March 16, 2022

Microsoft

Illlustration by Sébastien Thibault

2022 Work Trend Index: Annual Report

Great Expectations: Making Hybrid Work *Work*

From when to go to the office to why work in the first place, employees have a new “worth it” equation. And there’s no going back.

We’ve been on the cusp of the shift to hybrid work for more than a year, with false starts attributed to a pandemic that had other ideas. Now, we’re at a long-awaited inflection point: the lived experience of hybrid work.

Already, hybrid work is up seven points year-over-year (to 38%), and 53% of people are likely to consider transitioning to hybrid in the year ahead.[1]

One thing is clear: We’re not the same people that went home to work in early 2020. The collective experience of the past two years has left a lasting imprint, fundamentally changing how we define the role of work in our lives. The data shows the Great Reshuffle is far from over. Employees everywhere are rethinking their “worth it” equation and are voting with their feet. And as more people experience the upsides of flexible work, the more heavily it factors into the equation. For Gen Z and Millennials, there’s no going back. And with other generations not far behind, companies must meet employees where they are.

As leaders puzzle over how to make hybrid work *work*, big questions loom: What is the role of the office? How do teams build social capital in a digital-first world? The challenge ahead for every organization is to meet

employees’ great new expectations head-on while balancing business outcomes in an unpredictable economy.

To help leaders navigate the uncertainty, the 2022 Work Trend Index outlines findings from a study of 31,000 people in 31 countries, along with an analysis of trillions of productivity signals in Microsoft 365 and labor trends on LinkedIn. While we’re all learning as we go, the findings reveal an urgent opportunity—and responsibility—for leaders to approach the transition with intention and a growth mindset, or risk being left behind.

[1] The number of hybrid employees in our Work Trend Index surveys is up seven percentage points year-over-year.

Findings

1

Employees have a new "worth it" equation.

2

Managers feel wedged between leadership and employee expectations.

3

Leaders need to make the office worth the commute.

4

Flexible work doesn't have to mean "always on."

5

Rebuilding social capital looks different in a hybrid world.

1 Employees have a new "worth it" equation.

53%

of employees are more likely to prioritize health and well-being over work than before the pandemic.

52%

of Gen Z and Millennials are likely to consider changing employers this year, up 3% year-over-year.

The experience of the past two years has reshaped our priorities, identities, and worldview, drawing a bright line between what's important—health, family, time, purpose—and what's not. As a result, employees' "worth it" equation—what people want from work and what they're willing to give in return—has changed. The power dynamic is shifting, and perks like free food and a corner office are no longer what people value most.

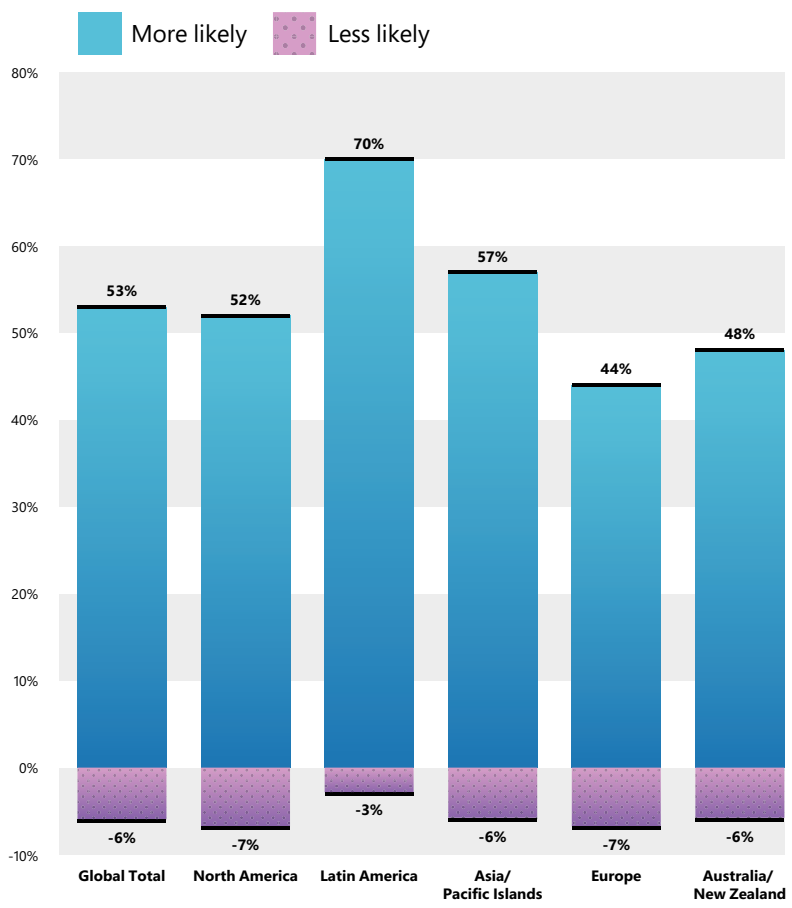
In our study, 47% of respondents say they are more likely to put family and personal life over work than they were before the pandemic. In addition, 53%—particularly parents (55%) and women (56%)—say they're more likely to prioritize their health and wellbeing over work than before.

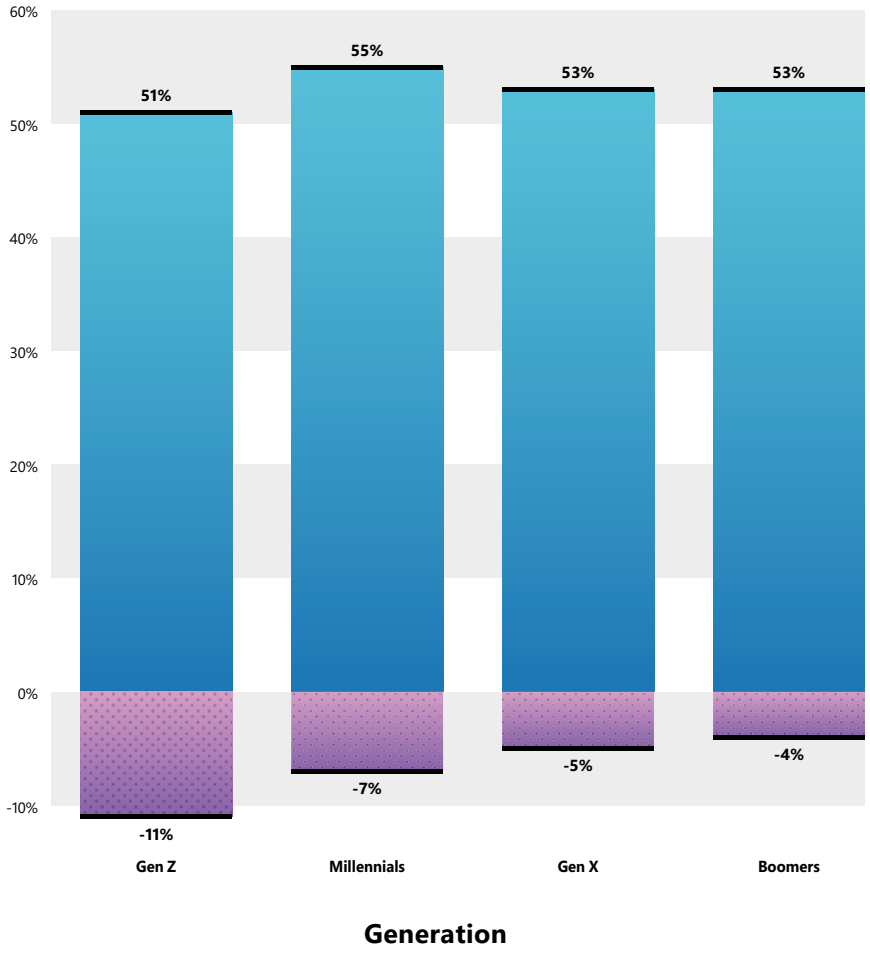
"Work is only a part of life. It shouldn't be your whole life or the only thing you care about."

—Team lead in professional services, Argentina

Priorities have shifted

People are now more likely to prioritize their health and wellbeing over work than before the pandemic.





Survey respondents were asked, "Compared to before the COVID-19 pandemic, how likely are you to prioritize your health and wellbeing over work?"

Illustration by Valerio Pellegrini

And employees are acting on their newfound priorities. In 2020, 17% of people left their jobs, and we see that trend continuing—reaching 18% in 2021. The top five reasons employees quit were: personal wellbeing or mental health (24%), work-life balance (24%), risk of getting COVID-19 (21%), lack of confidence in senior management/ leadership (21%), and lack of flexible work hours or location (21%). Somewhat surprisingly, "not receiving promotions or raises I deserved" landed in number seven on the list at 19%, further illustrating the shift in priorities.

