in establishing collegial relationships or the feeling of disconnection from those who always or mainly work remotely are more common among those working from home.

The same applies to getting to know new team members which is the second-ranked challenge. Onboarding them on a professional level is one thing; connecting them on a personal level is another. Scheduled introductory sessions and hybrid team activities can hardly replace an informal chat in the office.

What are the main challenges of working in a hybrid team?



Overall, the managers' responses were more diverse than those of the regular employees. **Managers put less emphasis on communicational aspects and more emphasis on organizational aspects.** Two challenges should be added: since the managers are usually responsible for bringing their team together, different working hours and finding the right tools to stay connected are the main challenges for as many as 18% and 15% of them. To find out more, let's look at some specific parts of managing a hybrid team.

Chapter 4: Challenges

Managing a hybrid team

Hybrid onboarding is the biggest challenge

In line with the previous results, onboarding new employees is the most challenging aspect of managing a hybrid team. If the onboarding process should take place face-to-face, all educating employees must also be on site.

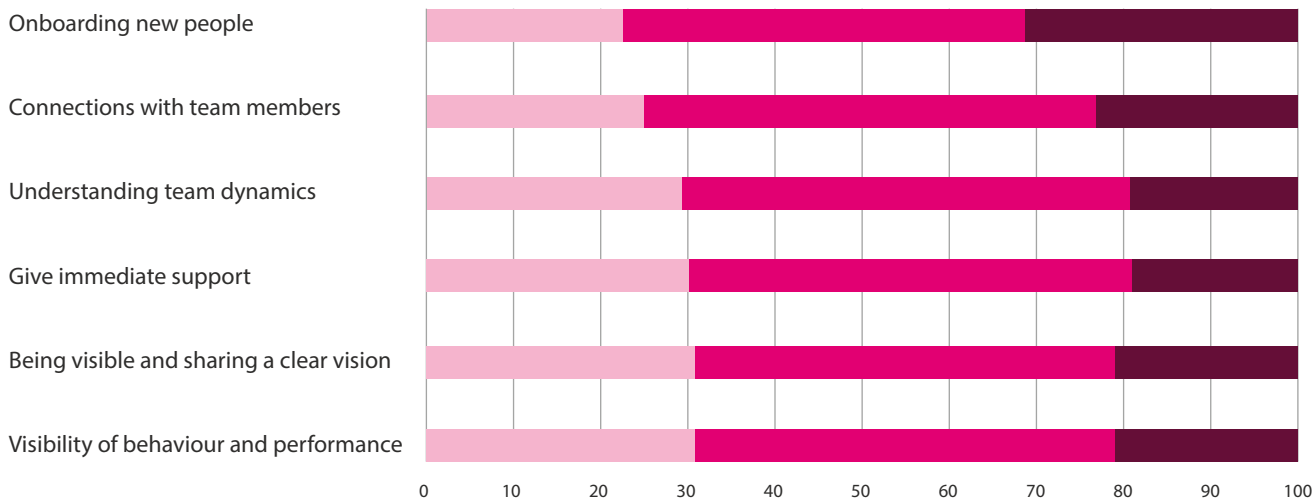
The alternative, remote onboarding, requires a new approach. On a social level, it's all about finding ways to make new members feel part of the team, regardless of its hybrid nature. On a professional level, remote onboarding forces educators to be more deliberate

about details. A new colleague provided with lots of information in a short time and afterward left alone will soon lack necessary information. To prevent this, the team must establish a sustainable hybrid support structure, e.g., including a safe space to ask questions.

How challenging are the following aspects of managing a hybrid team?

Results in %

■ Not challenging ■ A little challenging ■ Very challenging



Establishing a solid connection to all their team members is the second biggest challenge for managers, but other aspects are also demanding.

The size of the team doesn't raise difficulties, with one exception: one in ten managers with teams up to five members feel understanding team dynamics is "very challenging". In teams with more than 15 members, it is one in four.

Overall, identifying a challenge is one thing, and tackling it the right way is another. So, where do the teams stand so far?

Chapter 5: Dealing with challenges

Staying engaged

The majority of teams prioritize open communication

Half of all hybrid teams rely on open and frequent communication between members.

Their individual workplaces shouldn't play a role in that—a metaphorical open door replaces a literal open door in the office. **Moreover, almost the same number of teams use regular one-to-one meetings or team connects** that go beyond this open-door policy and dedicate time for coaching, mentorship, and giving context.

