Steelcase®

Steelcase Research: Work Has Changed. Has Your Office? (Asia Pacific 2026)

Foreword

Few periods have reshaped work as quickly as the last five years. What began as a response to disruption has become a lasting shift in employee expectations, workplace experiences, and the role of the office itself.

Hybrid work, rapid AI adoption and changing expectations around wellbeing are reshaping how people use technology, organize their day and interact with colleagues. This calls for a new approach to workplace strategy.



For many leaders, the challenge is practical. How do organizations make the office worth coming to more often? How do they compete for and retain talent in demanding markets?

How do they help employees focus, collaborate and recharge in a screen-heavy workday? And how do they adopt AI and new digital tools without adding to stress and burnout?

At Steelcase, our perspective is grounded in continuous global workplace research. By studying how people work, think, and collaborate, we help organizations translate emerging workplace trends into evidence-based design strategies that support human performance.

Our global research includes insights from China, India and Japan, offering a regional perspective on how technology, hybrid work and changing employee expectations are shaping the workplace in Asia Pacific. These findings show how global workplace strategies can be adapted to local market needs.

Many workplaces still struggle to support how people work today. Traditional layouts often provide too little choice, making it difficult for employees to balance focused work, collaboration, and informal connection throughout the day.



Our research shows that two-thirds of the time employees spend working alone is spent on a screen, yet many remain dissatisfied with their primary workspace. The challenge is not simply a lack of privacy, but a lack of variety. When workers cannot access private, low-distraction settings, focus breaks down, sensitive conversations are compromised, and mental energy is drained.

This report invites leaders to view the workplace as a strategic asset rather than a fixed footprint. By designing with intention, organizations can create environments that adapt to changing work patterns, strengthen connection and support people over time.

Workplace Inflection Point

The world is entering a new era of work. Organizations are navigating rapid AI adoption, hybrid work, and rising employee expectations while balancing economic pressures and the need to sustain performance and wellbeing.

Employees now spend 59% of their working day on screens. That share rises to 71% when they're working alone. Yet while work has evolved, many workplaces have not. 86% of Asia Pacific employees regularly participate in hybrid meetings with at least one remote participant, but office layouts were never designed for this level of mixed-presence work. The result is a growing mismatch between how employees work and the environments intended to support them.

For leaders, this mismatch matters because it influences whether employees see the office as a place that helps them do their best work.

As virtual collaboration becomes part of everyday office work, privacy has become one of the clearest signs of the problem. When spaces lack appropriate boundaries, acoustic and visual distractions disrupt focus, confidential work and everyday performance. Globally, 58% of employees say they cannot find privacy when they need it.

For organizations, the opportunity is to make the office a place people choose because it helps them do better work. That means moving beyond static, one-size-fits-all layouts and creating workplaces that support focus, collaboration, engagement and performance.



Macro Shift #1:

Living on Screen



The new competitive landscape

The traditional office has long measured its competitive position against the comfort of working from home. However, our latest research indicates a far more profound challenge has emerged. The modern office is no longer just competing with the home. It is competing directly with the screen, as well.

As digital tools dictate workflows, screens have become the primary destination for day-to-day work. This change has brought benefits by expanding access and allowing seamless time zone flexibility. But it has also locked teams in an "infinite workday" marked by frequent digital interruptions, extending work into early mornings and late evenings.

Steelcase Global Research reports that 85% of people have meetings with at least one remote participant. In Asia Pacific, that figure climbs to 86%, signaling that highly distributed, hybrid work is a permanent fixture of corporate life.

The rise of screen-first work

As screen dependence grows, so does its impact: Global Research by Steelcase shows employee engagement drops by 12% when screen time reaches 80% or more of the working day.

While Asia Pacific has not yet reached this threshold, employees already spend 53% of their working day looking at screens. Collaboration no longer depends on physical proximity. Instead, employees move continuously between video calls, shared documents, dashboards, and messaging platforms, making the screen the primary setting for work.

Employees adapt by creating new digital routines to manage their workloads. But when workplaces lack spatial variety, they are forced into compromised habits, such as taking video calls at open desks because they have nowhere else to go.

