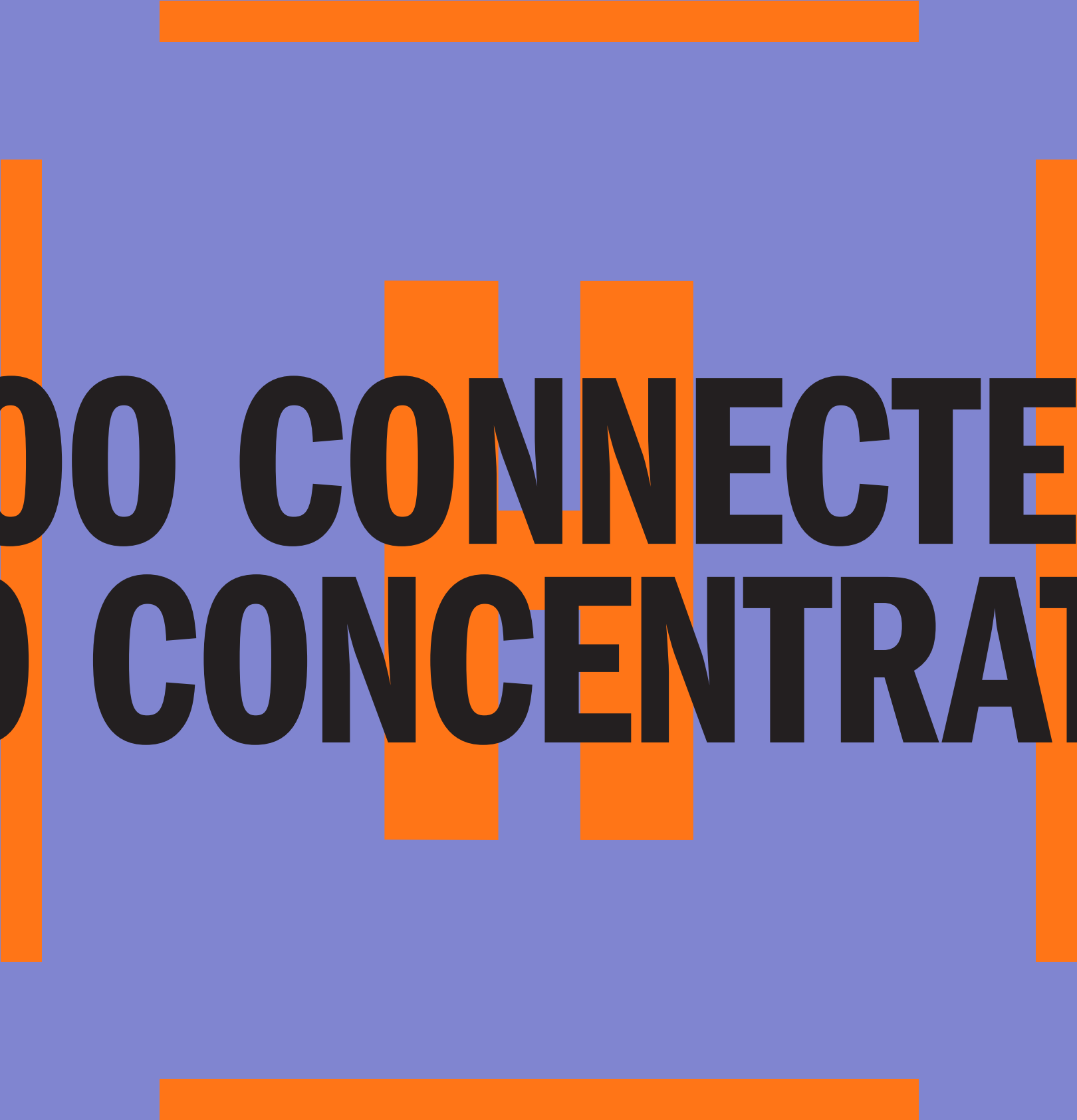




TOO CONNECTED TO CONCENTRATE

THE WORKPLACE IS DEALING WITH TWO CHANGES AT ONCE: A SLOW PHYSICAL RESET AND A FAST DIGITAL DISRUPTION

How can buildings and workplaces keep pace?

Our survey of 2,500 knowledge workers across five countries points to one answer. As work becomes more portable, place has to become more purposeful. This paper looks at what that means in practice: how existing buildings can compete, what people want from the next workplace, and how offices can prepare for the changes AI may bring.

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Photo: Australia Post, Melbourne. Photography by Nicole England.



SLOW AND FAST

The workplace is changing at two very different speeds. The physical reset that began with the pandemic is still unfolding. The digital disruption driven by AI is moving much faster.

