

Fieldwork by Citrix

Work rebalanced

The Citrix hybrid work report



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Foreword

The working world has been dramatically reshaped. The way that companies think about and organize around work has changed more in the last three years than at any time in history, and so have employee expectations. Remote and hybrid work are now the norm, and employees expect the freedom and flexibility to work when, where and how they want. Companies must provide this in order to attract and retain talent in what remains one of the most competitive labor markets the world has ever seen.

This report looks at the actions that business leaders are currently taking to enable flexible hybrid work and how organizations are performing against four key pillars: **tech empowerment, connection and collaboration, flexibility and fluidity**, and **trust and empathy**. These pillars are critical to enabling new work models and creating a positive employee experience, to support organizational success.

The four pillars of hybrid work effectiveness

Work today is driven by technology. We work at home, in the office, on the road and anywhere in between, and rely on technology to connect us to the people and information we need to get things done. All four of the hybrid effectiveness pillars in our study relate to both people and technology, but we consider two of them – tech empowerment and connection and collaboration – through a primarily tech-focused lens; and the other two – trust and empathy and flexibility and fluidity – through a primarily people-focused lens.

Tech empowerment	Connection and collaboration
<p>Employees have access to work technology that enables them to work effectively and to work in the way that they want. Work tech helps to equalize performance and opportunity across organizations.</p>	<p>Employees feel connected to their organization and their colleagues wherever, whenever and however they are working, and can collaborate effectively whether they are together virtually or in-person.</p>
Flexibility and fluidity	Trust and empathy
<p>Employees have choice over how they work, when they work and where they work, and can flex their working style and approach to match both business requirements and their own personal needs and lifestyles.</p>	<p>Employers trust their employees – they believe that they will complete their work and abide by company rules without needing to be checked or monitored – and employees trust their employers to be transparent with them and to treat them fairly and with respect. Leadership is empathetic and human-centered.</p>

The research finds that, in the world of hybrid work, balance is critical. Hybrid workers – those who work partly in an office and partly remote – report being more productive and engaged than employees who are entirely office-based or entirely remote. They also report better well-being – both physical and emotional – and feel more positive about their organization. Sixty-nine percent of hybrid employees would recommend their employer as a place to work, compared to 56% of office workers and 60% of remote workers. Hybrid workers are also more likely to feel empowered by their work tech, and to have a strong emotional connection to their teams and organization.

The driving force of these outcomes is undoubtedly tech. Work tech tools are not just enabling hybrid collaboration and ensuring continued productivity in a highly distributed environment; they are also helping to solve other, more fundamental challenges. For example, over two-thirds of both business leaders and employees believe that sophisticated work tech is driving more inclusive and equal work experiences.

But the news isn't all good. While digital collaboration and tech empowerment are flourishing, the *Work Rebalanced* study finds other aspects of hybrid work are proving more challenging to get right. Many business leaders are struggling to balance heightened employee expectations of flexibility with business needs. They are also finding it difficult to forge new bonds of trust between organization and employee now that traditional 'lines of sight' are largely gone. Solutions to these more people-focused challenges are both technological and cultural, and may take longer to reach.

Business leaders must now take stock, enabling tech-driven hybrid work and harnessing the benefits it brings. In doing so, they can attract and retain the talent they need to fuel innovation and business growth.

Tim Minahan, Executive Vice President Business Strategy & CMO, Citrix

About the study

Using four key pillars of hybrid work effectiveness, the Citrix hybrid work report assesses how organizations are adapting to new employee expectations of work, and how business leaders can ensure that they are doing enough to attract, retain and engage their people.

In early 2022, Citrix, in partnership with Man Bites Dog and Coleman Parkes Research, ran an independent opinion research study, examining the views of 900 business leaders (job titles included Chief Executive Officer, Chief Finance Officer, Chief Marketing Officer, Managing Director, Chief Technology Officer, Chief Operating Officer), and 1,800 employees (knowledge workers).

Respondents were from the following markets: Australia, France, Germany, Japan, Mexico, the Netherlands, the UK and the US. There were 200 employees and 100 leaders from each market, apart from the US where there were 400 employees and 200 leaders. Respondents were from the following sectors: financial services, healthcare and life sciences, tech, professional services, manufacturing, retail, government/public sector and education.

We have also analyzed the data according to employees' working location, as follows:

In-office employees	Hybrid workers	Remote workers
Employees that currently work 100% of the time in the office (567 respondents)	Employees that currently work part of the time remote and part of the time in the office (867 respondents)	Employees that are currently 100% remote (366 respondents)

Assessing organizations' 'Hybrid Work Effectiveness'

In collaboration with our research partners, we built a bespoke scoring system and ran the opinion research data through this scoring system to assess organizational performance across our four key pillars: 'tech empowerment', 'connection and collaboration', 'flexibility and fluidity', and 'trust and empathy'. We also calculated an overall score (an average of all four pillars) for hybrid work effectiveness. Scores were calculated from both the business leader and the employee data, to produce a snapshot of organizational performance according to both groups. The raw scores were indexed so that each score is out of a possible 'perfect score' of 100. Repeating the study at future dates will enable us to track movement and changes. See the detailed methodology (page 53) for further information.



Executive summary

Organizations' 'Hybrid Work Effectiveness'

The research provides a snapshot of how both business leaders and employees feel that their organizations are performing against key pillars that make hybrid work successful (see 'About the Study' on page 6 and detailed methodology on page 53 for more information).

Global	Tech empowerment	Connection and collaboration	Flexibility and fluidity	Trust and empathy	Overall
Employees	75	76	66	73	72
Leaders	72	74	62	69	68

Scores in the table above are out of a maximum possible 100

The results show that, according to both business leaders and employees, organizations are strongest on the tech elements of hybrid working (the 'tech empowerment' and 'connection and collaboration' pillars) but are struggling with the more people-focused aspects (the 'flexibility and fluidity' and 'trust and empathy' pillars). This suggests that the technology that enables effective working and hybrid collaboration is functioning well, but businesses are finding it more difficult to meet employee expectations for a new work culture and attitude.

The employee data produces higher scores across all four pillars than the business leader data, suggesting that leaders are more critical of their organizations than their employees, and are perhaps finding the cultural shift more challenging than their employees, many of whom are 'digital natives' who have grown up with technology at their fingertips.

The state of the workforce

Almost a fifth of knowledge workers (19%) are currently considering leaving their organization.

- 70% of employees rate their personal performance as good.
- 65% of employees say they're currently productive at work.
- 60% of employees say they're engaged with their organization.
- Over 60% also say their physical and emotional well-being is good.
- 63% of employees would recommend their employer as a good place to work.