Screen-based work is also isolating. Globally, workers spend 71% of their working time alone on a screen. As employees devote more of their day to independent digital work, workplaces must balance spaces that support deep focus with environments designed for meaningful collaboration.

Employees navigate the workday through screens

Global

59%
of total working time is spent on-screen

71 %
of total working time alone is spent on-screen

Asia Pacific

53%
of total working time is spent on-screen

64%
of total working time alone is spent on-screen



The hidden costs of saturation

This deep immersion carries severe, unaddressed costs for employee health and performance. Constant screen exposure triggers a sense of tech-driven fatigue and heavy cognitive overload. The brain is forced to work significantly harder to process flat, virtual social cues.

The physical environment often worsens this strain. Without proper spatial division, employees face a landscape of attention fragmentation and constant noise.

Employees feel the toll

Global

51%
burnout rate among frequent AI users

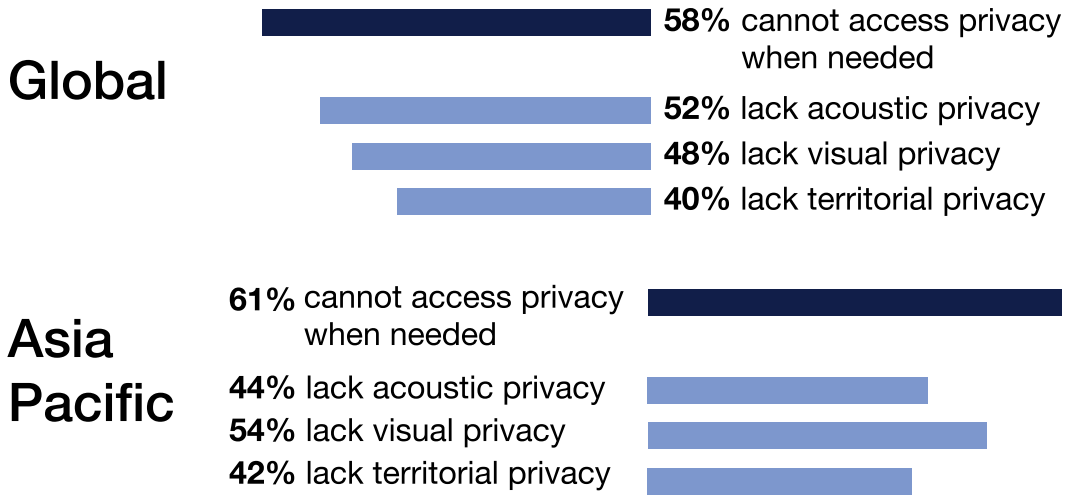
12%
engagement drop in people who spend more time on screens

Asia Pacific

48%
burnout rate among frequent AI users

There is also a steep emotional cost to this layout. Oversaturation leads to a severely reduced sense of connection with colleagues and company culture. When teams rely mostly on digital interactions, it becomes harder to build professional relationships and trust.

Employees need more privacy



Workplace implications

Design Principle #1:

Balance digital work with human connection

Workplaces adapt best when they provide balanced settings tailored to different modes of screen-based and face-to-face work. Forward-thinking organizations can achieve this balance by incorporating four key environmental capabilities:



Provide spaces for video calls that don't isolate. Design distinct, accessible areas intended for virtual meetings so individuals can speak freely without feeling cut off from the team.



Build hybrid environments for equal participation. Configure meeting rooms where in-person and remote participants can see, hear, and interact on equal terms.



Offer dedicated areas for quiet focus. Incorporate high-privacy settings that shield workers from constant pings and task pings, allowing them to think without interruption.



Create inviting places for face-to-face interaction. Activate informal, non-digital gathering hubs that naturally spark casual conversations, mentoring, and trust-building.

Macro Shift #2:

The AI Supercycle

AI changes workflows

Artificial intelligence is accelerating daily business operations across the globe. While digital tools evolve by the week, the physical office often lags behind. This baseline friction means that modern work is changing much faster than workplaces are adapting. Organizations frequently update software without rethinking their office layout. However, new technologies alter physical behaviors alongside digital ones.