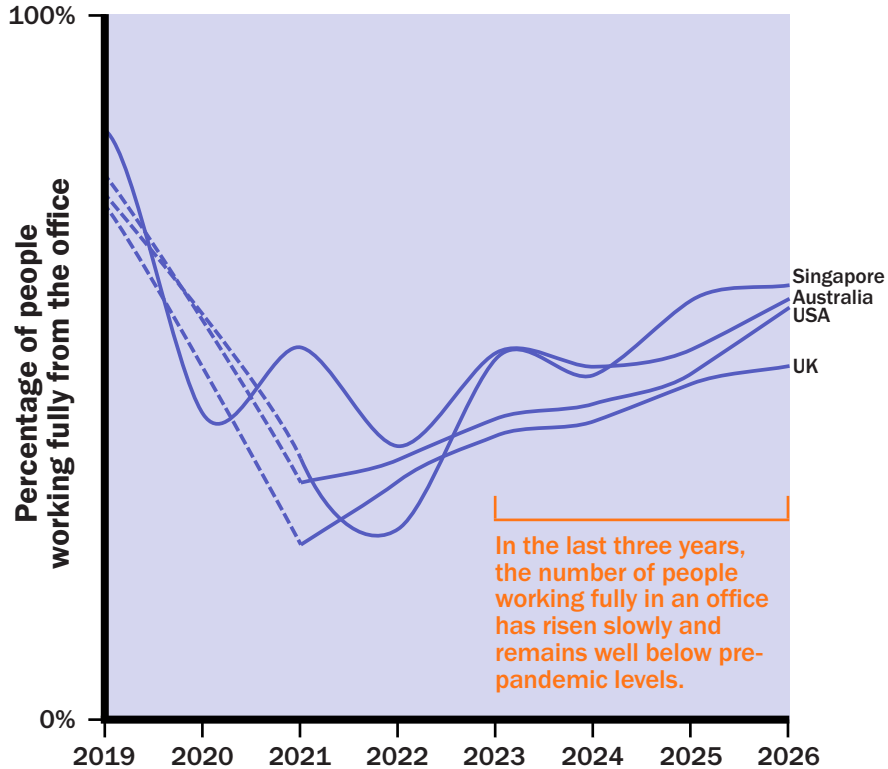
For the last few years, the workplace debate has focused on where people work: Are they coming back to the office? Should we tell them to? What does this mean for buildings?

The change has been incremental and uneven. In Australia, the proportion of people working from the office four or more days a week has risen from 52% to 59% over three years – a long way from where it was pre-pandemic.

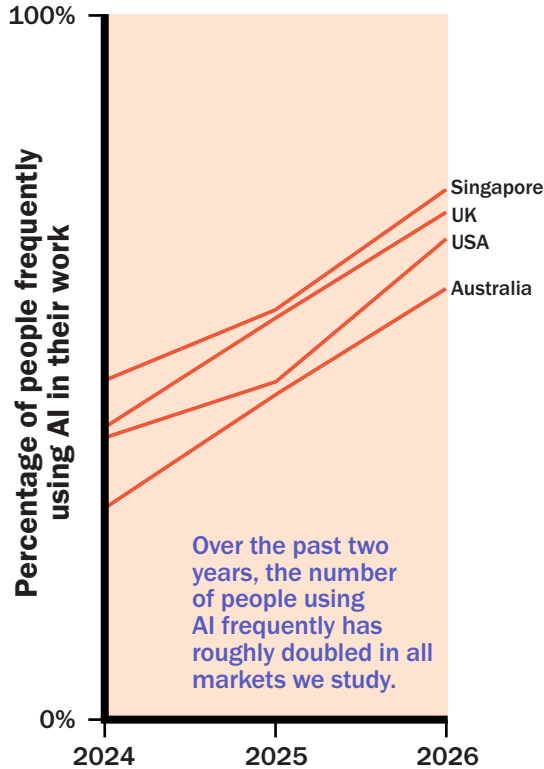
AI is different. In just two years, the number of people frequently using AI at work has doubled. So **where** we work is gradually shifting and **how** we work is starting to rapidly change.

These two changes are coming together in the workplace. The challenge for developers, landlords, and tenants is making long-term decisions in this fast-moving environment.