<p>Tech-focused</p>	<p>Tech empowerment</p> <p>Score (employees) 75/100 Score (biz leaders) 72/100</p> <p>64% of employees and 62% of leaders say the tech they use at work is as easy and intuitive as the tech they use in their personal life.</p> <p>Leaders and employees believe that tech is driving inclusivity (64% leaders and 69% employees) and equalizing performance (66% leaders and 64% employees).</p>	<p>Connection and collaboration</p> <p>Score (employees) 76/100 Score (biz leaders) 74/100</p> <p>Most leaders and employees feel that hybrid and remote work collaboration is working well, but 63% of leaders and 69% of employees say that in-person interactions are essential for emotional well-being.</p> <p>But are the days of in-person collaboration numbered? 74% of business leaders and 61% of employees believe that the metaverse will completely revolutionize workplace collaboration and make physical in-person collaboration unnecessary.</p>
<p>People-focused</p>	<p>Flexibility and fluidity</p> <p>Score (employees) 66/100 Score (biz leaders) 62/100</p> <p>Although leaders know they need to offer flexibility – 63% say it is becoming a key determinant in the job market – they also have some concerns:</p> <p>64% say that employees now expect a higher degree of flexibility than they can accommodate from a business perspective.</p> <p>62% say that employees who take advantage of flexible working options are less likely to progress quickly in their careers.</p>	<p>Trust and empathy</p> <p>Score (employees) 73/100 Score (biz leaders) 69/100</p> <p>80% of employees say it is very important to them that they can trust their employer to be transparent and honest with them and to treat them fairly and with respect, but just 49% of them say they trust their employer.</p> <p>72% of employees say that it is crucial that they work in an organization where the leadership and culture is empathetic and compassionate, and 70% said the experience of the pandemic has made it clear that empathy is a critical leadership quality.</p>

Rebalancing work: three top tips for business leaders

1. Offering flexible, hybrid working is now essential

As offices reopen, leaders need to get the balance right. Our study shows that employees who spend part of the week working remotely and part of the week working in the office are more engaged, more productive, and have better work well-being than employees who work entirely in the office or completely remotely. Yet over a third of business leaders (34%) do not currently give their employees any working location flexibility: either they offer no office option (6%), or they mandate complete office-working (28%).

Additionally, less than half of business leaders say that their organization currently has good levels of staff retention. With the talent market being so competitive, giving employees the option to work under a flexible, hybrid model is key. After all, the cost of replacing an individual employee can be up to twice the employee's annual salary.¹

34%
of employers offer no location flexibility

28%
of employers mandate complete office-working

6%
of employers offer a no office option

2. Leaders need to keep honing their communication skills

Good communication skills are the most important quality in a leader in today's working world, according to employees: 55% percent of employees rank this as a top three leadership attribute. The next most important quality is empathy, rated as a top three attribute by 38% of employees. Qualities such as creativity, technical skill, and delegation are not ranked as highly by employees.

In the shift to widespread remote and hybrid working, the way that leaders interact with their employees has had to change dramatically. This is not just about the methods and modes of communication, but also about what information is conveyed and the tone of the communication. Just as hybrid working is here to stay, so is the need for leaders to communicate effectively and sensitively. Employees are clear that this is key.

55%
of employees rank communication as a top leadership attribute

28%
of employees rank empathy as a top leadership attribute

¹ [Gallup](#)

3. Tech tools need to save time, not waste time

Work tech infrastructure that enables flexible, hybrid work has never been so important. Tech tools need to be in place to allow employees to work and collaborate at any time and in any place. But often, tech designed to make hybrid work possible is slowing employees down. Our study reveals that on average, employees could be losing around 54 minutes per day due to tech challenges such as restoring lost files and resetting forgotten passwords. When productivity is at such a premium and the business landscape is challenging, this is time that companies cannot afford to lose.

Leaders need to look at basing their tech strategies on employee needs and challenges. They should focus on investing in systems that simplify and automate workloads and consider digital collaboration and desktop virtualization tools that employees can access securely from anywhere.

54

minutes potentially lost
per day due to
tech challenges

Part One

A hybrid state of being

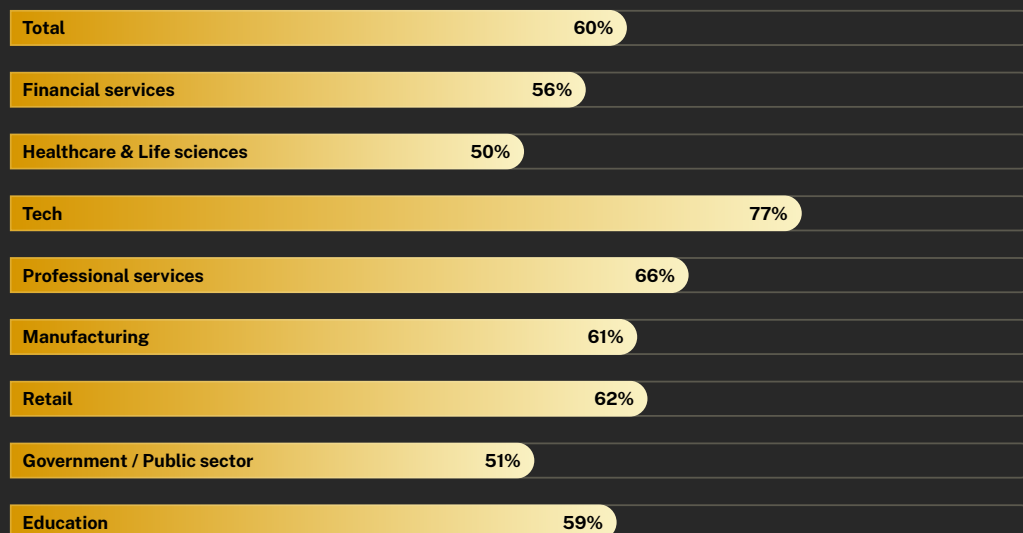
A split in the workforce

As offices reopen and organizations assess how knowledge economy roles and interactions should now function, our study provides a picture of employee engagement, productivity, performance and well-being.

It reveals that although the majority of employees are currently feeling engaged, productive and positive about their work well-being, there is a significant swath of the workforce that is struggling with these aspects of work. This is putting organizations in a precarious people position and suggests that leaders need to urgently look at ways of improving work happiness.

Six in 10 employees say that they currently feel engaged with the organization where they work: absorbed by and enthusiastic about their work and willing to take positive action to further the organization's reputation and interests. A similar proportion, of 63%, would recommend their employer as a place to work to a friend who was looking for a job. This varies significantly by sector however, with 77% of tech employees feeling engaged with their organization compared to just half of healthcare employees, and 51% of public sector workers. There are also some generational differences: 54% of Generation Z employees (aged 18-23) feel engaged with their organization, compared to 67% of Millennial employees (aged 24-39).

