

The state of
hybrid working:
An analysis of
hybrid trends
in UK businesses

Teleware



Introduction

01

The Teleware hybrid work survey was commissioned to track the prevalence and impact that hybrid working is having on UK businesses at the end of 2022.

More than 550 employees and managers took part in the first Hybrid Working Survey, providing rich insights into the changing working landscape affecting businesses across the UK.

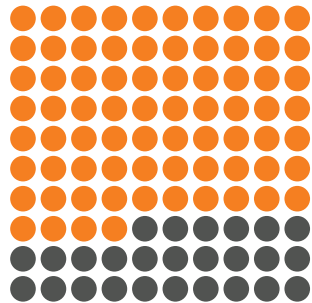
Teleware commissioned research from Censuswide, looking at the attitudes towards and implementation of hybrid working across the UK. This insight paints a picture of where hybrid is now and provides indications of where it needs to go next.

Hybrid working is now ubiquitous across organisations in the UK, but the speed of roll out means many could be missing the benefits in terms of reducing staff churn, improving collaboration and productivity and increased employee wellbeing.

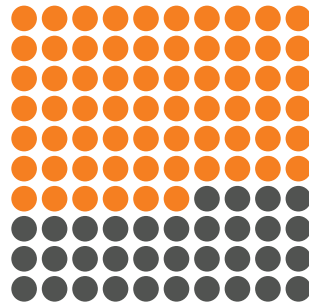


Key Findings

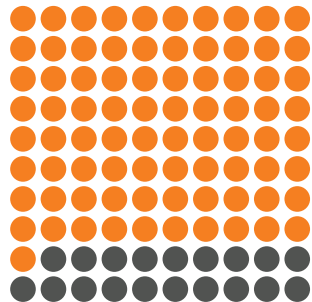
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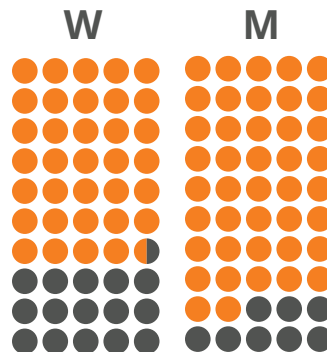
74% of respondents work for businesses that offer hybrid working



66% of people work for businesses that offer hybrid working to less than half of their employees



81% of business leaders see hybrid as business positive



Fewer women (69%) have access to hybrid work than men (84%)



The rise of hybrid working

03

The pace of recent change in the way we work in the UK has been extraordinary.

In pre-pandemic 2019, the Office for National Statistics (ONS) reports that just one in eight (12%) UK employees were based from home at some point in their working week. In 2022, 38% (that's around 10 million people) report hybrid working.

Hybrid working is here to stay – and it's easy to see why. Research from Teleware shows that, overall, 74% of respondents feel hybrid is good for their business:



81%

of business
leaders see
hybrid as
business
positive



40%

of CEOs and
MDs see
productivity
boosts



48%

of respondents
see hybrid
reducing costs



52%

of respondents
report hybrid as
improving
employee
wellbeing

Hybrid for necessity or hybrid by design?

04

Businesses offering hybrid working because they feel they have to due to employee demand or because other businesses are offering it risk falling into the trap of taking an IT-centric hybrid working approach.

This is when IT systems set up in the pandemic or even pre-pandemic are assumed to be ok for hybrid working at scale across their organisation. This model is often not aligned to business strategy and lacks clearly defined hybrid working goals and outcomes.

However, when businesses take an employee-centric approach, understanding the reasons for offering hybrid work and they use it to support business strategy, greater opportunities abound.

Under-investing in effective hybrid work technologies can have significant impacts on businesses and can prove to be counter-productive from a cost-saving perspective in the long run.



Security risks

Important to consider network security as employees use myriad networks on any given day.



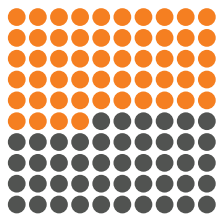
Staff churn

Frustrated employees will push up churn rates. The cost of recruitment and training could outweigh savings made elsewhere.