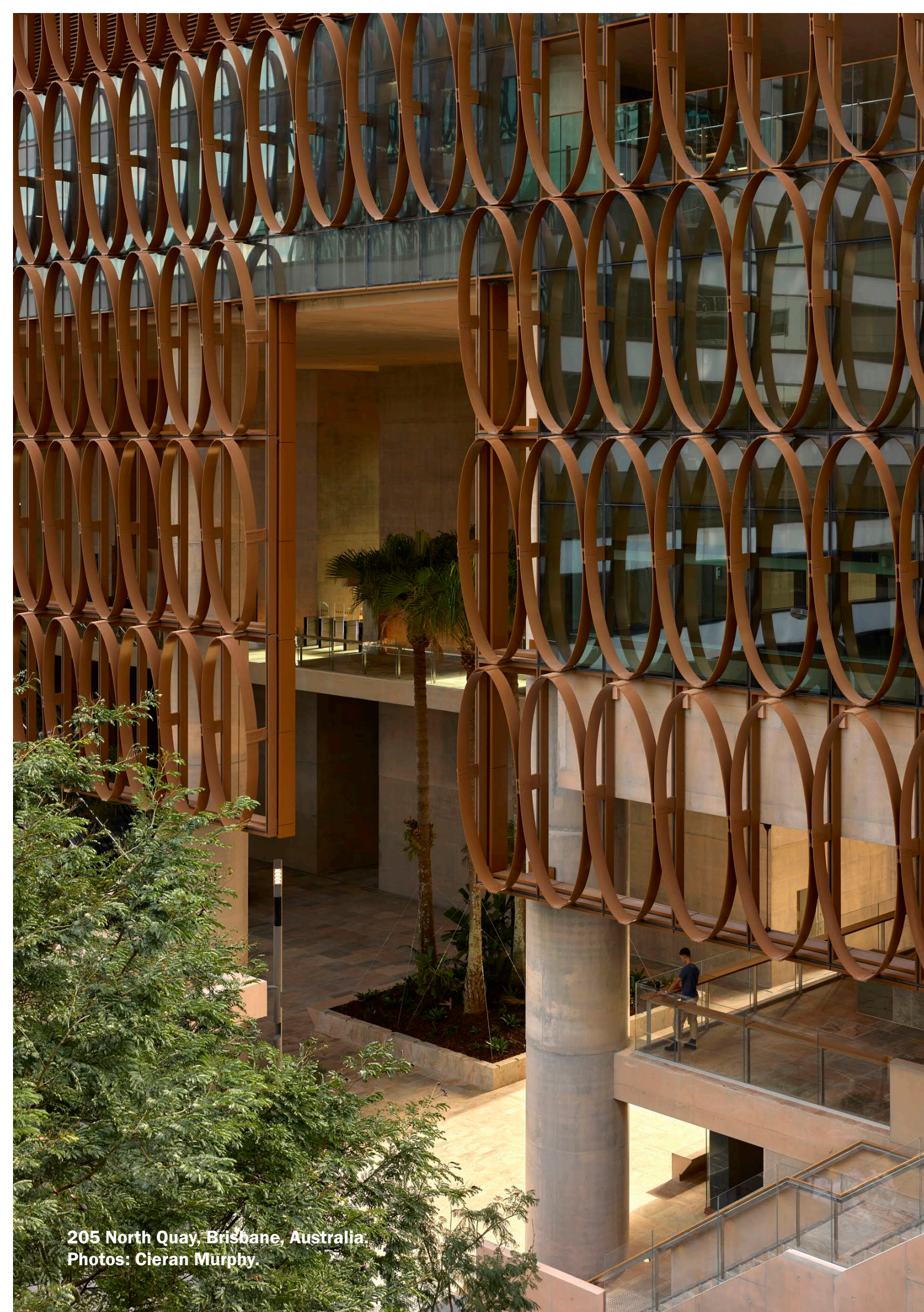
Where people work is shifting gradually



AI usage is growing rapidly



Source: Hassell Workplace Futures Survey 2026. Includes data from all regions studied except Hong Kong, which lacked the longitudinal data needed. For the office occupancy graph, 'fully in the office' is defined as spending 80% or more of the past week in the office – approximately four days. Data wasn't collected in 2020 for Singapore, the UK, and the US – a dashed line represents these missing data points. The 2019 data is based on self-reported pre-pandemic behaviour. For the AI graph, a frequent AI user was defined as someone using AI in their job either daily or weekly.



205 North Quay, Brisbane, Australia.
Photos: Cieran Murphy.



A GLOBAL SURVEY

Nearly 20,000 knowledge workers have taken part in our research since 2020, giving us a long-term view of how work and the workplace are changing.

This year, we surveyed 2,500 people across Australia, Hong Kong, Singapore, the United Kingdom, and the United States. We worked with a third-party research firm to assemble a representative sample in each market. Everyone surveyed worked in a white-collar role. As you might expect, most worked for medium-sized or large organisations, with technology, professional services, and banking among the most represented industries.

