

Employees are ready for hybrid work, are you?

Cisco Global Hybrid Work Study 2022



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Summary

In the two years since the World Health Organization declared COVID-19 a global pandemic on 11th March 2020, people’s lives have been upended.

Among the many changes has been to the way we work. While initially, many employees were challenged by the sudden shift to hybrid and remote working arrangements, our study shows that two years on, as businesses have pivoted to survive, hybrid work has yielded many positive and lasting benefits for both employers and employees. In fact, this mode of working has become the norm and is set to stay.

Our survey of 28,000 full-time employees across 27 markets reveals that for most, across different generations, gender, and seniority, work performance has improved as well as employees’ well-being, work-life balance, relationships, and even personal confidence.

With the evident benefits of hybrid working, going back to the old ways of doing things is not an option for employees or for those companies serious about competing for the best talent. However, while the vast majority feel hybrid work arrangements have benefitted them, only around one in four employees say their company is ‘very prepared’ for a hybrid work future. It is clear that there is much work still to be done to fully embed hybrid work arrangements and bring employers to the same readiness levels.

Culture will be critical. Three quarters of employees say their company needs to rethink its culture and mindset to make hybrid work truly inclusive. Every aspect of the employee experience must be reimaged, and companies need to understand that employees’ definitions of well-being and work-life balance have fundamentally changed.

As a result, there are several key changes employees want to see including even more flexibility and greater emphasis on employee wellness and work-life balance. Our study also finds that there is room to improve communications between senior managers and their teams.

Leaders must acknowledge that a point of no return has been reached and there must be deeper and more concerted investments in culture, communications, technology, workplace policies, and infrastructure to thrive in the new hybrid working future. This study shows that employees don’t want either end of the extremes – to be back in the office or to be working fully remotely – they want a middle ground that offers flexibility to achieve their own personal version of work-life integration that works for them and their employer.

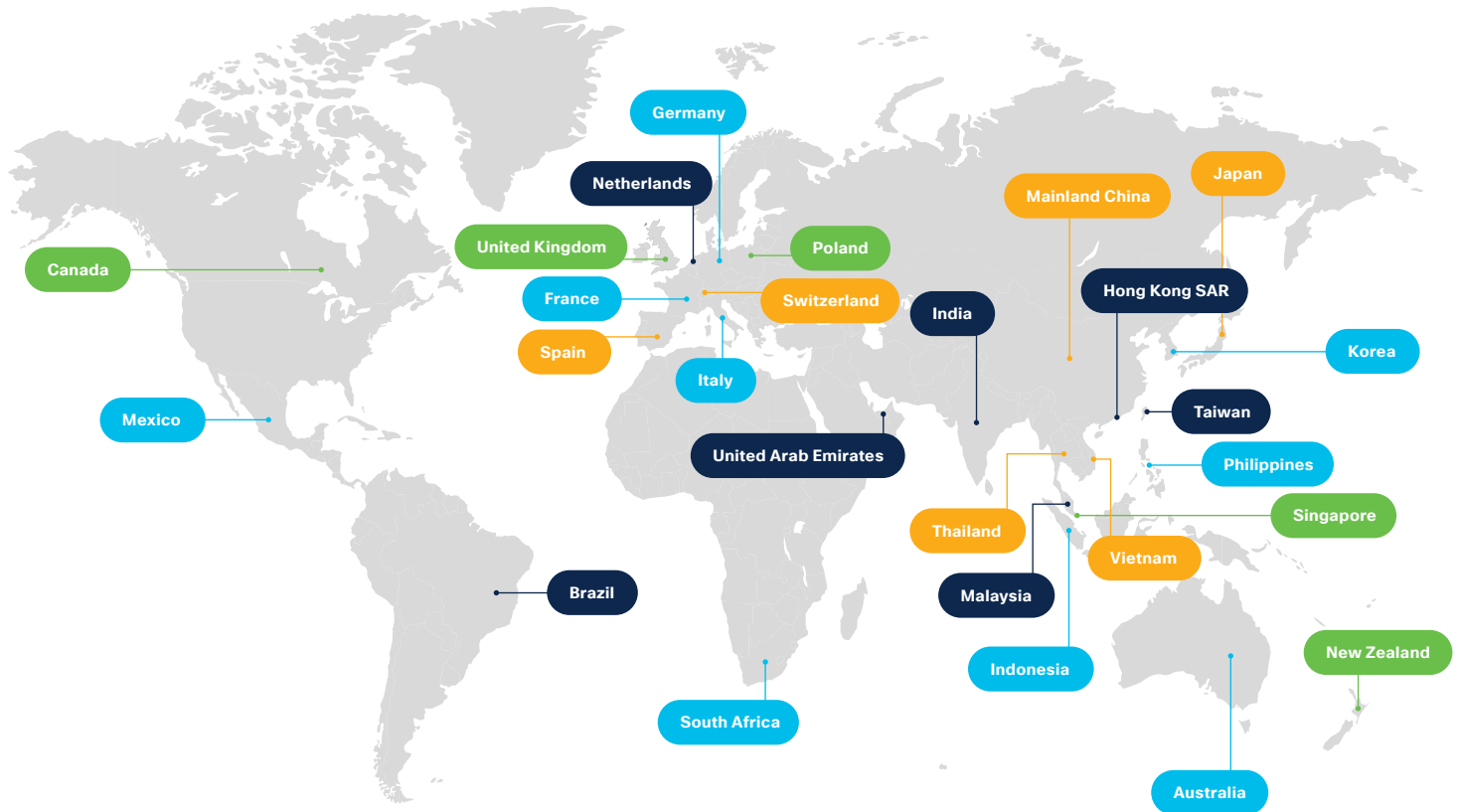
This also means the reasons employees will go to the office in the future will change. Rather than a place of everyday work, it is more likely to become a meeting place for in-person group collaboration and work, where it is required, and for social connection and interaction with colleagues. With this, organizations must rethink how they see their office space, why employees will need it, and how they use it.

Hybrid is working for employees and it can work for employers too – how ready are you for a hybrid working future?



Introduction

This report summarises the findings of a double-blind survey of over full time employees (28,025), undertaken between January and March 2022. Respondents were drawn from 27 markets touching every continent, other than Antarctica.



This research aimed to uncover insights into how employees have fared over the past two years, where hybrid and remote working has been commonplace. It reveals the significant benefits that hybrid working has brought to both employees and employers, despite the challenges anticipated at the start of the pandemic.

