



From Mandate to Magnet:

# The Race to Reimagine Workplaces and Workspaces for a Hybrid Future





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## Executive Summary

The way we work has drastically changed in recent years. For most of us, we have transitioned from traditional office hours to working remotely during the global pandemic, and moving forward we have the chance to balance both. While most organizations are now encouraging their employees to come back to their physical workplaces, they also recognize the benefits of hybrid working. In fact, three quarters of employers in Asia Pacific expect this arrangement to become the embedded norm for the average worker within the next two years.

Employers and employees across Asia Pacific say this shift to hybrid work including time in the office is being driven by a range of factors including deriving the highest productivity, collaboration, socialization, innovation, and a sense of belonging. Contrary to the popular belief that most workers are reluctant to return to the office, our survey of both employers and employees shows that they are actually highly receptive and eager to return.

However, there is a disconnect between what employees now expect from the office experience to support hybrid work and what is currently being provided. We have found that more than half of the employees feel their office is not ready or only somewhat ready to support in-person working and enable them to do their best work. Employees want to use their office workspaces for collaboration, ideation, and socialization, but currently organizations in the region are generally falling short in providing this.

The critical areas where improvements need to be made are in office layouts and the provision of technology and infrastructure to best support hybrid working. The top challenges cited include internet connectivity, difficulty collaborating with remote team members, and inadequate equipment or tools. While two-thirds of employers believe their collaboration tools are generally working well, less than half of employees feel the same.

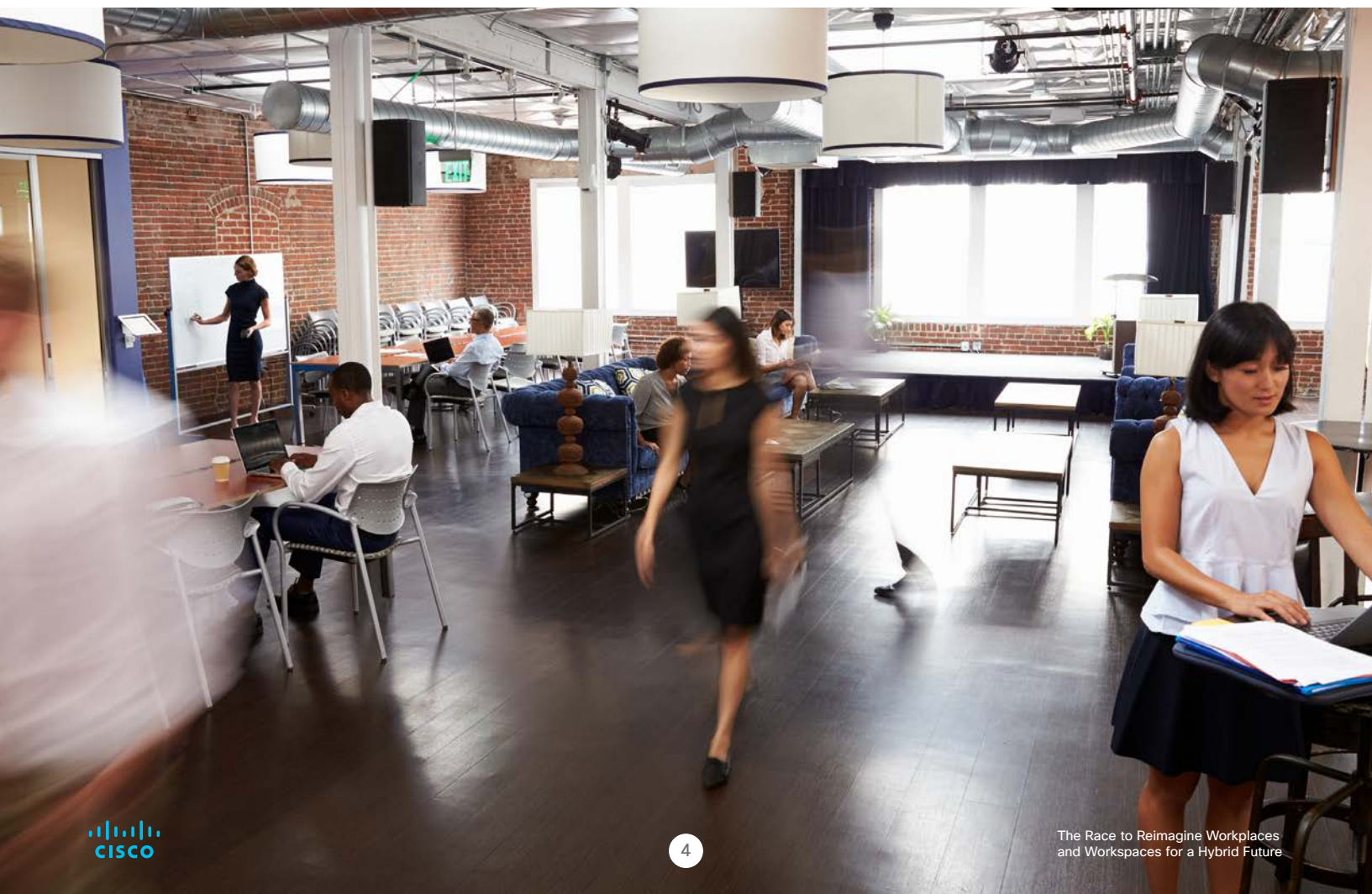
Fortunately, there is some alignment between what employees want and what employers are planning to do to address this. The top three areas where employees say things are not working well – seating arrangements,

