2023
Hybrid Work Report

The Age of Connection

HubSpot

We're entering the new frontier in the future of work. Here's what we learned about building a connected workforce.

In 2022, we experienced consistent churn and change in the way we work. Organizations including HubSpot continued to embrace and evolve hybrid models, leaning into flexibility and experimenting with new technologies. But over the past year, one thing has become clear: in a hybrid world, people are craving community and connection more than ever.

Just as there's no uniform approach to building a hybrid company, the experience of meaningful connection varies, too. People feel connection differently and therefore there's not one single solution to improving connection across your workforce. The opportunity as we see it is to rebuild how we foster connection by offering a variety of tools, resources, and moments to do so.

On our journey as a hybrid company, we recognize we don't have all of the answers. That's why to better understand the challenges and opportunities around building a connected workforce, we surveyed over 5,000 full-time remote, in-office, and flex workers from companies across 10 markets. Our 2023 Hybrid Work Report also shares learnings from our own hybrid strategy as we support employees who chose the following work preferences in 2023: 63.4% at home, 8.3% in the office, and 28.3% flex, a combination of the two.

In this new frontier, prioritizing connection is key to driving growth, engagement, and building a company that employees truly love. Whether you're an employer looking to improve your future of work strategy or an employee navigating a new workplace, we hope the data in this report will help you learn how to bridge the connection gap in a hybrid world.

Survey methodology

SAMPLE SIZE AND MARKETS:
Total N = 5,058

U.S. (N = 673)	UK (N = 500)
Australia (N = 552)	France (N = 500)
Canada (N = 527)	Japan (N = 500)
Ireland (N = 518)	Singapore (N = 482)
Germany (N = 504)	Colombia (N = 302)

AUDIENCE:
Full-time employees over the age of 18 across three working preferences:
Remote workers: 1,283 (25%)
In-office workers: 2,317 (46%)
Flex workers (splitting time between working remotely and in an office): 1,458 (29%)

ETHNICITY:
White, Hispanic or Latino, Black or African American, Native American or American Indian, Asian/Pacific Islander, Arabic/Middle Eastern

TIMING:
Survey fielded in December 2022

Closing the Connection Gap Requires Investment in Culture, Purpose, and People

The pre-pandemic workplace fostered connection by default. With spontaneous moments of human connection more challenging to recreate in a hybrid world, being intentional about how, when, and where people come together is key to creating a culture where everyone can do their best work. It doesn't matter where you work from - feeling connected to your company and colleagues is an important aspect of the employee experience.
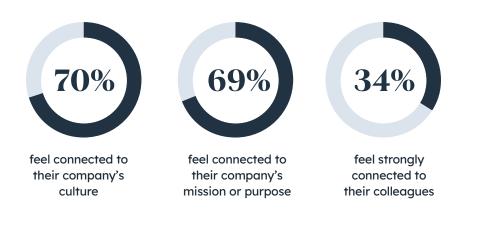
66%

of respondents who report having a close friend at work say that this impacts their intent to stay with their company.
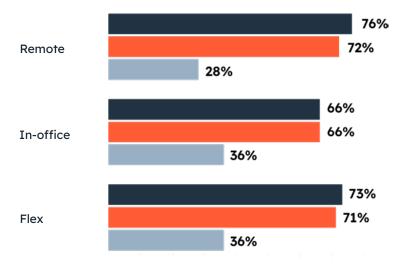
33%

of flex employees find relationship-building and establishing connections to be the biggest challenge of working with a hybrid team.

Regardless of work preference, employees feel connected to their company culture and purpose, but this doesn't translate to feeling connected to their colleagues.

70%

feel connected to their company's culture

69%

feel connected to their company's mission or purpose

34%

feel strongly connected to their colleagues

- Connection to company culture
- Connection to company's mission or purpose
- Strong connection to colleagues

Remote
- 76%
- 72%
- 28%

In-office
- 66%
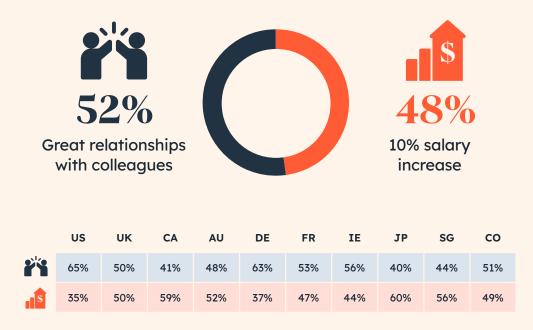- 66%
- 36%

Flex
- 73%
- 71%
- 36%

Connection plays a key role in retention for remote, in-office, and flex employees alike.