Respondents work in a wide range of industries: Agriculture; Consumer Goods; Construction and Engineering; Education; Energy; Manufacturing; Food & Beverage; Financial Services; Government and Public Service; Healthcare; IT, Technology & Telecommunications; Media and Communications Services; Mining; NGOs / Charitable Organisations; Professional Services; Real Estate; Retail; Tourism & Hospitality; Transportation (Airlines, Shipping); and Utilities.



Hybrid work has improved every area of employee performance, work-life balance, well-being, and company culture

Performance: Work quality, productivity, skills, and growth have improved

At the pandemic's outset, commentators worried that remote working would have a debilitating impact on both business and employee performance. Our research shows these fears are largely unfounded: as employees and organizations started to embrace hybrid working over the past two years, six out of 10 (61.4%) believe their quality of work has improved, and a similar number (60.4%) have seen their productivity increase.

There are some significant differences among the working generations. Looking at the quality of work, well over two-thirds (70.3%) of Gen Zers¹ say this aspect has improved compared to 49% of Baby Boomers². Seniority also impacts this area with senior team members more likely (64.3%) to see their work quality improve, compared to 56.9% of junior staff.

Similar trends can be seen when we look at productivity gains. Gen Zers again lead the way with nearly two-

1. Gen Z: The generation born between 1997 and 2010 2. Baby Boomers: Those born between 1948 and 1964

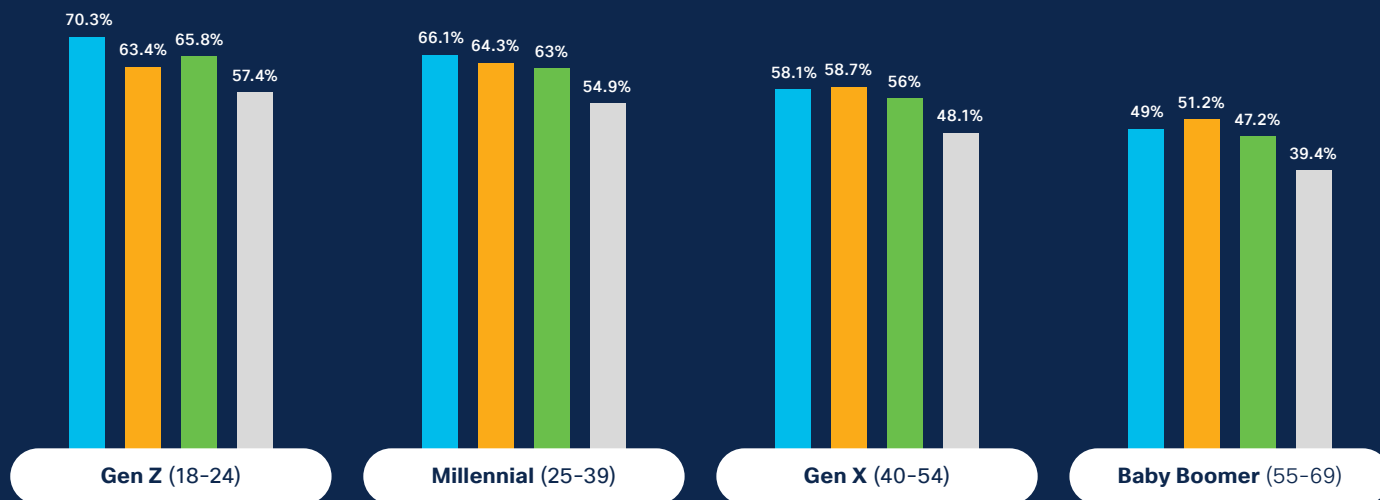


thirds (63.4%) seeing gains compared to older working age groups (Gen X³ at 58.7%; Baby Boomers at 51.2%). More than half of all our respondents (59.1%) also saw greater levels of self-improvement in job knowledge and skills, as well as improvements in working relations and attitude for over half (51.1%). Again, younger age groups were more likely to see these improvements than their older colleagues.

The net result is that well over eight out of ten (83.3%) say they have been able to learn, grow and succeed in their roles over the past two years and that three quarters (76.4%) feel their role can now be performed just as successfully remotely as in the office.

IMPACT OF REMOTE WORKING

■ Quality of work
 ■ Productivity
 ■ Self-improvement / Job skills and knowledge
 ■ Working relationships and attitude



3. Gen X: Those born between 1965 and 1980

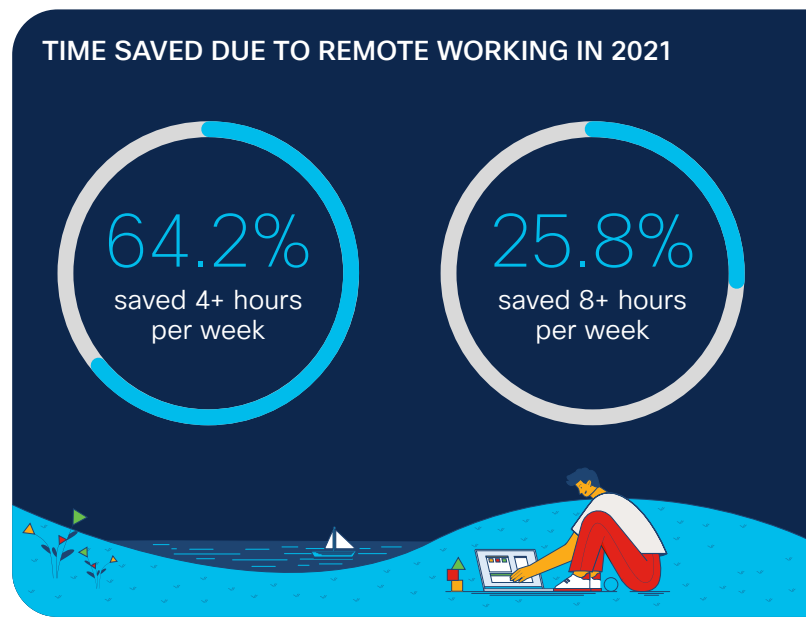
Work-life balance: Getting more time back has increased work-life balance

When separately looking at work-life balance, the vast majority of respondents (78.9%) felt this had improved with time away from the office. This is most keenly felt by Millennials (83%) followed by Gen Zers (80.3%), Gen X (77.4%), and Baby Boomers (69.5%). It is also noticeable that more senior employees (81.6%) felt they had an improved balance compared to 74.5% of more junior staff.