The data also shows the Great Reshuffle is far from over. In the year ahead, many hybrid employees (51%) say they will consider a switch to remote, and even more remote employees (57%) say they'll consider a switch to hybrid. At the same time, 43% of employees are somewhat or extremely likely to consider changing jobs in the coming year, up slightly year-over-year from 41%. Some generations are even more likely to consider changing employers—more than half (52 %) of Gen Z and Millennials combined may change jobs in the year ahead, up 3 percentage points since last year. By comparison, only 35% of Gen X and Boomers say they're considering a job change.

And the desire for flexibility extends to leadership, too—47% of leaders are likely to consider applying for jobs not near their homes in the next year.

Compared to last year, geographic migration is slowing. Today, 38% of respondents are considering moving because they can work remotely at their current job (compared to 46% in 2021), while 30% are

47%

of respondents say they are more likely to put family and personal life over work than they were before the pandemic.

"I can still be successful at work, but I need to make more balanced decisions to pursue my own interests."

—Mid-level manager, UK

likely to consider a move in the year ahead even if it requires finding a new job that lets them work remotely. Gen Z and Millennials are even more willing to change jobs in order to live in a different location (44% and 38%, respectively), while just 27% of Gen X and 17% of Boomers are considering the shift.

"Covid has not been all doom and gloom for me. It forced me to dig deep and reevaluate what is important."

—Self-employed education professional, Canada

What are employees looking for in a job now? Beyond pay, the top five aspects of work that employees view as "very important" for an employer to provide are: positive culture (46%), mental health/wellbeing benefits (42%), a sense of purpose/meaning (40%), flexible work hours (38%), and more than the standard two weeks of paid vacation time each year (36%). While new-to-the-workforce Gen Z shares the same top three priorities, they list positive feedback and recognition as their fourth priority, while ranking a manager who will help advance their career in fifth place.

For Gen Z, there's no going back

For younger employees, flexibility, mobility, and entrepreneurial freedom are non-negotiable.

- 58% of Gen Z are considering changing jobs in the year ahead versus 43% overall.
- 58% are considering a shift to hybrid work in the year head versus 53% overall.
- 56% are considering a shift to remote work in the year ahead versus 49% overall.
- 70% are considering earning additional income outside their current employer via a side project or business in the year ahead versus 59% overall.
- LinkedIn data says Gen Z is the most mobile generation on the platform: since the pandemic began, their migration rate is up 23% in the U.S.
- 52% of Gen Z hybrid employees say they're moving to a new location because they're able to work remotely versus 38% overall.
- Gen Z's likelihood to engage with a company posting on LinkedIn if it mentions "flexibility" is far higher (77%) than Millennials (30%) and others on the platform.

And many employees are looking beyond their "day job" for creative opportunities. Fully 70% of Gen Z and 67% of Millennials say they are considering earning additional income via a side project or business in the next year. For leaders, this is creating new challenges—not just in attracting and retaining top talent, but in engaging current employees who increasingly define and design their careers around creative pursuits.

In all, there's no erasing the lived experience—and lasting impact—of the past two years. A few months of remote work could have been a blip, but 24 months in, people have proved you can be a great employee *and* have a life. Now, flexibility and wellbeing are non-negotiables that companies can't afford to ignore.

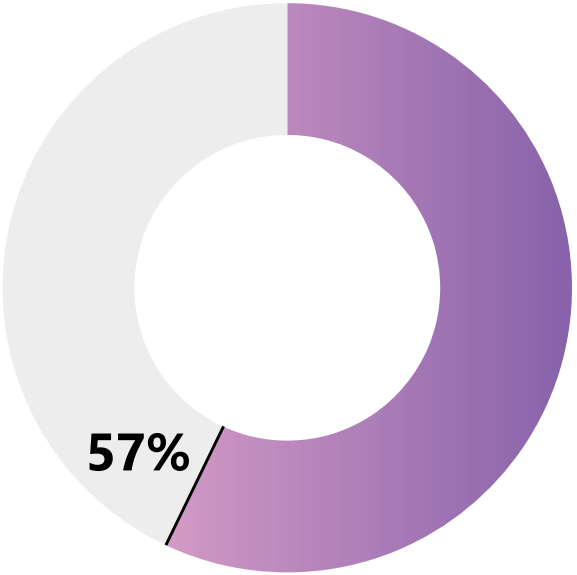
Key Takeaway

Meeting these new employee expectations will require a mindset shift that considers the experience of the past two years. Employees' "worth it" equation has changed—and there's no going back. The best leaders will create a culture that embraces flexibility and prioritizes employee wellbeing—understanding that this is a competitive advantage to build a thriving organization and drive long-term growth.

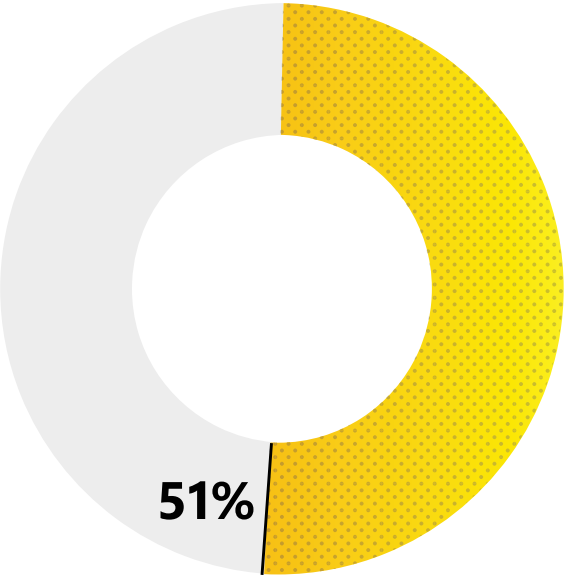
The workforce is still in transition

Many hybrid employees are considering a switch to remote while even more remote employees are considering a switch to hybrid in the year ahead.

Remote employees
considering a shift to hybrid



Hybrid employees
considering a shift to remote



Respondents were asked, "Thinking ahead, how likely are you to consider doing the following in the next year?" Percentages shown in graphic include those who are somewhat or extremely likely to shift to remote or hybrid work in the year ahead.

Illustration by Valerio Pellegrini

2

Managers feel wedged between leadership and employee expectations.

74%

of managers say they don't have the influence or resources to make change for employees.

54%

of managers say leadership is out of touch with employees.

The past two years have taught us that culture will stand or fall with managers. But many managers feel stuck between leadership and new employee expectations, and they feel powerless to drive change for their team. Over half of managers (54%) feel leadership at their company is out of touch with employee expectations. And 74% say they don't have the influence or resources they need to make changes on behalf of their team.

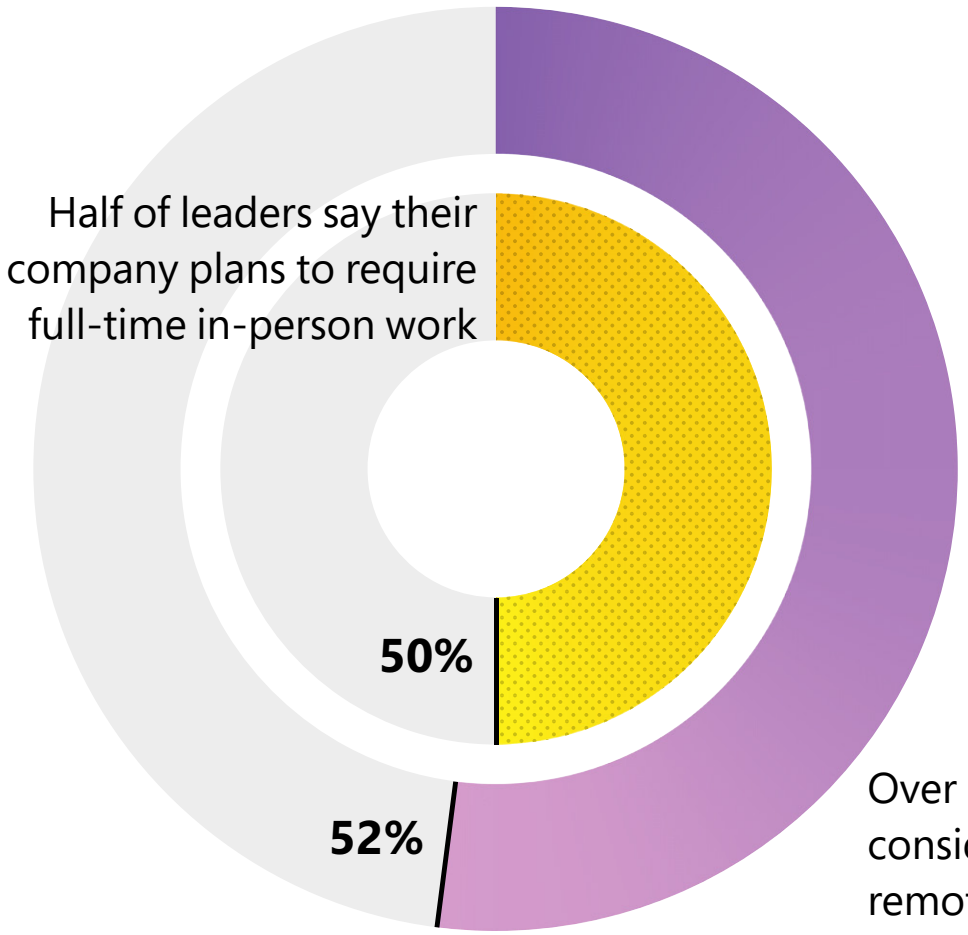
The source of this tension is clear as business leaders seek a return to what once was; 50% of leaders[2] say their company already requires, or plans to require, full-time in-person work in the year ahead. This percentage is even higher for leaders in the manufacturing (55%), retail (54%), and consumer goods (53%) industries.

