

New Frontiers for Smarter Working: 2025 update

April 2025



Contents

1.0	Executive Summary	3
2.0	Study Background and Aims	5
3.0	Sample and Method	10
4.0	Current Working Patterns	12
5.0	Preferences and Motivations for Hybrid Working	15
6.0	Impacts of Hybrid Working	18
7.0	Designing Workplaces for the Future	23
8.0	Survey Findings 2024:2025	29
9.0	Thoughts for the Future	34

1.0

Executive Summary

It is now five years since the Covid-19 pandemic ushered in working from home at pace and allowed organisations to see that remote working was possible for many roles. As we move through the shifting landscape around work and workplace, where are we in 2025?

No longer an experiment, hybrid working has become a relatively common organisational practice.

Despite this, we are seeing an increase in the number of private sector organisations seeking to increase onsite presence with some even returning to working five days in the office again.

This year, the Scottish Futures Trust (SFT) received 39 responses to its annual New Frontiers for Smarter Working Survey.

Among responding organisations, a range of mostly public sector and Scottish-based organisations, hybrid working arrangements remain relatively stable. The key findings of the survey include:

- More than 40% of respondents indicated a commitment to hybrid arrangements within their organisation. Similarly, nobody responded that their organisation is largely office-based.
- While most organisations had not set mandated days in the office, most respondents reported working patterns of between one and three days spent in the office.
- There was little indication of potential changes in office presence, as 64% of respondents suggested they do not see their organisations increasing mandated days in the office.
- Preference for hybrid working is common across all age groups and role types. The main motivations bringing workers to the office are more collaborative activities, such as attending meetings or training initiatives, and team working.
- A preference for choice and flexibility is also evidenced by the fact that 72% of respondents agree that their organisation works best when teams have choice on where they work.

Hybrid working arrangements deliver a range of organisational and personal benefits.

When asked about which organisational benefits were supported by hybrid working, respondents mostly mentioned a happier (82%) and more flexible workforce (76%).

These responses broadly align with perceptions of individual benefits, which included a better work-life balance, flexibility and choice.

The main organisational challenges identified in the survey include underutilized buildings and the onboarding of new employees.

Changes in working arrangements have meant 58% of respondents reported that a reduction in their organisations' office space has already occurred. A minority (14%) reported no plans to reduce their office space.

To support equitable access to hybrid working, organisations focus on encouraging autonomy and on the provision of kit, with most popular tools involving those to support with managing hybrid teams and asynchronous working.

Respondents also highlighted the importance of cultural factors such as trust, and a clear vision from management.

It is great to see there has been little change in the core messages from the survey compared to its first iteration in 2024.

This suggests preferences and practices have remained stable across the organisations answering the survey.

What does this mean for the future?

It is fantastic to see that our respondents are still embracing hybrid working and continuing to explore the amazing benefits that it can offer.

As we work to understand our future ways of working, how do we;

- Ensure we create a clear vision to support the way we work
- Provide support for managers to 'manage' hybrid teams
- Ensure our presence is purposeful - wherever we are working
- Develop our workplaces as places of connection
- Retain all the great benefits of hybrid working for both individuals and organisations

It is all about understanding where and how the office adds value for the tasks and activities we deliver.

What is the purpose of the office for our organisation and how do we ensure the office aligns with the way we work?

As we said in 2024, it's all about understanding the 'sweet spot' for office presence and creating that 'social glue' that binds us all together.

Where does your organisation's best work happen?

2.0

Study Background and Aims

2.1 Background

This study sets out the findings from SFT’s New Frontiers for Smarter Working 2025 Survey



Fig. 1: Previous Reports on Hybrid Working

This work draws on the baseline analysis carried out in 2024.

The resulting report detailing the 2024 baseline along with previous studies (Fig. 1) are available via the SFT website.

The findings of the 2024 Baseline Report indicated that:

- 43% of organisations were committed to hybrid working
- Workers spent 1-3 days per week in the office
- 60% of organisations weren’t expecting an increase in the number of mandated office days
- All age groups and organisational roles preferred hybrid working, with increased flexibility and a happier workforce seen as the main benefits
- 53% of organisations had reduced their office space

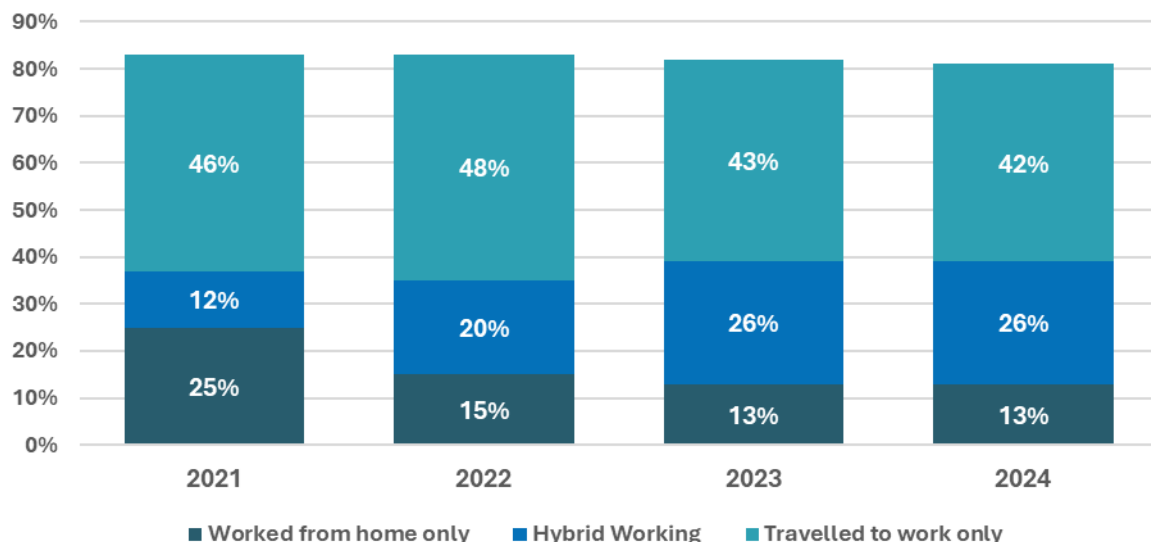
The 2025 study looks to understand what has changed over the last year – where are we one year on?

This study provides an update on current working arrangements and any potential future changes, based on survey evidence.

SFT were supported by BiGGAR Economics in the development of this study.

2.2 Current Trends: the Continuation of Hybrid Working

Hybrid working remains a widely-adopted working arrangement for many organisations



Hybrid working continues to be in place at similar levels as in 2023, with 26% of workers in the UK (Fig. 2) reporting to work under a similar arrangement.

The formality of such arrangements varies between organisations, with larger companies more likely to have specific mandates and formal agreements.

For the public sector, there is a mixed approach. For example, UK Government

civil servants are currently expected to be in the office for 60% of their working week.

Where organisations are encouraging office presence, the design and type of office environment provided are important.

Design and the types of workspace available are key in encouraging workers, particularly young workers, to work from an office.

2.3 Time Spent in the Office

Recent trends indicate an increasing return to office-based working, particularly in the private sector

The number of companies mandating workers to be in the office at least 3 days a week increased between 2023 and 2024, to 75% based on Virgin Media O2 Business Movers Index.

The same survey, which tracks commuting behaviour, found that around 1 in 3 companies required workers to be fully office-based

As we have said already, there are differences between the public and private sector - with the return to the office being led by large private organisations.

Where a mandate is in place, workers are most likely to have 2 – 3 days mandated for work in an office.

According to survey evidence from KPMG, nearly 40% of British workers now commute five days a week.

This same survey found that business leaders expect a full return to office by 2027 while other sources think it's too early to make a call on that.

Potential impacts of mandated return to offices have been identified by University of Pittsburgh in their November 2024 study (Fig. 3 and link to full research paper below)

They identified increases to average turnover, increased time to fill vacated posts and a lower hire rate in 'Return to Office' (RTO) organisations.