collaboration and meeting spaces, and technology and infrastructure – are also the top focus areas for employers as they think about office redesigns. Nearly two-thirds of employees want better technology and infrastructure that can accommodate different types of work and activities. This is also what most employers are aiming to provide in their future office designs.

Positively, our study indicates that rather than being viewed as a risk, organizations are seeing the growth of hybrid working as an opportunity to create more enriching and productive workplaces that improve employee engagement and satisfaction while enhancing corporate performance.

However, with clear knowledge and capability gaps around what smarter offices of the future and new technologies can provide, it will also be critical for organizations to provide sufficient training and support to ensure that employees are not left behind on this journey – and that the starkly different needs of older generations are balanced with those of their younger co-workers.

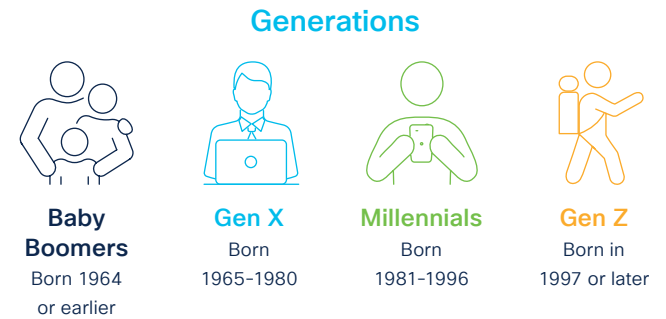
We hope this report will provide useful insights and information for leadership teams looking to optimize their organization's approach to hybrid work and reimagine their offices to meet the needs of their employees.