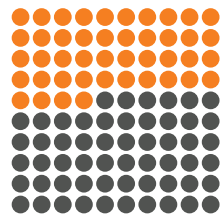
Hybrid for necessity or hybrid by design?

05

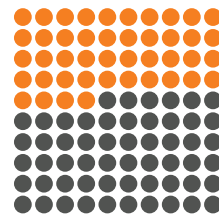
The more logical step is for a business to provide a portfolio of technologies and protocols for effective hybrid working. Teleware research reveals that this approach is starting to be adopted across industry sectors. The most popular investments by businesses in hybrid working have been:



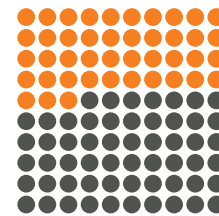
54%
upgraded or
introduced
communications
software, such
as Teams, Zoom
and Google
Meets



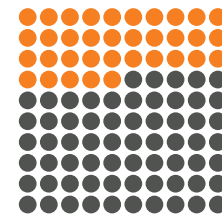
44%
upgraded or
introduced
collaboration
software, such
as Slack



44%
improved
remote
connectivity



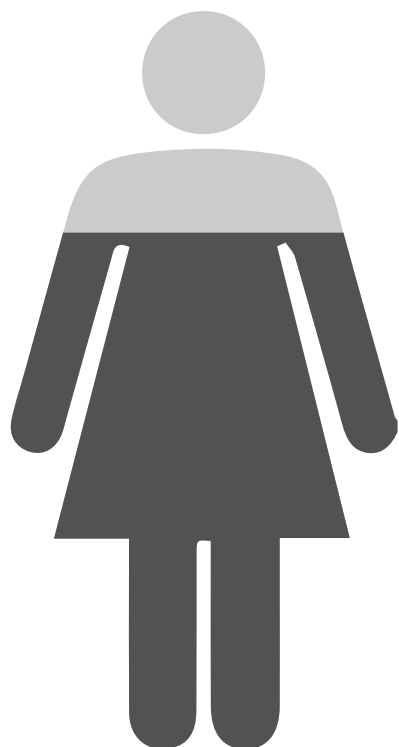
43%
invested in new
hybrid-capable
hardware, such
as laptops



35%
enhanced
remote
security
systems

Teleware research reveals a gender divide, with 69% of women working for organisations offering hybrid working, compared to 84% for men.

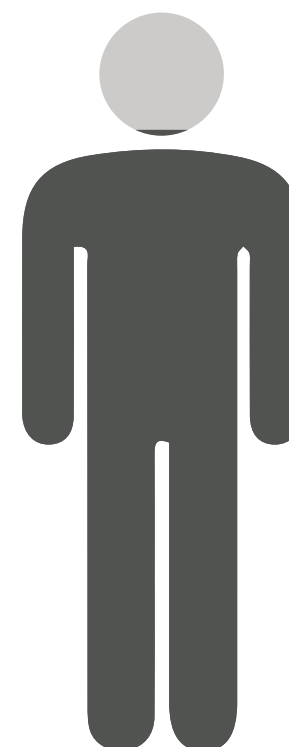
69%



This may be because sectors where female employment is highest – such as health and social care (78%) and education (70%) – are traditionally seen as ‘onsite’. This reasoning falls down, however, given that 81% of workers in manufacturing – another onsite, but this time male dominated, sector – are offered hybrid.