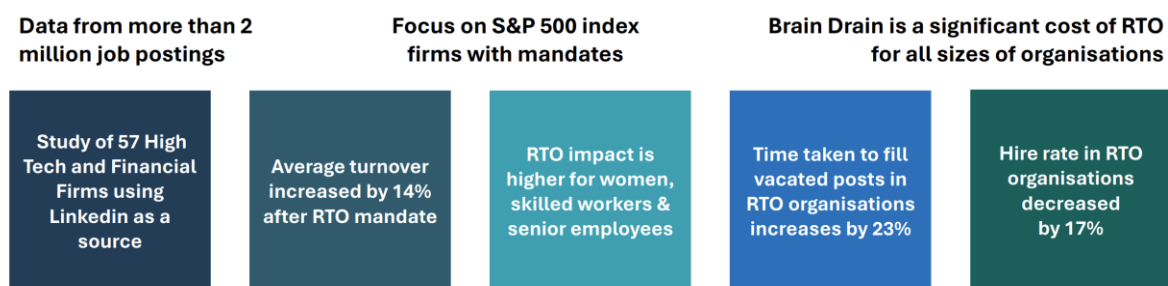


Fig. 3: SFT summary of University of Pittsburgh Study. Original source in links below

Sources: *Virgin Media O2 Business Movers Index (2023 to 2024)*

<https://www.bbc.co.uk/news/articles/c0qww8xdvnwo>

<https://www.cipd.org/uk/views-and-insights/thought-leadership/insight/employers-return-to-office-plans>

University of Pittsburgh Study [link to the research](#)

2.4 Hybrid Benefits Remain

Many organisations remain committed to hybrid working practices and ensuring they continue to work effectively

Whilst some organisations are increasing mandated office presence, many organisations remain committed to hybrid working, recognising the benefits it brings.

For example, Airbnb requires its staff to go to the office once a month, with its CEO stating that physical office presence is not a key driver of its workers' productivity or value.

In comparison, at Amazon, who has returned to full office working, workers have faced a lack of desks and parking spaces and the continued use of virtual meetings.

Research by Andy Lake highlights the importance of autonomy for individuals and teams, and its impact on employee health and wellbeing as a key driver of productivity, employee engagement and loyalty.

A return to smarter working principles rather than focussing on hybrid and office presence is a key message in Andy's work.

This is echoed in recent research by Gemma Dale indicating hybrid working has both benefits and challenges for individuals, and autonomy and flexibility over the choice of working location improves employee wellbeing.

Such benefits make it likely that organisations offering hybrid working can recruit from a wider talent pool.

Sources: https://flexindex.substack.com/p/airbnb-meet-monthly-work-anywhere?utm_campaign=email-half-post&r=4fv5pg&utm_source=substack&utm_medium=email
<https://flexibility.co.uk/its-the-autonomy-stupid-6-reasons-to-avoid-heavy-handed-rto-mandates/>
<https://www.hrmagazine.co.uk/content/features/make-hybrid-work-healthy-work/>



3.0

Sample and Method

This section considers the data sources and outlines the methodology used to analyse the surveys

3.1 Study Sample

At the end of 2024, the SFT issued their now annual survey to a range of organisations from the public, private and third sector.

Responses were provided by a representative from each of 39 organisations (Fig. 4) including:

- 13 public bodies
- 14 local authorities
- Eight government organisations

- Four other organisations across the third, private and public sector

The size of organisations sampled varied, however, at least 17 respondents accounted for over 5,000 employees.

The organisations covered in this report therefore cover at least 85,000 employees.

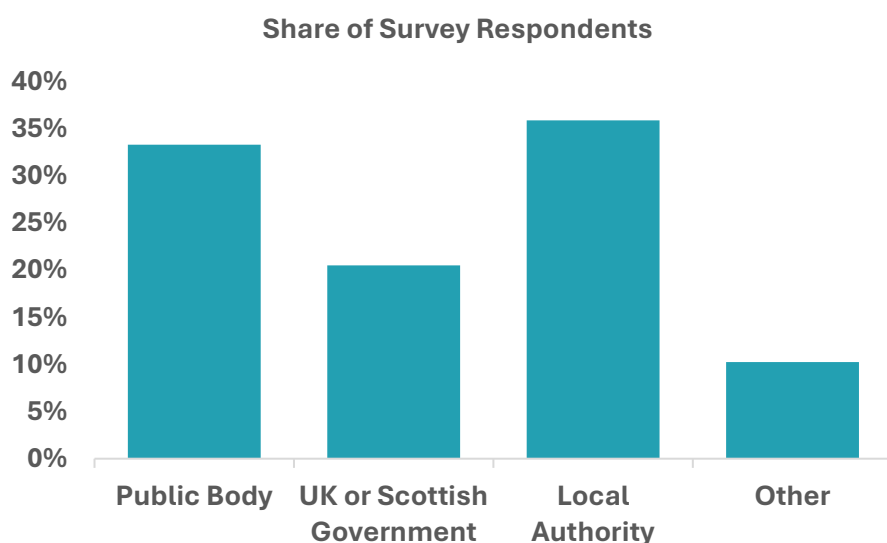


Fig. 4: Share of survey respondents. Number of Respondents= 39. Note: ‘other’ includes a range of different organisations in the private, third and public sector. Separating those out would have made responses traceable to an individual organisation.

3.2 Method and Key Themes

The analysis considers the most recent responses to the SFT Survey and compares the findings to those from the 2024 baseline

The methodology for this report was based on the following (Fig. 5)

<p style="text-align: center;">Approach</p> <p>Key themes and messages were drawn from different organisations, while ensuring:</p> <ul style="list-style-type: none"> • Non-traceability • Anonymity 	<p style="text-align: center;">The Survey</p> <p>The New Frontiers for Smarter Working survey was created to capture the views from organisations’ leaders and decision makers.</p> <p>This study follows analysis of a baseline survey presented in 2024.</p>
<p style="text-align: center;">Key Themes</p> <ul style="list-style-type: none"> • Current working patterns • Preference and motivations for hybrid working • Impacts of hybrid working • Designing workplaces for the future 	<p style="text-align: center;">Process for Data Collection & Analysis</p> <ul style="list-style-type: none"> • Standard survey was distributed to organisations • Aggregate responses across organisations • Report against key themes in the baseline (2024 Baseline Report) • Compare analysis to baseline (2024 Baseline Report)

Fig. 5: Methodology

4.0

Current Working Patterns

This section provides evidence on current working arrangements across the organisations surveyed

4.1 Hybrid Working Model

Where possible, respondent organisations are still either partially or fully remote.

All organisations still support partial or full remote working for those office-based employees who could work at home during the pandemic.

43% of respondents maintained their organisation is fully committed to a hybrid working model (Fig. 6).

No respondents reported their organisation was largely office-based.

This is consistent with the 2024 results.

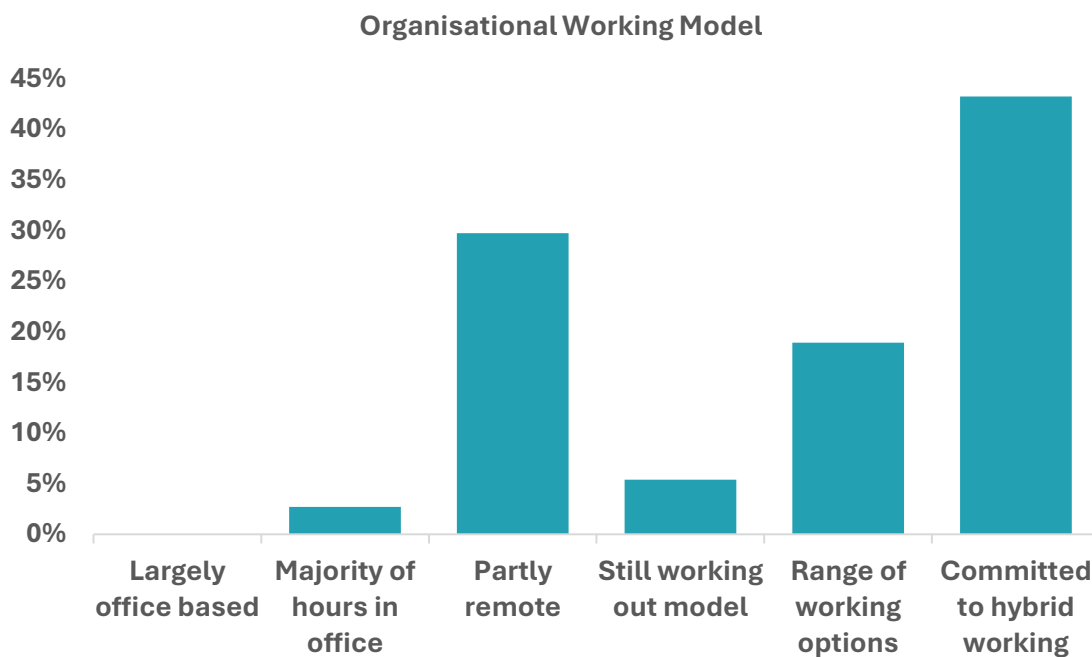


Fig. 6: Organisational Working Model. Number of Observations (N) = 37

4.2 Prevalence of Hybrid Working

None of the organisations surveyed is mandating full office-based working

92% of respondents reported their organisations working between 1 and 3 days in the office per week (Fig. 7).