# Introduction

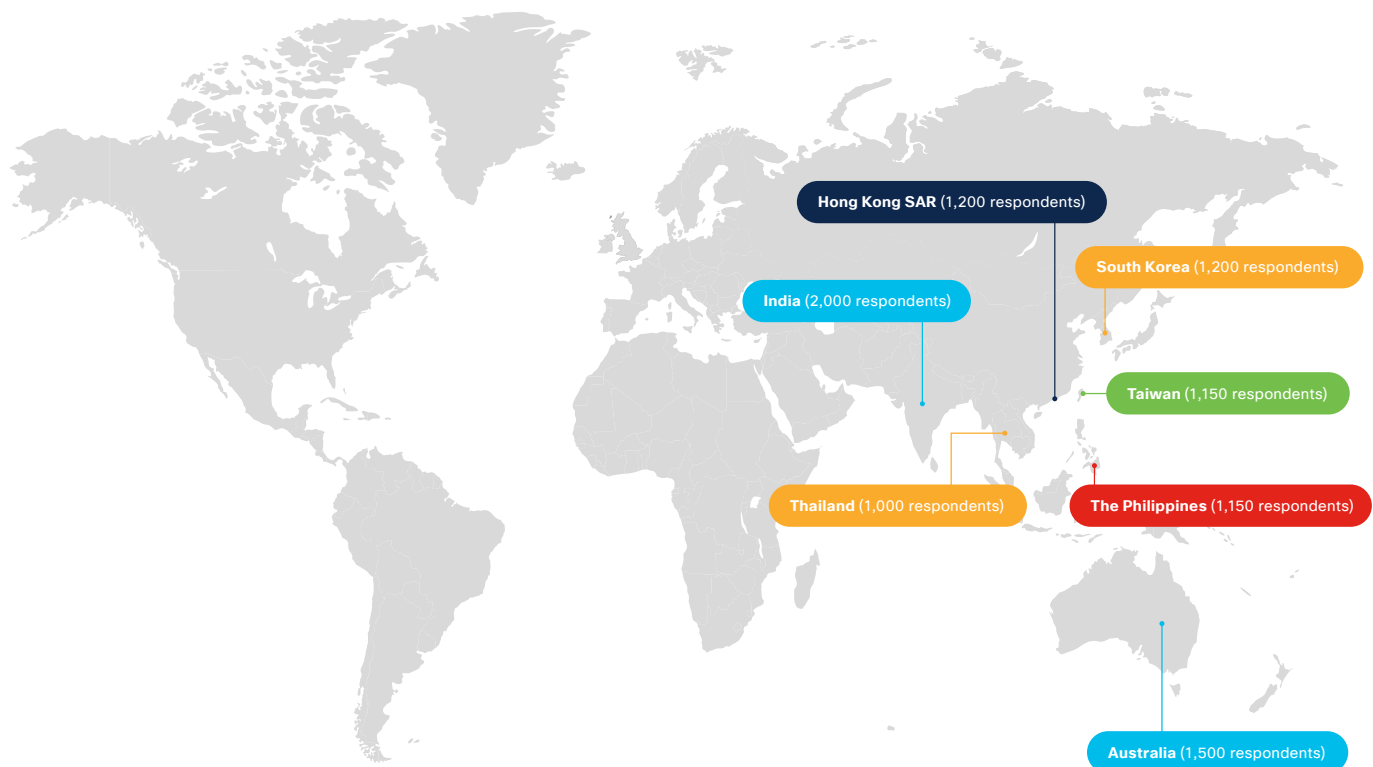
This report is based on a survey of 7,550 full-time employees and 1,650 employers, undertaken in November 2023. Respondents are from **seven Asia-Pacific markets** (Australia, Hong Kong, India, the Philippines, Taiwan, Thailand, and South Korea).

The research focused on uncovering insights regarding how employees and employers view hybrid work arrangements (a mix of working from the office and working remotely) and how they are using workspaces to support these. It reveals the significant benefits and opportunities that hybrid working arrangements have brought to both employees and employers, while simultaneously highlighting that as employees embrace a hybrid work style, their expectations of what the office is used for is changing. The results show that work needs to be done to reimagine workplaces and workspaces to cater to the evolving expectations so that employees and employers can fully realize benefits of hybrid working arrangements. Further, employers must address the key differences in how people from four generations in the workforce (**Baby Boomers**, **Gen X**, **Millennials**, and **Gen Z**)



have responded to hybrid working tools and technologies. The research also explores and ultimately debunks some common misconceptions about employee sentiments regarding returning to the office.

Respondents work for companies of a range of sizes: small (10-499 employees); medium (500-1,000 employees), and large (1,000+ employees). They also represent a wide range of industries: Business Services; Construction; Education; Engineering, Design and Architecture; Financial Services; Healthcare; Manufacturing; Media and Communications; Natural Resources; Personal Care and Services; Real Estate; Restaurant Services; Retail; Technology Services; Transportation; and Travel Services.







## The Return to the Office is Real, and Employees Welcome It

Remote and hybrid working suddenly became ‘the new normal’ following the global pandemic, with many organizations quickly realizing the benefits of this new way of working.

The employers we surveyed across the Asia Pacific region believe that hybrid working has most positively impacted their employees’ productivity (72%), cost savings (68%), and employee wellbeing (66%). While most employees agree, notably they are less likely to agree that they are more productive (61%).

Today, nearly nine out of 10 organizations across the region have at least 10% of their workforce on hybrid working arrangements, half have more than 40%.

For those on hybrid working arrangements, most of these employees attend the office 3 to 4 days per week according to employers.

Employers also report that 44% of all interactions in their office have someone now joining remotely, and they see multiple benefits from collaboration technology shaping the workplace of the future. Almost two-thirds (64%) believe it enhances employee engagement.

This trend is forecast to grow, and within two years three-quarters of employers expect hybrid working arrangements to become an embedded norm, with less than one-quarter (23%) of employers expecting the average employee to be working full time at the office.