Employees that feel engaged with their organization

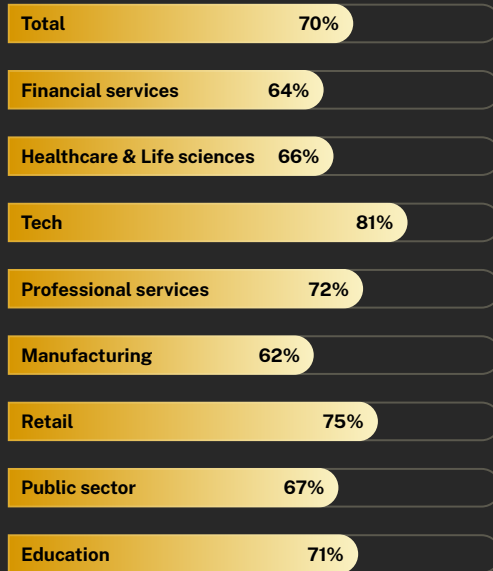


Sixty-five percent of employees say that they currently have good physical well-being at work, defined as feeling physically healthy and functioning well, and 61% say that their emotional well-being at work is currently good. Meanwhile, 70% of employees currently rate their personal work performance positively, and 65% say that they feel productive in their current role on a typical day.

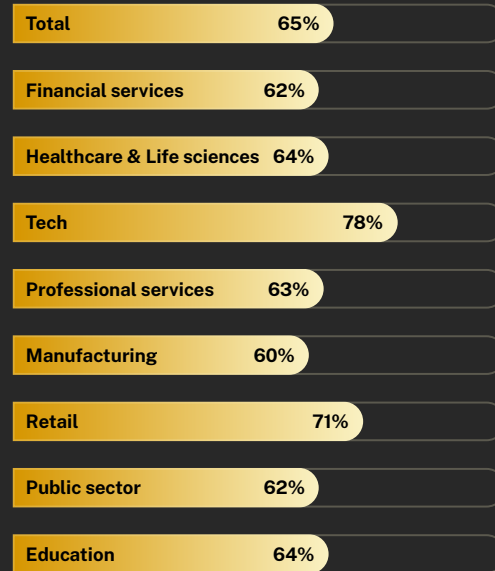


Levels of employee performance, productivity, and engagement by sector

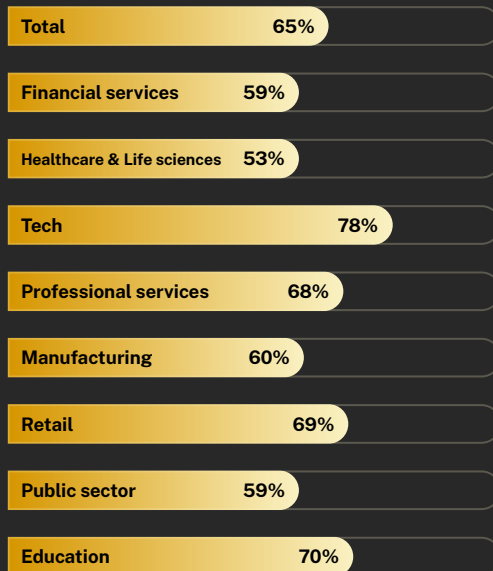
Positive about individual performance



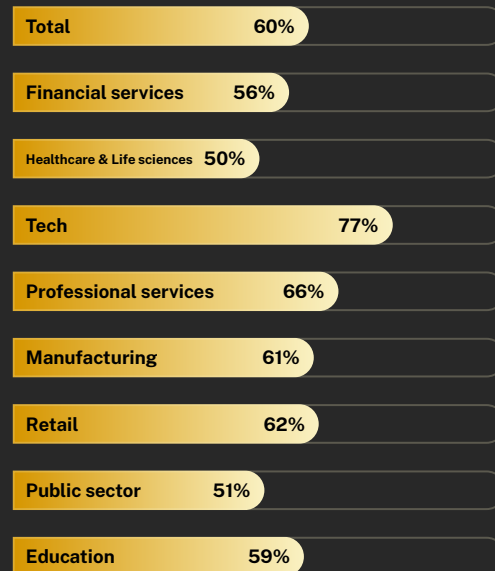
Positive about team performance



Positive about levels of productivity



Positive about level of engagement



Hybrid happiness

The study also reveals that enabling flexible, hybrid working is one of the best ways to improve job satisfaction and employee engagement. Hybrid workers, who work partly in the office and partly remote, report better levels of productivity, well-being and engagement than either entirely in-office or entirely remote workers. Sixty-nine percent of hybrid workers say that they feel engaged with their organization, compared to 56% of remote employees and 51% of in-office employees.

	100% office employees	Hybrid (part remote, part office) employees	100% remote employees
Good physical well-being at work	60%	70%	61%
Good emotional well-being at work	56%	64%	59%
Feel engaged	51%	69%	56%
Feel productive	59%	69%	64%
Positive about personal performance	65%	73%	69%
Feel positive about team performance	58%	70%	64%
Would recommend their employer	56%	69%	60%

Leaders are less positive

For leaders, however, the picture appears bleaker. In the new world of work, leaders are more negative about organizational levels of productivity and engagement than their employees. Half of leaders feel that levels of engagement are good at their company, while less than half are positive about levels of productivity (47%) and employee retention (49%).

Leaders are struggling with their own well-being, too: fewer than half of business leaders say that their current physical well-being is good (49%) and 51% are positive about their emotional well-being at work. Leaders have a lot to balance, and some have adjusted to the new world of work better than others. Even as the most acute disruption of the pandemic appears to be behind us, the commercial landscape is full of uncertainty, talent is on the move, and meeting employee expectations has become more challenging and complex.



Financial services fault lines

Leaders of financial services companies are the most bullish about their companies' levels of engagement and retention, but financial services employees are amongst the least engaged. Three-quarters of financial services business leaders believe that employee engagement is good at their organization, and 78% say that employee retention is good. Yet just 56% of financial services employees feel engaged with their company (below the average of 60%) and financial services employees are the least likely across all sectors (tied with public sector employees) to recommend their employer as a place to work.

Historically, financial services firms have been largely office-centered, with less working location flexibility than other knowledge economy sectors. The move to remote working during the pandemic was therefore a big shift for this sector and brought a number of challenges: companies needed to move away from legacy tech and systems and implement effective remote working while navigating potential data security issues. This transition was one that many companies seem to have struggled with. Our [Era of Hyper-Innovation](#) study found that financial services business leaders felt that their organizations' productivity, innovation, engagement and retention dropped during the pandemic. As in-person working becomes possible again, this study reveals a disconnect between financial services leaders and employees, perhaps reflecting a tension between how employees want to work and what financial services organizations are expecting of their employees.

Part Two

The four dimensions of hybrid work effectiveness

Pillar 1

Tech empowerment



In the post-pandemic hybrid work era, work technology – including video conferencing, document collaboration tools, virtual desktops and messaging apps – is not just a collection of tools for helping to get work done. Rather, it is the glue that holds organizations together.