True workplace performance requires spatial adjustments that match these operational shifts. Accelerated digital tool use correlates with higher strain, resulting in a 51% burnout rate among frequent AI users worldwide, compared to 44% among infrequent users.

This global trend is reflected regionally. According to Steelcase research, 47% of AI users in Asia Pacific say AI has changed the way they use their physical workspace.

AI Adoption Impact

Global



35%
of AI users say AI has changed the way they use their physical workspace



37%
of AI users report stress or burnout

Asia Pacific



47%
of AI users say AI has changed the way they use their physical workspace



46%
of AI users report stress or burnout

Nearly half of AI users say that AI has changed how they use physical space. At the same time, accelerated digital cycles introduce hidden wellness challenges as heavy AI users report higher levels of stress and burnout.

AI changes collaboration

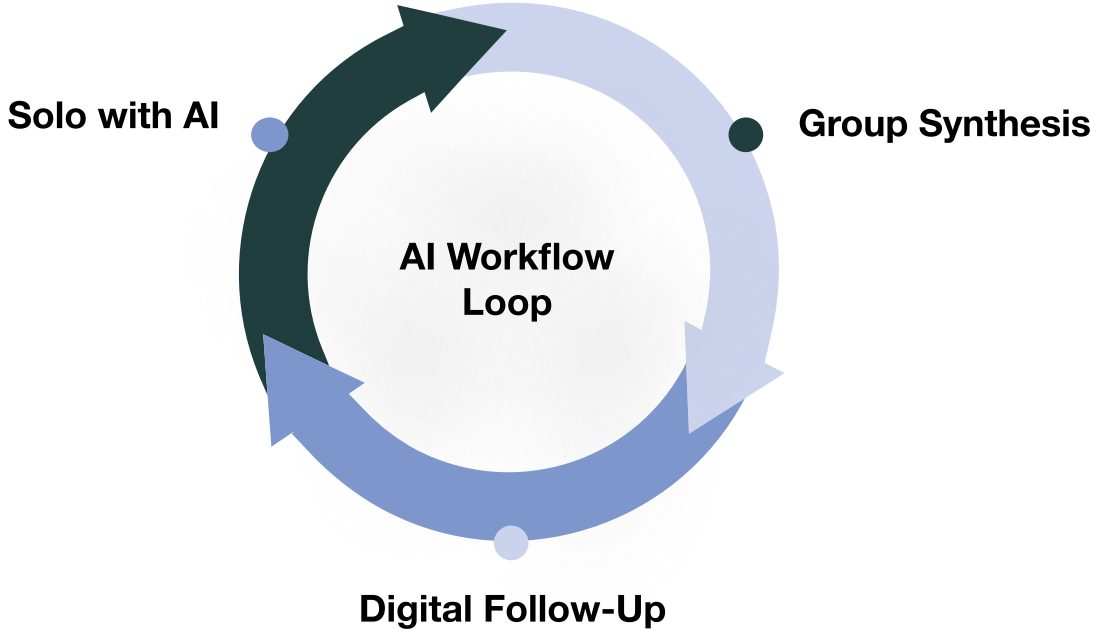
As automated tools absorb routine tasks, Steelcase research identifies a clear three-part rhythm that employees adopt to structure their workday. This pattern reflects how workers intentionally move between digital tools, team dialogue, and execution:

Solo with AI:
Employees spend time working intensely with digital agents to generate baseline content.

Group Synthesis:
Teams gather in person to critique, refine, and validate those automated insights.

Digital Follow-Up:
Workers return to their screens to execute decisions and manage workflows

AI Workflow Loop



Source: Creating People-Centered AI Spaces, Work Better Magazine, Summer 2026

AI changes the purpose of the office

Because automation handles basic administrative data, the purpose of workspaces has evolved. Supporting routine task execution is no longer a major requirement for the office. Instead, physical environments must support deep human capabilities.

Employees find value in a modern office that focuses on three essential human objectives:



A Sense-Making Environment:
A destination where professionals gather to evaluate complex data.

A Trust-Building Environment:
A supportive space that fosters strong, face-to-face team relationships.





A Creativity-Enhancing Environment:
An inspiring space that sparks organic, spontaneous innovation.