56% of respondents said their organisation had no mandated days in the office.

No respondents reported their organisation works more than 3 days in the office.

21% reported their organisation structures hybrid working in another way (e.g., a team-based business needs approach; variation across departments/roles).

64% of respondents reported their organisation is not looking to increase mandate days in the office.

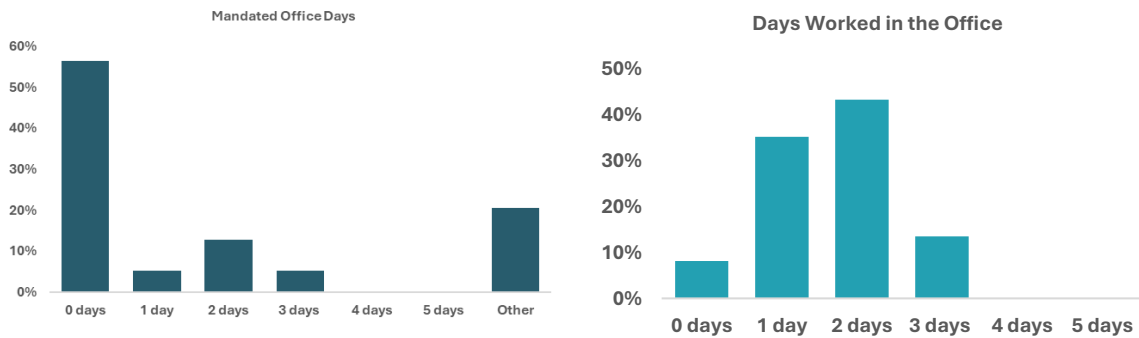


Fig. 7: Mandated days compared to the number of days people work in the office. N depended on the question considered and ranged between 37 and 39 responses



5.0

Preferences and Motivations for Hybrid Working

This section provides evidence on current working preferences across the organisations surveyed and explores the reasons employees come into the office

5.1 Hybrid Working Preferences by Age Group

Across all age groups, there is a preference for hybrid working (Fig. 8)

Respondents largely feel all age groups prefer mixed working (i.e., a mix between home and office working).

Employees aged 26-35 were the most likely to prefer hybrid working (77%).

Very few respondents feel any age group in their organisation prefers fully office-based working.

No respondents reported a preference to work fully from the office across the 36-45 age group.

Office working is less popular than it was in the 2024 survey responses.

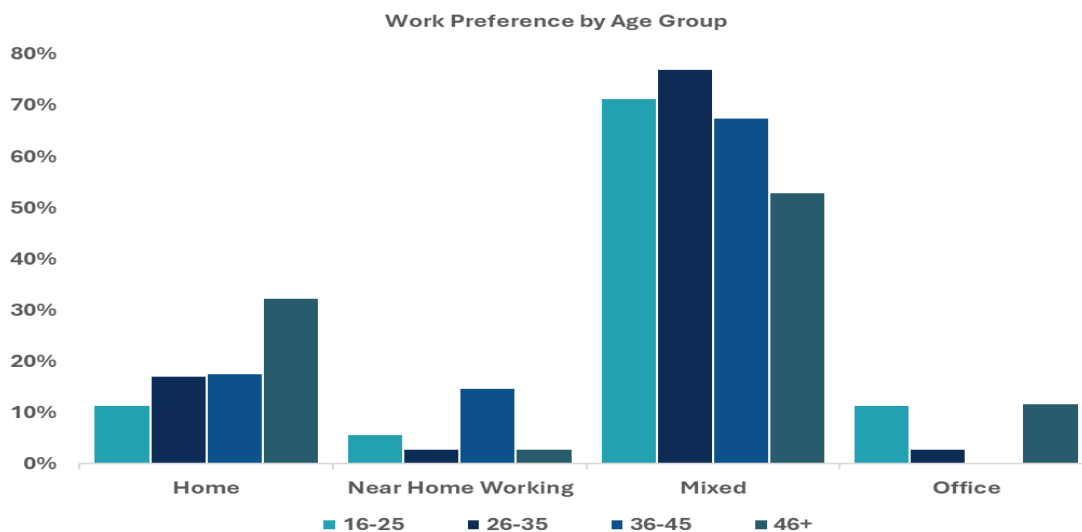


Fig. 8: Hybrid Work Preferences by Age. Number of Observations (N) = 35

5.2 Hybrid Working Preferences by Employee Group

Across all experience levels, the preference is for a mixed work location (Fig. 9)

Respondents reported the most common preference across all employee groups was a mix of office and home working.

Those working at the organisation for a long time were the least likely to prefer office-based working.

Leadership and senior management teams were the most likely to prefer working from the office.



Fig. 9: Work preferences by employee group. Number of Observations (N) = 35

5.3 Motivations for Office Working

Collaborative and interactive work are more likely to bring workers to the office (Fig. 10)

Based on survey respondents, the top three reasons workers in their organisations go to the office are:

- For interactive activities (including collaboration and training) (77%)
- To attend meetings (67%)
- To engage in team working (67%)

These three motivations have remained the same since the 2024 survey.

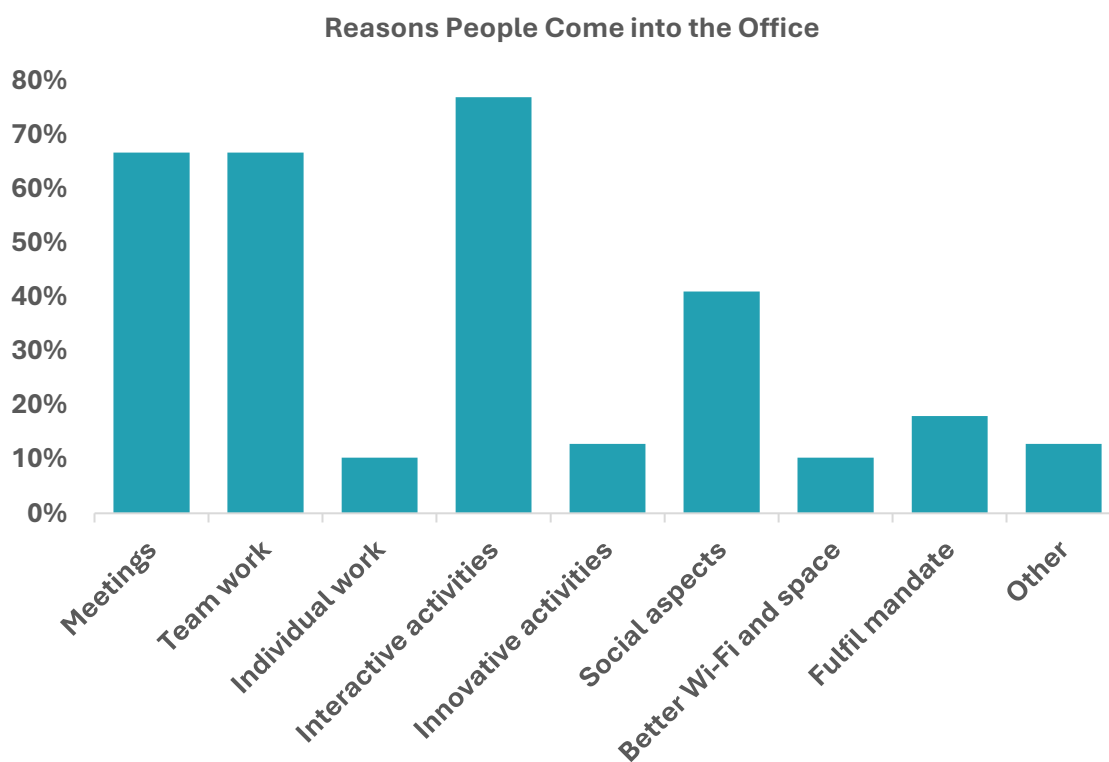


Fig. 10: Why do people come to the office? Number of Observations (N)=39

6.0

Impacts of Hybrid Working

This section considers both the benefits and challenges from hybrid working

6.1 Organisational Benefits of Hybrid Working

Hybrid working has brought organisational benefits, creating more flexible and happier workforces. (Fig. 11 & 12)

50% of organisations indicated that improved performance was either a benefit or potential benefit of hybrid working.