Most attributed the improvement in work-life balance to more flexible work schedules at 62%, while 52.9% said significantly reduced (or completely removed) commuting times was a major contributory factor.

In terms of time saved, nearly two-thirds of people (64.2%) saved at least four hours per week in a hybrid work setting and over a quarter (25.8%) of all respondents saved eight or more hours a week. While commuting was the single biggest time saver, more than three-quarters also saved at least four hours a week from eliminating office interactions such as team activities, water cooler chats, and so on.

Perhaps unsurprisingly, the largest time savings are seen in markets with heavy traffic congestion: 75.7% of respondents in Vietnam and 74.2% of those in the Philippines saved four hours or more, while 74% in Indonesia saved more than an hour.

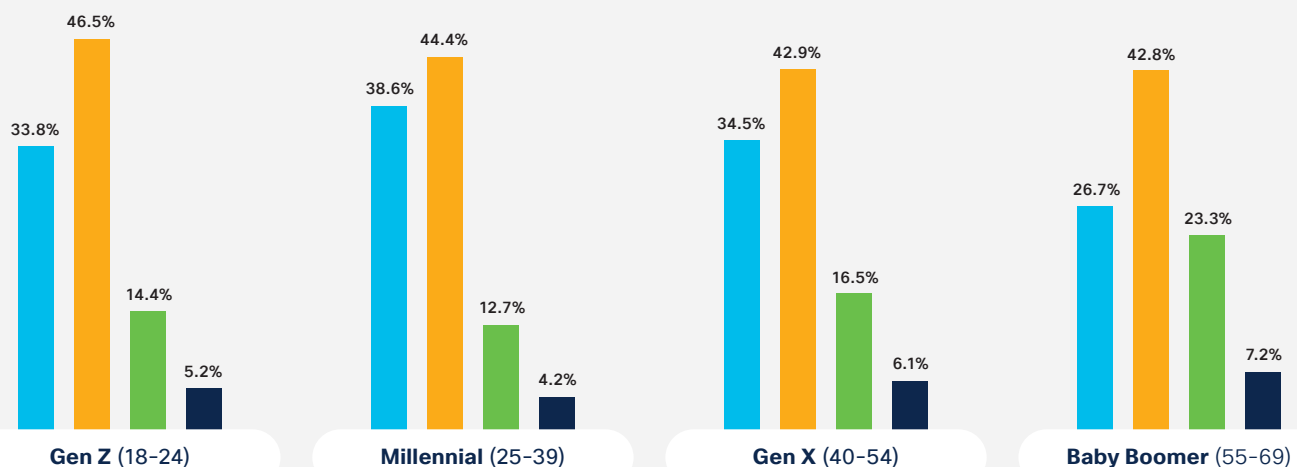


These extra hours were reinvested into a wide range of activities in employees' personal lives. 44% ranked 'time with family, friends and pets' as the top choice for how they reinvested their time, trailed by some way by selfcare at 20.2%.

Hybrid or remote working has not all been a bed of roses, though. 70.9% say the reason they have not seen an improvement in work-life balance is because of the difficulty of switching-off from work. This is consistent across all levels of seniority and age groups.

IMPACT ON WORK-LIFE BALANCE

■ Yes - It's considerably improved
 ■ Yes - It's somewhat improved
 ■ No - It's the same
 ■ No - It's worsened



Well-being: As a result of better balance, most employees are happier, healthier, wealthier, and have stronger familial ties

With better work-life balance from time saved, hybrid working has had a positive effect on all areas of employee well-being. This is counter-intuitive to most people's assumptions at the start of the pandemic and the ensuing lockdowns when there was widespread worry, particularly about the impact on emotional, mental, and physical well-being.

Our research lays to rest those fears with more than three quarters (77.9%) of respondents believing that remote and hybrid working has improved their overall well-being. As we saw with performance indicators though, there are significant differences between the generations studied: over eight in ten (82.7%) of Millennials⁴, for example, feel their overall well-being has improved, compared with 66.3% of Baby Boomers.

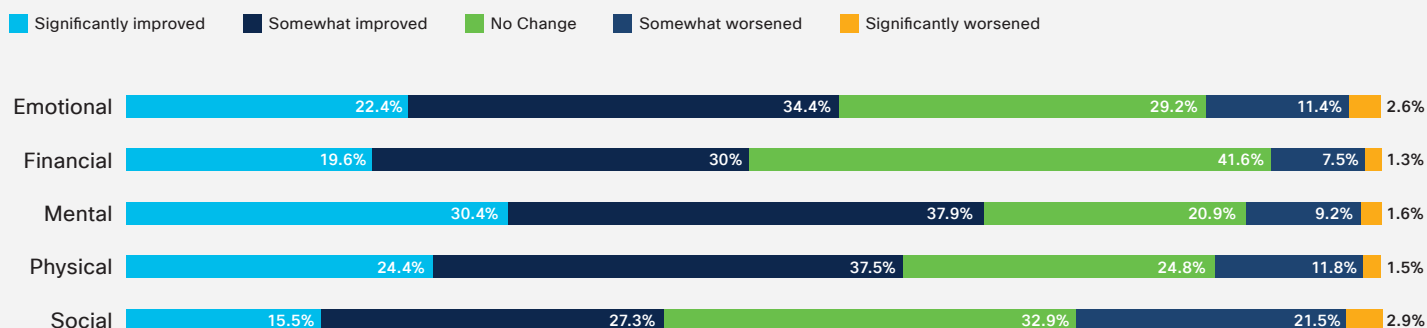
Great variations can be seen between markets also. India (53.3%), South Africa (47.9%) and Vietnam (44.3%) had the largest numbers of respondents who had seen 'significant improvements' in well-being. At the other end of the scale are Indonesia (14.8%) and Korea (16%).

There were also notable differences across the five categories of well-being we researched: emotional, financial, mental, physical, and social well-being. While over two-thirds (68.3%) say their mental well-being has improved, social well-being is the least improved, with 42.8% believing their social well-being has improved, and a further 32.9% saying it has not changed.