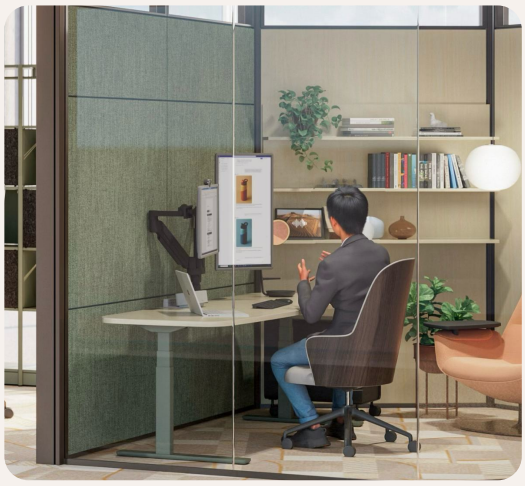
Workplace implications

Organizations can address workers' needs by moving away from isolated technology labs. High-performance workplaces require a coordinated ecosystem of diverse spaces. This framework balances focused work, collaboration, socialization, learning, and physical rejuvenation.

Design Principle #2:

Create people-centered AI workplaces

Leaders can optimize workspaces by focusing on three core spatial ideas:



Focus (AI Dialogue and Human Review):
Provide private enclaves equipped with dual monitors and tools to support quiet work with AI agents. Pair these enclaves with adjacent collaboration areas so workers can transition quickly to deliberate team collaboration and content verification.

Collaboration (Agile Project Rooms with Micro Zones):
Build flexible, reservable spaces that allow teams to shift seamlessly among informative, evaluative, and generative teamwork. Use micro zones with AI-assisted dashboards, writable surfaces, and reconfigurable furniture to support layered human engagement.





Socialization (Human Connection Counters Screen Intensity):
Activate tech-free, nature-infused social hubs like coffee bars to maximize face-to-face moments and lower user stress. Integrate ambient AI and place device charging ports out of direct line of sight to prevent digital distractions.

Macro Shift #3:

Wellbeing as a Performance Strategy

The productivity trap

As organizations accelerate AI adoption to drive productivity, employees face growing demands to learn, adapt, and deliver results in new ways. The data show a stark gap between what employees need and what offices currently provide.

Across global workplaces, 46% of employees identify wellbeing as a top priority. Yet only 52% are at least somewhat satisfied with their current office wellbeing spaces, with just 17% of them being extremely satisfied, creating a gap that can strain teams and undermine long-term organizational performance.

The same tension is evident in AI adoption. Worldwide, 37% of AI users report at least a moderate level of stress or burnout, with heavier AI use associated with higher levels of strain. In Asia Pacific, the challenge is even more pronounced: 46% of AI users report stress or burnout, with heavier use correlating with more strain. Among frequent AI users, 48% report higher levels of burnout, compared with 42% of infrequent users.

Burnout Disparity

Global

51%
of frequent AI users experience burnout

44%
of infrequent AI users experience burnout

Asia Pacific

48%
of frequent AI users experience burnout

42%
of infrequent AI users experience burnout

Why recovery matters

The challenge of a screen-first workday is not simply maintaining productivity. It's also sustaining human performance over time.

As digital interactions consume more of the day, employees seek out spaces that enable deep concentration, privacy, and personal rejuvenation. When employees have access to three or more dedicated workplace settings, they report higher wellbeing and productivity. Globally, wellbeing is 13% higher and productivity 8% higher, while in Asia Pacific, the increases are even greater at 20% and 14%, respectively.

Spatial Intervention Impact

Global



+26%

Office Satisfaction

When employees have access to wellbeing spaces



+13%

Wellbeing

When employees have access to 3+ types of space in the office



+8%

Productivity

When employees have access to 3+ types of space in the office

Asia Pacific



+27%

Office Satisfaction

When employees have access to wellbeing spaces



+20%

Wellbeing

When employees have access to 3+ types of space in the office



+14%

Productivity

When employees have access to 3+ types of space in the office

The need for recovery is especially clear across Asia Pacific. Nearly three-quarters of employees (72%) say access to spaces for rejuvenation is important to their daily work experience.