This stands in sharp contrast to the data on the importance of flexible work to employees. Over half of respondents (52%) say they are likely to consider shifting to hybrid or remote work in the year ahead. And remote and hybrid jobs are still on the rise. According to LinkedIn, in March of 2020, 1 in 67 U.S. jobs offered a remote work option. Today, that number is about 1 in 7. And remote jobs on LinkedIn attract 2.6 times more views and nearly 3 times more applicants compared to on-site roles.

[2] The 50% of business leaders who say their company already requires or plans to require full-time in-person work in the year ahead reflects leaders who are in information worker roles. It does not include leaders who work in frontline settings such as hospitals, warehouses, retail settings, etc.

Back to the office

Many leaders say their company is planning a return to the office full time within the next year, but a majority of employees prefer the flexibility of remote and hybrid work.



50% of leaders in information worker roles say their company is currently or planning to focus on requiring full-time in-person work in the year ahead, while 52% of respondents say they are somewhat or extremely likely to consider going remote or hybrid in the year ahead.

Illustration by Valerio Pellegrini

There's no question technology helped preserve productivity during the pandemic, but fears about lost gains may be factoring into the pullback to in-person work. Despite 80% of employees saying they are just as or more productive since going remote or hybrid, 54% of leaders fear productivity has been negatively impacted since the shift.

Leaders have spent the past two years under crushing pressure, shepherding their people and organizations through uncertainty amid unprecedented economic challenges. It's easy to imagine why they might see a return to the office as the solution. But now, leaders have a new and urgent challenge in an uncertain economy and labor market: setting the standard for flexible work in a way that balances business outcomes with new employee expectations.

Key Takeaway

An important lesson of the past two years is that managers embody and instantiate the culture for every organization. Managers are a critical bridge between evolving employee expectations and leadership priorities. If empowered, they hold the key to unlock the potential of hybrid work. Equip them with the resources and training they need to manage the transition. While policy is set at the top, leaders need to decentralize decision-making and empower managers to make change on behalf of their employees' individual needs. Microsoft encourages managers to use this template to create team agreements for hybrid work.

"There's no erasing the lived experience and lasting impact of the past two years. Empowering managers to adapt to new employee expectations helps set businesses up for long-term success."

—Jared Spataro, CVP, Modern Work, Microsoft

3 Leaders need to make the office worth the commute.

38%

of hybrid employees say their biggest challenge is knowing when and why to come into the office.

28%

of leaders have created team agreements for hybrid work to define why and when to go to the office.

A

s the world shifts more fully into hybrid work, the biggest opportunity for business leaders is to reimagine the role of the office and create clarity around why, when, and how often teams should gather in person. More than a third (38%) of hybrid employees say their biggest challenge is knowing when and why to come into the office. Yet few companies (just 28%) have established team agreements to clearly define the new norms.

Making the office work for all employees will take radical intentionality. There's no one-size-fits-all approach: Experiment with "Team Tuesdays" or in-person office hours between 12 p.m. and 2 p.m., two days a week. Consider quarterly offsites that bring far-flung teammates together regularly. The key is for managers to provide clear guidance to employees as they experiment and learn what works for the team.

"You must design workplaces with enough flexibility to support every employee. A mix of quiet places, collaboration areas, and touch-down locations helps ensure everyone can be connected, engaged, and productive."

—Michael Ford, CVP of Global Workplace Services

Hybrid work requires new team norms

Few companies have created new team norms to ensure time together is intentional.

38% of hybrid workers say the greatest challenge of hybrid is knowing when/why to come to the office, yet only...

28% of companies have created team agreements that create team norms around hybrid work.

43% of remote workers say they do not feel included in meetings, yet only...

27% of companies have created new hybrid meeting etiquette to ensure all feel included and engaged.

Hybrid employees were asked, "Which of the following have been the biggest challenges for you personally in working a mix of remote and in person?" Remote employees were asked if they were "thriving or struggling" when it comes to feeling included in meetings. Leaders were asked, "What has your company done to ensure remote workers are not disadvantaged/have an equal opportunity to succeed and contribute?"

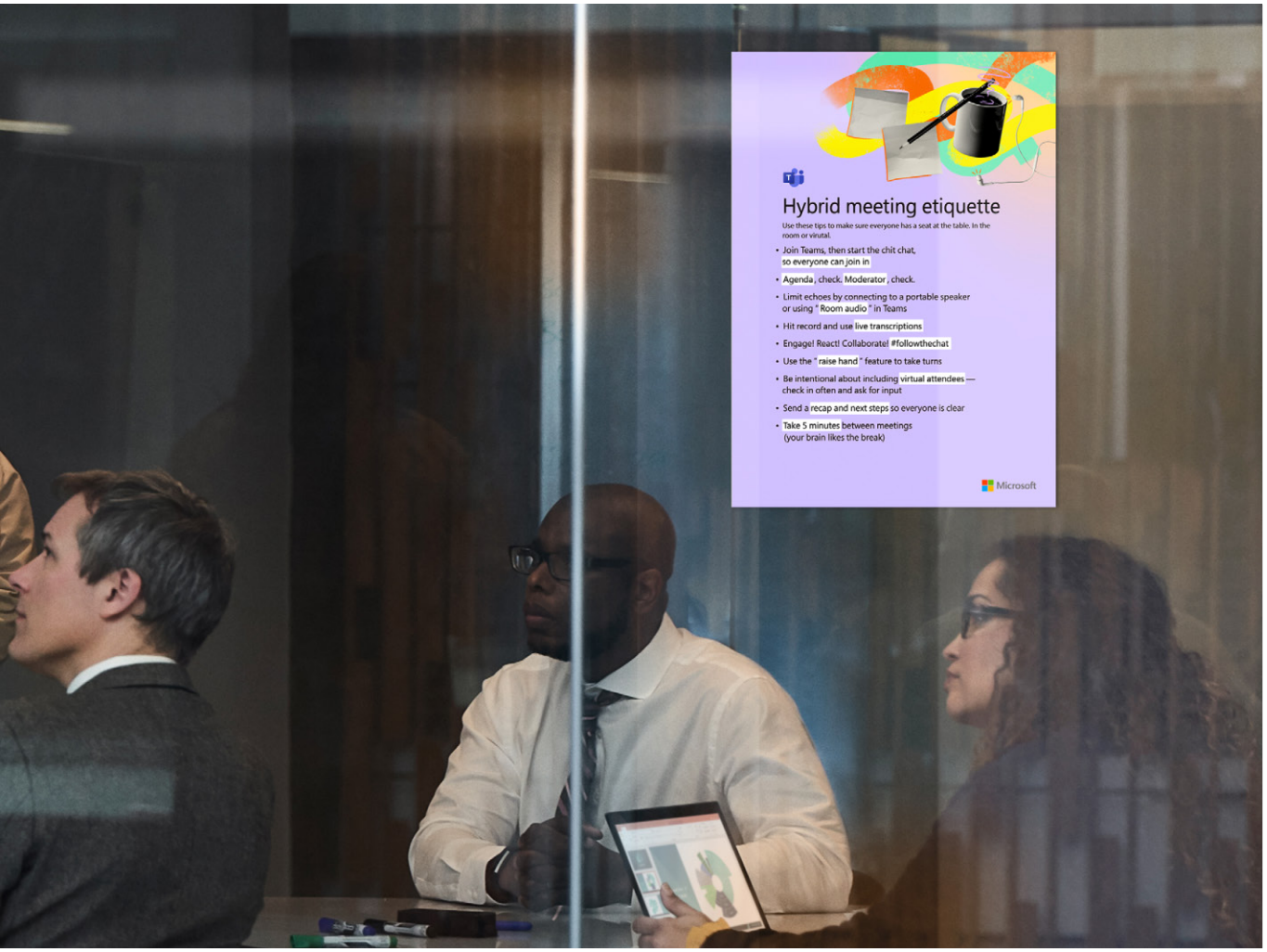
Illustration by Valerio Pellegrini

27%

of organizations have established new hybrid work meeting etiquette.