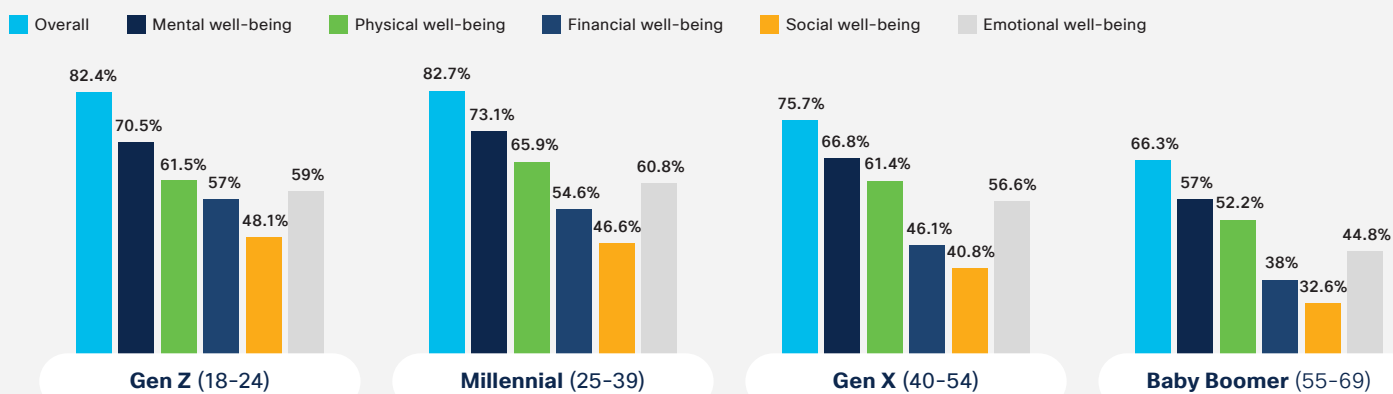
When looking more deeply into the different areas of well-being studied, some interesting insights can be gained for employers.

4. Millennials: Those born between 1981 and 1996

IMPACT ON WELL-BEING ACROSS AREAS



SAW IMPROVEMENT IN WELL-BEING





Financial well-being

With staying-in being the new going-out, it is unsurprising that over three-quarters (76.3%) of people have been able to save money over the past year. The average saving has been a little over US\$150 per week (\$153.54) which works out to a staggering US\$8,000 a year.

The financial savings amounted to a sizeable 14.5% increase in disposable income on average, with 79.9% seeing an increase in their disposable income of at least 5%.

A good proportion of the savings have come because of reduced expenditure on key items. A sizeable 86.6% ranked savings on fuel and/or commuting among their

\$8,000

average savings per year



14.25%

average increase in disposable income

top three areas for savings, followed by decreasing spending on food and entertainment at 74%.

These savings are not short-term; an overwhelming majority – nearly nine in ten (86.4%) believe they can maintain these savings over the long term and, of great note for employers, 69.3% would take these savings into account when considering changing jobs.

ITEMS WHERE MONEY WAS SAVED

86.6%



Fuel and/or commuting to work

74%



Food and entertainment

57.4%



Lifestyle and/or limited social activities

53.6%



Wardrobe and personal care

27.5%



Rent and/or cost of living



Physical well-being

In another positive development for well-being, over two-thirds (67.9%) believe remote working has had a positive impact on their physical condition, although there are some significant variations across the markets. For example, 45.4% of respondents from Brazil say their physical well-being has improved significantly while at the other end of the scale, just 19.3% in Indonesia believe the same.

Seven in ten respondents (70.6%) exercise more when they work remotely with an average increase of an

extra 2.5 exercise sessions per week, or 130 additional sessions a year. Assuming the average exercise session burns approximately 200 kcals, that means our respondents could be burning 26,000 extra calories per year – the equivalent of 3.5kg!

In more good news for physical well-being, 68.1% credited the new working arrangements with a positive impact on their eating habits.

IMPACT ON PHYSICAL FITNESS

	All	AU	BR	CA	CH	CN	DE	ESP	FR	HK	IN	IND	IT	JP
Improvement (significant or somewhat)	67.2%	69.5%	70.8%	52.3%	58.3%	81.5%	56.2%	63.3%	55%	79.3%	81.4%	79.1%	55%	51.1%
	KR	MA	MX	NL	NZ	PH	PL	SA	SG	TH	TW	UAE	UK	VN
Improvement (significant or somewhat)	73.7%	72.2%	71.6%	56%	68.1%	74.2%	42.9%	67.3%	71.8%	82.6%	74.5%	80.2%	59.1%	85.6%

IMPACT ON EATING HABITS

	All	AU	BR	CA	CH	CN	DE	ESP	FR	HK	IN	IND	IT	JP
Improvement (significant or somewhat)	67.7%	65%	78.1%	54%	59.8%	79.8%	55.4%	64.7%	54.7%	76.2%	82.1%	80.5%	65.2%	54.9%
	KR	MA	MX	NL	NZ	PH	PL	SA	SG	TH	TW	UAE	UK	VN
Improvement (significant or somewhat)	66.9%	69.4%	82.3%	54.3%	62%	76.3%	52.1%	60.3%	70.2%	78%	73.6%	79.5%	56.2%	87.6%

AU – Australia; BR – Brazil; CA – Canada; CH – Switzerland; CN – Mainland China; DE – Germany; ESP – Spain; FR – France; HK – Hong Kong SAR; IN – India; IND – Indonesia; IT – Italy; JP – Japan; KR – South Korea; MA – Malaysia; MX – Mexico; NL – Netherlands; NZ – New Zealand; PH – Philippines; PL – Poland; SA – South Africa; SG – Singapore; TH – Thailand; TW – Taiwan; UAE – United Arab Emirates; UK – United Kingdom; VN – Vietnam





Social well-being

With the stresses and strains of working under the same roof as home-schooling children, there were fears of fault lines appearing in family relationships. Our research shows that for a significant majority (73.7%), remote working has improved family relationships and seems to be a major reason for people's improved happiness. Over half (50.7%) also report strengthened relationships with friends. There was a direct correlation with age and improvement in social well-being – with surprisingly younger generations more likely to report improvements

than older generations – which may be a sign of younger generations being more comfortable and adept with virtual communications.

In a finding that supports the point made in the first section about self-improvement, 55.4% say that hybrid working has increased their self-esteem and confidence. While, perhaps counter-intuitively, working away from the office has made work a more fulfilling experience for nearly two thirds (63.1%).