Organizations that invest in wellbeing-focused spaces see a tangible return, with access to these environments linked to a 27% increase in workplace satisfaction.



Yet many workplaces are not meeting that need. Only 57% of employees report being satisfied with the spaces available to help them recharge, revealing a significant gap between what people need and what today's workplaces provide.



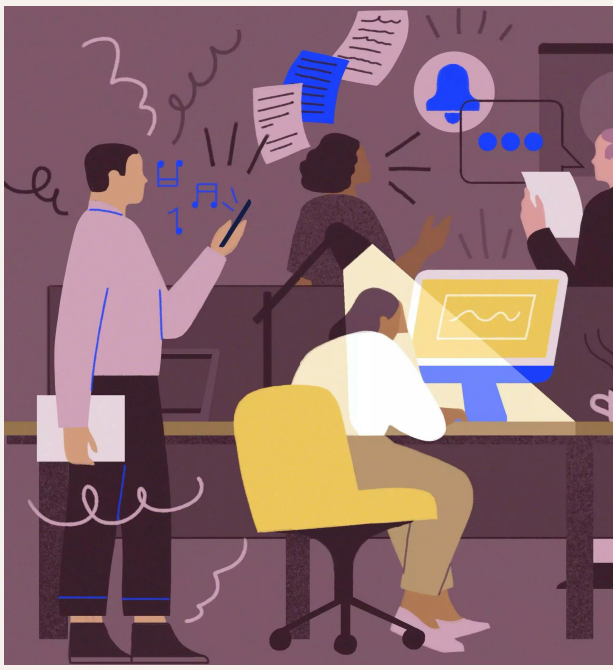
Why choice matters

Throughout the day, employees move between focused individual tasks, virtual collaboration, informal conversations, and problem-solving with colleagues.

Yet many workplaces remain designed around static layouts that offer limited support for these changing needs.

The challenge becomes even more apparent as AI-enabled work and digital collaboration continue to increase. Forty-three percent of employees in Asia Pacific most commonly take video calls at their desks, even with colleagues nearby, while 87% would prefer to take them elsewhere.

The finding underscores a growing mismatch between the work employees are being asked to perform and the environments available to support it.



Why community matters

As hybrid work continues to redefine where work happens, the office must reinforce its role as a place designed for different ways of working.

Community-based design responds to this shift by organizing workplaces around people rather than floor plans. Instead of relying on long rows of assigned desks, organizations create a network of interconnected spaces that support different activities and encourage meaningful interactions throughout the day.

These workplace "settings" give employees greater choice while helping teams maintain a stronger sense of belonging and connection.



The impact extends beyond the physical environment. Employees with access to three or more dedicated workplace settings report measurable improvements across key indicators of organizational health:

Workplace Impact	Global	Asia Pacific
Higher Inclusion Increase in fostering diverse team perspectives	18%	22%
Company Adapts and Responds to Change Improvement in responding to change	17%	23%
Higher Accountability Rise in shared responsibility within project teams	14%	19%
Higher Engagement Increase in daily connection to work	14%	17%
Higher Wellbeing Improvement in overall physical and cognitive wellbeing	13%	20%
Stronger Community Increase in employees' sense of connection to colleagues	15%	21%



Workplace implications

Design Principle #3:

Give People Choice, Control, and Community

Modern workplaces must transition into high-performance ecosystems that support human health. Creating a resilient network of functional corporate settings allows organizations to unlock sustainable productivity.

Leaders can drive collaborative performance by activating three spatial strategies:

Choice (Ecosystem Variety):
Provide three or more dedicated workplace settings on the floorplate to support focus, learning, and physical rejuvenation.





Control (Immediate Spatial Agility):
Deploy lightweight, highly responsive furniture platforms that allow users to adjust their posture fluidly throughout the day.

Community (Face-to-Face Gathering Hubs):
Build comfortable social settings that encourage eye contact, minimize screen distractions, and foster authentic human connection.