If the right technology is used in the right way, it can empower employees to work in the way that they want, help to upskill newer or more junior members of the team, and equalize performance. Today, work tech has the potential to empower employees to do their best work.

This is the focus of our tech empowerment pillar, based on opinion research data including:

- The extent to which employees feel their work technology enables them to work effectively and in the way that they want;
- The extent to which work tech is as intuitive and easy-to-use as personal technology;
- The equality of the tech available at home and in the office;
- The extent to which work tech is driving inclusivity through equal access and asynchronous team collaboration;
- The extent to which tech is enabling rapid upskilling and helping employees to get proficient at new tasks quickly.

Organizations are performing well in tech empowerment. It is the second-highest scoring pillar, according to both business leaders (72) and employees (75). Hybrid workers register a higher score here (77) than in-office (72) and remote workers (75). On a sector level, tech companies score highest according to employee data (80) while government and public sector companies score lowest (72).

Some workers are still facing a level of tech friction, however, with employees reporting that they are losing time each day due to tech challenges like restoring lost files and resetting forgotten passwords. This could be partly due to the high number of different apps and platforms that knowledge workers are juggling: on average, business leaders say that they use six different apps and platforms each day for work, while employees use an average of five.

Organizations' tech empowerment scores (out of 100)

Country	According to business leaders	According to employees
USA	76	75
UK	76	79
Australia	77	78
Netherlands	68	74
Germany	66	74
Mexico	74	81
France	69	71
Japan	65	67

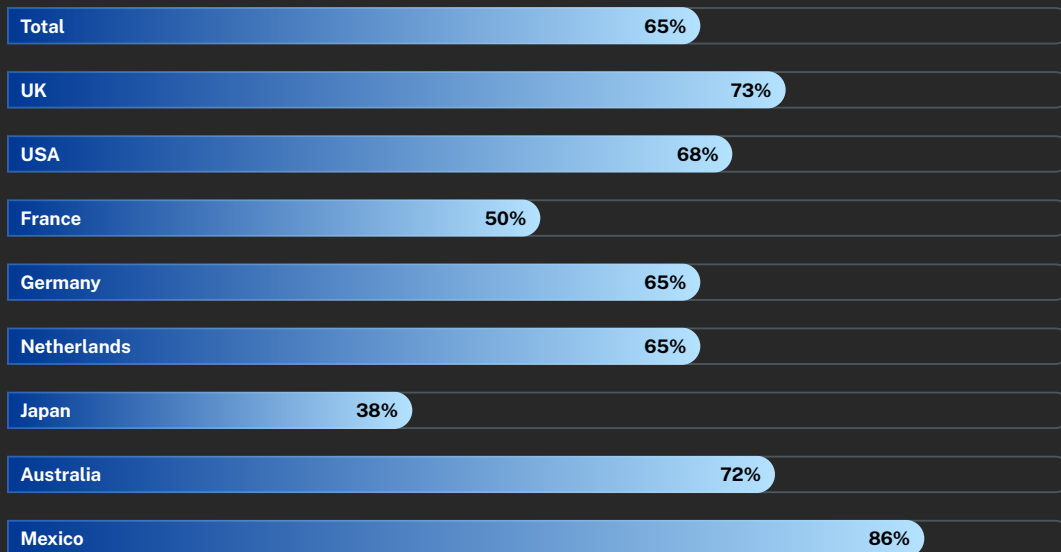
Sector	According to business leaders	According to employees
Manufacturing	72	75
Telecommunications / Media / Technology	74	80
Government / Public sector	71	72
Education	71	73
Financial services	78	74
Healthcare & Life sciences	70	73
Retail	68	76
Professional services	71	76

Tech in two places

Hybrid workers are more likely than either in-office workers or fully remote workers to say that they feel empowered by their work technology. Sixty-eight percent of hybrid workers say that their work tech enables them to work effectively, in the way that they want, compared to 60% of in-office and 65% of remote workers.

This is interesting given that most employees say that there is no difference between their in-office and at-home technology. Eighty-five percent of hybrid employees say that the same technology is available to them whether they are at home or in the office. This suggests that it is not necessarily about what technology employees have access to, but more about having the freedom to use it how and where they want.

The proportion of employees that feel empowered by their work technology



“One of the fundamental shifts for the future of work will be IT departments prioritizing focus on people instead of just tools and technology. More and more organizations are using techniques like design thinking to really understand the needs of employees and then leveraging the right technologies to deliver the right experiences.

The reality is, today’s work environment is complex, distributed, and cluttered with an array of apps, communication channels, and devices that are disrupting employees and negatively impacting productivity and engagement. Business and IT leaders need to drive strategies to simplify and streamline work technology in this hybrid world, ensuring that employees have the space for ‘deep work’ and focus.”

Safi Obeidullah

Global Head of Value Advisory, Citrix

Is work catering mainly to Millennials?

Tech expectations are escalating rapidly, especially as younger, digital native employees increasingly dominate the workforce. With a host of intuitive apps at our fingertips helping us to manage every aspect of our lives, we might expect work apps to seem clunky in comparison.

The study shows that many feel that work tech is in fact managing to keep up: over three in five employees (64%) and business leaders (62%) say that their work tech is as easy-to-use and intuitive as the tech they use in their personal life. But this is not consistent across the generations, with younger and older employees less enthusiastic: 56% of Generation Z employees

(aged 18-23) and 63% of Generation X employees (aged 40 to 54) say that their work tech is as intuitive as their personal tech, compared to 70% of Millennial employees (aged 24-39). While 73% of Millennial employees say that their company meets their expectations in terms of the level of IT that is provided, this falls to 62% of Generation Z employees. The higher level of tech satisfaction amongst Millennials may partly explain this generation’s higher level of engagement with their organizations. Business leaders need to ensure that they are considering the needs and expectations of different demographics and generations, and in particular thinking about how their technology needs to evolve to meet the requirements of their youngest workers.

Tech empowerment and IT satisfaction by generation

	Generation Z (18-23)	Millennials (24-39)	Generation X (40-54)
Employees who feel empowered by their work technology	56%	70%	63%
Employees who feel their company broadly meets their IT requirements	62%	73%	68%

As the boundaries between work and personal life merge, the boundaries between work and personal tech are blurring too. Over half of employees (52%) say that the difference between personal and work tech is becoming less clear, and admit they are using their own equipment and installing apps themselves for work purposes. There is perhaps a lack of awareness of this shift amongst business leaders: only 20% of leaders believe that this blurring is taking place amongst their employees.



Tech levels the playing field

Leaders and employees are also positive about the power that work tech has to drive inclusivity and equalize performance:

- 71% of employees say that work tech enables them to rapidly upskill and to get proficient at new tasks quickly.
- 64% of employees say that sophisticated work tech means they can perform at the same level as colleagues who have more experience or are more senior to them.
- 68% of business leaders say that technology now enables new or more junior employees to rapidly become competent and effective at work.
- 64% of business leaders and 69% of employees believe that work technology can drive inclusivity through equal access and asynchronous* team collaboration (*any time, any place).