IMPACT ON WELL-BEING ACROSS AREAS: IMPROVEMENT (SIGNIFICANT OR SOMEWHAT)



Mental well-being



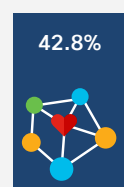
Physical well-being



Emotional well-being



Financial well-being



Social well-being

Emotional and mental well-being

Finally, and most likely as a result of all other areas of well-being improving, 82.2% of respondents say the ability to work from anywhere has made them happier. And, over half (54.7%) report that hybrid working has decreased their stress levels.

At the heart of these findings is that nearly a third (28.8%) find hybrid working more relaxing and the working environment less pressurized. The greater flexibility offered by hybrid working ranks as the second most common reason for decreased stress at 27.4%, followed by having more time to invest in personal relationships, such as those with family at 24%. These findings were largely consistent across each market, with respondents in all ranking these as the top three drivers – however, around 40% of markets ranked ‘greater flexibility’ as the top driver, and in India, Indonesia, and Italy ‘increased time to invest in personal relationships’ was ranked first.

By contrast, one in five (22.1%) also said their stress levels had increased – with 41.2% attributing this to



their belief that the remote working environment has affected their performance. The second biggest driver of increased stress was managing the balance between work and personal time at 36.2%. These are challenges employers will need to be mindful of helping their employees to overcome in a hybrid working future.

IMPACT ON STRESS LEVELS

	All	AU	BR	CA	CH	CN	DE	ESP	FR	HK	IN	IND	IT	JP
I have a more relaxing / lower pressure work environment	28.8%	32.1%	36.4%	32.5%	25.1%	25.3%	17.7%	19.6%	27.5%	23.8%	25.4%	26.5%	24%	36.7%
	KR	MA	MX	NL	NZ	PH	PL	SA	SG	TH	TW	UAE	UK	VN
I have a more relaxing / lower pressure work environment	33.9%	33%	25.2%	27.8%	25.7%	35.7%	34.8%	34%	25.3%	27.4%	34%	19.6%	29.1%	34.1%
	All	AU	BR	CA	CH	CN	DE	ESP	FR	HK	IN	IND	IT	JP
There is more time to spend on personal relationships (e.g. family)	24%	21.3%	22.5%	18.4%	23.8%	14.5%	29%	29.1%	21.6%	24%	30.6%	37.9%	31.7%	27.8%
	KR	MA	MX	NL	NZ	PH	PL	SA	SG	TH	TW	UAE	UK	VN
There is more time to spend on personal relationships (e.g. family)	19.1%	20.5%	23.3%	22.3%	20.6%	27.8%	23.6%	16%	25.5%	23%	18.9%	29%	20.2%	21.8%
	All	AU	BR	CA	CH	CN	DE	ESP	FR	HK	IN	IND	IT	JP
Greater flexibility	27.4%	29.7%	23.2%	28.1%	29%	32.2%	30.7%	29.3%	29%	33.1%	25.6%	25.7%	23.7%	20.2%
	KR	MA	MX	NL	NZ	PH	PL	SA	SG	TH	TW	UAE	UK	VN
Greater flexibility	26.1%	30.8%	24.2%	32.8%	31%	21.4%	22.1%	28.6%	29.6%	29.4%	28.8%	31.1%	31.7%	23.6%

AU – Australia; BR – Brazil; CA – Canada; CH – Switzerland; CN – Mainland China; DE – Germany; ESP – Spain; FR – France; HK – Hong Kong SAR; IN – India; IND – Indonesia; IT – Italy; JP – Japan; KR – South Korea; MA – Malaysia; MX – Mexico; NL – Netherlands; NZ – New Zealand; PH – Philippines; PL – Poland; SA – South Africa; SG – Singapore; TH – Thailand; TW – Taiwan; UAE – United Arab Emirates; UK – United Kingdom; VN – Vietnam

Hybrid working has positively impacted the workplace and talent retention – though trust remains fickle

As well as the benefits realized for individual employees from hybrid work arrangements, a positive collective impact is also seen when it comes to building and maintaining a strong and healthy corporate culture.

Hybrid working can improve company culture and make employees happier, more motivated, and more likely to stay

With most saying that the ability to work remotely has made them happier and more motivated in their role, 61.9% are less likely to look for a new role as a result. This directly reinforces and confirms fears and trends seen of mass resignations if people are forced to abandon hybrid working arrangements in favour of a return to the office.

With more avenues for communication and engagement, nearly half (44.3%) of our respondents say that working remotely has improved their relationships with colleagues. More than half (57.1%) also believe that hybrid and remote working has improved their company’s culture – though strong generational

differences are evident with 61.7% of Millennials believing this, compared with 46.9% of Baby Boomers.

Trust is being accepted more easily than it’s being given...

However, our research also finds that managing and maintaining high levels of trust will be a critical element for organizations to manage as they grow hybrid and remote working arrangements. While 70.5% of our respondents believe their manager trusts them to be productive when working remotely, a far lower number (58.9%) believe their colleagues can be trusted to work remotely.

Also, not all reported positive experiences, with over half (55.3%) believing micromanaging behaviors had increased with hybrid and remote working.

This shows there are some other new dynamics at play in working from home, including that nearly two-thirds (63.9%) have been less likely to take sick leave since being able to work remotely.



Key ingredients for successful hybrid work arrangements

As part of this study, we further looked at what are the key ingredients that have made hybrid working successful over the past two years. From this, we identified four key factors:

- 1) for nearly two-thirds (65.6%) of employees, a **flexible work schedule** is most important;
- 2) **increased use of technology** is a critical factor for 53.4% of people;
- 3) **reduced or no commuting time** is a factor for 52.8%; as well as
- 4) **greater use of virtual meeting and collaboration tools** (50.4%).

Increased use of technology has eased the transition

When looking more closely at the technological aspect, good technology and support has played an integral role to hybrid-work success. It is rated as the most important element for working from home successfully, with 76.8% of employees rating it among their top three success drivers. This is followed by supportive management (68.4%) and flexible time schedules (58.9%).

Perhaps unsurprisingly, increased use of technology was a greater driver of performance improvements for younger employees than their older colleagues (Gen Zers at 73.3% vs Baby Boomers at 79%).

Conversely, nearly half (45%) rank an unreliable or weak internet connection as the single biggest challenge with

working from home – which is something we can all identify with. A distracting work environment (40.5%) and feeling disconnected from work colleagues (39.3%) are the next two biggest challenges identified.