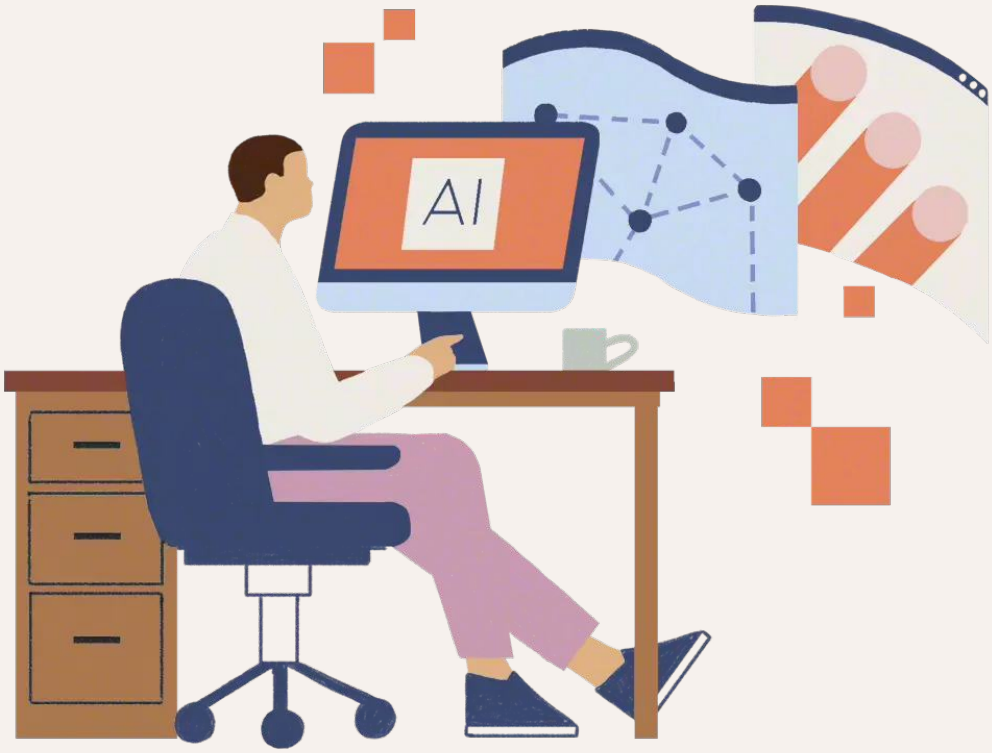
Regional Perspectives

Our analysis examines three benchmark markets in Asia Pacific: China, India and Japan. Together, they demonstrate how global workplace trends play out in different regional contexts.

Rather than standalone market snapshots, these insights extend Steelcase's global research, showing how a consistent workplace strategy can be adapted to local ways of working while maintaining alignment with global business and brand objectives.

For multinational organizations operating across the region, this provides a framework for translating global workplace principles into market-specific decisions. It allows business leaders to make locally informed investment choices while maintaining consistency with enterprise-wide workplace standards.

Although all three markets are experiencing rapid digital transformation, employees interact with technology, collaborate, and use the workplace in different ways. The research reveals three distinct workplace trajectories, shaped by varying levels of digital maturity, collaboration patterns, and expectations of the physical workplace.



Asia Pacific Is Not One Workplace

The need for better focus spaces is a global challenge. Worldwide, 40% of office workers are dissatisfied with their access to focus spaces, and 54% lack access to individual enclosed spaces. Asia Pacific reflects this broader trend, but with its own distinct workplace dynamics.



While many forces are shared, employees in China, India, and Japan experience work in distinct ways shaped by local economies, cultures, and expectations. Understanding these differences matters because workplace design ultimately shapes how people feel and perform at work.

What works in one context may not meet the needs of another, particularly when it comes to collaboration, technology use, and everyday office experience.

China

Organizations in China are navigating an exceptionally fast-paced digital ecosystem where new tools are integrated almost overnight. This rapid adoption creates an environment where physical offices must change just as quickly to support hybrid workflows.

Our research confirms this momentum, showing that 85% of employees in China report that AI tools have already changed their physical workspace at least moderately. Among AI users, 61% say AI has changed how they use their workspace.