## Respondents believing hybrid working arrangements have positively impacted their organization

		● Employers ● Employees						
	Total	Australia	Hong Kong	India	The Philippines	South Korea	Taiwan	Thailand
Productivity	72% 61%	59% 56%	75% 51%	86% 80%	78% 73%	49% 36%	62% 45%	87% 77%
Cost savings	68% 65%	54% 55%	67% 61%	80% 76%	77% 73%	55% 50%	58% 56%	78% 79%
Employee wellbeing	66% 60%	57% 58%	61% 53%	81% 77%	75% 74%	47% 39%	50% 42%	77% 76%
Team communication	63% 53%	42% 45%	64% 42%	81% 72%	74% 62%	43% 28%	55% 40%	74% 72%
Diversity and inclusion	62% 57%	41% 45%	62% 49%	77% 71%	69% 65%	50% 43%	51% 49%	77% 74%
Workplace culture	59% 51%	43% 42%	56% 41%	69% 70%	64% 62%	46% 34%	52% 37%	74% 64%



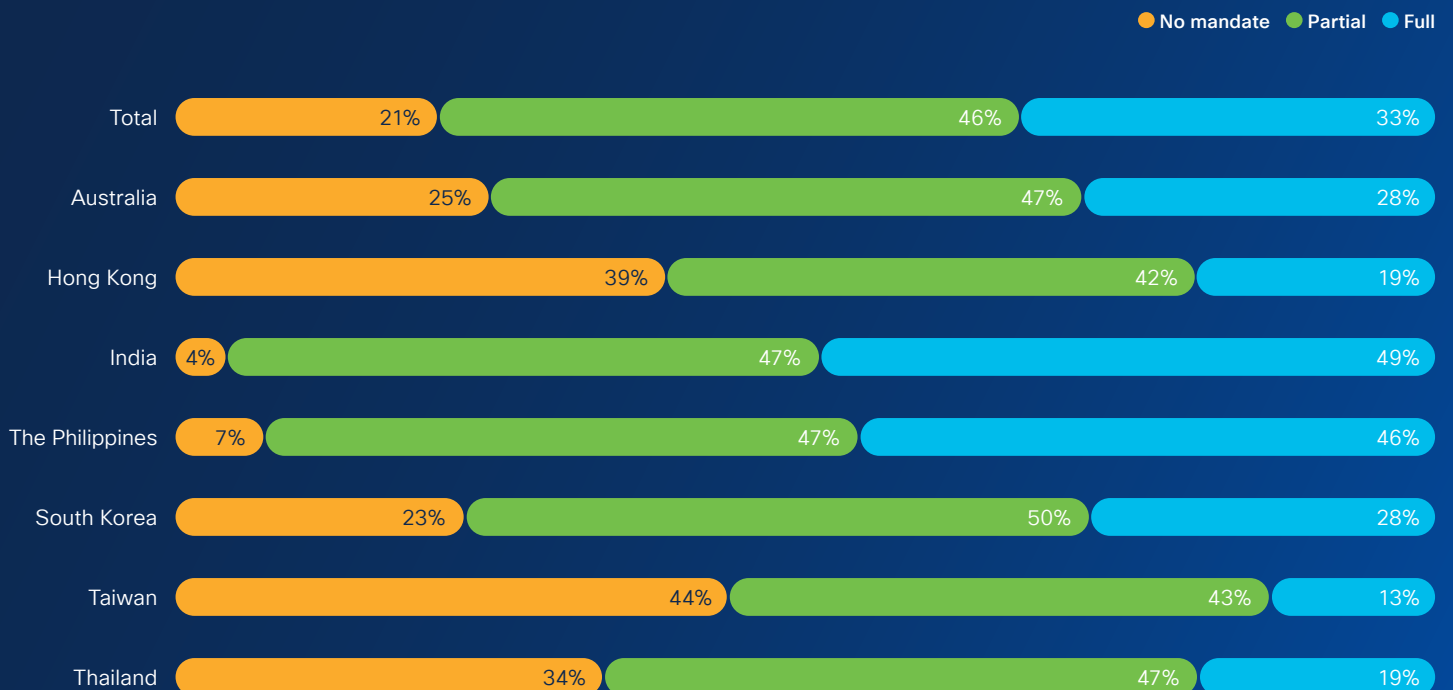
### Employers forecasting that the average employee will be a hybrid worker within two years



However, our study shows that employers have also been quick to realize the need to get the balance right between working from home and the office to create a truly successful hybrid working experience. With this in view, mandates to return to the office have been reintroduced. Nearly half of employers (46%) across the region are choosing to partially mandate returning to the office, followed by 33% fully mandating this, and just over one in five (21%) not mandating any return.