Pillar 2

Connection and collaboration



In a hybrid world, work connections – between co-workers and between employees and their organization – are largely digital. The pandemic period has proved that work tech is up to the challenge, with creativity and collaboration continuing to thrive even when in-person interactions have been impossible.

Citrix's 2021 [Era of Hyper-Innovation](#) study – which looked at collaboration and innovation in a remote-working world – found that most business leaders were positive about the potential for tech-enabled hybrid collaboration. Almost nine in 10 business leaders (88%) said that the recent rollout and adoption of new work tech tools had vastly improved company collaboration, and 80% expected their organization to enter a hyper-innovation phase due to tech-powered hybrid working, generating more ideas than ever before.

The connection and collaboration pillar of this study focuses on organizations' effectiveness at tech-enabled collaboration. It draws on opinion research data including:

- The extent to which employees are able to collaborate effectively (in different scenarios: all in the office, all remote, or a combination);
- The extent to which the organization has the tech it needs to support effective collaboration;
- The strength of connection that employees believe they have to their organization and leadership team, and to their direct team and immediate colleagues.

This is the pillar where companies perform best, according to both employee (76) and business leader data (74). The tech sector once again takes the lead based on employee data, although financial services companies score best according to their leaders.

Organizations' connection and collaboration scores (out of 100)

Country	According to business leaders	According to employees
USA	81	76
UK	78	80
Australia	80	79
Netherlands	71	74
Germany	69	73
Mexico	72	81
France	69	73
Japan	68	69

Sector	According to business leaders	According to employees
Manufacturing	73	75
Telecommunications / Media / Technology	79	81
Government / Public sector	73	72
Education	72	74
Financial services	82	75
Healthcare & Life sciences	72	74
Retail	72	78
Professional services	72	76

In-person is still in play

Although most leaders and employees feel that collaboration is taking place successfully whether employees are together in the office, working remotely or hybrid-working, they also feel that in-person interactions have an important role to play. Sixty-three percent of business leaders and 69% of employees say that in-person interactions are essential for emotional well-being. Additionally, 61% of both employees and leaders say that creativity and innovation is enhanced when working face-to-face. This could help to explain higher levels of engagement and well-being amongst hybrid workers, who are

benefiting from the flexibility of remote work, while also enjoying the psychological benefits of in-person working.

In fact, hybrid workers feel the strongest connections to their organizations and colleagues. Seventy-one percent of hybrid employees say that they have a strong emotional connection to their direct team and immediate colleagues, which motivates them to work harder, compared to 63% of in-office workers and 60% of remote workers. Seventy percent of hybrid workers say they have a strong emotional connection to their organization and leadership team, compared to 58% of in-office and 60% of remote workers.

Tech companies ace collaboration

Tech companies excel at hybrid collaboration: 70% of tech employees report that remote and hybrid working has not impacted their ability to effectively collaborate, compared to 56% across all sectors. Seventy-nine percent of tech employees agree that technology is driving supercharged innovation in a hybrid working world, compared to 67% across all sectors.

Next step – the metaverse

Potentially, there is another period of significant work tech disruption on the horizon. Although our study shows that digital collaboration is working effectively, businesses are increasingly exploring the potential for the metaverse – a network of 3D virtual worlds – to further transform workplace collaboration. Both business leaders and employees believe that this is imminent and will be hugely impactful: 74% of business leaders and 61% of employees believe that the metaverse will completely revolutionize workplace collaboration and make physical in-person collaboration unnecessary.

However, youngest workers are the least likely to believe that in-person collaboration is on the brink of extinction: only 52% of Generation Z employees (aged 18-23) think that the metaverse will revolutionize collaboration, compared to 68% of Millennials (aged 24-39) and 58% of Generation X (aged 40-54).

Many believe that this change is just around the corner: 67% of business leaders and 52% of employees believe that by 2025, physical in-person work collaboration will be completely replaced by virtual collaboration, despite the emotional and well-being benefits of in-person collaboration.



“We are at the early stage of another significant shift in both the capability and opportunity of the Internet. We are seeing the beginnings of ‘extreme collaboration’ where tech enables us to collaborate in ways that we have never seen before and promises to reconfigure the relationships between colleagues and teams.

The evolution of the metaverse will have a massive impact, solving issues that we still have with hybrid collaboration. Primarily, it will provide ‘presence’ and true immersion. Second, it will provide incredible opportunities for businesses to create new commercial models. We have become used to flat, 2D digital collaboration that puts everybody in a box on a screen, but the metaverse will unleash us into a 3D collaboration space with vast potential. In the new working world, virtual worlds will be a key part of keeping employees upskilled, engaged and productive.”

Christian Reilly
VP, Technology Strategy, Citrix

Pillar 3

Flexibility and fluidity



In the new working world, the boundaries of work flexibility have expanded dramatically.

Previously, flexible working may have meant little more than the ability to slightly flex hours or occasionally work-from-home. Now, many knowledge workers expect a new, radical flexibility that enables them to shape their work to suit their own working styles and to fit around their personal lives and commitments. They also expect their employers to take a holistic view of their needs: 67% of employees are more interested in benefits that support 'key life events' such as paid time off for the birth of a grandchild, fertility treatment, loss of pregnancy, menopause, or new pets, rather than perks that improve in-office experience like free food and activities.

With offices reopening, new boundaries need to be negotiated. While the work tech is in place to enable effective working from any place at any time, the study shows that organizations still have some way to go in terms of offering the level of flexibility that employees expect.

Overall, this is the lowest-scoring dimension, according to both business leader (62) and employee data (66).

The flexibility and fluidity pillar of this study focuses on the degree of choice that organizations are providing to their employees in terms of how, when and where they work. It draws on opinion research data, including:

- The degree to which employees have flexibility over their working location;
- The extent to which employees have flexible working hours;
- Whether organizations are offering employees the level of flexibility that they expect;
- How attitudes to flexibility are impacting retention and recruitment of employees.

Organizations' flexibility and fluidity scores (out of 100)

Country	According to business leaders	According to employees
USA	63	65
UK	64	68
Australia	66	67
Netherlands	61	66
Germany	60	63
Mexico	64	70
France	59	64
Japan	58	64

Sector	According to business leaders	According to employees
Manufacturing	61	65
Telecommunications / Media / Technology	65	69
Government / Public sector	63	65
Education	64	64
Financial services	65	65
Healthcare & Life sciences	59	66
Retail	58	67
Professional services	62	65

Wherever, whenever?