These lead to quite clear feelings for employees about what is needed for growth in their roles. Well over half (57.4%) think investment in technology is critical, followed by support from leadership (54.1%) and then culture (both team and company) come in at 53.4%.

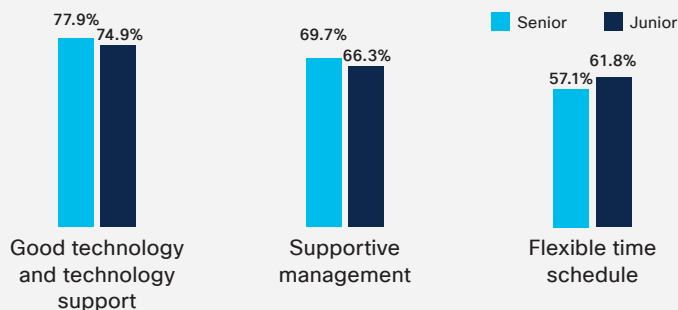
Organizations have been supportive

Company support has further been the bedrock for hybrid working success. In what was a rapid transition for many businesses, most of our respondents (83.4%) feel their company has been supportive of hybrid working, with more than a third (39.3%) believing their company has been ‘very supportive’.

There are, though, big variations across the markets, with India at 63.1%, Philippines at 59.6%, and South Africa at 55.1% recording the highest number of employees who thought their company was ‘very supportive’. By contrast, the three with the lowest number of ‘very supportive’ employers were Spain (21.6%), Poland (20.1%) and Korea (18.9%).

There are similar variations in the feelings of senior versus junior employees with those in senior roles (44.2%) more likely to believe their company has been ‘very supportive’ compared to 31.6% of those in more junior roles.

SUCCESS DRIVERS FOR HYBRID WORK



ENABLING FACTORS TO LEARN AND GROW





Collaboration technology experience as well as meeting etiquette will determine the effectiveness of hybrid working

Out of all the technologies enabling and furthering hybrid work arrangements over the past two years, collaboration platforms – from messaging services to video calls – have been far and away the most prominent. We have all become well-adjusted and accustomed to the virtual relationships and rituals formed with our companies and co-workers, and we can expect this will be a continued feature of working life. This study finds many benefits, including some perhaps unexpected, have been unlocked from the growth of this area.

Collaboration technology is enabling better performance and better relationships between colleagues

Firstly, we see collaboration technology playing an increasingly direct role in employees' career development and progression. Overall, nearly two-

thirds (65%) believe that the increased incidence of people working away from the office has leveled the playing field between remote and in-office workers. Additionally, more than half (51.6%) think that technology makes it easier to speak and be heard in virtual meetings, which leads 54.6% to feel more confident during these online meetings.

In what is perhaps another counterintuitive finding, virtual working technology is also helping build personal relationships in the workplace. Half of our respondents said they enjoyed seeing their colleagues' families and pets via virtual meetings.

As a result, 49.7% said that seeing people's home life through virtual meetings has in some cases changed their opinions of them while for 46.8%, seeing their colleagues' home life has made them feel closer to them.

Small changes to collaboration etiquette can have a big impact

When looking further into the day-to-day, while most are satisfied with the collaboration technology they use, 65.2% feel less than half the virtual meetings they attend are productive. This reflects a need to discuss and agree 'etiquette' to ensure virtual meetings are more effective. For example, over half (52.9%) think it is fine to multitask during a meeting, but 56.8% believe it affects productivity.

Of those items which employees admitted to doing while on virtual meetings, around one in four said they had multitasked on other items and had eaten meals, with around a third taking unrelated calls. In addition, one in three have worn their pajamas for virtual meetings.

However, there are also many upsides observed, with around two thirds feeling that virtual meetings encourage their colleagues to be more punctual, that casual dress has become acceptable, and meetings have become shorter.



43.9%

multitask on other work



43.6%

eat meals



35.1%

take unrelated phone calls
or send messages unrelated
to the meeting



32.1%

worn pajamas for
virtual meeting



68.4%

observed people being more
punctual for virtual meetings



65.9%

think it's acceptable to be dressed
casually for virtual meetings



62.1%

say virtual meetings tend to be
shorter than face to face meetings



More people want to work in hybrid arrangements because of the benefits realized

As a result of the benefits experienced from changing working arrangements, we see very clearly that hybrid work is now the most preferred working arrangement globally, and employees are well adjusted to it.

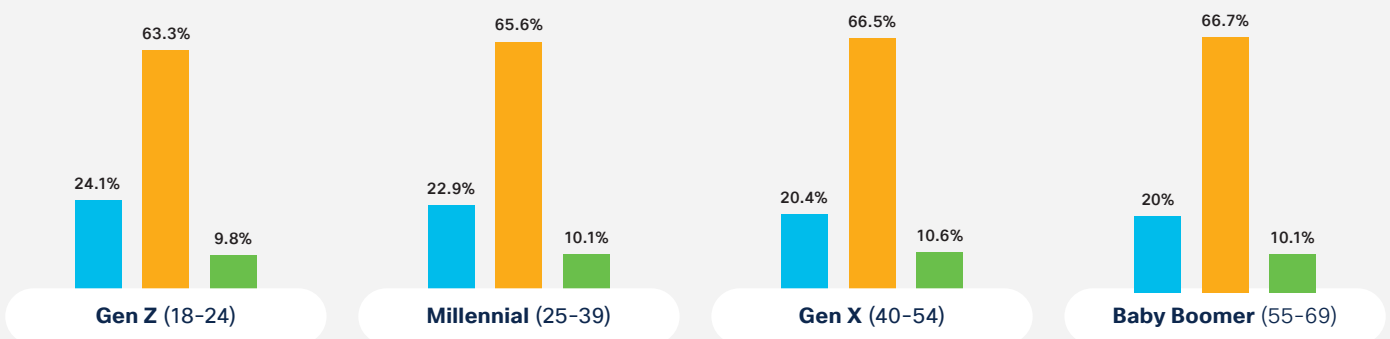
Our study shows that nearly three quarters (71.2%) want a combination of remote and in-office hybrid working

model in the future. Around a fifth (20.2%) want a fully remote working experience, leaving just 8.6% who want to go to the office on a full-time basis.