At a minimum, bigger teams commit to meetings that are inclusive and accessible for everyone, e.g., considering different working hours and time zones, and equipping meeting rooms with technology that allows remote colleagues to join. Other measures to stay engaged are less common: around one-quarter of hybrid teams count on social networking, leveraging individual working styles and implementing communication guidelines.

Our average hybrid team adopts two of the described measures to stay engaged. However, if we only ask its manager, we will count three since respondents in management positions report significantly more measures than regular employees. The difference is most apparent concerning communication guidelines: **every third manager says their team has ground rules, yet only every second employee is aware of them.**

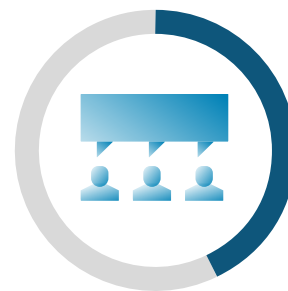
How does your hybrid team stay engaged with each other?



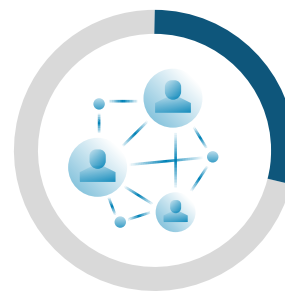
51%
Open and frequent communication



44%
Regular 1:1 or team connects



43%
Inclusive meetings



29%
Networking



26%
Individual working styles



23%
Communication groundrules

Chapter 5: Dealing with challenges

Technology and leadership

Adaptation to hybrid work has room to grow

Other key measures to address the challenges of hybrid teamwork include four areas: technical adaptation, leadership, investment in personal resources and psychological support. Technical tools like Zoom, Teams or Slack maintain constant communication via video calls and chat channels. Specially equipped hybrid meeting rooms go even further: they aim to bridge the gap between physically present employees and remote workers, e.g., with wide-angle cameras capturing the room and automatically controlled cameras providing a close-up of the current speaker.

Overall, two in three hybrid teams use communication tools, which conversely means: every third does not. They still rely on traditional communication channels such as e-mail, telephone, or in-person meetings at the office, bearing the risk of remote team members feeling less connected. The ratio for task management or collaboration tools is reversed: **only one-third of teams use them to manage projects and track workflows.**

What actions are taken to overcome the challenges of working hybrid?

Technical and leadership adaption

64%
Communication tools



42%
Strong internal communication



33%
Collaboration tools



19%
Leadership investments



Leaders may be concerned about losing leadership when they don't have their team around them—remember our introductory example of Elon Musk 'leading' his staff back to the office. Companies that adopt hybrid structures should therefore invest in leaders willing to support their employees' autonomy and build a solid foundation of trust. **To date, only one in five companies do so. Twice as many, however, foster robust internal communications to keep everyone informed and engaged.** The bigger the teams, the more they do so. Since leaders can no longer rely on organic interaction, they must continuously communicate expectations and rules of engagement to ensure clarity, trust, and productivity.

Chapter 5: Dealing with challenges

Personal and psychological resources

The minority of companies take targeted action

Overall, most hybrid teams face challenges, but a minority of companies seize the chance to address them with targeted actions. This applies to all countries, but the effort is different. **In the US, more than two-thirds of the companies take at least three of the eight described actions. In Germany and the Netherlands, it is less than one-half.**



Investments in personal resources and psychological support are lagging behind technical and leadership adaptation to hybrid teamwork. Considering the risk of isolation and disconnection, psychological support is worthwhile to keep people engaged. **At least 37% of the companies encourage occasional in-person meetings and team building events that allow employees to catch up and socialize, regardless of their work structure.** Exploring team dynamics and culture can further help to improve not only connections but also the performance of hybrid teamers and the interaction between them. **Today, 20% of companies take action in this field.** Once more, appropriate measures are more prevalent in bigger teams.

26% of the companies that adopt hybrid teamwork ingrain initiatives to support the general health, lifestyle, and behaviors of employees. Besides physical health, fitness, or nutrition, these can address mental aspects like mindfulness or stress management. Wellness initiatives for hybrid teams must accommodate

What actions are taken to overcome the challenges of working hybrid?

Personal resources and psychological support



their different workplaces and flexible schedules, thus requiring more inclusive planning and more creativity to engage employees. Moreover, training programs e.g., on effective communication or new technologies, can equip the team with relevant skills to work hybrid. **However, only 21% of the companies have implemented specific development plans, including upskilling for hybrid environments.** What does that mean for the employees?