This intentionality extends to hybrid meetings. Making hybrid meetings a great experience for everyone requires investing in three things: hardware, software, and culture. Start by augmenting existing hardware with AI-powered cameras designed for the people not in the room; consider adding larger screens to give everyone a seat at the table and create a canvas for collaboration. Second, have everyone join Teams—including those in the room—to create a shared experience. Third, create new cultural norms for hybrid meetings to help everyone feel included and able to contribute.

Data suggests companies are making progress on investments in space and technology, but there's more work to do on culture. On technology and space, monthly use of Microsoft Teams Rooms, optimized for hybrid collaboration, has more than doubled year-over-year. And 54% of leaders are currently redesigning meeting spaces for hybrid work, or plan to in the year ahead. However, despite 43% of remote employees and 44% of hybrid employees saying they do not feel included in meetings, just 27% of organizations have established new hybrid work meeting etiquette.



Microsoft's new hybrid meeting etiquette will be posted physically and digitally for the company's 180,000 employees in over 100 countries around the world.

Key Takeaway

Leaders must establish the why, when, and how of the office. This means defining the purpose of in-person collaboration, creating team agreements on when to come together in person, defining hybrid meeting etiquette, and rethinking how space can play a supporting role. Organizations that fail to grasp the new intentionality required to define the role of the office risk missing out on the true benefits of hybrid work.

4 Flexible work doesn't have to mean "always on."

252%

Increase in weekly time spent in meetings for the average Teams user since February 2020

32%

Increase in chats sent per person since March 2020

28%

Increase in after-hours work since March 2020

The trillions of anonymized productivity signals across Microsoft 365 show flexible work in action. But as employees make flexible work *work* for them, there's still a need to combat digital exhaustion.

On the face of it, for the average Teams user, meetings, chat, workday span, and after-hours and weekend work have all risen over the past two years.[3]

Meetings are still consuming a lion's share of our time. Since February 2020, the average Teams user saw a 252% increase in their weekly meeting time and the number of weekly meetings has increased 153%. The average Teams user sent 32% more chats each week in February 2022 compared to March 2020 and that figure continues to climb. Workday span for the average Teams user has increased more than 13% (46 minutes) since March 2020, and after-hours and weekend work has grown even more quickly, at 28% and 14%, respectively.

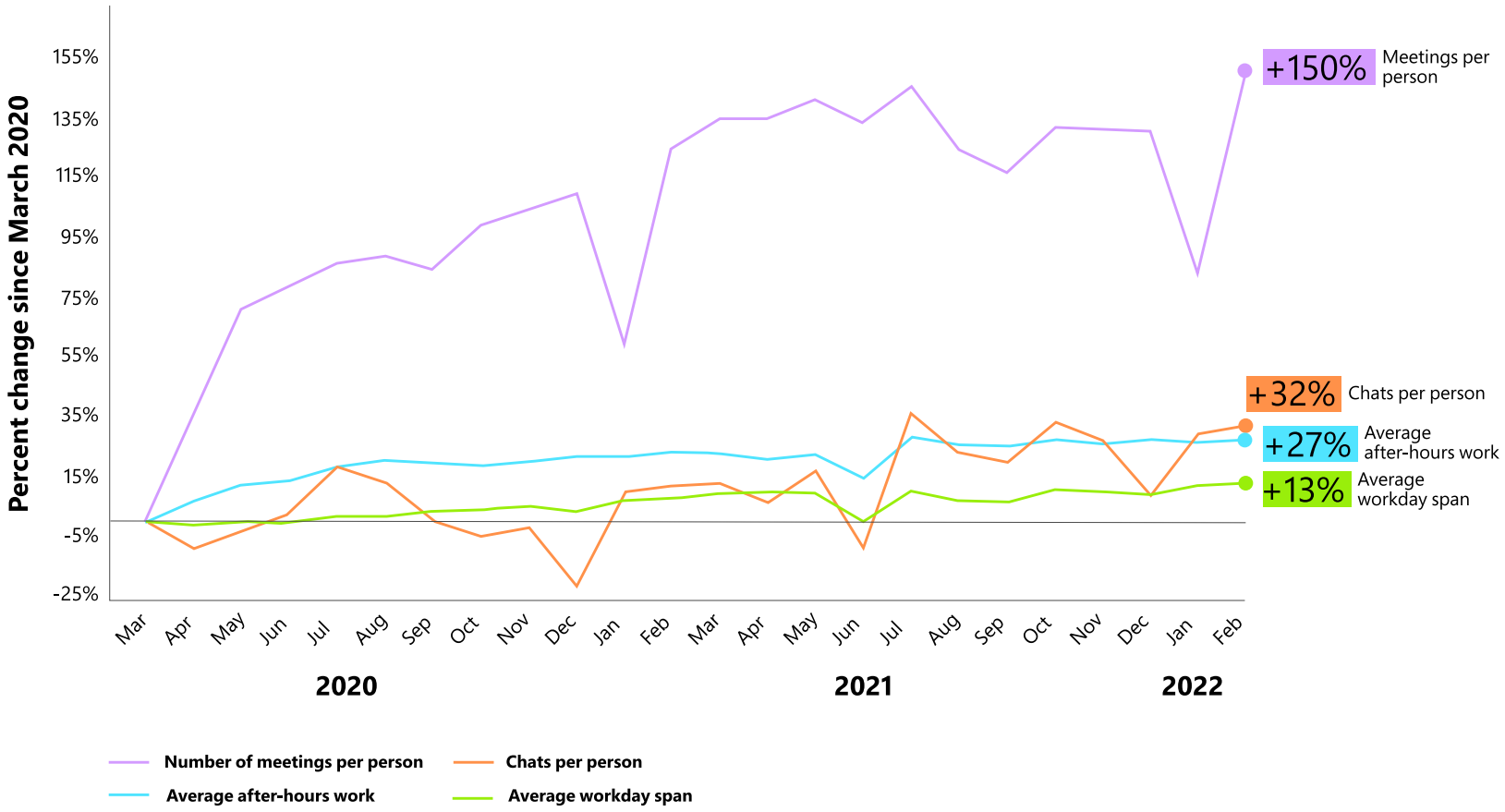
[3] **Workday span:** Time between the first and last meeting or chat of the day for the average Teams user.

After-hours work: Average span between the first Teams chat/call/meeting after 5pm local time to the last signal for the day.

Weekend work: Average span between the first Teams meeting/call/chat to the last signal on Saturdays and Sundays.

Work is more flexible, but digital overload is still a risk

After-hours work and workday span are still increasing, as are the number of weekly meetings and chats per person



Analysis of collaboration activity across Microsoft 365 tools the past two years. This visualization is based on aggregated data, without personal or organization-identifying information.

Illustration by Valerio Pellegrini

Despite the digital overload, people are making flexible work their own, taking control of their time and reshaping the workday. Productivity patterns in Outlook show people are becoming more intentional about taking breaks, avoiding double booking, and establishing meeting-free work blocks. Between March 2021 and February 2022, anonymized Outlook calendar data show the average number of overlapping meetings per person per month decreased by 44%. Compared to last year, teams are starting meetings later on Mondays and wrapping up earlier on Fridays. There are also fewer noon meetings, which may point to people taking a midday break. More employees are also using their vacation time, with out-of-office time blocks on calendars increasing by 10% in the last year.

Making flexible work sustainable

Tips from Mary Czerwinski and Shamsi Iqbal, two Microsoft researchers with decades of experience studying productivity, focus and wellbeing.