■ Connection to my organization's mission or purpose impacts my intent to stay.

■ Having a close friend at work impacts my intent to stay.

Remote
- 60%
- 70%

In-office
- 55%
- 65%

Flex
- 61%
- 67%

When given the choice, employees would prioritize relationships with their colleagues over a salary increase.

52%
Great relationships with colleagues

48%
10% salary increase

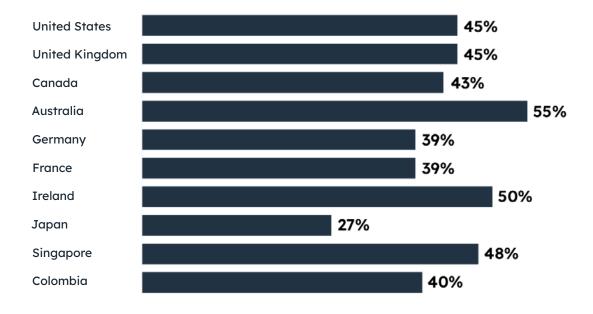|	US	UK	CA	AU	DE	FR	IE	JP	SG	CO
🙌	65%	50%	41%	48%	63%	53%	56%	40%	44%	51%
📈$	35%	50%	59%	52%	37%	47%	44%	60%	56%	49%

Remote employees are more likely to know the names of their coworkers' family or pets (**62%**) than in-office workers (**54%**), proving you don't have to be in the office to build strong bonds at work.

Learn how HubSpot managers are hacking hybrid work.

43% of respondents would like to see their company invest in more team-building events in order to foster a strong culture.

Country	Percentage
United States	45%
United Kingdom	45%
Canada	43%
Australia	55%
Germany	39%
France	39%
Ireland	50%
Japan	27%
Singapore	48%
Colombia	40%

Remote workers would have preferred more opportunities to connect with other new hires during the onboarding process whether in-person (**54%**) or virtual (**38%**).

"

Despite living in a world where social media and technology is at our fingertips, employees feel more disconnected than ever. But, we've learned that the quantity of interaction doesn't equate to the quality of high connection. Employees are seeking more meaningful ways to connect in-person and online, rather than simply more ways to communicate. That's why we've tried to help employees rebuild their community and deepen their connections through hybrid initiatives like Bring Your Family to Work Day or our Great Ice Cream Social.

Eimear Marrinan
Sr. Director of Culture, HubSpot

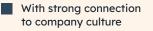# A Connected Employee Experience is the Secret to Productivity

Connection is critical to high-performing teams. When employees feel connected to each other and their culture, it boosts alignment, enables problem-solving, and strengthens the customer experience. But in a hybrid workplace, employees need the right tools and strategies to help them build connections with teams located around the world.
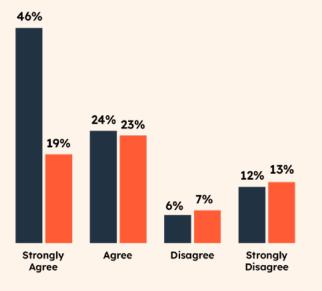
31%

of respondents believe that connection amongst teams would help improve customer experience, especially those working at larger organizations with more than 1,000 employees.

The employee experience positively impacts the customer experience. Those who feel strongly connected to their company's culture are more likely to build connections with their customers.

I'm able to build connections with my customers, no matter where I work from.

■ With strong connection to company culture

■ With weak connection to company culture

46% Strongly Agree
19% Strongly Agree
24% Agree
23% Agree
6% Disagree
7% Disagree
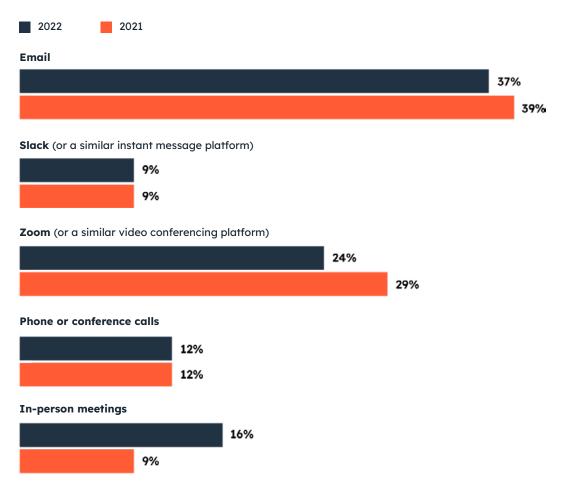**12%** Strongly Disagree
13% Strongly Disagree

And, **41%** of those surveyed say that connecting with customers means having a personal relationship with them - even over meetings or recurring business.