The most reported organisational benefits from hybrid working include:

- A happier workforce (82%)
- A more flexible workforce (76%)
- Staff retention (66%)

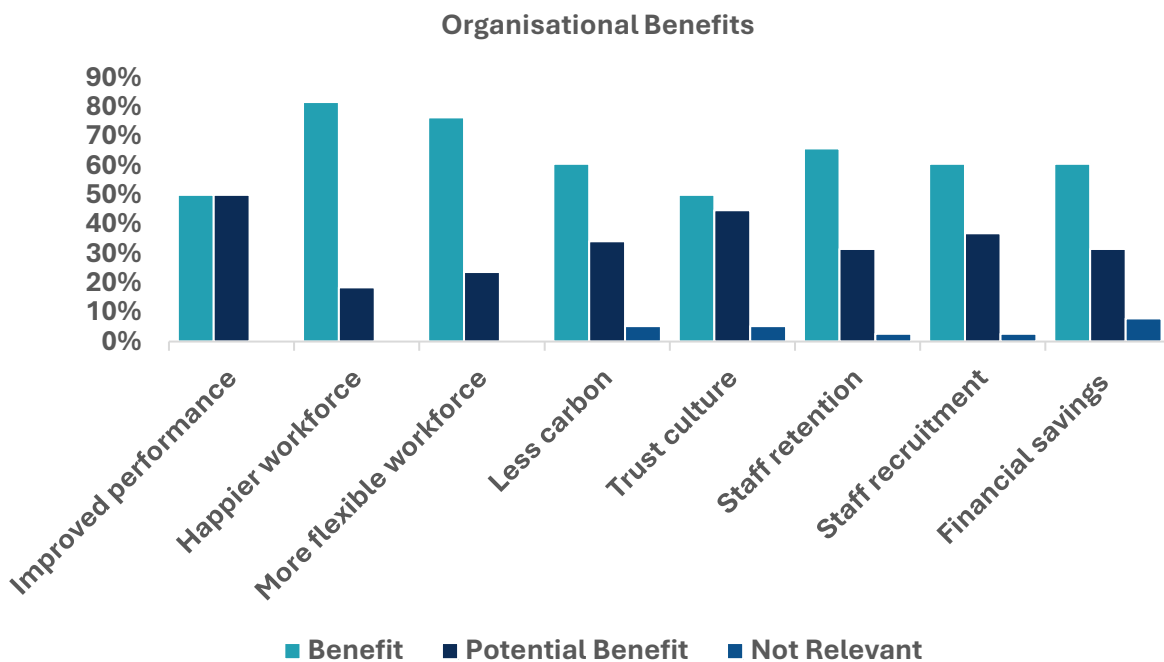


Fig. 11: The benefits for organisations. Number of Observations (N) = 38.

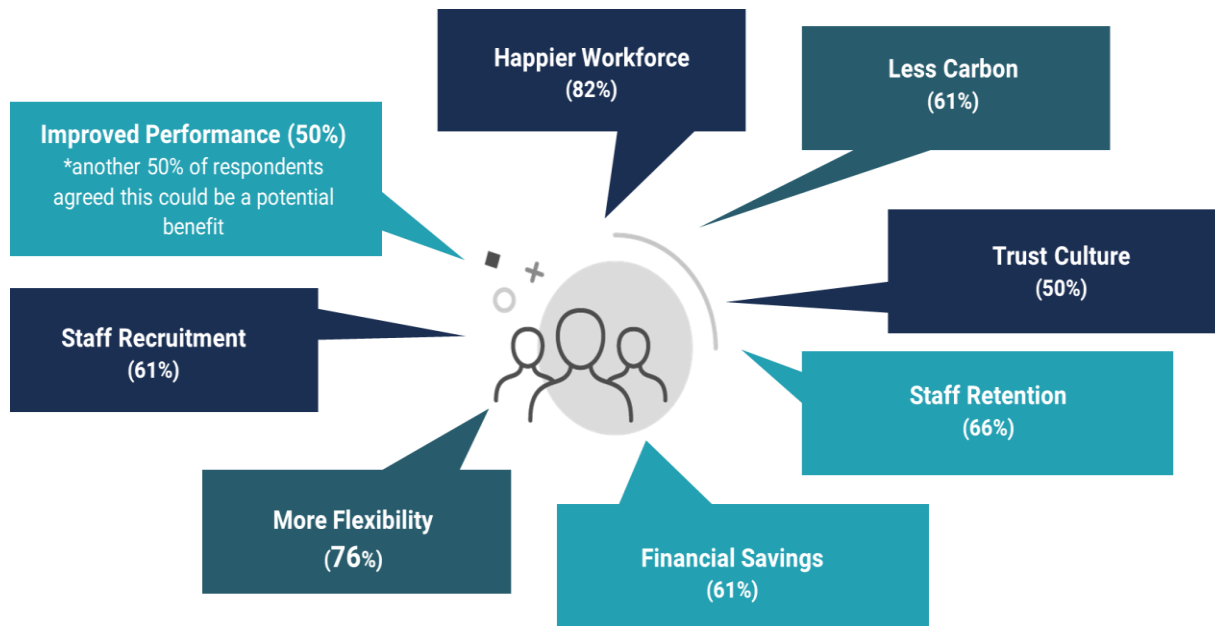


Fig. 12: Summary of the Organisational Benefits of Hybrid Working

6.2 Individual Benefits of Hybrid Working

As well as supporting organisations, hybrid working has several benefits for individuals

Organisational benefits around a happier and more flexible workforce align with perceptions on individual-level benefits (Fig. 13).

The most reported personal benefits from hybrid working include a better

work-life balance (84%), flexibility and choice (58%) and time saved due to reduced travel (53%).

Those were the same top three reasons within the 2024 survey.

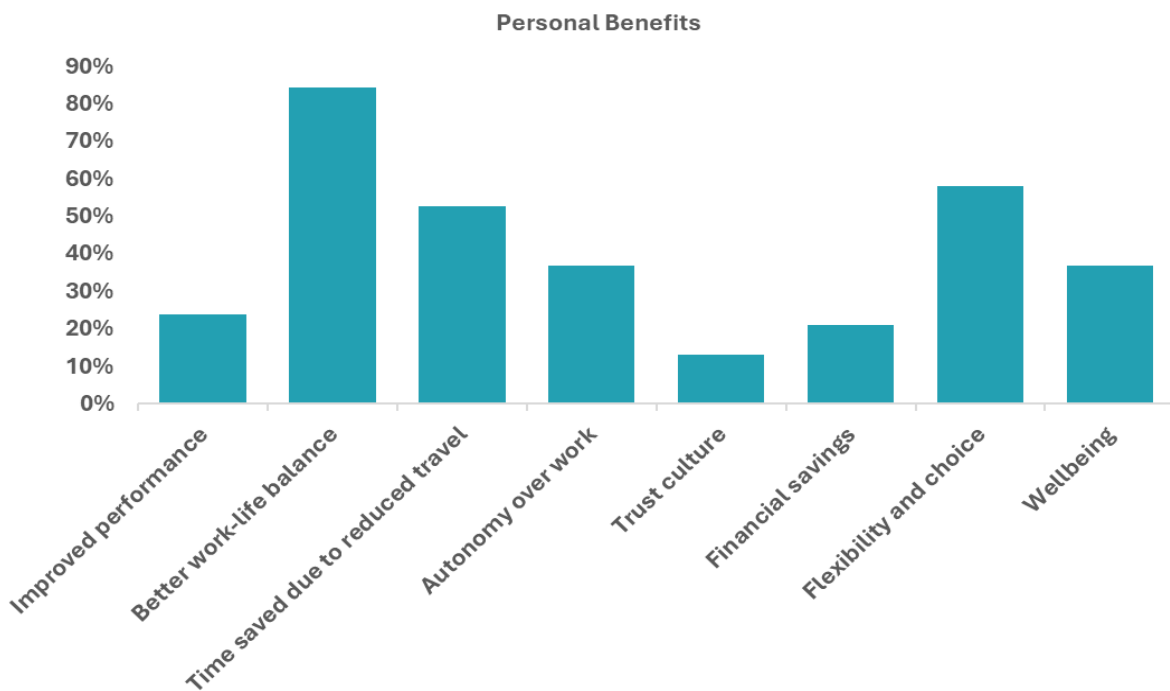


Fig. 13: Summary of personal benefits of hybrid working. Number of observations (N)=38

6.2 Organisational Challenges from Hybrid Working

Respondents were asked to select organisational issues associated with hybrid working

The most reported organisational issues (Fig. 14 & 15) from hybrid working include underutilised buildings (70%) and onboarding of new employees (53%).