Looking at the differences among age groups, there is a relatively homogenous view if we look at the data. However, there is a pronounced generational difference

PREFERRING TO WORK IN HYBRID, FULL REMOTE OR FULL TIME IN OFFICE ARRANGEMENT BY GENERATION

Office Hybrid Fully remote

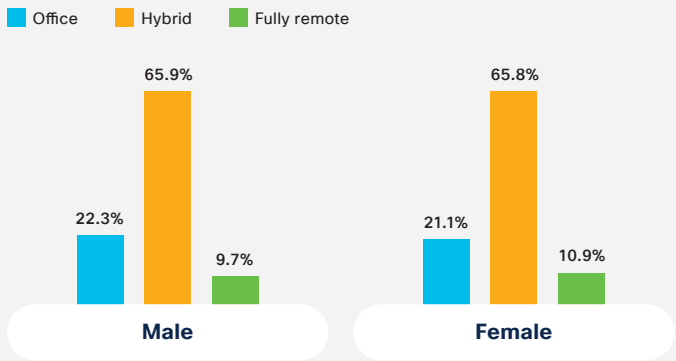


in selected markets, for example in Mainland China, only 3.4% of Gen Zers would like to work fully remote, compared with 26.4% of Baby Boomers.

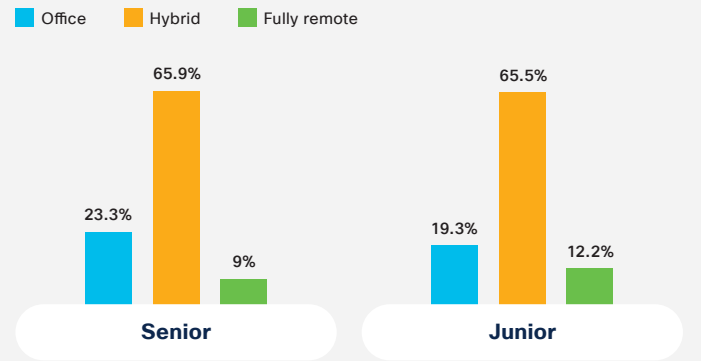
As businesses look ahead to future working arrangements, they need to know that hybrid working has become firmly entrenched in the minds of employees. Our research shows that more people want to work in a hybrid mode, instead of being fully remote or in the office, in 2022 than they did in 2021 – at the height of the pandemic.



PREFERRING TO WORK IN HYBRID, FULL REMOTE OR FULL TIME IN OFFICE ARRANGEMENT BY GENDER



PREFERRING TO WORK IN HYBRID, FULL REMOTE OR FULL TIME IN OFFICE ARRANGEMENT BY SENIORITY



Significant variations can be seen between the markets

As we saw with the generational differences in selected markets, there are significant variations in preferred working arrangements by market as well.

The markets where employees are most and least in favor of hybrid work are:

Most: Indonesia 83.5%; Hong Kong SAR 80.8%; Mainland China 80.7%

Least: Canada 54.8%; Philippines 59.6%

The markets where employees are most and least in favor of fully remote work are:

Most: Philippines 37.7%; Canada 34.8%; South Africa 33.5%

Least: Netherlands 9.5%; UAE 9.7%; Mainland China 10.1%

The markets where employees are most and least in favor of working in the office full time are:

Most: Italy 14.9%; Poland 13.2%

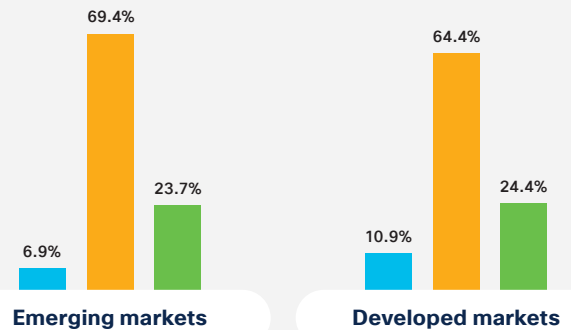
Least: Indonesia 2.7%; Philippines 2.7%; Singapore 4%

Interestingly, in general, employees based in emerging markets worked more days from home in 2021, than employees based in developed markets. One possible reason may be a more concerned attitude around the COVID-19 pandemic, especially since the number of 'ideal days in the office' preferred by employees in emerging and developed markets is similar.



2021 WORKING ARRANGEMENTS

Office Hybrid Fully remote



PREFERRING TO WORK IN HYBRID, FULL REMOTE OR FULL TIME IN OFFICE ARRANGEMENT BY MARKET

	AU	BR	CA	CH	CN	DE	ESP	FR	HK	IN	IND	IT	JP	KR
Office	27.3%	17.3%	22.2%	18.2%	22.8%	21.7%	17.9%	23.2%	18%	28.7%	29.9%	17.8%	14.2%	18.7%
Hybrid	61.7%	67.4%	56.5%	69.50%	62.4%	64%	70.4%	65.8%	71.3%	57%	66.8%	71.9%	71.2%	68.1%
Fully remote	9.4%	14.2%	19.5%	10%	7.3%	11.3%	9.9%	9.1%	8.4%	13.2%	2.5%	8.9%	9.5%	9.5%

	MA	MX	NL	NZ	PH	PL	SA	SG	TH	TW	UAE	UK	VN
Office	20.2%	17.2%	32%	28.5%	19.6%	24.4%	14.9%	22.4%	23.1%	17.1%	23.9%	23.4%	22.9%
Hybrid	66.5%	71.6%	58.3%	60.9%	69.2%	61.4%	70.1%	64.1%	63.3%	73.3%	64.2%	59.1%	69.9%
Fully remote	11.2%	9.9%	7.2%	9.4%	10.6%	11%	13.8%	10.9%	9.5%	7.3%	10.9%	15.6%	6.9%

AU - Australia; BR - Brazil; CA - Canada; CH - Switzerland; CN - Mainland China; DE - Germany; ESP - Spain; FR - France; HK - Hong Kong SAR; IN - India; IND - Indonesia; IT - Italy; JP - Japan; KR - South Korea; MA - Malaysia; MX - Mexico; NL - Netherlands; NZ - New Zealand; PH - Philippines; PL - Poland; SA - South Africa; SG - Singapore; TH - Thailand; TW - Taiwan; UAE - United Arab Emirates; UK - United Kingdom; VN - Vietnam



While there is evidence of organizations preparing for a hybrid working future, there remains much work to do