Despite much discussion about people moving further away from urban centers during the pandemic, no longer tethered by the need to come into an office each day, our study finds that 82% of knowledge workers still live within daily commuting distance of a company office. This is perhaps not surprising given that only 27% of business leaders say that they offer their employees complete flexibility in terms of working

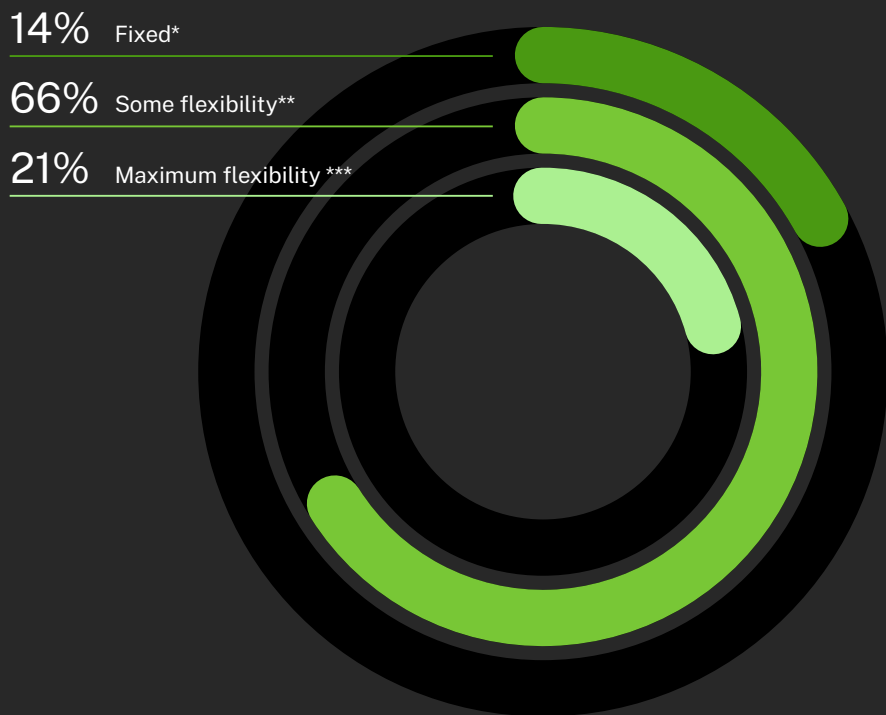
location, allowing most of their employees to work in the office or remotely at any time and under any pattern that suits them.

Meanwhile, 38% offer some working location flexibility and 28% impose complete office-working. Only 6% of employers say that they currently offer no office option. Levels of complete working location flexibility are highest in the UK (36%) and lowest in Japan (13%) and Germany (19%).



Working hours

The level of working hours flexibility currently offered to the majority of employees, according to business leaders



14%

Fixed*

66%

Some
flexibility**

21%

Maximum
flexibility***

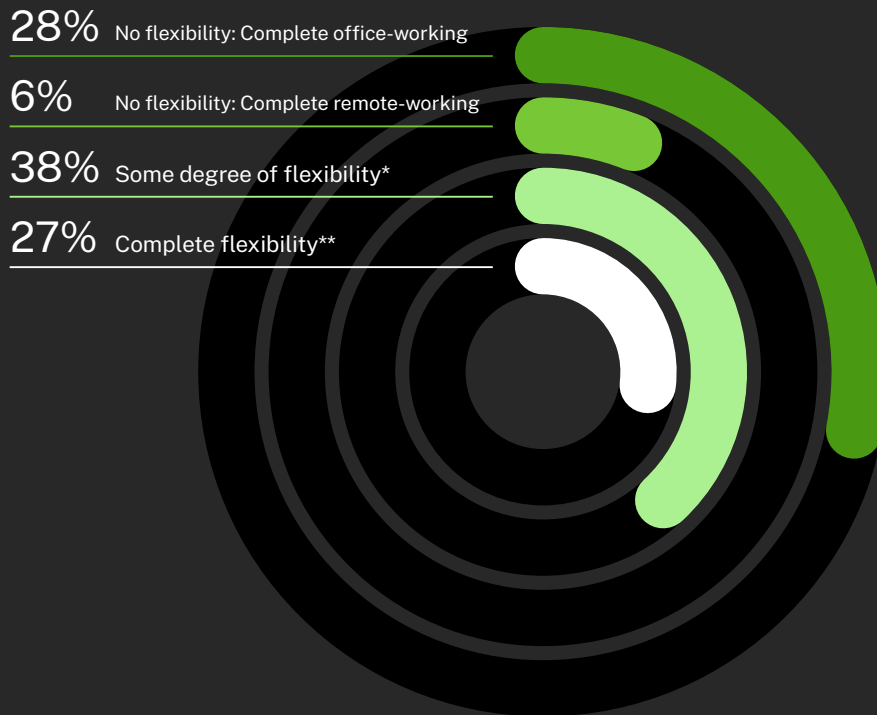
*Employees have specific, contracted hours (e.g. between 9am and 6pm each day) and are expected to work these hours

** There is some flexibility (e.g. in terms of start and end hours and/or lunchbreaks), but employees are expected to be working/available between core hours (e.g. between 9.30am and 4.30pm)

*** There are no set hours - employees have autonomy over when they complete their work and which hours they work each day (within reason and ensuring that they are available for meetings etc.)

Working location

The level of working location flexibility currently offered to the majority of employees, according to business leaders



28%

No flexibility:
Complete
office-working

6%

No flexibility:
Complete
remote-working

38%

Some degree
of flexibility*

27%

Complete
flexibility**

*Employees have a choice about where they work but we have guidelines/recommendations around how often they come into the office.

**Employees can work in the office or remotely at any time and under any pattern that suits them.

Finding balance

What is the ideal, if knowledge workers can spend as much or as little time in the office as they wish? Organizations shouldn't fear a mass office exodus if they don't mandate office working, although neither can they expect to fill the desks every day. The majority of both employees and business leaders say that – if they had the freedom to work in the office as often as they chose – their ideal number of days in the office on an average week would be two or three. Collaboration with colleagues is the most popular reason for coming to the office for both leaders (62%) and employees (51%). Meanwhile, considerations like better tech, more learning and development opportunities and other facilities are not very impactful.

For employees who would prefer complete remote working, the most popular reason is to save time by avoiding the commute (69%). Worryingly, however, 52% of the women who would rather not come into the office give the reason that they feel safer at home, compared to just 33% of men. [Studies have shown](#) that women are generally more worried about Covid-19 than men, so the risk of getting sick may be causing women to feel the office is an unsafe environment. But women's safety concerns may also extend beyond Covid-19. Organizations will need to make efforts to ensure that all employees feel safe and comfortable in the office, and leaders will need to understand and address the safety concerns of their employees if they want to encourage workers back to their desks.



What are your motivations for coming into the office?