The most reported ‘potential’ organisational issues from hybrid working include career progression

(65%) and negative impact on places (53%).

35% of respondents reported that performance was not a relevant organisational issue from hybrid working.

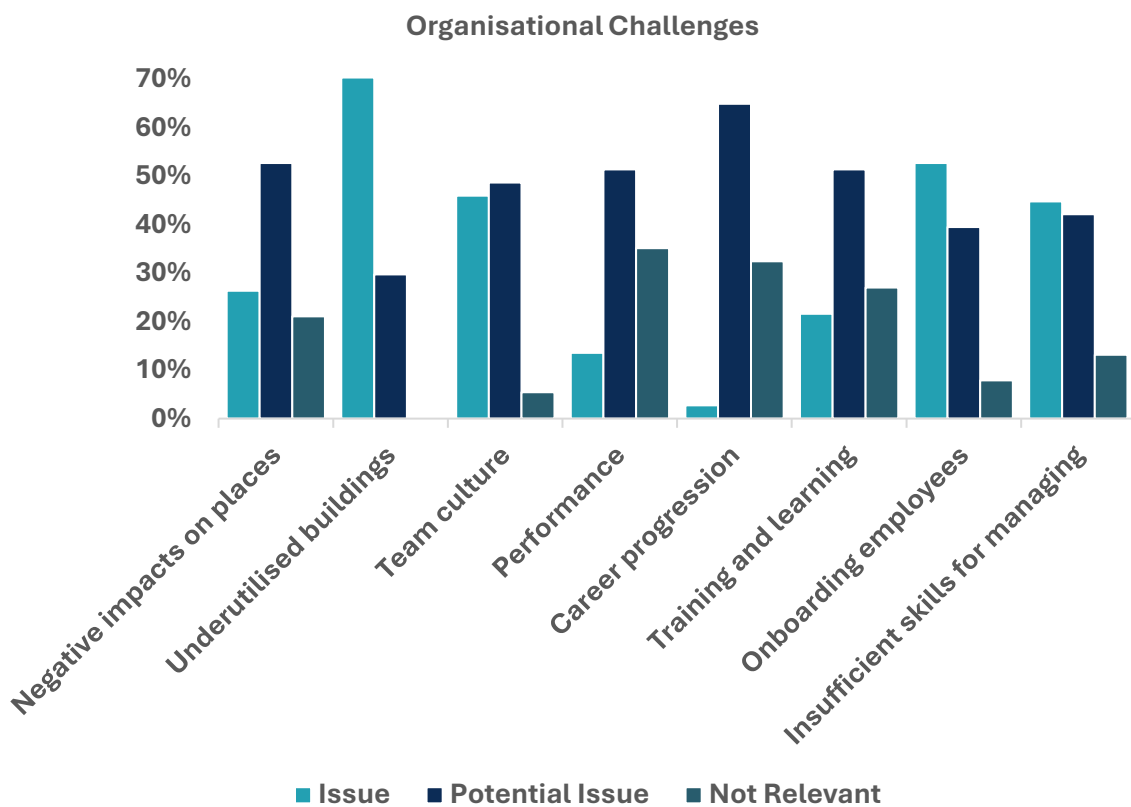


Fig. 14: Organisational issues and challenges of hybrid working. Number of Observations (N)=38

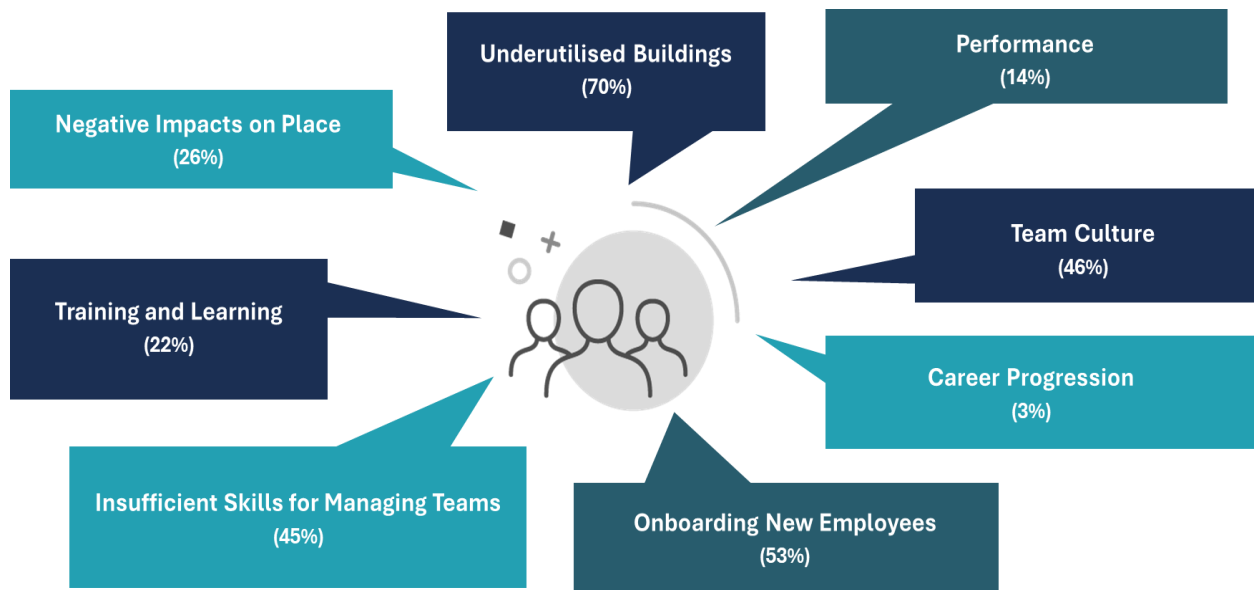


Fig. 15: Summary of organisational issues and challenges from hybrid working

7.0

Designing Workplaces for the Future

It is important workplaces continue to evolve to account for the requirements of different activities associated with hybrid working

7.1 Best Practice

The survey asked how respondents feel their organisation works best regarding the level of choice on working patterns (Fig. 16)

72% of respondents agree that their organisation works best when ‘teams’ have choice on where they work. 42% of respondents agree that they work best as an organisation when ‘individuals’ have choice around where they work.

Almost all (94%) of the organisations surveyed disagreed with the statement ‘we work best as an organisation when everyone is in the office’.

Findings on best practice are in line with what was recorded in the 2024 survey.