## Companies mandating a return to the office

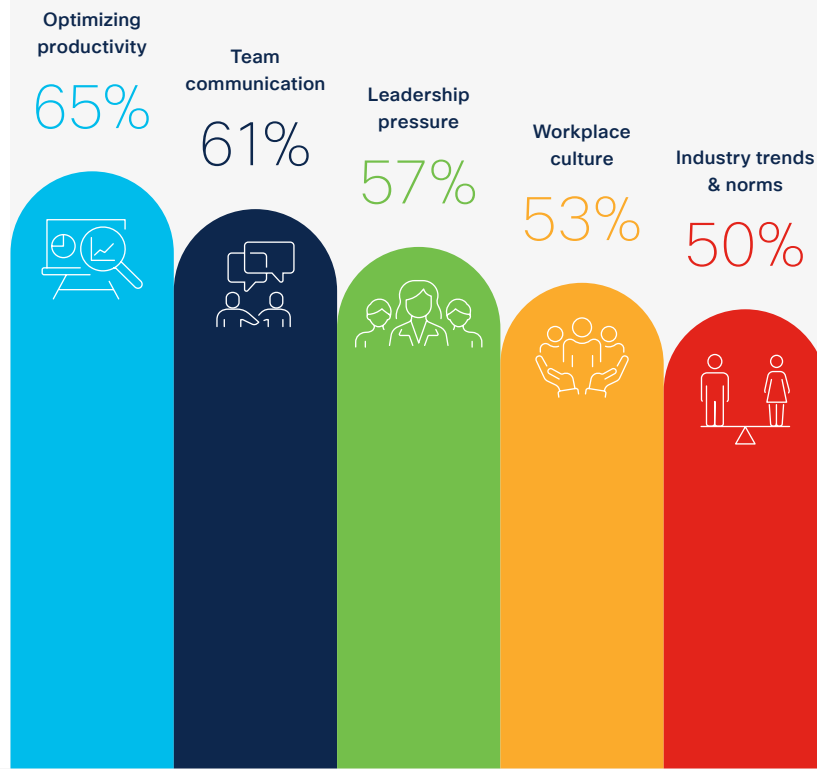




The strongest factors that have influenced these mandated returns to the office by employers across the region are optimizing productivity (65%), maintaining team communication (61%), responding to leadership pressure (57%), preserving workplace culture (53%) and meeting industry trends and norms (50%).

Counter to popular belief, these mandates have been welcomed by the vast majority. Over three quarters (76%) of employers say that employees have positively received the company's mandate to go back to the office – whether it has been a full or partial mandate. Seven out of 10 (71%) employees corroborate this saying they feel positive about their organization's mandate, with Baby Boomers most likely to feel positive.

## Top five factors influencing mandates to return to the office



## Employees saying they positively received organization's mandate to return to the office



Among the 19% of employers with some employees who have not welcomed a return to office mandate, the issues they have experienced the most are decreased productivity, decreased morale and engagement, and difficulty attracting new talent. Out of this group, only 28% say staff have left as a direct result of their mandate.

When looking into the reasons driving the high levels of positivity around spending more time in the office, the most common reasons rated in the top three across the region for both employers personally and employees are to collaborate with others (77%), socialize with colleagues (68%), ideating and brainstorming (63%), and developing a sense of belonging (48%).

Personal flexibility and comfort are the strongest drivers for employees to want to work from home by a significant margin.

## Employers saying that employees have left due to return to office mandates

Total	5%
Australia	12%
Hong Kong	4%
India	5%
The Philippines	<1%
South Korea	6%
Taiwan	5%
Thailand	2%

## Drivers for employees to return to the office

	Total	Australia	Hong Kong	India	The Philippines	South Korea	Taiwan	Thailand
Develop a sense of belonging	48%	49%	47%	58%	45%	42%	37%	52%
Collaborate with team members and learn	77%	76%	70%	80%	82%	78%	70%	82%
Ideate and brainstorm with colleagues	63%	52%	72%	53%	65%	59%	75%	70%
Interact and socialize with colleagues	68%	69%	66%	66%	68%	74%	64%	69%
Combat the feelings of isolation while working from home/remotely	26%	35%	27%	31%	20%	18%	32%	14%
Others	2%	4%	2%	1%	1%	3%	2%	1%