Collaboration with colleagues

51%

Meeting with customers/partners

40%

It provides separation of home and work life

37%

Dedicated workspace

33%

Greater access to senior leadership

32%

I am more productive in the office

29%

More learning and career development opportunities

27%

Escaping distractions of working from home/remotely

26%

Better technology

23%

Faster/more reliable internet

20%

Other facilities available e.g. gym, cafeteria

18%

The office location makes it easier to run errands

17%

Fear of missing out

12%

Flexible expectations

Leaders are aware that they need to offer work flexibility in order for their organizations to attract and retain top talent: 63% say that flexibility is becoming a key determinant in the job market, and that companies that fail to offer enough flexibility risk losing the best candidates. But business leaders are struggling to let go of preconceptions around flexibility, with many still feeling that it has a negative impact on business. Almost two-thirds of business leaders (64%) say that employees now expect a higher degree of flexibility than they can accommodate from a business perspective, and 59% feel that increased flexibility in the working world is

negatively impacting the quality of customer service that businesses provide. Strikingly, 62% of business leaders say that employees who take advantage of flexible working options are less likely to progress quickly in their careers.

As work technology now makes work 'anywhere, anytime' easy and effective, it is important for business leaders to reassess their perceptions of flexibility, and consider whether flexible working is really harming their company performance. With flexibility now a dealbreaker for employees, businesses that do not embrace this move to greater flexibility risk losing out.



“The employer-employee social contract has changed dramatically. The previous work narrative of “work for us and we’ll pay your wages” has gone – employees now expect their employers to offer flexibility and well-being support. It’s an employee’s market right now as companies compete for talent. Offering flexibility benefits that apply to both remote and in-office workers is a baseline, and companies not offering it will struggle to compete.”

Traci Palmer

VP, People and Organization Capability, Citrix

Pillar 4

Trust and empathy



Trust between employees and organizations has taken on a new significance over the last two years. Business leaders have been forced to trust their employees even when they can't see them, and employees have needed to trust their leaders to treat them fairly and sympathetically as they navigate difficult situations such as home-schooling and sickness.

The importance of empathetic, human-centered leadership has become clear. Seventy-two percent of employees say that it is crucial that they work in an organization where the leadership and culture is empathetic and compassionate, and 70% say the experience of the pandemic has made it clear that empathy is a critical leadership quality.

Leaders also believe that their workforce needs to have these qualities: 60% of business leaders say that when deciding whether to award promotions, an employee's empathy and emotional intelligence are as important as their technical skills and concrete achievements. The extent to which employees trust their employers to be transparent with them and to treat them fairly and with respect.

However, the 'trust and empathy' pillar is the second-lowest scoring pillar in our study, based on both business leader (69) and employee (73) data. Again, hybrid workers are happier here: the responses from hybrid workers produce a score of 74, compared to 71 for in-office workers and 72 for remote workers.

This pillar is based on opinion research data including:

- The extent to which employees feel their employer trusts them (i.e. believes that they will complete their work and abide by company rules without needing to be checked or monitored);
- The extent to which employees trust their employers to be transparent with them and to treat them fairly and with respect.

Organizations' trust and empathy scores (out of 100)

Country	According to business leaders	According to employees
USA	72	75
UK	69	76
Australia	72	73
Netherlands	65	71
Germany	67	72
Mexico	70	76
France	66	70
Japan	68	65

Sector	According to business leaders	According to employees
Manufacturing	68	71
Telecommunications / Media / Technology	71	76
Government / Public sector	69	72
Education	67	71
Financial services	73	72
Healthcare & Life sciences	69	73
Retail	69	74
Professional services	68	72

Two-way trust falters

Eight in 10 of employees say it is very important to them that they can trust their employer to be transparent and honest with them and to treat them fairly and with respect. However, just 49% of employees say that they currently trust their employer. Levels of trust are highest amongst hybrid workers: 57% trust their employer, compared to 41% of office workers and 42% of remote workers. Parents – who have perhaps needed to trust their employer more than most during the last two years – have strikingly low levels of trust: 39% of parents *don't* trust their employer, compared to 27% of employees without children².

The relationship is working better the other way round: organizations have relatively high levels of trust in their employees, and employees feel confident that this is the case. Sixty-seven percent of leaders say their organization trusts their employees, and 76% of employees feel trusted by their employer. But how deep does this trust really run? Half of business leaders believe that when employees are 'out of sight' of colleagues and management they do not work as hard, rising to 62% of UK business leaders and 70% of leaders in the financial services sector.

Tech triumphs

Across all sectors in the study, fewer than half of employees trust their employer, yet this rises to 79% of tech employees. This high level of trust in the tech sector may be linked to tech organizations' success at managing hybrid work effectively, with high levels of tech empowerment, effective collaboration and enhanced flexibility.

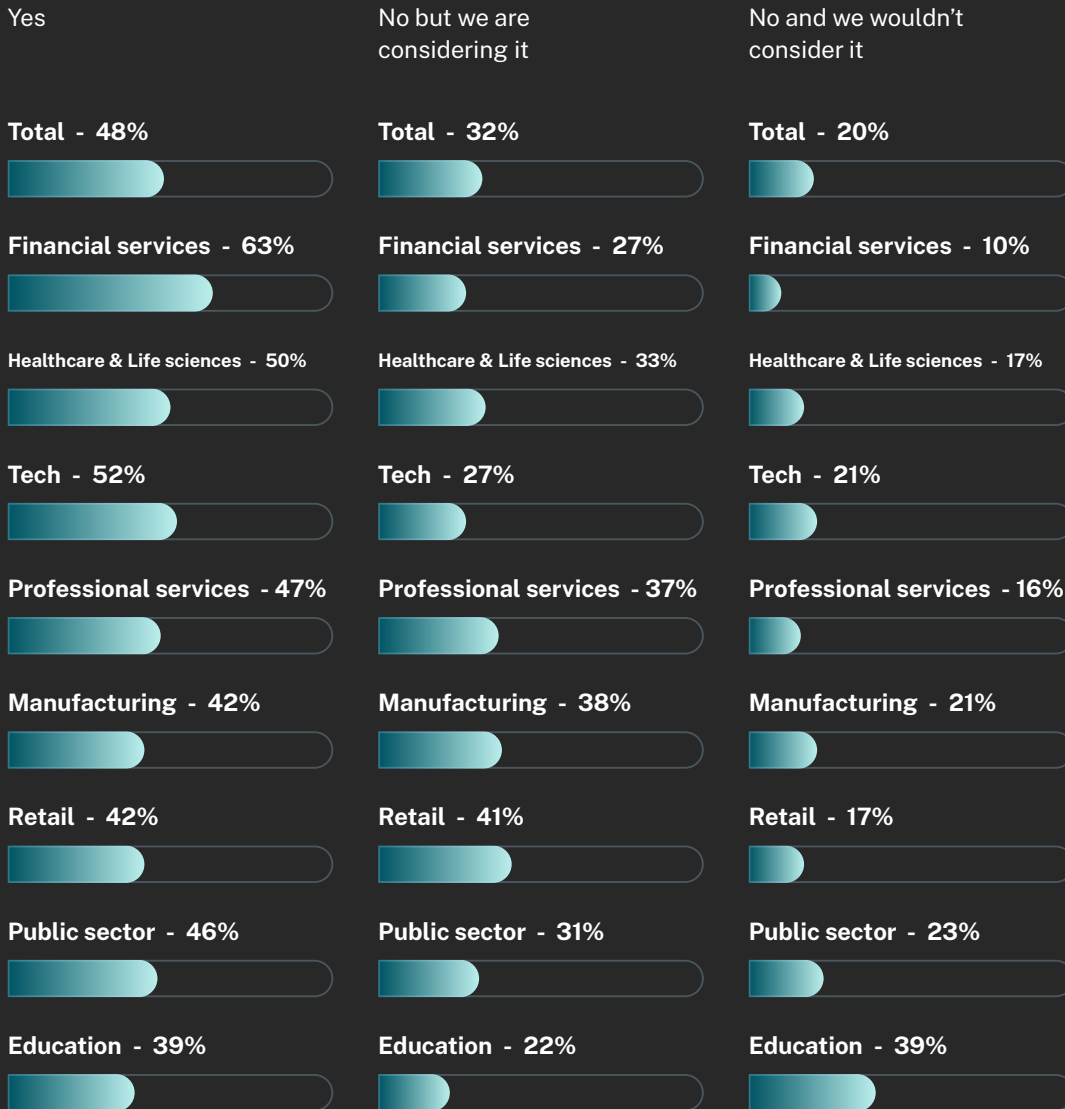
² A proportion of respondents answered this question neutrally, i.e. they neither said they trusted nor didn't trust their employer.