1. Too many meetings

- Make it a team practice to ask, "Could we cover this in email or chat instead?"
- Look for opportunities to divide and conquer meetings with team members
- Use the "required" and "optional" lines of meeting invites to help people prioritize their time
- Block focus time on your calendar for personal productivity and wellbeing, and protect it
- As a team, consider designating certain days or time blocks "meeting-free"

2. Waning energy or focus due to back-to-back meetings

- Share an agenda ahead of the meeting and assign an owner to each part
- Create team norms around established breaks between meetings (e.g., start all meetings at five or 10 minutes after the hour)
- Keep meetings as short as possible; if they're longer than 30 minutes, include a 5-minute break
- Avoid scheduling large, presentation-only meetings in the first hour of the workday when people tend to multitask and catch up on emails and to-dos

3. Chats or emails from colleagues outside of working hours or during meetings

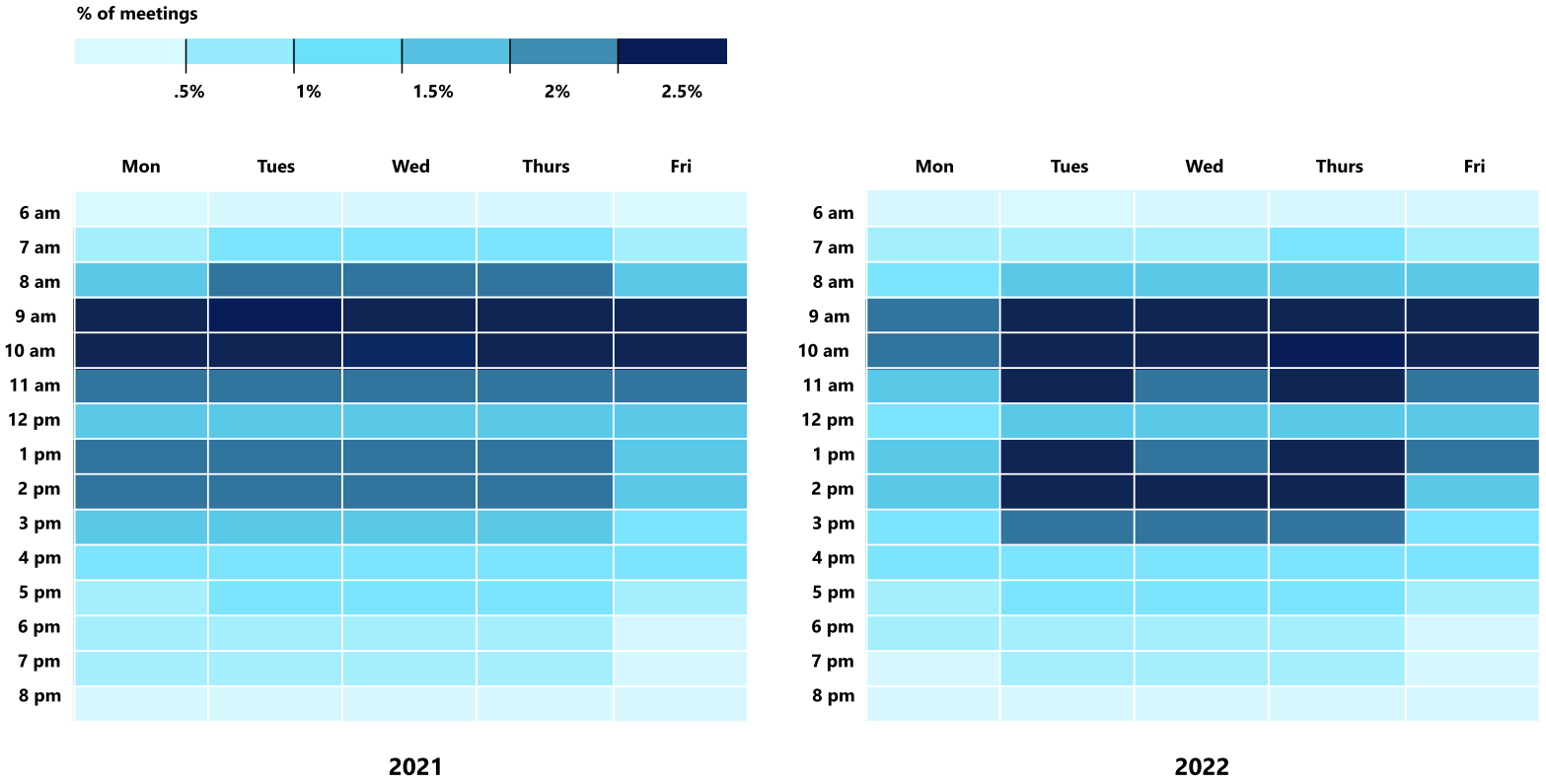
- Use the delay delivery feature in Outlook for emails outside of established working hours
- As a team, set expectations on response time to emails and chats sent outside of working hours
- Use NOT URGENT in the headline of emails or chats when your colleague is in a meeting or it's outside working hours

4. Working in different time zones

- Share meeting-related documents ahead of time and ask for comments so participants can review asynchronously
- Record meetings and share notes with invitees afterwards

Meeting habits are changing

Meetings now start later on Mondays and finish earlier on Fridays, and there are fewer meetings at lunchtime. While 9-11 a.m. is the most used meeting time, 2-3 p.m. is rising in popularity.



Analysis of collaboration activity across Microsoft 365 tools the past two years. This visualization is based on aggregated data, without personal or organization-identifying information."

Illustration by Valerio Pellegrini

While meetings are up overall, they are getting shorter and more ad-hoc. As employees find digital equivalents of the "drive by" or "hallway conversation", unscheduled, ad-hoc calls have risen 8% in the last two years and now make up 64% of all Teams meetings. And meetings under 15 minutes now make up a majority of all meetings (60%) and are increasing more than any other meeting length (39% between February 2021 and 2022).

The data also shows the shift to asynchronous work as part of the new normal. Monthly use of meeting recordings that allow people to catch up on meetings, training, and town halls on demand has more than doubled since March 2020[4]. And new patterns—like the "triple peak day"— are emerging as some people leave the 9 to 5 behind to do what works for them.

"Because everyone is working at different times and in different places, it's important

to shift as much work as you can to be asynchronous and get really intentional about the use of the synchronous time you have together," says Jaime Teevan, Microsoft's Chief Scientist.

Taken altogether, the data indicates that employees are doing what they can to make flexible work their own but making flexible work sustainable long-term will require new team norms to guard against being "always on."

[4] Monthly usage of Microsoft's Stream platform as a way for employees to work asynchronously has more than doubled between March 2020 and February 2022.

Key Takeaway

Teams need to create new norms around flexible work to reduce time spent in meetings and empower people to hit the off switch. This should not be a solo effort, but a team-led movement to establish more sustainable hybrid work practices.

The metaverse is coming to work

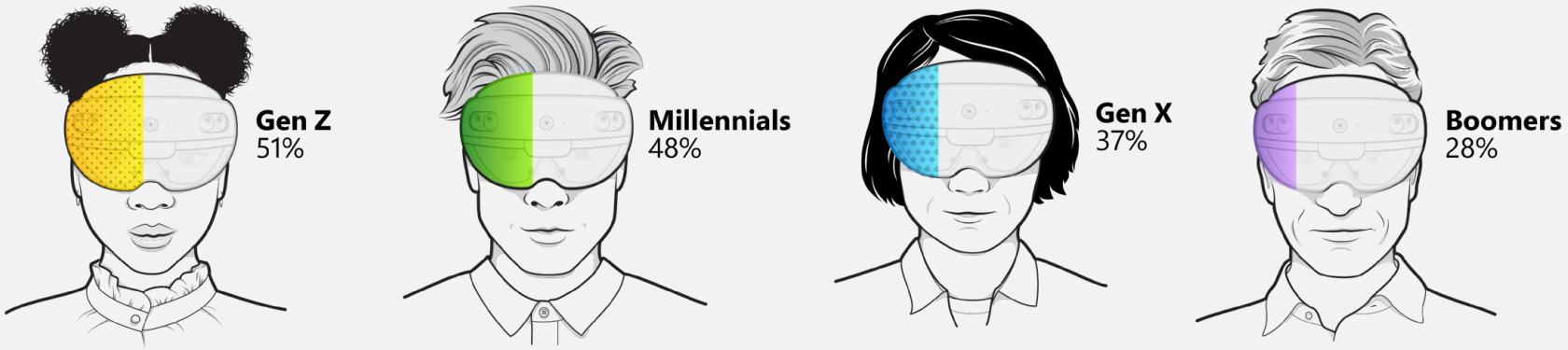
We also asked respondents about emerging technologies at work.

- 52% of employees are open to using digital immersive spaces in the metaverse for meetings or team activities in the next year.
- 47% of employees are open to representing themselves as an avatar in meetings in the next year.
- 51% of Gen Z and 48% of Millennials envision doing some of their work in the metaverse in the next two years.
- 16% of employees say they never expect to do any work in the metaverse.
- 13% of employees say they don't know what the term 'metaverse' means.

"Avatars and the metaverse bring us one step closer to making people feel like they're together even when they are physically apart," says Mar Gonzalez Franco, principal researcher at Microsoft Research. "Our early research shows that when compared to an audio-only call, people feel more engaged, more present, and even more comfortable when using an avatar in a meeting. The people you are speaking with are better able to see your body language, and back-and-forth conversations feel more natural."

Leaders need to consider how emerging technologies like the metaverse and AI can augment collaboration and facilitate co-creation and creativity in a distributed work world.

Millennials and Gen Z are more likely to envision doing some of their work in the metaverse in the next two years.



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Rebuilding social capital looks different in a hybrid world.