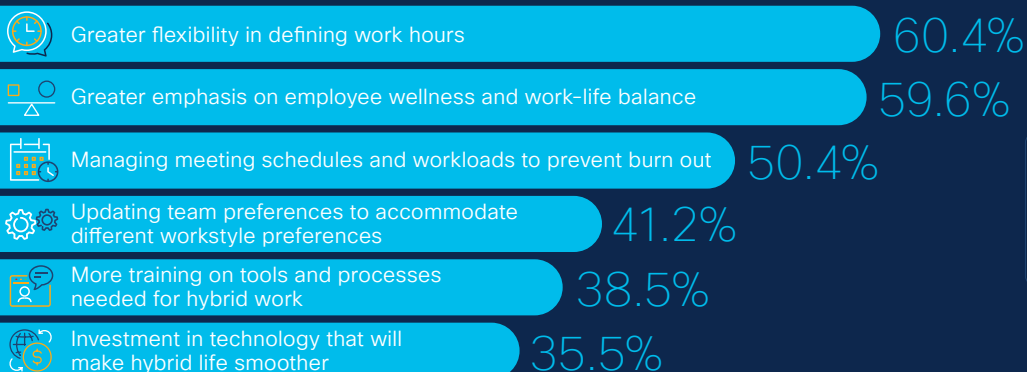
As workforces start to form the new normal for working arrangements, there seems to be a considerable job to be done by organizations to fully prepare. This is clearly shown by the fact that just one in four employees feel their employer is ‘very prepared’ for a hybrid working future.

Across a range of areas, hard elements such as investment in technology is where employees feel their companies are most prepared, whereas softer elements such as employee support and HR policies and processes are the areas of least preparedness. This suggests that companies and leadership teams are yet to fully commit to the new future of hybrid working or may still have some hesitance to do so.

An inclusive work culture is vital

As conversations around return to work get louder, an inclusive culture needs to be at the forefront of employee engagement. Over half believe that fully remote workers will have challenges engaging with their colleagues (59.4%) and company (56.9%), compared to those who toggle between remote and in-office work. Perhaps as a result, nearly three-quarters (73.2%) say companies need to rethink culture and mindset to make hybrid work truly inclusive.

CHANGES TO COMPANY CULTURE AND MINDSET THAT EMPLOYEES WOULD LIKE TO SEE



One area that businesses need to look at is career progression. A sizeable minority (42.7%) believe they are less likely to be promoted as quickly when working remotely, while 56.8% say those in the office will see more career growth than remote workers. This needs to be addressed to ensure a level playing field for all employees irrespective of where they find themselves working.

Looking more broadly, the changes to company culture and mindset to support the hybrid workforce that employees would like to see vary – with even greater flexibility and increased emphasis on wellness and work-life balance leading the way by some margin. These views imply a complete rethink of how businesses operate, from the strategic to the tactical. Leaders will need to change how they engage with their teams, and employees will need to adapt to how they engage with the company and their colleagues.

There will be a change in how offices are used. No longer will they be a central hub for everyone, and thought will need to be given to what employees come into the office to do and how often.

And, at a more fundamental level, operations across the business – IT, finance, HR, and other key functions will need to review how they work and interact across an organization.

Technology presents opportunities and risks in the hybrid work future

As seen throughout this report, technology has become fundamental to organizations of all shapes and sizes and will remain essential to enabling a future with

increasingly diverse and distributed workforces. As long as the future of work looks like it will be a hybrid working model, technology will remain a significant opportunity and threat.

As we have all experienced in the past two years, connectivity can be a significant issue working away from the office. Six out of 10 (61.6%) say suffering connectivity issues on a regular basis is career limiting for remote workers.

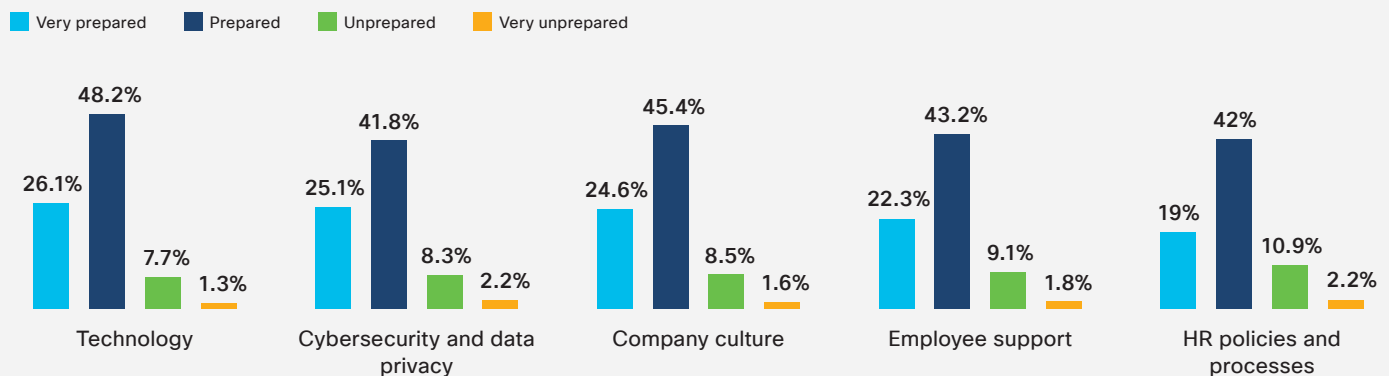
As a result, 84.3% say networking infrastructure is essential for a seamless working from home experience, but only 67.9% say their company currently has the right networking infrastructure now.

There is also a recognition that cybersecurity is important in a hybrid world, with more than three-quarters (77.6%) saying that cybersecurity is critical for making hybrid working safe, but less than two-thirds (64.9%) say their organisation currently has the right capabilities and protocols in place.

Also worrying is that only 61.9% think that all employees across their company understand the cyber risks involved with hybrid work, and only 67.5% think business leaders are familiar with the risks.

For organizations to operate and grow a hybrid workforce with success, it is important that investment in the right technologies and tools goes hand-in-hand with the right culture, employee engagement approach, and people processes. Leadership teams must embrace the new future of hybrid work and be the examples for their teams.

% OF EMPLOYEES WHO RATE THEIR COMPANY'S CURRENT LEVEL OF PREPAREDNESS ACROSS DIFFERENT AREAS TO SUPPORT AND INCREASE HYBRID, REMOTE AND FLEXIBLE WORKING ARRANGEMENTS



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