China Workplace Shifts



85% say AI tools have already changed their physical workspace at least moderately



61% of AI users say AI has changed how they use their workspace



69% of screen time is spent alone

This digital transition places unique pressures on individual performance and office design. Chinese workers report high screen saturation, spending 69% of their daily screen time completely alone, while 24% of workers overall report at least moderate burnout. Among employees who spend 80% or more of their alone time on screens, that figure rises to 33%.

Taken together, these changes point to a workplace that is in a constant state of adaptation, where digital acceleration directly influences spatial behavior. At the same time, this transition places unique pressures on individual performance and workplace design.

India

The corporate environment in India is defined by business acceleration, massive scale, and a strong cultural enthusiasm for new technology. Employees show an immense eagerness to learn and deploy automated tools to enhance daily productivity.

The data highlight how AI is reshaping work in India. While 80% of Indian workers report that AI has changed their physical workspace at least moderately, 58% of AI users say it has changed how they use that space. AI is also influencing how people work together, with 83% of AI users reporting more interaction and connection with their colleagues as a direct result.

India Collaboration and Tech Trends



80% of employees report that AI has changed their physical workspace at least moderately



58% of AI users say AI has changed how they use their workspace



83% of AI users say colleague interaction has increased



99% say their meetings involve at least one remote participant

Hybrid collaboration has become a baseline standard for enterprise companies in the region. An overwhelming 99% of employees in India report that their daily meetings involve at least one remote participant.

Burnout is also a significant concern. Among AI users, 56% report experiencing stress or burnout. And for employees who spend 80% or more of their alone time on screens, 74% experience at least moderate burnout.

Because teams are constantly balancing digital tool use with high-frequency teamwork, Indian offices face significant acoustic and spatial strain. Business leaders must design adaptive, collaborative zones that mitigate burnout.

While Indian workplaces are increasingly defined by constant connectivity and continuous coordination, this also places growing pressure on the physical environment, particularly regarding noise, space allocation, and support for focused work.

As a result, workplaces are being pushed to move beyond purely collaborative layouts toward more adaptive environments that can flex between high-intensity teamwork and individual focus.

Japan

In sharp contrast to the hyper-growth environments of China and India, Japan exhibits a far more measured pace of technology adoption. Japanese organizations approach workplace change with careful deliberation.

Our research shows that AI tools have changed how 28% of employees in Japan use their physical workspace at least moderately. Among AI users, 12% say AI has changed how they use their workspace.

Japan Satisfaction and Focus Gaps



40 % are satisfied with their current focus spaces



76 % lack access to enclosed quiet hubs



79 % can’t get privacy when they need it

However, Japan faces a severe crisis regarding individual focus and physical workplace satisfaction. Only 40% of Japanese workers are satisfied with their current environments to focus, and a striking 76% completely lack access to individual enclosed spaces. Furthermore, 79% of employees state they simply cannot get privacy when they need it during the day.

These figures point to a structural tension rather than a behavioral one. Employees show up at the office to perform cognitively demanding work, but existing spatial conditions do not yet provide them with the privacy or control needed to succeed.

For leaders, the implication is not simply about adding more space, but about rebalancing the workplace toward greater choice, particularly environments that enable uninterrupted focus, privacy, and recovery within an otherwise collaborative office model.

Improving workplace performance in Japan is less about accelerating adoption, and more about closing the gap between presence and productivity by strengthening the quality of focused work environments.



The New Blueprint for Work

A workplace can look beautiful, but its real value lies in whether it helps people get work done. While 96% of US leaders plan to update their spaces, global research shows these efforts often miss the mark where it matters most.

Employees continue to encounter spatial gaps that limit how effectively they can work. Addressing these challenges requires organizations to move beyond occupancy planning and design workplaces around five human-centered principles.



Design for Focus

On average, professionals spend two-thirds of their day working alone, yet 40% are dissatisfied with their focus options. Open formats often overexpose employees, forcing the brain to burn energy simply filtering out visual and acoustic disruptions. Discomfort quickly becomes cognitive noise that derails daily productivity.

Solving this tension requires a diverse spectrum of quiet spaces, from simple pods to semi-shielded individual workstations. Integrating visual privacy elements reduces cognitive load, giving the brain the extra bandwidth it needs to focus deeply.

Design for AI-Enabled Work

As automated tools accelerate, solo work increasingly involves a continuous back-and-forth dialogue with digital agents. This intensive screen time isolates individuals.