51%

of hybrid employees say they're likely to go remote in the year ahead.

43%

of leaders say relationship-building is the greatest challenge in remote and hybrid work.

One of the most felt aspects of remote and hybrid work is the impact it's had on our relationships. Last year's Work Trend Index revealed that teams became more siloed, and this year's study shows the trend one year later.

While a majority of hybrid employees seem to be maintaining their work relationships, only half of remote workers say they have a thriving relationship with their direct team, and even fewer have a strong relationship with those outside their team.

In a digital-first work world, where 51% of hybrid employees are considering a shift to remote work in the year ahead, we can no longer rely solely on the office to recoup the social capital we've lost. Leaders must be intentional about reconnecting both hybrid and remote employees into the fabric of the organization.

This won't be a trivial task—43% of leaders say relationship-building is the greatest challenge in hybrid and remote work—but it's one worth prioritizing. Building social capital is crucial for organizational success. Employees who have thriving relationships

with their immediate team members report better wellbeing than those with poor relationships (76% versus 57%). They also report higher productivity (50% versus 36%) and are less likely to change employers in the year ahead (61% versus 39%).

Strengthening networks outside of the immediate team matters, too. Employees with thriving relationships beyond their immediate team members say they're more satisfied with their employer (76% versus 57%), more fulfilled by work (79% versus 59%), and have a more positive outlook on workplace stress (40% versus 30%) than those with weak organizational networks. Having a broad network also fuels career opportunities within a company—LinkedIn data shows that employees at companies with high internal mobility stay almost twice as long.

Our research shows many hybrid employees have been successful at maintaining their workplace relationships. More than half (58%) say they have a thriving relationship with their direct team, and 48% say they have a thriving relationship with people outside their immediate team. However, these numbers dip to 50% and 42%, respectively, for remote employees—highlighting the need for leaders to help fully remote employees build strong and broad networks.

"When people trust one another and have that kind of [social] capital, you get a willingness to take risks, you get more innovation and creativity and less groupthink."

—Nancy Baym, Principal Researcher, Microsoft Research

Employees who onboarded the past two years also need extra support. Nearly two-thirds (62%) of leaders are concerned new employees aren't getting the support they need since moving to hybrid or remote work—and for good reason. The data shows that employees hired since March 2020 are less likely to feel included (60% versus 64%), have weaker relationships with their direct team (51% versus 55%), and are at greater risk of attrition (56% versus 38% are likely to leave their employer in the year ahead).

Work Friends Matter, Too

In addition to looking at formal workplace relationships, our research explored deeper workplace friendships.

- 59% of hybrid employees and 56% of remote employees have fewer work "friendships" since going hybrid or remote.
- This may be contributing to feelings of loneliness. 55% of hybrid employees and 50% of remote employees feel lonelier at work than before going hybrid or remote.
- 66% of respondents say doing informal coffee chats virtually feels like "more of a chore" than an in-person get together.

Organizational psychologist Constance Noonan Hadley describes loneliness at work as the belief that, "Few people truly know me or would support me in my time of need." And research shows loneliness at work brings health problems, reduced productivity, turnover, and burnout.

Hadley says, "Without a new approach, employee isolation and disconnection will continue to grow—regardless of whether people are back in the office. The post-pandemic transition provides the perfect opportunity to put the structures and rewards in place to facilitate a more connected workforce."

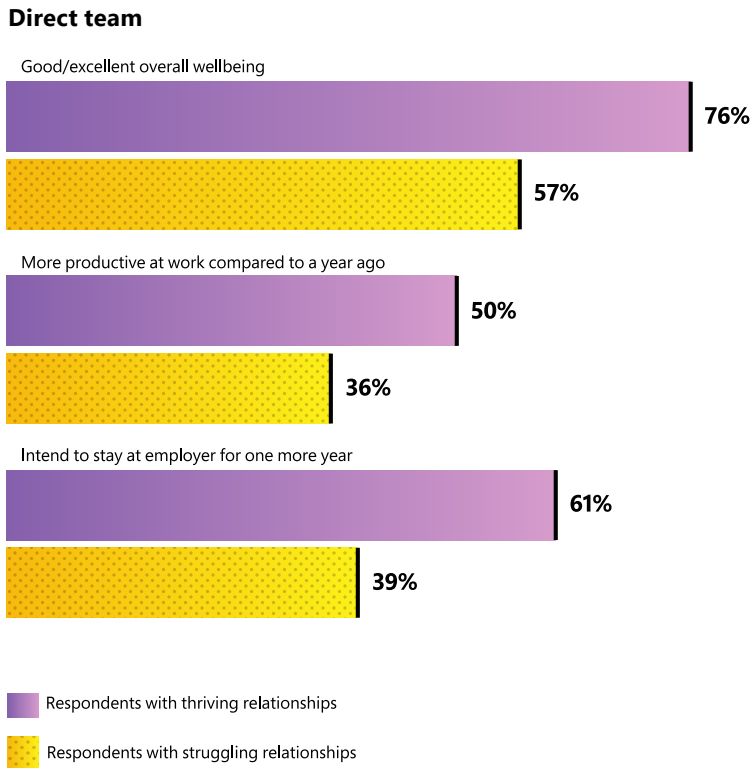
Managers should prioritize time for employees to connect in more deep and authentic ways beyond the to-do list and foster a culture that rewards psychological safety, so employees can be vulnerable and lean on each other for support when needed.

The impact of strong workplace relationships

Research shows the massive benefits of thriving relationships within and outside of your direct team.

Respondents were asked several questions on this topic, such as, "Would you say you are thriving or struggling with the following types of bonds or relationships at work?" and "When thinking about your network/social circle at work, how much do you agree or disagree with the following statements?"

Illustration by Valerio Pellegrini



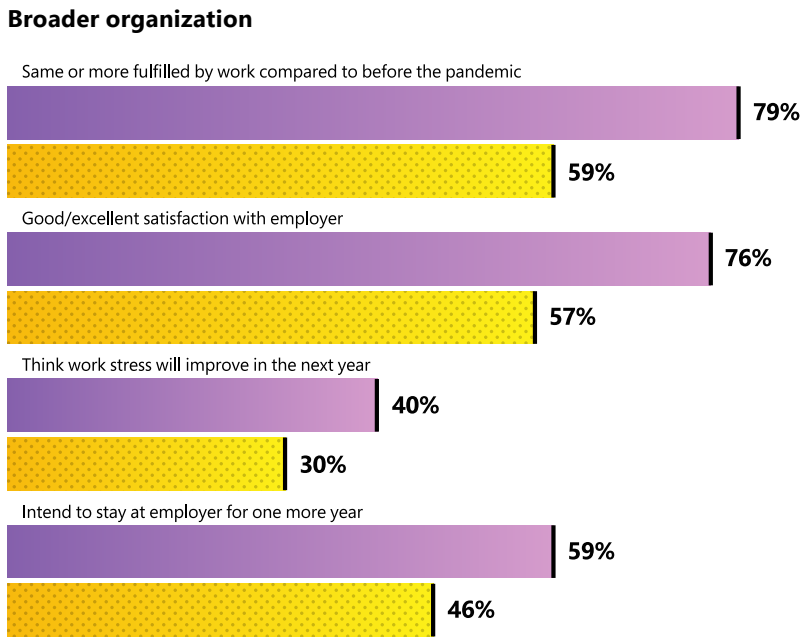


Illustration by Valerio Pellegrini

The data shows employees are ready to stop emailing and start connecting. While 48% of employees say they want to spend less time on things like answering emails and scheduling meetings and more time networking, just 30% of leaders feel that networking-related activities drive business impact. To reap the benefits of social capital, leaders need to make time and space for employees to build their networks and deepen relationships beyond the transactional in a hybrid world.

"When work-life balance is out of whack, most people cut out relationship-building for more urgent matters," says Constance Noonan Hadley, an organizational psychologist who studies workplace relationships. "Regardless of remote status, building relationships will still feel like a luxury workers cannot afford unless there is a shift in how time is prioritized and valued by managers."

Key Takeaway

Leaders should not see a return to the office as the only solve for rebuilding the social capital we've lost over the past two years. They should prioritize time for relationship-building to happen, knowing remote and newly onboarded employees will need extra support. Managers play a crucial role in fostering close team bonds and acting as dot connectors to help employees broaden their networks.

In a hybrid world, it's up to leaders to help all employees prioritize time to build relationships, with additional support to remote and newly onboarded employees, who our research shows are most at risk of being left behind.

The Way Forward

The past two years have made a lasting imprint on work—the impact of which will be felt long into the future. The new "worth it" equation is not a zero-sum game. Employees value flexibility and wellbeing, and these great expectations create an opportunity for every organization to reimagine work-life integration as a win-win.