Chapter 5: Dealing with challenges

Providing support

Needs-based support structures can be improved

About one-third of employees feel insufficiently supported with opportunities to connect with their team, autonomy and flexibility, decisive feedback calls with their manager, and training in digital collaboration and communication tools. Those who demand connection opportunities are more often members of bigger teams. We might expect them to work mainly remotely, but this expectation is unconfirmed: a lack of connection affects both remote and office workers. The same holds for any other need, but we do find two additional correlations.



1 in 4 employees

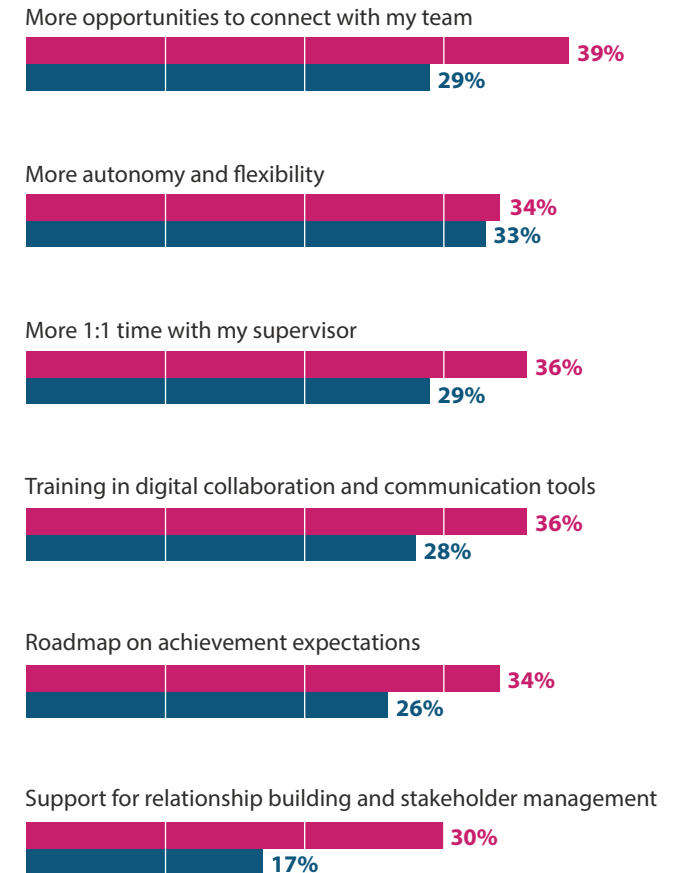
feel insufficiently supported in three or more different areas.

First, the younger the employees, the bigger their need for support, especially when it comes to relationship building and stakeholder management, as well as clarity about achievement expectations. However, there is no rule without exception: training in digital collaboration and communication tools is the only demand that older employees express more often.

Second, employees in management positions express significantly more need for support than regular employees, except regarding autonomy and flexibility, while a substantial number of regular employees explicitly state that they don't need help in the areas mentioned.* This suggests that the current support structures for managers of hybrid teams is insufficient.

What support would you like to receive to work more effectively?

■ Manager ■ Employee



*The respondents could add open answers. Three-quarters of respondents who did so (n = 63) said they're supported sufficiently.

Chapter 6: The future of teams

Skill development

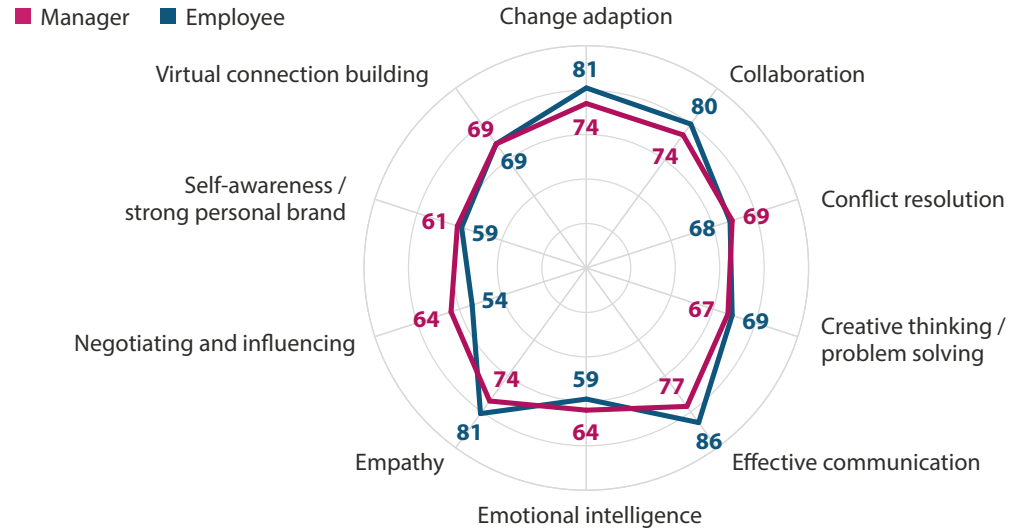
Effective communication is most relevant for hybrid teams