Workplaces must support this reality by providing specialized areas equipped with auto-framing cameras and integrated docking stations. These settings ensure that data synthesis occurs seamlessly while maintaining clear visual equity for remote colleagues.





Design for Wellbeing

Employees globally request wellbeing as the number one improvement they want. Spending long hours locked in static positions strains the body and turns physical discomfort into a source of mental fatigue.

Because sitting is dynamic, physical support must move at the speed of the body. Organizations can elevate satisfaction by adopting the principles of cognitive ergonomics to support both body and mind.



Design for Community

When daily routines become dominated by solitary screen time, employee engagement drops. Working in isolation can trigger a threat state in the brain, which actively stifles creative problem-solving and collaboration. The office must serve as a welcoming destination that naturally draws people together.

Leaders can build a resilient culture by designing inviting social hubs that encourage face-to-face interaction. Introducing vibrant shared spaces prompts the spontaneous knowledge transfer that virtual platforms cannot replicate.

Design for Adaptability

A resilient workplace avoids rigid layouts, giving teams complete autonomy to reorient their settings as project demands change.

Large, traditional conference rooms often sit empty because their formal furnishings cannot accommodate diverse group dynamics. Real flexibility is an operational necessity, not an abstract design goal.

Deploying modular architectures allows teams to alter boundaries instantly. Spatial versatility gives people meaningful choice and control, transforming the office into a highly agile environment.



Conclusion

A System for Human Potential

The modern office needs to be more than a place people are expected to show up. It should attract people in, support their wellbeing and help them do productive work. The findings point to a practical conclusion: the office creates value when it helps people focus, connect and adapt throughout the day.

That means providing quiet places for concentrated work, settings that support hybrid collaboration and AI-enabled workflows, spaces that help people recover from digital intensity, and environments that strengthen connection and belonging.



To help people think better, workplaces must reduce the acoustic and visual distractions that fragment attention. Spaces that provide privacy and support deep focus give individuals the cognitive room to solve complex problems and produce higher-quality work.

To help people connect better, the office must restore the quality of human interaction in an increasingly digital world. Shared environments that support informal exchange and equal participation among in-person and remote colleagues strengthen trust, culture, and a sense of belonging.





To help people adapt better, organizations must move beyond fixed layouts. Flexible environments that can be reshaped throughout the day give teams the autonomy to respond to shifting priorities and evolving ways of working.

For organizations competing for talent and asking employees to spend more time in the office, these factors matter. A workplace that supports how people work now can help employees feel more engaged, more effective and more connected to the organization.

The opportunity for leaders is to move beyond attendance and footprint, and design workplaces as connected ecosystems that support performance, culture, and wellbeing over time.

Methodology

Steelcase conducted global employee research that analyzed baseline behaviors, workplace satisfaction, and changing performance patterns across multiple sectors.

Research Identification
The data in this report are derived from the official Steelcase WorkSpace Futures, Global User Survey, 2026. Fieldwork took place from December 2, 2025, to January 13, 2026.

Sample Descriptions
The research evaluated a broad cross-section of industries to isolate exactly how new daily workflows alter space utilization, surveying a total of 5,438 active office workers across three major global corporate regions:

- **North America:** 1,298 active office workers surveyed.
- **Europe, Middle East, and Africa:** 2,362 active office workers surveyed.
- **Asia Pacific:** 1,778 active office workers surveyed.

Country	Respondents
Canada	698
United States	600
Spain	600
United Kingdom	595
France	594
Germany	573
India	593
China	592
Japan	593

Creating spaces that unlock human potential

Steelcase®

For over a century, Steelcase has studied how people move, think, and interact to help world-leading organizations create spaces that support human performance. Grounded in continuous global workplace research, we translate human behavior, emerging technology trends, and spatial insights into evidence-based solutions that elevate the everyday work experience.

Connect with our workplace advisors and design strategists to discover how data-led insights can help you transform your real estate into strategic infrastructure for culture, wellbeing, and sustainable business growth.

Steelcase Asia Pacific

Moving or renovating your office,
or making room for new hires? Start here.

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