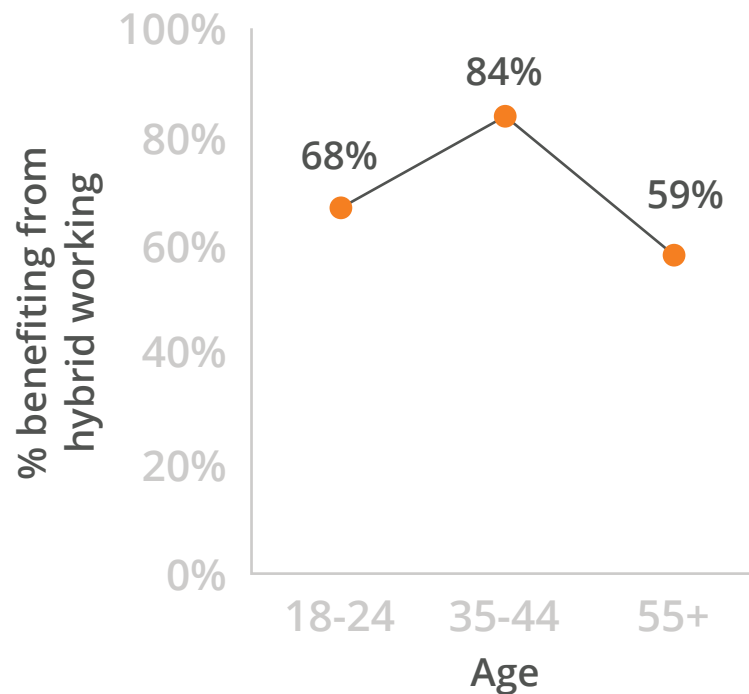
The fact is, hybrid offers as many opportunities to working women and their employers as it does to working men. With huge recruitment challenges, particularly in female dominated sectors, failure to meet employee needs threatens to exclude some of the UK’s 15 million working women. Companies need to optimise hybrid if they are to attract and retain this incredibly valuable resource.

84%



Teleware research also reveals age variations, with fewer opportunities for the youngest and oldest workers.

Who is benefitting from hybrid work by age group



There are many possible reasons for this, but denying the future workforce, or increasingly valuable and experienced employees, access to the benefits of hybrid working puts them at a disadvantage in a competitive employee market.

This can prove costly, as research suggests that just 6% of UK workers want to return to the office full time and a third were considering quitting in 2022. Failing to meet employee requirements - of any age - adds to the number of growing workforce challenges.