To best prepare teams for hybrid work, existing training programs must be adapted. Not necessarily at the tactical level (programs could be offered in a hybrid or face-to-face format), but in terms of content. The ideal skillset of a hybrid team doesn't necessarily mirror the ideal skillset of its office-based counterpart.

The overarching relevant skill for hybrid teams is effective communication. Ineffective communication between team members with flexible work structures can cause misunderstandings, uncertainty, frustration, and wasted time. **Next are the ability to adapt to change, empathy, and collaboration.** In our average hybrid team with ten members, of which six flexibly switch between the office and remote work, change adaptation means adjusting to a new workplace atmosphere every day.

How important are the following skills for hybrid teamwork?

Results range from 0 (not important) to 100 (very important)



Importance of the skills has been calculated as the mean of the ratings "not important" (0), "partly important" (50), and "very important" (100).

Conflict resolution, creative thinking, and virtual connection building are middle-ranked skills. The latter might have been expected as more important, but building connections virtually is not just a recent daily practice for most of us.

Emotional intelligence as well as negotiating and influencing are primarily relevant for hybrid team managers. They need to understand the needs of

different stakeholders and communicate with them appropriately.

Companies can't take all these qualities for granted. Instead, they should regard them as the starting point for frequent and in depth team training to increase the skillset of every team planning a successful hybrid future. But do they plan to maintain hybrid working at all?

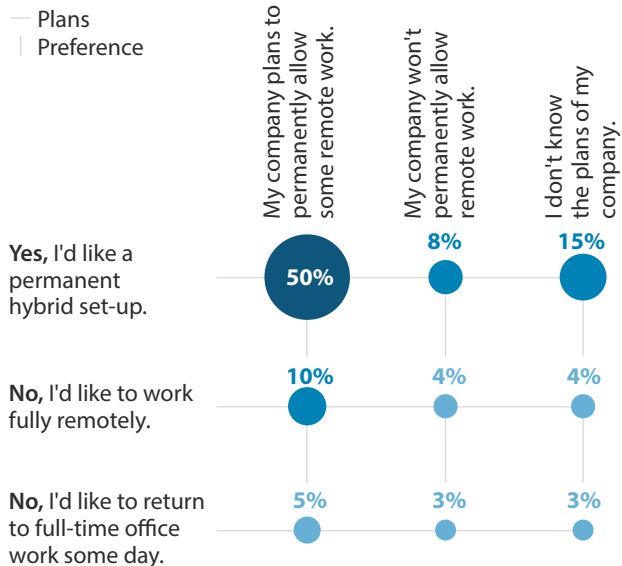
Chapter 6: The future of teams

Plans and demands

Two-thirds of companies will maintain a hybrid structure

In our average hybrid team, seven out of ten members would like to keep the hybrid setup for the rest of their careers. Two would prefer a fully remote team, and the last one would choose to return to full-time office work. The companies we surveyed

Would you like to work hybrid for the rest of your career and what are the plans of your company?



confirmed a clear vote for hybrid work: **at least 65% of companies with hybrid structures plan to maintain it permanently**—no matter what Elon Musk is tweeting. Only 14% of companies plan to fully return to the office in the medium or long term.

Hybrid teams are here to stay and reaching their whole potential hinges on support and empowerment. Accordingly, the final two questions in our survey were: what does hybrid work mean for your career and ongoing development? And: what is the critical area that hybrid teams should work on developing together?

30% of respondents, at least one-quarter in each country, agree with the statement: "I perform much better since starting hybrid working." On the other hand, effective collaboration is the greatest need for development, followed by achieving results together, improving working processes and becoming more cohesive. While personal productivity has been rated positively in various respects, teamwork seems to lag behind.