> "We believe the companies who will win in the future are the ones that focus on customer **connection**, not customer **management**. That means you need more than data, you need context. You need more than leads, you need connection. You need more than contacts, you need community.

Yamini Rangan
CEO, HubSpot

Learn more from Yamini about how to build a connected customer growth strategy.

Compared to 2021, email continues to be the preferred method of communication at work. However, employees would increasingly opt for meeting in-person, showing a desire for more connection in a hybrid world.

■ 2022 ■ 2021

Email

37%
39%

Slack (or a similar instant message platform)

9%
9%

Zoom (or a similar video conferencing platform)

24%
29%

Phone or conference calls

12%
12%

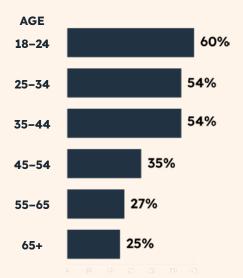**In-person meetings**

16%
9%

46% of respondents believe the rise of asynchronous tools like Slack and Zoom has increased their productivity, with remote **(54%)** and flex **(58%)** workers more likely to agree than those working in-office **(34%)**.

❝

The biggest thing for networking is being able to help or support each other, but the tools out there don't have the pieces to make it quite right. There's no recommendation, there's no spark to make the connection grow.

Terri
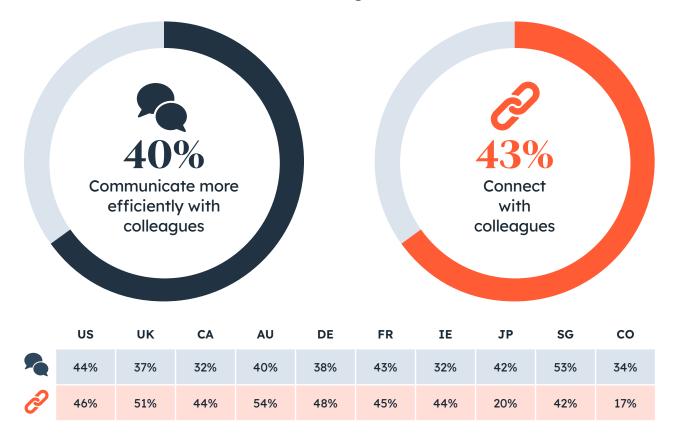a HubSpot customer

Remote workers who report that a lack of in-person time with their boss has impacted their career growth:

AGE

Age	
18–24	60%
25–34	54%
35–44	54%
45–54	35%
55–65	27%
65+	25%

Flex workers choose to go into the office to:

40%
Communicate more efficiently with colleagues

43%
Connect with colleagues

66%
of those surveyed say that flexible start and finish times would help boost their productivity, with individual contributors reporting this more than C-Suite or managers.
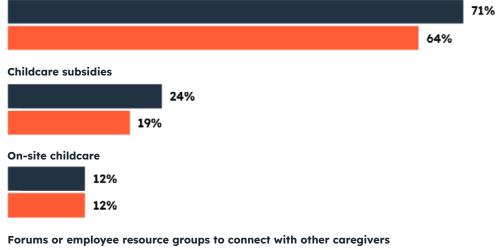
	US	UK	CA	AU	DE	FR	IE	JP	SG	CO
💬	44%	37%	32%	40%	38%	43%	32%	42%	53%	34%
🔗	46%	51%	44%	54%	48%	45%	44%	20%	42%	17%

Employee Well-Being Suffers Without Purposeful Connection

Talking about mental health and well-being at work is no longer taboo. It's essential. Now more than ever, employees need safe spaces where they can connect around shared experiences and through vulnerability.

Despite **40%** of workers reporting they are likely to leave their roles in 2023, **more than 1/3** cite relationships with colleagues as a motivating factor to stay.