## Employee preference for working arrangements

	Total	Australia	Hong Kong	India	The Philippines	South Korea	Taiwan	Thailand
I prefer working from home and find it the most productive option	17%	26%	15%	17%	21%	11%	10%	19%
I prefer working in the office and find it the most productive option	42%	37%	44%	45%	33%	42%	43%	48%
I prefer a mix of both working from home and the office, depending on the task	35%	29%	33%	37%	42%	42%	36%	29%
I don't have a preference and am equally productive regardless of the location	6%	9%	9%	1%	4%	5%	11%	4%

As a result of these factors, we see a fairly even split between work preferences. Most employers across the region (37%) now personally prefer a mix of working from home and the office, followed by 35% who prefer to be in the office mostly, and 26% whose preference is working mainly from home. This picture is slightly different for employees, with 42% preferring to work mostly in the office, followed by a mix of working from home and the office at 35%. Only 17% prefer working from home. The oldest generation within the workforce, Baby Boomers, are most likely to favor working mostly from the office and the youngest generation, Gen Z, are the most likely to favor working mostly from home. Millennials (Gen Y) are the most likely to favor hybrid working arrangements.





## Workplaces and Workspaces Not Ready for the New Way of Working

With both employers and employees looking to achieve the perfect hybrid working arrangement, our study reveals some differences in viewpoints between employers and employees around the readiness of workspaces and the technologies their company is providing for the new world of work.

While more than half of employers across Asia Pacific (54%) say their office spaces are very well prepared to support evolving hybrid working needs, less than half (42%) of employees believe the same. The greater ownership that employers have over this issue and the requirements therefore on this to take responsibility may explain in part their higher levels of positivity.

Additionally, 64% of employees believe that their current office is not fully fit for purpose for enabling them to do their best work.

### Respondents believing office is 'very well prepared'

	Employers	Employees
Total	54%	42%
Australia	43%	44%
Hong Kong	47%	32%
India	72%	59%
The Philippines	64%	50%
South Korea	26%	19%
Taiwan	43%	34%
Thailand	63%	47%



This sentiment is being driven by the fact that employees feel that most parts of their current office set up are not designed in a way that promotes in-office productivity, especially in light of the changing expectations around office use.

Despite collaborating with colleagues being one of the key reasons employees want to go to the office for, 86% of employers say that 50% or more of their organization's office space is allocated to personal working spaces.

Even where organizations have the provision of flexible working spaces to support in-office working, there is consensus that these areas are currently not 'highly effective' in enhancing in-office productivity. While the numbers vary slightly, both employers and employees have similar opinions about this.



## Respondents saying different kinds of workspaces are ineffective or only moderately effective



Six in 10 employees (60%) say that individual work stations are either ineffective, or moderately effective at best, at enhancing in-office productivity. 46% of employers also feel the same. The trend is similar for all other types of workspaces – with 66% of employees and 55% of employers saying large meeting rooms are either ineffective, or moderately effective, at enhancing in-office productivity. For small meeting rooms, 72% of employees and 61% of employers feel the same. The numbers are the worst for huddle space, where 74% of employees and 63% of employers say they are either ineffective, or moderately effective at best, at enhancing in-office productivity.

As employers look to redesign their office space to meet the evolving expectations, they do have to tackle another challenge – that of making it attractive and effective for a multi-generational workforce. The study has highlighted differences in how employees across generations perceive the effectiveness of dedicated areas.

Older employees are significantly less likely to appreciate the productivity benefits of shared workspaces. For instance, 33% of Gen Z but only 19% of Boomers highly appreciate huddle spaces as productivity enhancing and this trend is evident for all types of in-office collaboration spaces.

## Reasons why meeting spaces are ineffective for employees

Lack of video and audio endpoints to make it inclusive

41%

Insufficient video and audio endpoints across meeting rooms

52%

Low quality audio-visual experience

46%

Lack of consistency in the experience of remote vs in office participants

35%

## Respondents believing that tools do not integrate seamlessly

	Employers	Employees
Total	72%	86%
Australia	85%	86%
Hong Kong	79%	93%
India	59%	74%
The Philippines	67%	83%
South Korea	89%	96%
Taiwan	78%	92%
Thailand	61%	81%

Amongst the employers who feel meeting rooms are ineffective in enhancing in-office productivity, the main reasons given are lack of video and audio endpoints in rooms (52%), the low quality of the audio-visual experience (46%), lack of video and audio endpoints to make it inclusive (41%) and a lack of consistency in the experience of remote vs in office participants (35%). On average, just over half of meeting rooms across organizations have video and audio capabilities.