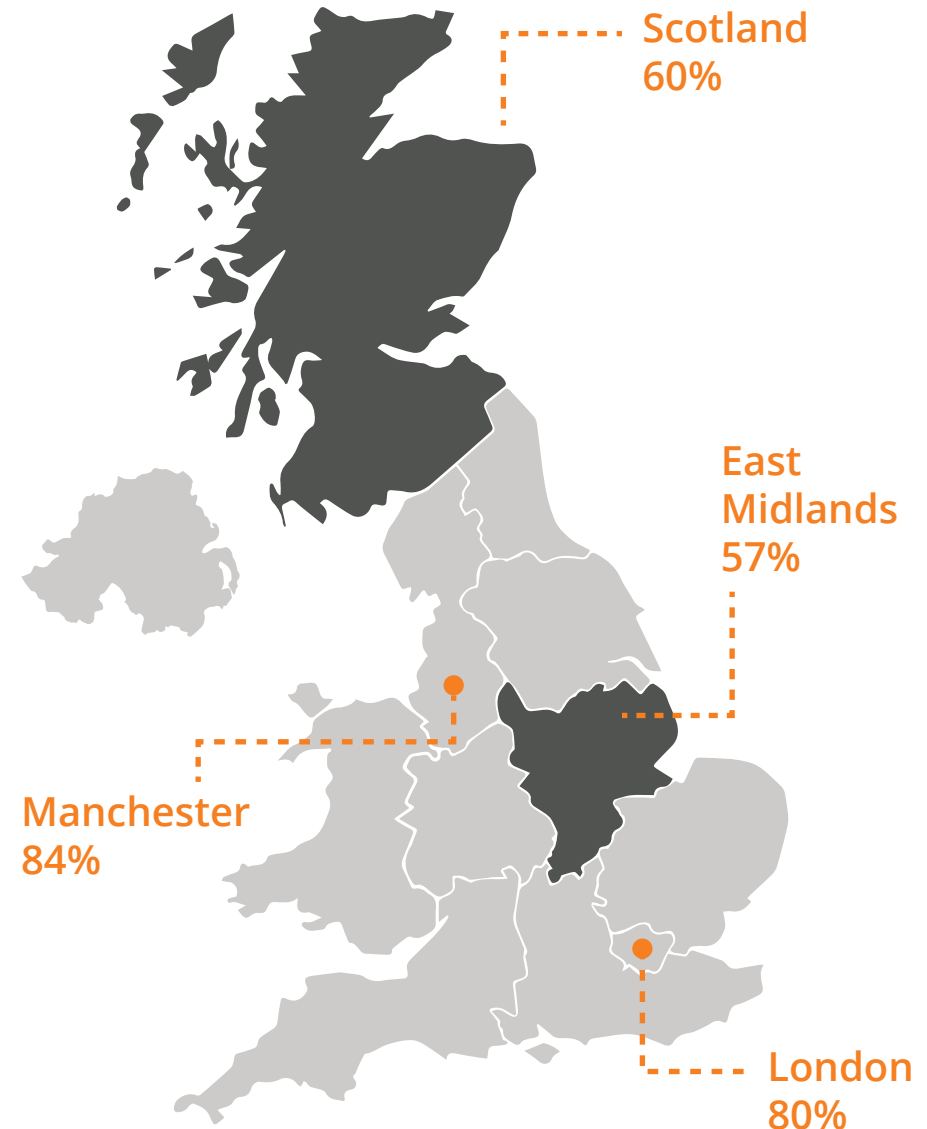
Postcode disparity

08

There are significant variations in the approach to hybrid working in different regions and cities across the UK. The familiar north-south divide however doesn't play out in the Teleware survey data:

Manchester (84%), for example, edges **London (80%)** in terms of access to hybrid working in cities.

Worryingly however, some parts of the UK are slow to respond to hybrid transformation. **Scotland (60%)** and the **East Midlands (57%)**, for example, are significantly off the pace and well below the 76% national average. Falling behind could be painful, in terms of business costs, employee happiness and worker attrition – exacerbating entrenched regional variations in innovation, opportunity and wealth creation.



With variation across gender, age and geography, it's unsurprising that there are significant differences within companies.



12% of companies
offer hybrid to more
than three quarters of
their workforces



66% offer it to fewer
than half their
employees



Close to one in four
24% don't offer it at all

Reasons for this are similarly varied. They include a lack of trust in staff to be as productive when working from home. This is despite multiple studies – such as those from the Universities of Oxford and Warwick – showing data to the contrary. Barriers to equitable access could also be perceived in available technology solutions and the cost of complexity of implementation – despite the evolution of optimised hybrid technologies.

Access to all?

These barriers are further highlighted in another recent study from Microsoft and LinkedIn – and the damage that assumptions around issues such as productivity and technology can do to a company's worker morale, productivity and talent acquisition. Microsoft's CEO, Satya Nadella, talks about the importance of managers overcoming "productivity paranoia" and the need to nurture workforces: to "re-energise them, re-recruit them [and], help them form social connections."

This study also finds that the hybrid trend is unstoppable, with Generation Z employees willing to walk away from jobs that don't offer them the working experiences they want. The report reveals that there has been a 90% increase in Gen Zs looking to change jobs on LinkedIn, against an overall average of 50%, during what it describes as the Great Reshuffle following the pandemic. Microsoft, which is fully embracing hybrid working technologies and policies, reports that feelings of "inclusion" at the company are now at a record 90%.



Teleware's survey data also reveals interesting results around those most and least worried about the business impact of a move towards greater hybrid working.

Perhaps the most surprising statistic is that IT decision makers – who are tasked with executing the transition – are the most optimistic when it comes to hybrid's business benefit.

Who sees hybrid as business positive?

87%



IT decision makers

81%



CEOs/MDs

71%



Senior HR staff

Positives and negatives

12

Most senior job roles within businesses have a largely positive view when asked if they believe hybrid work is good for their business, 86% of CEOs and 83% of Managing Directors answered positively. However, attitudes differed in financial roles where just 67% answered positively.

Teleware's research makes it clear that, while an incredible practical success, hybrid systems that were developed at speed in the aftermath of Covid-19 lockdowns are proving to be disjointed and disconnected from business strategy. This further highlights the need to align hybrid strategy with the wider business strategy. Hybrid therefore becomes an enabler to delivering business growth.