What is the key area that hybrid teams should work on developing together?



Chapter 6: The future of teams

Summary and conclusion

The future of teams is hybrid

Hybrid teams are here to stay. Most office workers are part of a hybrid team, and their employers plan to maintain the structure. This is good news for employees who value the convenience of hybrid, are comfortable with it, and are likely to work hybrid for the rest of their careers. It's clear that the office remains a vital part of the workplace equation: most employees either work part or fulltime in the office, and they prefer this over a fully remote structure.

We're still in the early stages of change, but hybrid is working to an extent. Employees feel at least as productive as before hybridization, but the research shows a need to evolve. Employers may have blind spots around areas like communication, engagement, and collaboration—crucial aspects for long-term success and satisfaction.

How can companies prepare for the future of teams? Six take aways:

1. The World Economic Forum points to **workplace flexibility** as a critical topic in the future of work. A trade-off between in-person and remote team interactions “seems to be the optimal solution”—an opinion that this survey reinforced.
2. The data suggests that there are no hard or fast rules around what will suit every team. Organizations should **consider the behavioral and work preferences** of their teams when adapting working models.
3. Organizations should check in with leaders and employees to **ensure communication policies are understood** and practised at all team levels.
4. Managers of hybrid teams may be vulnerable to increased stress levels and blind spots around what's happening on their team. Companies should **focus on empowering their leaders to adapt to the diverse demands of managing a hybrid team.**
5. Personnel managers should **keep in mind the employees' commitment to hybrid work** when designing roles and onboarding programs, considering training opportunities, and providing support around individual development and team building.
6. Organizations that wish to futureproof their workforce can't ignore critical components of effective team building and crucial drivers of organizational growth: **communication, engagement, and collaboration.**

At the beginning of this report, we asked a question: **Is hybrid working the best of both worlds or a tentative middle ground?**

In conclusion, we'd suggest that, while hybrid may be the future, for the time being, it remains a tentative middle ground. Organizational leaders still have work to do to bridge the gap between remote and in-person work and ensure their teams are truly engaged and supported.

Chapter 7: Methodology

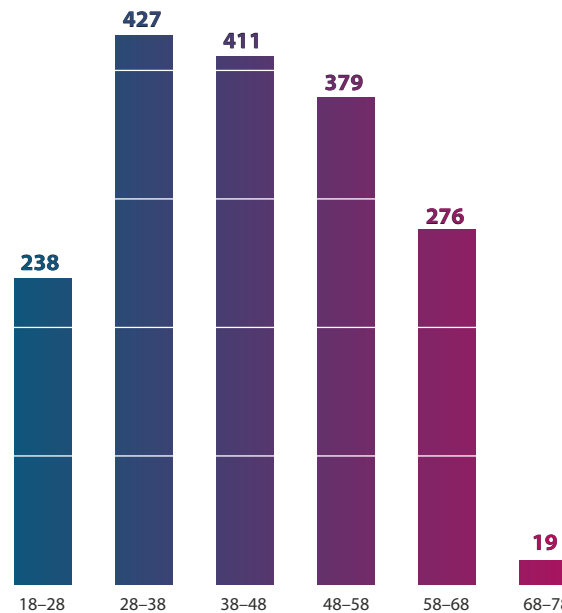
Survey design

To draw an up-to-date picture of hybrid teams, **Insights Learning & Development Ltd** conducted an international survey among office and professional workers. Together with the market research experts from **Statista**, answers of **1,750 employees** currently part of a hybrid team have been evaluated—each **250 from the USA, the UK, Canada, France, Germany, the Netherlands, and Denmark**. About half of them hold a management position (n = 851), the rest are regular employees (n = 899).

Data was collected between the 8th and 24th of August 2022 using an e-mail invitation and an online survey. The participants are at least 18 years old. The result of the first question, “How many people are working hybrid?”, is based on the answers of 2,975 respondents. Those who are part of remote or office-based teams were subsequently excluded.

Age distribution

Results in total numbers



Key objectives are:

1. Demonstrate the **shift to hybrid teamwork** after the outbreak of the Covid-19 pandemic and how this is experienced across employees.
2. Identify the **benefits and challenges** associated with that shift.
3. Quantify the extent to which companies take **measures to overcome the challenges**.
4. Highlight **development needs** to ensure successfully thriving in a hybrid environment.



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