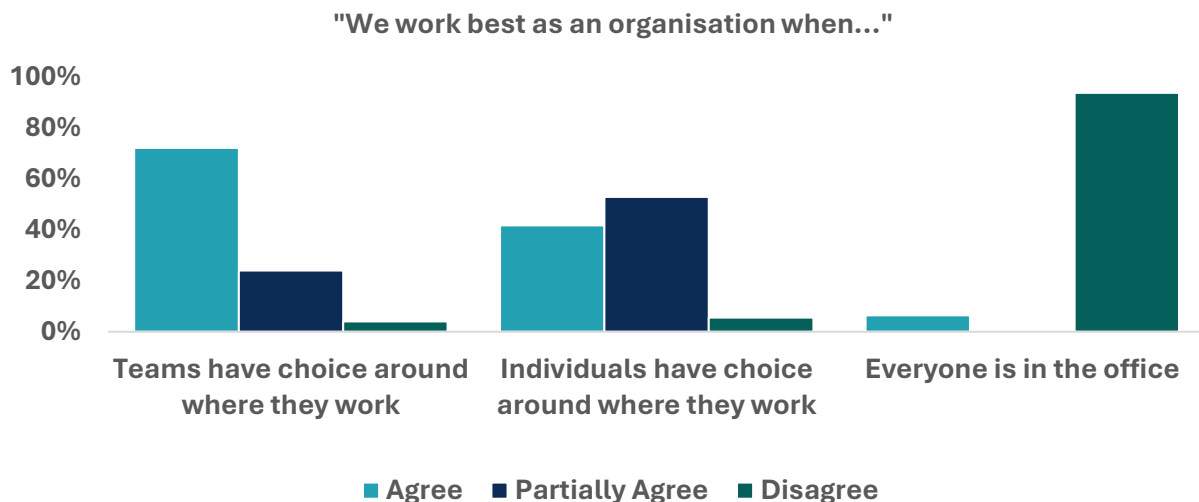


Fig. 16: How does your organisation work best? Number of Observations (N) = 39

7.2 Reduction in Office Space

Most organisations reported that they had, or expect to, reduce their office space following changes in working preferences (Fig. 17)

More than half the respondents (58%) reported that their organisation has already reduced office space.

Only 14% of respondents reported their organisation had no plans to reduce their office space .

28% reported that their organisation is still planning to reduce office space.

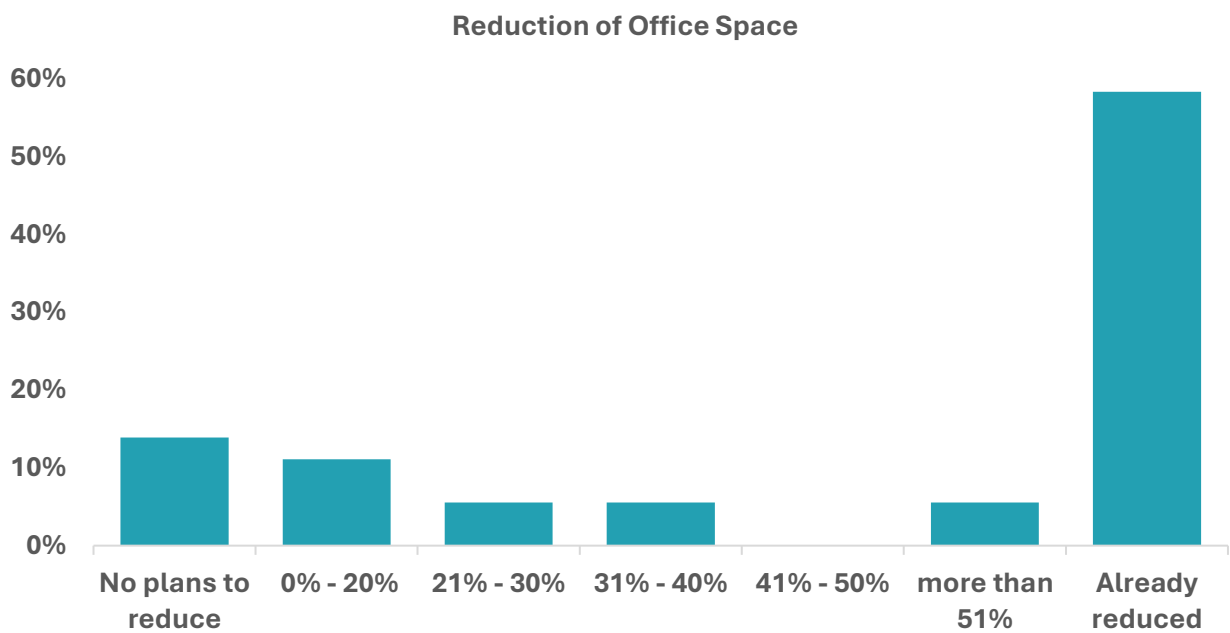


Fig. 17: Reducing your workspace. Number of Observations (N) = 36

7.3 Making Hybrid Working Accessible to All

Autonomy and equipment were the most reported strategies to support greater equity in hybrid working (Fig. 18)

The most popular ways respondents reported their organisation approached equity towards hybrid working included:

- Encouraging autonomy around where and when people work within the context of their role (35%)
- Providing all staff with kit to allow them to work as flexibly as their role allows (27%)

- Recognising everyone in your smarter policy scored a bit lower at 19%

Findings on making hybrid working accessible to all are in line with what was recorded in the 2024 survey.



Fig. 18: How do we support equity across the organisation. Number of Observations (N) = 37

7.4 Tools Implemented to Support Hybrid Working

Toolkits and technologies are the most reported ways to support hybrid working (Fig. 19)

The most common mechanisms that have been introduced in organisations to support hybrid working include:

- Toolkits to assist with managing hybrid teams (54%)
- Technologies to support asynchronous working (54%)

Findings on tools implemented by organisations to support hybrid working are in line with what was recorded in the 2024 survey.

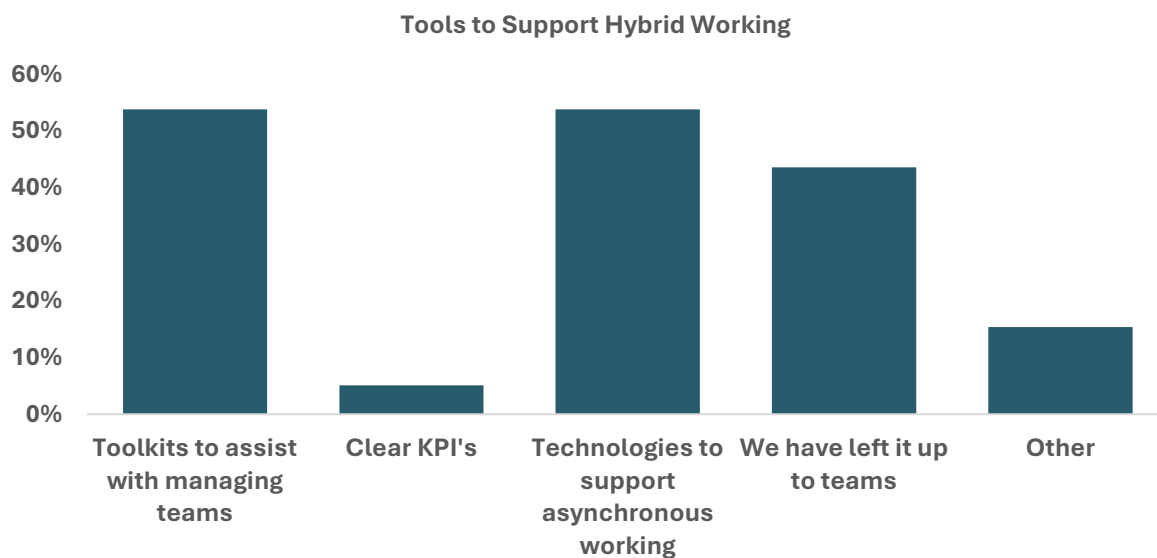


Fig. 19: Most popular tools to support hybrid working. Number of Observations (N) = 39

7.5 How to Support Hybrid Working Going Forward

The following elements would be useful to explore and better understand during 2025 (Fig. 20)

Respondents were asked where they could most use assistance going forward.

Practical tools such as clear working principles, booking system tools and ways of measuring utilization were all mentioned.

Cultural issues around trust, vision and clear direction were also cited.

These are all elements that SFT can support with our New Frontiers for Smarter Working methodologies.