The era of employee monitoring

This discomfort with employees being 'out of sight' is leading to many organizations using digital tools to keep an eye on their staff remotely. Almost half of business leaders (48%) say that they have installed monitoring software on their employees' computers to check when they are working and what they are doing, and 32% say that they are considering doing so, meaning that a total of 80% of business leaders have either installed monitoring software or are considering it.



Has your organization installed monitoring software on your employees' computers to check when they are working and what they are doing?



Levels of current monitoring are highest in the US, where 60% of business leaders have installed software and in the financial services sector, where 63% of organizations are monitoring their employees.

What is driving this monitoring? Forty-four percent of employers who have installed software say they wanted more accurate data on their employees to optimize performance and productivity, 39% wanted to ensure employees were adhering to compliance and data security protocols, and 36% felt that employees would work harder if they were monitored.

However, it seems that many employees are unaware they are being monitored, giving rise to significant privacy implications. Globally, just 34% of employees believe their company has installed monitoring software on their computer. Of those who did know, 44% felt fine about it and 38% were a little concerned. Only 19% were very concerned.

Conclusion

For decades, the possibility of widespread hybrid working – working in a flexible way, between office spaces and remotely – was discussed but never fully took hold. The pandemic changed everything.

The new, hybrid working world is one that promises a better balance for employees. Employees expect radical flexibility and an enhanced work-life balance. They rely on always-on tech that empowers them to work and collaborate with colleagues wherever and whenever they choose.

But while tech is enabling effective remote-working and hybrid collaboration, there are several challenges still to solve. Flexibility and trust are arguably the key to making long-term hybrid work successful and fulfilling, but this study shows that these are the areas where there is the most work to do.

Leaders need to focus on demonstrating empathy, building trust, and providing employees with the flexibility they expect without worrying that this could jeopardize company performance.

To do this, organizations must implement solutions – both tech and people-focused – that help them balance what might appear to be competing priorities. Some cultural issues remain to be resolved, some outdated definitions of work still need to be addressed, and further tech tools and integration need to make work even smoother and more intuitive. Organizations that do not keep up with their employees' new working expectations risk missing out on the best talent. But the companies that perform well will be set up for success in the new world of work.

Detailed methodology

Assessing organizations' hybrid work effectiveness

This study looks at how companies are performing against four key pillars of hybrid effectiveness:

- Tech empowerment
- Connection and collaboration
- Flexibility
- Trust and empathy

The pillars were chosen and developed based on literature reviews and expert insights. We believe they are critical aspects for creating a positive employee experience and a flourishing organization in today's working world.

To assess how organizations are performing in each of these pillars, we ran our opinion research data through a bespoke scoring system (details on the inputs for each pillar below) to produce scores for each pillar and an overall score for hybrid work effectiveness (an average of all four pillars).

Scores were calculated from both the business leader and the employee data, to produce a snapshot of organizational performance according to each group. Scores were also calculated for different demographic groups, including sectors and countries.

Several relevant questions are used to build each pillar. For example, for the flexibility pillar, organizations will score higher according to their employees if a high proportion of employees say that their employer offers them a high degree of working location flexibility and that they have a high degree of flexibility over their working hours (amongst other factors).

The raw scores have been indexed so that each score is out of a possible 'perfect score' of 100. Repeating the study at future dates will enable us to track movement and changes.

Further detail on each pillar

The opinion research data that the **tech empowerment** pillar is based on includes:

- The extent to which employees feel their work technology enables them to work effectively and in the way that they want;
- The extent to which work tech is as intuitive and easy-to-use as personal technology;
- The equality of the tech available at home and in the office;
- The extent to which work tech is driving inclusivity through equal access and asynchronous team collaboration;
- The extent to which tech is enabling rapid upskilling and helping employees to get proficient at new tasks quickly.

The opinion research data that the **connection and collaboration** pillar is based on includes:

- The extent to which employees are able to collaborate effectively (in different scenarios: all in the office, all remote, or a combination);
- The extent to which the organization has the tech it needs to support effective collaboration;
- The strength of connection that employees believe they have to their organization and leadership team, and to their direct team and immediate colleagues.

The opinion research data that the **flexibility and fluidity** pillar is based on includes:

- The degree to which employees have flexibility over their working location;
- The extent to which employees have flexible working hours;
- Whether organizations are offering employees the level of flexibility that they expect;
- How attitudes to flexibility are impacting retention and recruitment of employees.

The opinion research data that the **trust and empathy** pillar is based on includes:

- The extent to which employees feel their employer trusts them (i.e. believes that they will complete their work and abide by company rules without needing to be checked or monitored);
- The extent to which employees trust their employers to be transparent with them and to treat them fairly and with respect.

Further reading

FIELDWORK

Research and stories to transform the way we work

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INFOGRAPHIC

Surviving or Thriving? IT Perceptions for 2022 – International survey of IT leaders from Fieldwork by Citrix and Pulse

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REPORT

The Era of Hyper-Innovation: How business leaders expect corporate creativity to reach new heights in the post-pandemic period

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E-BOOK

The state of remote work: A guide for leaders looking to navigate new norms in the world of remote work

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Thank you