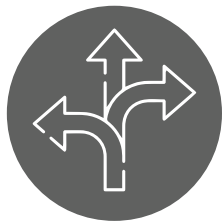
As we have now moved on from Covid-19 restrictions, it is time to re-evaluate the needs of employees across the business, adapting hybrid practices and technologies to meet changing business requirements.



Hybrid work models

13

Not all hybrid work is the same and choosing the right model for your business depends on what you are looking to achieve. There is no right or wrong answer, it's about choosing the model that will work best for your business and your people.



Flexible hybrid work enables employees to choose where they work from on any given day of the week.



Fixed hybrid is when individual employees or teams have set days of the week where they will be office based.



Office-first hybrid work is when employees are mainly office based, but can work remotely on agreed days.



Remote-first hybrid work is where employees work remotely for most of the time with occasional visits to the office.

Hybrid work models

14

Choosing the right model for your business and then optimising it is a huge opportunity for organisations across all sectors to work in better ways.

Optimised hybrid work:



Attracts and retain the best talent.



Reduces recruitment and technology spend.



Empowers employees to do their best work, where they want or need to work from.



Increases productivity. Research from the Universities of Oxford and Warwick showing that happier workers are 12%-13% more productive.



Delivers seamless communication & collaboration experiences.



Reduces carbon emissions with less traveling.

A truly successful hybrid strategy ceases to be seen as the combination of two systems and simply becomes one. Hybrid shouldn't be seen as 'office plus': i.e. an assumption that the office is a base and remote is a bolt on.

To achieve these benefits, fully optimised hybrid working allows seamless interaction between multiple environments so that demarcations cease to exist.

Hybrid optimisation is where experiences become immersive, engaging and inclusive; where a portfolio of the latest technologies deliver effective hybrid working; where employee-centred policies support intuitive hybrid environments; and it's where Teleware now takes the technology.

Creating the ultimate hybrid work solution

Optimising hybrid work is achievable for every business, while the adverse implications of failing to deliver on its potential are very real.

More than 76% of UK companies already offer hybrid work, but the Teleware survey results indicate that almost two thirds offer hybrid to fewer than 50% of employees.

This could have major impacts on UK PLC's ability to leverage hybrid benefits, when UK firms need to seize competitive advantage more than ever before. And with only a third of firms planning in investing more in hardware or software tools to support hybrid working, we risk creating a chasm between employee hybrid working expectations and their day-to-day reality. The result will be moribund productivity, dissatisfied employees and higher employee churn.



Creating the ultimate hybrid work solution

16

There are big differences between 'basic' hybrid working and fully optimised, 'ultimate' hybrid working.



Basic hybrid

- is driven by technology rather than employee need
- has few defined goals and outcomes
- isn't part of the wider business strategy
- only offered out of necessity



Ultimate hybrid

- clearly defined goals and outcomes
- built around employee communication and collaboration needs
- employee well being front and centre
- cost savings understood and tracked
- hybrid by design



The next step

17

If you haven't already identified the hybrid work priorities for your business, we can help you do this with our **Ultimate Hybrid Work Workshop**. We will help you define your goals and objectives and provide you with a plan to help you achieve profitability gains through hybrid working.

We also offer a range of products and services that can be implemented to improve hybrid working in your business:

Cloud Contact Centre for hybrid working enables you too offer hybrid working for your contact centre employees, helping reduce costs and improve employee and customer experience.

Direct Routing using Microsoft Teams for voice provides a secure, cost-effective voice platform.

Unified Communications means you can get the most out of Microsoft Teams for every employee regardless of where they are working from.

ReCall is a second number app, eliminating the need for two mobile phones, improving the hybrid work experience for your employees.

[For more information about our hybrid work solutions click here](#)

Teleware software and services have enabled businesses to communicate with customers, suppliers and with each other for 30 years. We have a wealth of expertise to help your employees work securely and productively wherever they are. Whether it's migrating to Microsoft 365, optimising existing Microsoft technology, cloud communications software or compliant recording, we can help your business achieve so much more.

Now is the time to optimise hybrid for the ultimate working environment – to deliver immersive, engaging and inclusive working experiences.