Further to this, there is a universal feeling that currently available collaboration tools do not integrate with each other seamlessly, with 86% employees and 72% employers highlighting this in the survey. In fact, even among the youngest of the employees (from Gen Z), who are thought to be digital natives, only 16% feel that these tools integrate seamlessly, highlighting the urgency to address this issue.



Employers believing their organization is providing a well-managed hybrid working experience for employees



When it comes to employees working remotely, in office, and in between environments (for example while commuting) just over half (52%) of employers believe they are ensuring a well-managed experience. A further 43% say they are partially achieving this with issues with working from home as the greatest challenge.

Both employers and employees say the top challenges they face relating to technology and workplace set up when working remotely are internet connectivity, followed by difficulty collaborating with remote team members, and inadequate equipment or tools.

Finally, the study reveals that work needs to be done even outside of the office, as 63% of employees say their current collaboration tools are ineffective, or moderately effective, in enhancing home-based work productivity. This feeling is shared by employers as well, with 45% of them saying the same. The groups that find this a big challenge are the Baby Boomers and Gen X, with 73% and 72% of them respectively highlighting this as an issue.





## The Race to Reimagine

As a result of the move to spend more time in the office and perhaps growing awareness of the mismatched expectations of what the office of today should offer, most organizations are taking action to reimagine and redesign their workspaces.

Eight out of 10 employers say their organization has either completed an office redesign in the wake of the global pandemic or is planning or underway with one. Nearly half of employers (47%) are planning to redesign their office space within the next 12 months, with 34% looking to do so in the next one to two years.

These redesigns are taking place in the context of employees wanting to use the office for different kinds of tasks than before. The top-rated functions regionally as indicated by both employers and employees for offices of the future to facilitate were ‘enablement for local collaboration and teamwork’, ‘flexibility and adaptability to tailor a more individualized work experience’ and ‘fostering innovation and creativity’.

### Progress and plans for office redesign

	Redesign completed	Redesign underway	Redesign planned
Total	34%	29%	17%
Australia	29%	23%	17%
Hong Kong	32%	30%	17%
India	43%	28%	16%
The Philippines	44%	30%	13%
South Korea	18%	25%	24%
Taiwan	29%	37%	17%
Thailand	36%	37%	19%

## Drivers for office redesign

	Technological advancements	Changing employee expectations	Better enabling hybrid work
Total	59%	55%	53%
Australia	38%	45%	42%
Hong Kong	62%	48%	68%
India	70%	67%	50%
The Philippines	63%	54%	42%
South Korea	47%	41%	63%
Taiwan	63%	45%	68%
Thailand	67%	70%	51%

By extension of this, the biggest drivers for organizations to transform workplaces are to cater to new technological advancements (59%), adapt to changing employee expectations around what they come to the office for (55%), and better enable hybrid work (53%).

As a result, technology and collaboration spaces are the aspects of the office that are given the most focus, and most likely to be budgeted for in redesign projects. They are also rated as most important by employees – showing strong alignment. With only around a quarter of employees believing their current office space(s) performs well in these areas, the necessity of this work is evident.







Regular enhancements to workplace layouts (67%) and technology features (61%) are the top items organizations have allocated budgets for in relation to workplace design.

## Perspectives on performance of different aspects of the office and their priority for redesign

	Employers rating as top three aspect looking to redesign	Employees rating as top three aspect for redesign	Employees rating current performance as 'very well'
 Technology and infrastructure	67%	64%	28%
 Collaboration and meeting spaces	65%	55%	24%
 Layout and seating	53%	53%	19%
 Sustainability and eco-friendly features	47%	41%	19%
 Health and wellness amenities	39%	46%	22%
 Privacy and security features	29%	41%	27%



## Priorities for transformation of collaboration technology

	Employers want transformed	Employees want transformed
 Whiteboards or interactive displays	61%	54%
 Hybrid meeting rooms	60%	49%
 Enhanced remote access	57%	58%
 Upgraded individual working spaces	53%	53%
 Wellness spaces	44%	48%
 Enhanced digital collaboration channels	34%	36%

Over half (56%) of employers in the region say they have increased the proportion of their office space in relation to their headcount (by an average of 43%), just 8% say they have decreased this (by an average of 29%) and 36% have maintained the same ratio. This means, on average, the ratio of office space to employees has increased 22% over the past two years.