Giving people agency to do *their* best work is not only in their best interest—it's good for business. To make hybrid work *work*, leaders need to empower managers to be the culture keepers, rethink the role of the office, rebuild social capital for a digital-first workforce, and create new practices for sustainable flexible work. Technology plays a key role, but this moment calls for a new mindset. **As the world continues to evolve, organizations that take a culture-first, learn-it-all approach will come out ahead.**

Learn more about how Microsoft is innovating to help organizations make hybrid work *work*.

Methodology and Audience Definitions:

The Work Trend Index survey was conducted by an independent research firm, Edelman Data x Intelligence, among 31,102 full-time employed or self-employed workers across 31 markets between January 7, 2022 and February 16, 2022. This survey was 20 minutes in length and conducted online, in either the English language or translated into a local language across markets. At least 1,000 full-time workers were surveyed in each market, and global results have been aggregated across all responses to provide an average. Each market is evenly weighted within the global average. Each market was sampled to be representative of the full-time workforce across age, gender, and region; each sample included a mix of work environments (in-person, remote vs. non-remote, office settings vs. non-office settings, etc.), industries, company sizes, tenures, and job levels. Markets surveyed include:

Australia and New Zealand (ANZ): Australia, New Zealand; **Asia-Pacific (APAC)**: China, Hong Kong, India, Indonesia, Japan, Malaysia, Philippines, Singapore, South Korea, Taiwan, Thailand, Vietnam; **Europe**: Czech Republic, Finland, France, Germany, Italy, Netherlands, Poland, Spain, Sweden, Switzerland, United Kingdom; **Latin America (LATAM)**: Argentina, Brazil, Colombia, Mexico; **North America**: Canada, United States.

Audiences mentioned in the report are defined as follows:

- **Frontline Workers:** self-selected at time of survey fielding as being required to be in-person to do their job and do not work at a traditional 'desk setting' (for example work at a healthcare facility, school, construction site, or warehouse).
- **Hybrid Workers:** self-selected at time of survey fielding as currently working a mix of in-person and remotely, at least one day every other week in a typical week.
- **Remote Workers:** self-selected at time of survey fielding as currently working remotely every day of the week in a typical week.
- **Information Workers:** self-selected at time of survey fielding that their typical work setting is at a desk (whether in an office or at home). This group includes those who are in-person or working remotely in some cAsia-Pacificity.
- **Business Leaders/Business Decision Makers:** those in mid to upper job levels (i.e., SVP, VP, Sr. Director, General Manager, EVP, C-Suite, President, etc.) and have at least some influence on decision making related to hiring, budgeting, employee benefits, internal communications, operations, etc.
- **Non-Business Decision Makers:** employees who are not in mid to upper job levels and have no influence on decision making related to hiring, budgeting, employee benefits, internal communications, operations, etc.
- **Managers:** Employees who manage at least one employee as a direct report. Managers can be BDMs or non-BDMs.

Appendix: Key Global Trends

1. Employees have a new "worth it" equation.

Aggregated Totals	By Region	By Market	
53% of workers are more likely to prioritize their health and wellbeing over work than before the pandemic.	North America: 52% Latin America: 70% Asia-Pacific: 57% Europe: 44% Australia/New Zealand: 48%	North America Canada: 50% Latin America Brazil: 71% Asia-Pacific China: 58% India: 67% Japan: 37% South Korea: 46% Europe France: 48% Germany: 38%	Italy: 54% Netherlands: 40% Poland: 31% Spain: 57% Sweden: 43% Switzerland: 36% UK: 56% Australia/New Zealand Australia: 51% New Zealand: 44%
18% of workers say they actually left their jobs in the past year.	North America: 17% Latin America: 18% Asia-Pacific: 19% Europe: 16% NZ: 20%	North America Canada: 15% Latin America Brazil: 12% Asia-Pacific China: 7% India: 41% Japan: 12% South Korea: 19%	Europe France: 12% Germany: 12% Italy: 17% Netherlands: 21% Poland: 14% Spain: 17% Sweden: 18% Switzerland: 20%

1. Employees have a new "worth it" equation.

Aggregated Totals	By Region	By Market	
18% of workers say they actually left their jobs in the past year (*continued*).		UK: 15%	Australia/New Zealand Australia: 20% New Zealand: 21%
43% of workers are somewhat or extremely likely to consider changing employers this year (vs. 41% in 2021) 52% of Gen Z and Millennials are somewhat or extremely likely to consider changing employers this year (vs. 49% in 2021).	North America: 41% (vs. 39% in 2021); 56% (vs. 56% in 2021) Latin America: 40% (vs. 36% in 2021); 47% (vs. 41% in 2021) Asia-Pacific: 50% (vs. 47% in 2021); 55% (vs. 52% in 2021) Europe: 36% (vs. 37% in 2021); 49% (vs. 47% in 2021) Australia/New Zealand: 48% (vs. 45% in 2021); 56% (vs. 55% in 2021)	North America Canada: 37% (vs. 35% in 2021); 52% (vs. 53% in 2021) Latin America Brazil: 38% (vs. 38% in 2021); 44% (vs. 45% in 2021) Asia-Pacific China: 56% (vs. 45% in 2021); 46% (vs. 38% in 2021) India: 65% (vs. 62% in 2021); 70% (vs. 63% in 2021) Japan: 33% (vs. 38% in 2021); 44% (vs. 49% in 2021)	South Korea: 46% (vs. 49% in 2021); 56% (vs. 54% in 2021) Europe France: 33% (vs. 30% in 2021); 49% (vs. 45% in 2021) Germany: 28% (vs. 29% in 2021); 43% (vs. 42% in 2021) Italy: 37% (vs. 34% in 2021); 49% (vs. 46% in 2021) Netherlands: 41% (vs. 45% in 2021); 57% (vs. 57% in 2021) Poland: 37% (vs. 39%

	Aggregated Totals	By Region	By Market	
1. Employees have a new "worth it" equation.	43% of workers are somewhat or extremely likely to consider changing employers this year (vs. 41% in 2021) 52% of Gen Z and Millennials are somewhat or extremely likely to consider changing employers this year (vs. 49% in 2021). (*Continued*)		in 2021); 49% (vs. 48% in 2021) Spain: 39% (vs. 32% in 2021); 54% (vs. 43% in 2021) Sweden: 36% (vs. 42% in 2021); 46% (vs. 57% in 2021) Switzerland: 39% (vs. 41% in 2021); 53% (vs. 44% in 2021) UK: 41% (vs. 41% in 2021); 55% (vs. 49% in 2021)	Australia/New Zealand Australia: 48% (vs. 42% in 2021); 58% (vs. 50% in 2021) New Zealand: 47% (vs. 48% in 2021); 52% (vs. 60% in 2021)
2. Managers feel wedged between leadership and employee expectations.	74% of people managers wish they could do more to implement change for their team but do not have the influence or resources.	North America: 68% LATAM: 75% APAC: 78% EMEA: 69% ANZ: 73%	North America Canada: 67% Latin America Brazil: 73% Asia-Pacific China: 77% India: 84% Japan: 65% South Korea: 63%	Europe France: 72% Germany: 66% Italy: 71% Netherlands: 65% Poland: 69% Spain: 79% Sweden: 66%

2. Managers feel wedged between leadership and employee expectations.

Aggregated Totals	By Region	By Market	
74% of people managers wish they could do more to implement change for their team but do not have the influence or resources (*continued*).		Switzerland: 66% UK: 69%	Australia/New Zealand Australia: 71% New Zealand: 75%
54% of people managers say leadership at their company is out of touch with employees.	North America: 53% Latin America: 43% Asia-Pacific: 57% Europe: 53% Australia/New Zealand: 61%	North America Canada: 53% Latin America Brazil: 34% Asia-Pacific China: 65% India: 65% Japan: 61% South Korea: 59% Europe France: 48% Germany: 51%	Italy: 56% Netherlands: 56% Poland: 51% Spain: 60% Sweden: 57% Switzerland: 46% UK: 56% Australia/New Zealand Australia: 59% New Zealand: 62%

2. Managers feel wedged between leadership and employee expectations.

Aggregated Totals	By Region	By Market	
54% of business leaders fear productivity has been negatively impacted since a shift to remote or hybrid work.	North America: 51% Latin America: 39% Asia-Pacific: 62% Europe: 49% Australia/New Zealand: 59%	North America Canada: 46% Latin America Brazil: 27% Asia-Pacific China: 84% India: 62% Japan: 45% South Korea: 58% Europe France: 52% Germany: 41% Italy: 53% Netherlands: 61%	Poland: 53% Spain: 44% Sweden: 48% Switzerland: 47% UK: 43% Australia/New Zealand Australia: 53% New Zealand: 63%