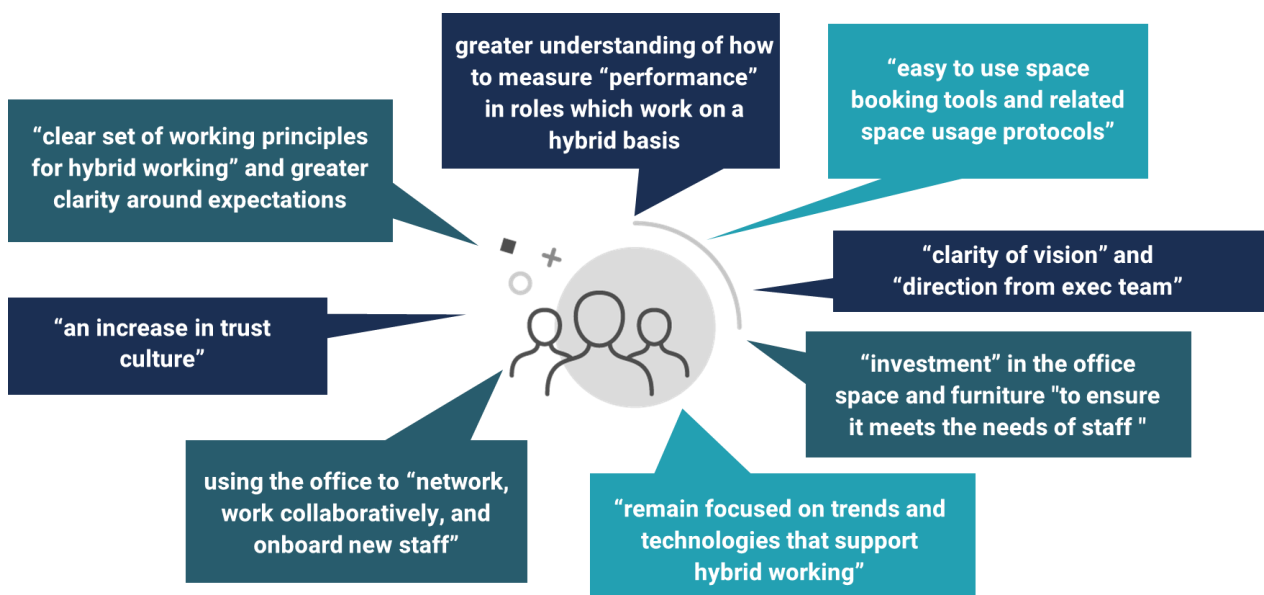


Fig. 20: Summary of the best ways to support hybrid working going forward



8.0

Survey Findings: 2025 vs 2024

This section compares the results of this study to the 2024 baseline report so can understand what has changed and what has remained the same

8.1 Changes to Working Patterns and Preferences

Respondents reported little change between their organisations working patterns between 2024 and 2025

The survey analysis is consistent with the key findings from 2024, including that:

- Nobody reported their organisation worked in the office more than 3 days per week (Figs. 21 & 22)

- Preference for hybrid working remains most popular across all age groups
- The most common preference across all employee groups continues to be a mix of office and home working
- The top three reasons employees go to the office, continue to be interactive activities (including collaboration and training), to attend meetings and team working

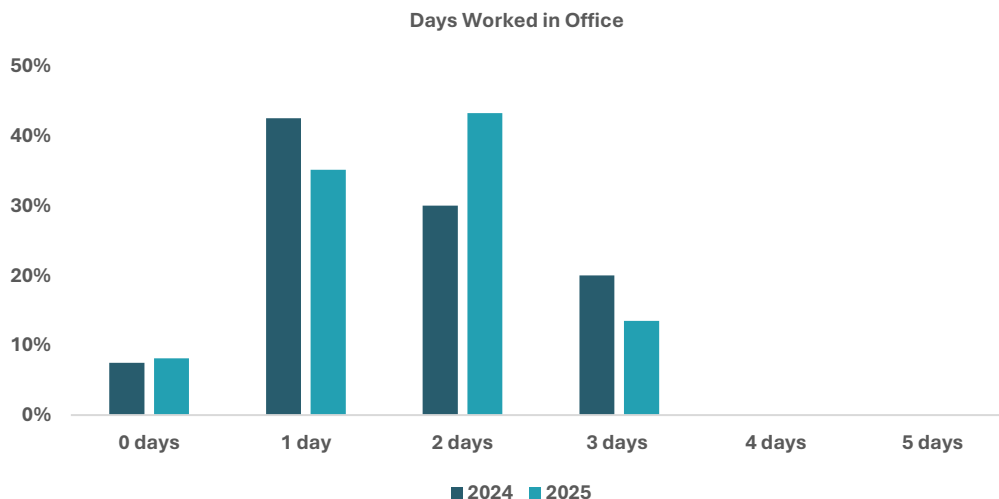


Fig. 21: Comparison of the numbers of days worked in the office for 2024 and 2025

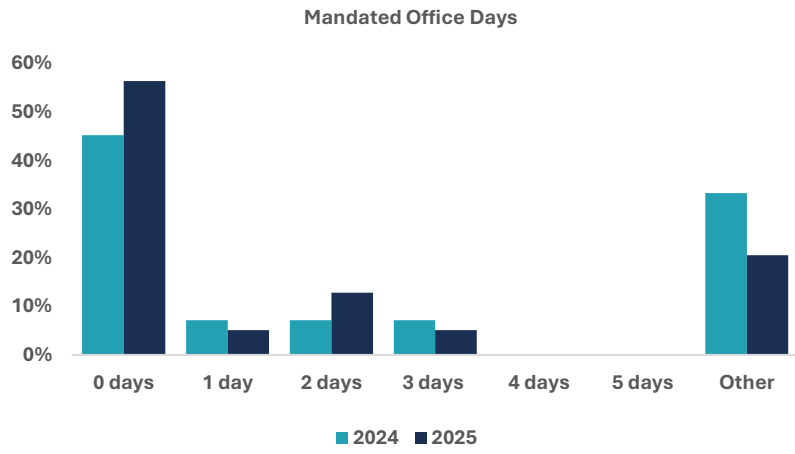


Fig. 22: Comparison of the number of mandated office days for 2024 and 2025

8.2 Changes to Impacts of Hybrid Working

The key impacts from hybrid working also remain consistent with those identified in 2024

The most reported organisational and individual benefits from hybrid working have remained the same since 2024, including:

The two most reported organisational benefits (Fig. 23):

- A happier workforce
- A more flexible workforce

The two most reported individual benefits:

- A better work-life balance
- Flexibility and choice

The two most reported issues from hybrid working remain as ‘underutilised buildings’ and ‘onboarding new employees’

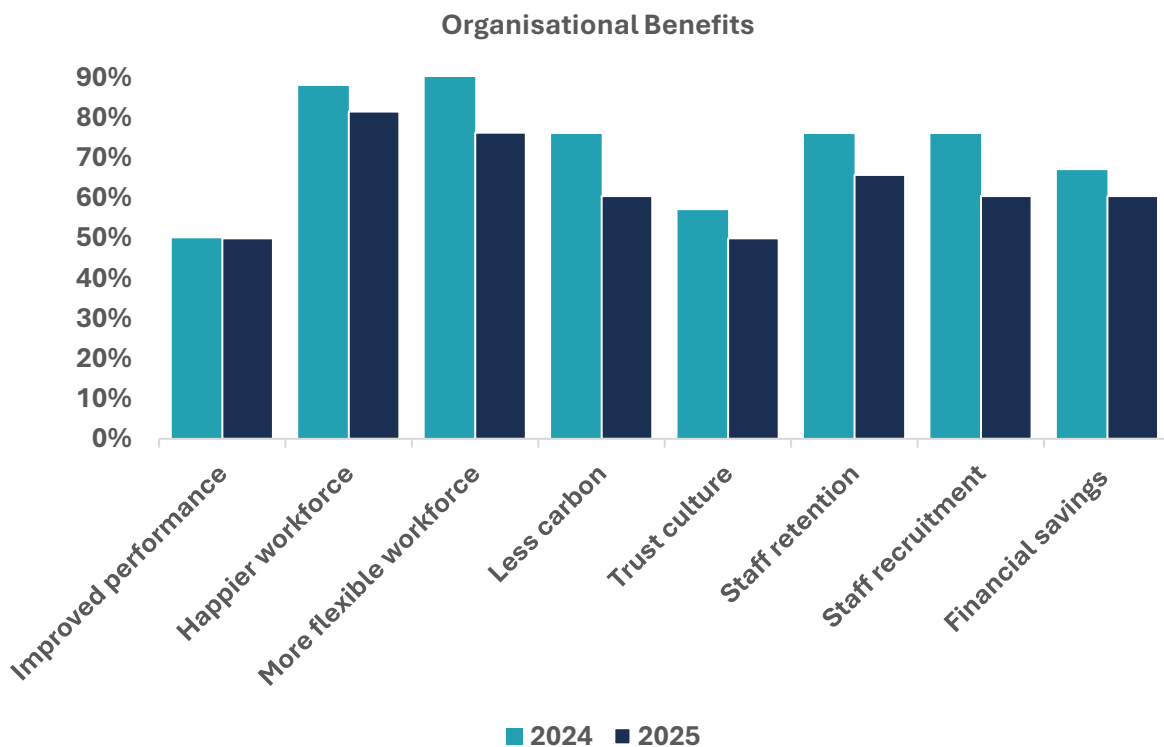


Fig. 23: Organisational Benefits for 2024 and 2025

8.3 Changes to Designing Workplaces for the Future

The approach to designing workplaces remains consistent with the strategies identified in 2024

Respondents still agree that their organisation works best when teams and individuals have choice on where they work (Fig. 24).