It's been a tough few years for working parents and caregivers. While employers continue to offer flexibility and other sources of support, they need to be more intentional about creating opportunities for connection.
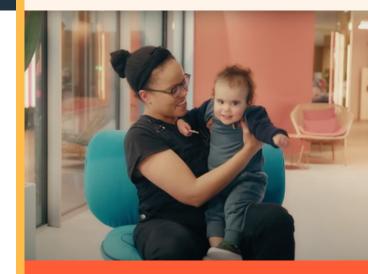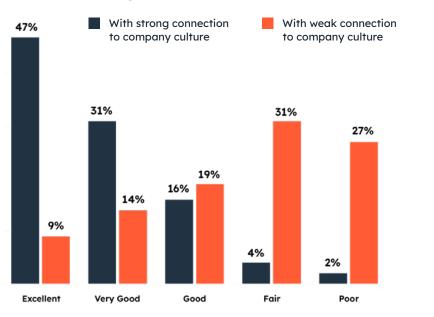
■ 2022 ■ 2021

Options for flexible working hours
- 71%
- 64%

Childcare subsidies
- 24%
- 19%

On-site childcare
- 12%
- 12%

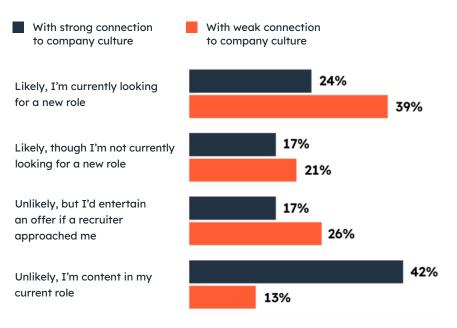**Forums or employee resource groups to connect with other caregivers**
- 13%
- 14%

Discover how HubSpot is creating connections across all generations with our annual Bring Your Families to Work Day hybrid event.

Workers who feel more connected to their company culture are less likely to experience mental health challenges or leave their job.

How would you describe your mental health currently?

■ With strong connection to company culture ■ With weak connection to company culture

47% — 9% — Excellent
31% — 14% — Very Good
16% — 19% — Good
4% — 31% — Fair
2% — 27% — Poor

How likely are you to leave your current role in 2023?

■ With strong connection to company culture ■ With weak connection to company culture

Likely, I'm currently looking for a new role
24%
39%

Likely, though I'm not currently looking for a new role
17%
21%

Unlikely, but I'd entertain an offer if a recruiter approached me
17%
26%
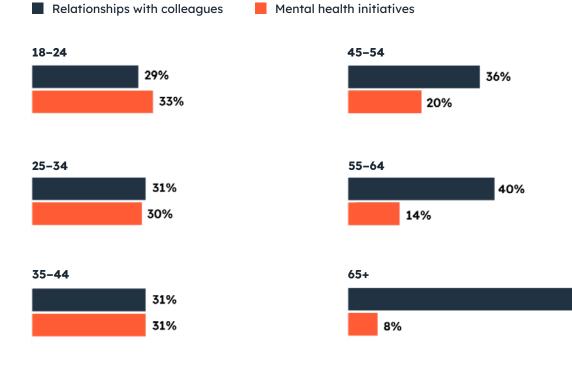
Unlikely, I'm content in my current role
42%
13%

> " Our goal is to build an equitable, sustainable, and high performing hybrid company. To do that, we want to create intentional space for employees to share more about themselves as humans and to connect across teams."

Katie Burke
Chief People Officer, HubSpot

Read more from Katie on what it means to build community in a hybrid workplace.

For workers who are considering leaving their jobs, older generations are more likely to cite relationships with co-workers as a motivating factor to stay at their current company, while younger generations care more about mental health support.

■ Relationships with colleagues   ■ Mental health initiatives

18–24
- 29%
- 33%

45–54
- 36%
- 20%

25–34
- 31%
- 30%

55–64
- 40%
- 14%

35–44
- 31%
- 31%

65+
- 67%
- 8%

Beyond workload, employees cite manager support and inclusion and belonging as top reasons for changing careers.

	US	UK	CA	AU	DE	FR	IE	JP	SG	CO
Not feeling supported by manager	28%	35%	40%	31%	40%	38%	35%	32%	29%	22%
Lacking a sense of inclusion and belonging	27%	22%	17%	21%	17%	17%	12%	17%	24%	16%

In the rapid transition to hybrid work, it often felt like we were living in a house as it was being built. In 2022, we saw the cracks in how we connect, collaborate, and communicate begin to show.

In 2023, the companies who'll find success will recognize that connection is the thread that binds co-workers, customers, and their purpose together. Thank you for taking the time to read our report. We hope the insights are helpful as we build a hybrid world where everyone can do their best work.

Learn more about how we're evolving our company and culture for the future of work.

HubSpot