2. Managers feel wedged between leadership and employee expectations.

Aggregated Totals	By Region	By Market	
81% of workers say they are as productive or even more productive compared to a year ago	North America: 81% Latin America: 85% Asia-Pacific: 80% Europe: 82% Australia/New Zealand: 80%	North America Canada: 80% Latin America Brazil: 85% Asia-Pacific China: 89% India: 85% Japan: 71% South Korea: 74% Europe France: 81% Germany: 85%	Italy: 81% Netherlands: 81% Poland: 79% Spain: 86% Sweden: 82% Switzerland: 81% UK: 84% Australia/New Zealand Australia: 80% New Zealand: 79%
50% of business leaders say their company is planning to require employees to work in-person full time within the next year.	North America: 51% Latin America: 50% Asia-Pacific: 58% Europe: 39% Australia/New Zealand: 40%	North America Canada: 44% Latin America Brazil: 47% Asia-Pacific China: 46% India: 67% Japan: 42% South Korea: 49% Europe France: 42% Germany: 36%	Italy: 47% Netherlands: 31% Poland: 37% Spain: 46% Sweden: 32%, Switzerland: 36% UK: 44% Australia/New Zealand Australia: 51% New Zealand: 32%

	Aggregated Totals	By Region	By Market	
2. Managers feel wedged between leadership and employee expectations.	52% of workers are considering switch to remote or hybrid in the year ahead	North America: 48% Latin America: 59% Asia-Pacific: 60% Europe: 39% Australia/New Zealand: 49%	North America Canada: 48% Latin America Brazil: 58% Asia-Pacific China: 59% India: 67% Japan: 31% South Korea: 43% Europe France: 34%	Germany: 35% Italy: 41% Netherlands: 42% Poland: 42% Spain: 49% Sweden: 37% Switzerland: 37% UK: 43% Australia/New Zealand Australia: 47% New Zealand: 50%
3. Leaders need to make the office worth the commute.	Only 28% of business leaders have created team agreements for hybrid work to define why and when to go to the office.	North America: 25% Latin America: 27% Asia-Pacific: 32% Europe: 24% Australia/New Zealand: 20%	North America Canada: 20% Latin America Brazil: 31% Asia-Pacific China: 26% India: 42% Japan: 24% South Korea: 22% Europe France: 26% Germany: 24%	Italy: 27% Netherlands: 23% Poland: 25% Spain: 23% Sweden: 21% Switzerland: 28% UK: 23% Australia/New Zealand Australia: 26% New Zealand: 16%

	Aggregated Totals	By Region	By Market	
3. Leaders need to make the office worth the commute.	38% of hybrid workers say their biggest challenge is knowing when to work remotely and when to work in-person.	North America: 33% Latin America: 39% Asia-Pacific: 41% Europe: 34% Australia/New Zealand: 34%	North America Canada: 31% Latin America Brazil: 34% Asia-Pacific China: 38% India: 45% Japan: 40% South Korea: 43% Europe France: 28% Germany: 35%	Italy: 33% Netherlands: 34% Poland: 34% Spain: 32% Sweden: 38% Switzerland: 31% UK: 35% Australia/New Zealand Australia: 36% New Zealand: 32%
4. Flexible work doesn't mean "always on."	Weekly time spent in meetings for the average person has plateaued after increasing over 250% since March 2020.	Pulled from internal Microsoft data (no regional or market data available)		
	After two years, chat use is still on the rise with chats sent per person up 27%.			
	Workday span, after-hours and weekend work still on the rise.			

4. Flexible work doesn't mean "always on."

Aggregated Totals	By Region	By Market	
52% of employees are open to using digital immersive spaces in the metaverse for meetings or team gatherings in the next year.	North America: 49% Latin America: 63% Asia-Pacific: 56% Europe: 45% Australia/New Zealand: 50%	North America Canada: 49% Latin America Brazil: 65% Asia-Pacific China: 57% India: 49% Japan: 38% South Korea: 55% Europe France: 39% Germany: 46%	Italy: 46% Netherlands: 47% Poland: 50% Spain: 52% Sweden: 45% Switzerland: 42% UK: 44% Australia/New Zealand Australia: 49% New Zealand: 50%
47% of employees are open to representing themselves as an avatar in meetings in the next year.	North America: 42% Latin America: 55% Asia-Pacific: 53% Europe: 38% Australia/New Zealand: 44%	North America Canada: 42% Latin America Brazil: 56% Asia-Pacific China: 57% India: 49% Japan: 38% South Korea: 48% Europe France: 32% Germany: 36%	Italy: 39% Netherlands: 39% Poland: 45% Spain: 46% Sweden: 40% Switzerland: 39% UK: 38% Australia/New Zealand Australia: 43% New Zealand: 45%

5.Rebuilding social capital looks different in a hybrid world.

Aggregated Totals	By Region	By Market	
51% of workers who are currently hybrid seek being fully remote in the next year	North America: 50% Latin America: 58% Asia-Pacific: 61% Europe: 35% Australia/New Zealand: 47%	North America Canada: 43% Latin America Brazil: 58% Asia-Pacific China: 56% India: 63% Japan: 33% South Korea: 47% Europe France: 33%	Germany: 35% Italy: 39% Netherlands: 39% Poland: 39% Spain: 50% Sweden: 28% Switzerland: 32% UK: 38% Australia/New Zealand Australia: 42% New Zealand: 50%
55% of hybrid workers feel lonelier at work than before shifting to hybrid while 50% of remote workers feel this way since shifting to remote work	North America: 56%, 48% Latin America: 45%, 48% Asia-Pacific: 57%, 57% Europe: 55%, 47% Australia/New Zealand: 53%, 44%	North America Canada: 57%, 50% Latin America Brazil: 44%, 48% Asia-Pacific China: 53%, 83%, India: 60%, 54% Japan: 57%, 36% South Korea: 60%, 58% Europe France: 53%, 45%	Germany: 49%, 38% Italy: 54%, 41% Netherlands: 60%, 43% Poland: 55%, 48% Spain: 60% ,52% Sweden: 57%, 53% Switzerland: 53%, 47% UK: 51%, 45% Australia/New Zealand Australia: 49%, 45% New Zealand: 56%, 42%

5. Rebuilding social capital looks different in a hybrid world.

Aggregated Totals	By Region	By Market	
59% of hybrid workers have fewer work friendships since shifting to hybrid work while 56% of remote workers say this since shifting to remote work.	North America: 60%, 53% Latin America: 53%, 53% Asia-Pacific: 63%, 68% Europe: 55%, 50% Australia/New Zealand: 57%, 51%	North America Canada: 61%, 55% Latin America Brazil: 50%, 50% Asia-Pacific China: 56%, 81% India: 72%, 63% Japan: 55%, 41% South Korea: 61%, 58% Europe France: 49%, 38% Germany: 47%, 45%	Italy: 51%, 50% Netherlands: 62%, 47% Poland: 55%, 51% Spain: 60%, 53% Sweden: 59%, 53% Switzerland: 49%, 52% UK: 57%, 55% Australia/New Zealand Australia: 53%, 52% New Zealand: 60%, 50%
43% of business leaders say relationship-building activities are the greatest challenge of having employees work hybrid or remote.	North America: 41% Latin America: 42% Asia-Pacific: 43% Europe: 45% Australia/New Zealand: 40%	North America Canada: 39% Latin America Brazil: 34% Asia-Pacific China: 41% India: 32% Japan: 40% South Korea: 48% Europe France: 48% Germany: 49%	Italy: 49% Netherlands: 43% Poland: 44% Spain: 42% Sweden: 49% Switzerland: 50% UK: 37% Australia/New Zealand Australia: 38% New Zealand: 42%

5. Rebuilding social capital looks different in a hybrid world.

Aggregated Totals	By Region	By Market	
62% of business leaders are concerned that new employees aren't getting enough support to be successful during hybrid or remote work.	North America: 56% Latin America: 53% Asia-Pacific: 69% Europe: 57% Australia/New Zealand: 62%	North America Canada: 56% Latin America Brazil: 39% Asia-Pacific China: 90% India: 73% Japan: 47% South Korea: 64% Europe France: 55%	Germany: 50% Italy: 49% Netherlands: 68% Poland: 60% Spain: 56% Sweden: 53% Switzerland: 58% UK: 58% Australia/New Zealand Australia: 58% New Zealand: 64%
56% of pandemic hires are considering changing employers in the next year.	North America: 57% Latin America: 50% Asia-Pacific: 62% Europe: 51% Australia/New Zealand: 59%	North America Canada: 52% Latin America Brazil: 45% Asia-Pacific China: 59% India: 71% Japan: 43% South Korea: 61% Europe France: 50%	Germany: 47% Italy: 53% Netherlands: 59% Poland: 49% Spain: 58% Sweden: 48% Switzerland: 51% UK: 53% Australia/New Zealand Australia: 63% New Zealand: 56%