Whilst the share of respondents reporting that their organisation plans to reduce office space has fallen from 34% to 28%, the share reporting that their organisation has already reduced office space has increased (Fig. 25).

The most common tools introduced in organisations to support hybrid working

were technologies to support asynchronous working and toolkits to assist with managing hybrid teams.

The most popular ways respondents reported their organisation approached equity towards hybrid working continue to be:

- Encouraging autonomy around where and when people work
- Giving staff kit to allow them to work as flexibly as their role allows

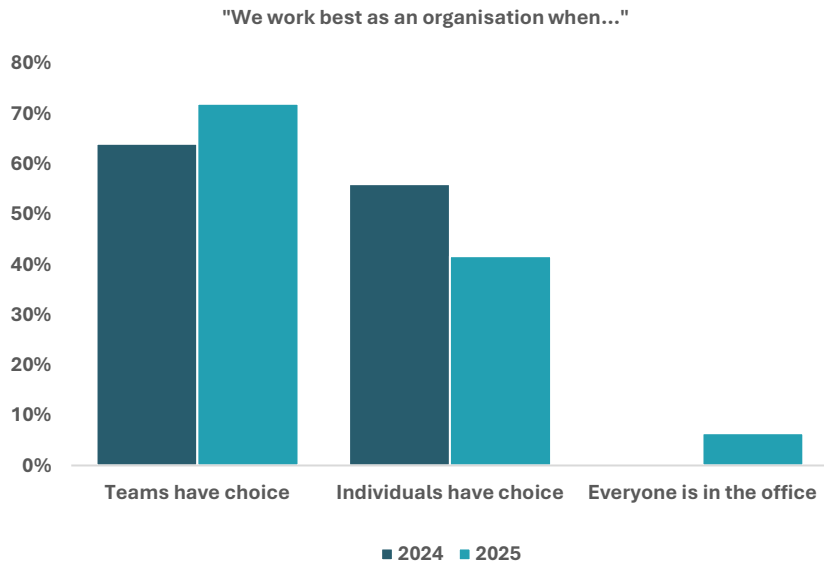


Fig. 24: How people work best responses for 2024 and 2025

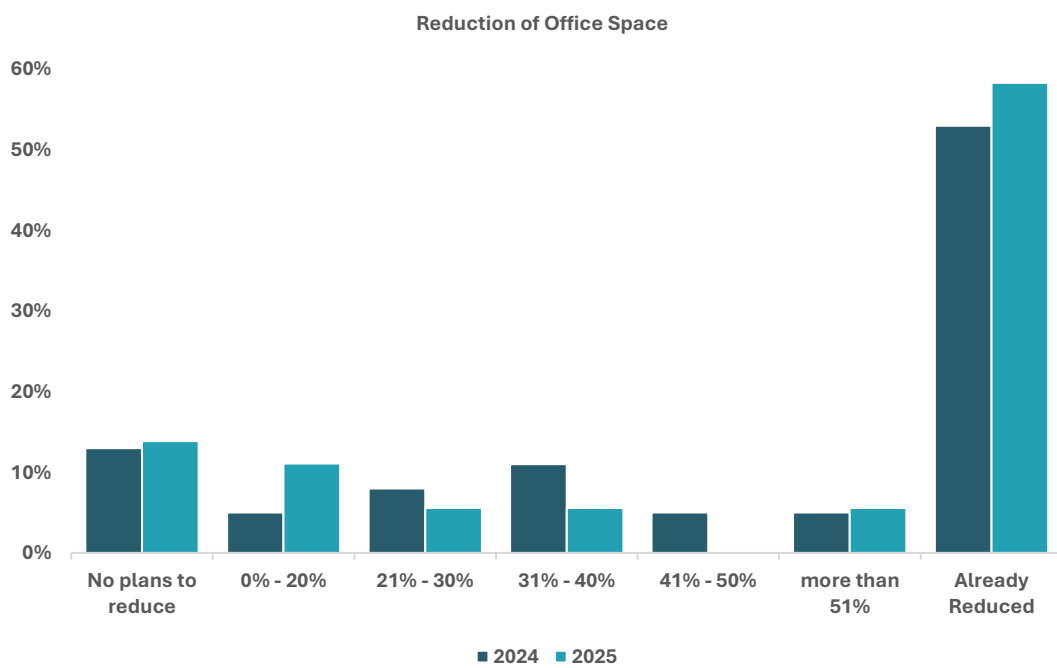


Fig. 25: Office space reduction responses for 2024 and 2025

9.0

Thoughts for the Future

Where are we one year on?

Our 2024 baseline survey set the foundation for this piece of work and it's good to see we haven't gone back on our ambitions given the negative press hybrid working has had this year.

A lot of good work is underway and it's great to see how many organisations are still embracing hybrid concepts.

None of our respondents have returned to full office based working and there has been very little change to the core messages over the last year which again is fantastic.

For this coming year, we have a lot of work to do. We need to focus our efforts on:

- Engaging with leaders to ensure clarity of vision around future ways of working
- Continuing to work with managers to help them to support remote work teams. Even one home working day per week accounts for 20% of work hours.
- understanding the team based approach to work. Really getting those team agreements working for us.

- Exploring task based approaches – what works best from the office and what works best at home or delivered remotely?
- Ensuring our presence is purposeful – whether we are remote working, home working or in the office
- Continuing to work with partners to understand where our best work happens

The office plays a pivotal role in future ways of working BUT it isn't the answer to everything. We need to encourage a return to smarter and activity based working principles where we find the right space to undertake the task at hand.

We learned so much during the Covid-19 phase of work and it would be disappointing if we lost this opportunity and simply returned to how things were done previously.

It's not going to be easy but we can make this work for us. This amazing experiment (see Gallup Poll) will likely continue for many years to come.

Sources: Gallup Poll: [The Post-Pandemic Workplace: The Experiment Continues](#)

If you would like to connect with us, our contact details are as follows:

Peter Kearns

Senior Associate Director

peter.kearns@scottishfuturestrust.org.uk

Shona Adam

Associate Director, Workplace Change

Shona.adam@scottishfuturestrust.org.uk

Disclaimer

The New Frontiers for Smarter Working - 2025 update report was developed by Scottish Futures Trust and all copyright, trademarks and other intellectual property rights in New Frontiers for Smarter Working - Creating our 2024 Baseline April 2024 are owned by and vest solely in Scottish Futures Trust.

The New Frontiers for Smarter Working - 2025 update has been prepared by Scottish Futures Trust on a non-reliance basis and thus is not advice. It does not absolve any recipient or user from its responsibility to conduct its own investigations and procure its own advice – legal, financial, technical, commercial, or otherwise as they see fit – to the validity and viability of the New Frontiers for Smarter Working – 2025 update. Scottish Futures Trust accepts no liability for any losses (including any indirect or consequential loss), including but not limited to loss of business or profits or any other financial or material loss arising out of or in any way connected with the use of, or inability to use, New Frontiers for Smarter Working – 2025 update report by any recipient or user. Scottish Futures Trust disclaims all responsibility for the consequences of any recipient's reliance on New Frontiers for Smarter Working – 2025 update report - including this paper – or for any decisions made or not made which are based upon this.