From these results, we can clearly see that employee experience remains front and center for office redesign considerations. With an overwhelming 95% of employers and 89% of employees across the region believing there is a positive correlation between workspace design and employee satisfaction, this trend does not look likely to abate any time soon. Particularly as the younger generations of Gen Z and Millennials are more likely to rate this correlation as significant.

When it comes to collaboration technology, both employers and employees across the region have similar priorities for what they would like transformed in their office, with employers very much leading the charge for these transformations.

Younger worker cohorts are more likely to desire all types of office upgrades compared to older groups, particularly redesigned meeting rooms to accommodate hybrid meetings (57% for Gen Z compared with 40% for Baby Boomers).

Our study further reveals that sustainability sits further down the pecking order as a priority for organizations across the region. Only 44% of employers and 31% of employees say that sustainability is a top priority in redesigning and reimagining their workspaces and that they have comprehensive plans in place to integrate eco-friendly practices and technologies. Perhaps resulting from the lack of consideration in this area and lower progress in measurement of environmental impact, office footprints also appear to be increasing.





## Bridging Education Gaps and Bringing Employees on the Journey

While the majority of employers (84%) say they are providing necessary technology to ensure a seamless transition from the home to the office, significantly fewer are providing an array of necessary practical supports.

The most common support features provided include network infrastructure both at home and in the office (66%), comprehensive training and support for technology usage (65%), and flexible work arrangements to reduce the need for constant transitions (65%). Advanced network monitoring and troubleshooting tools are provided by just 34%. Just one in eight employers (13%) say they have not provided any additional support to assist employees with hybrid working.

In terms of enabling technology and tools, most employers are providing video conferencing platforms (61%), instant messaging and team chats (57%), interactive virtual meeting rooms (57%), cloud-based document sharing (57%) and project management and collaboration tools (53%), but these numbers do not indicate mainstream adoption.

Employees who either do not have access to the technology or at best moderately equipped to use it





With an eye on the future, four in 10 also provide office footprint monitoring and smart meeting room assistants.

While most employers are clearly making progress in deploying a wide range of collaborative technologies and tools to support hybrid working, significant work still remains to simplify the experience to better enable employees to more fully utilize these tools and technologies.

Providing the tools alone is not sufficient, as in general most employees who can access enabling technologies don't feel highly equipped to use them, making simplicity even more important as a central focus for implementation. The majority of respondents report either a lack of access to or proficiency in these technologies. For instance, three-quarters (75%) lack access to or proficiency in

project management or collaboration tools, with the same number reporting these issues around cloud-based document sharing. Significant numbers also lack access and proficiency around the use of office footprint monitoring and smart meeting room assistants (80% for both).

Therefore, to optimize productivity in hybrid working environments, the provision of collaboration tools and technology needs to be backed up by appropriate training and support to use them.

This is especially the case for older workers who consistently express lower levels of comfort and satisfaction with these tools compared with younger worker groups.







## Recommendations for Companies

- 1 Accelerate Hybrid Plans:** Hybrid working arrangements are increasingly the new normal and are here to stay. From technology to workspace design to corporate culture, leaders with an eye on the future should ensure that all aspects of their employee experience are aligned to supporting this working style, and to do so without delay to avoid missing capitalizing on competitive advantages.
- 2 Invest in Understanding:** Our research shows that some disconnects exist between employer and employee perceptions, expectations, and needs, and it's easy to see how these can be formed. As investments in office infrastructure are costly and for the long term, it's vital for employers to spend time really understanding what their employees need today and, in the future, to optimize their work and results.
- 3 Make the Journey Easy:** Simplicity. Simplicity. Simplicity. It's evident from our research, that while most employees need better technology, tools, and workspaces, they also need training and support to get the best out of these and can easily become

overwhelmed and confused with technology and system overload. Starting with focusing on simplicity in technology and experience design is crucial.

- 4 Being Connected Everywhere:** With hybrid employees needing to work from the office, home, and everywhere in between, resolving connectivity issues and ensuring interoperability is crucial to create a seamless and stress-free working and collaboration experience with employees.
- 5 Age is Not Just a Number:** Our study uncovers significant differences between the viewpoints of employees from the four different generations representative in today's average company workforce. It's important to account for these different needs to create a truly inclusive and thereby effective working environment.

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