WHO



Employed



Do ‘white-collar’ work



Independent

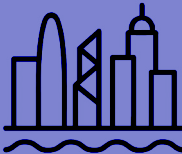


Representative

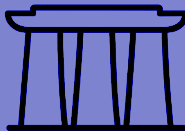
WHERE



Australia



Hong Kong



Singapore



United Kingdom



United States



1. How existing buildings compete

120 Collins Street, Melbourne, Australia.
Photos: Peter Bennetts.

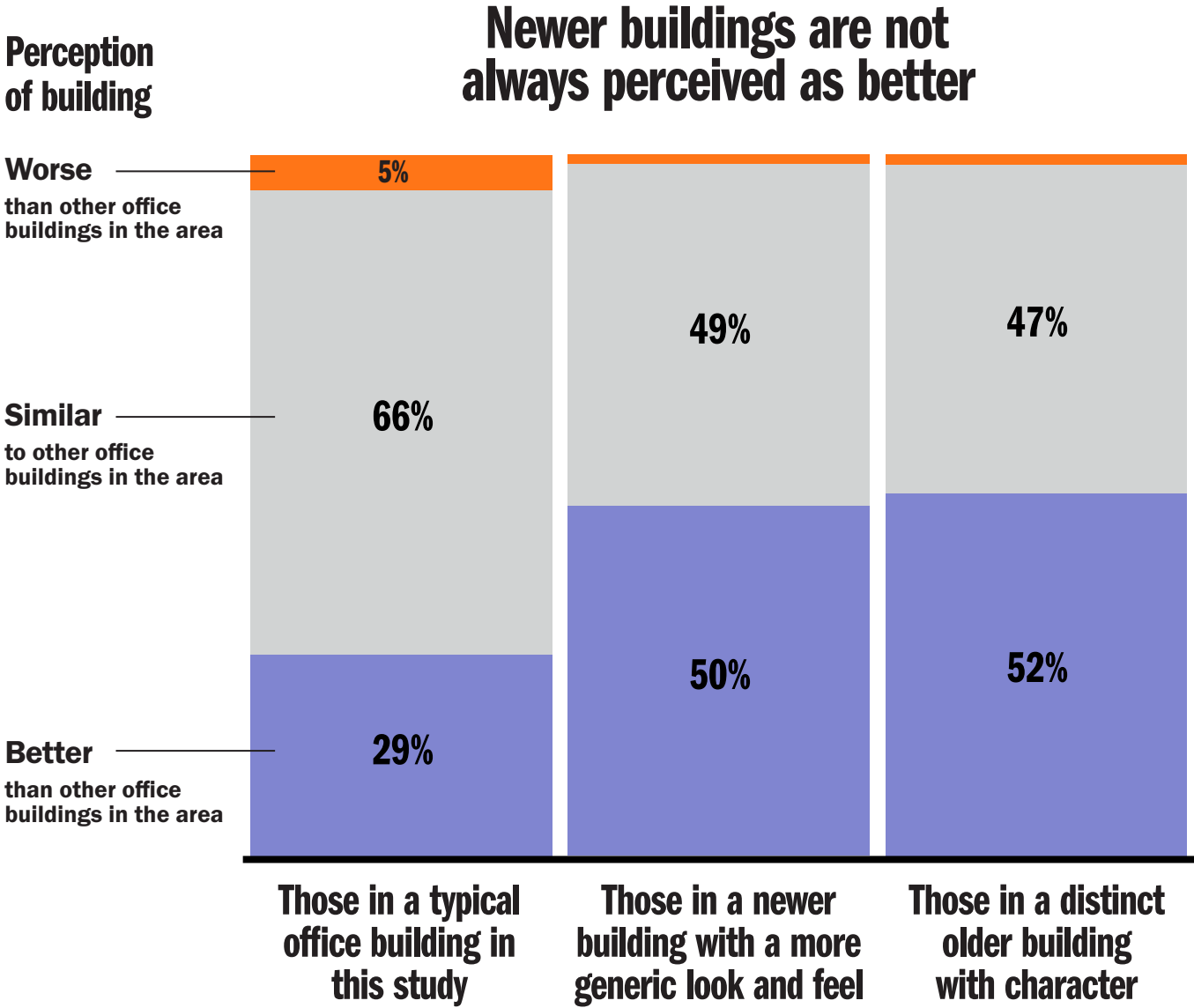
NEW DOESN'T ALWAYS WIN

In many cities, office demand is concentrating in the strongest assets, leaving high vacancies in the rest. For these underperforming assets, age can seem like the obvious explanation. Our research suggests it is not that simple.

For owners, an underperforming building raises a practical question. What can be done to make it more attractive? In this section, we approach this question from the perspective of the people using the building. We look at the signals they associate with quality and how those signals shape the value they see in a building.

Age is an obvious place to start. You might expect an older building to be less attractive than a newer one. But in our study, age wasn't decisive. People in newer, more generic buildings rated them well above the baseline. But people in older, distinctive buildings with updated comforts did too.

This signals that older buildings can remain attractive to end users. They don't need to be knocked down or imitate something new. An older building can remain competitive, provided it retains what makes it distinctive while bringing the experience up to date.



People in new, generic buildings and old, character buildings have a fairly similar perception.

Source: Hassell Workplace Futures Survey 2026. Includes all data globally.

THE VISITOR TEST

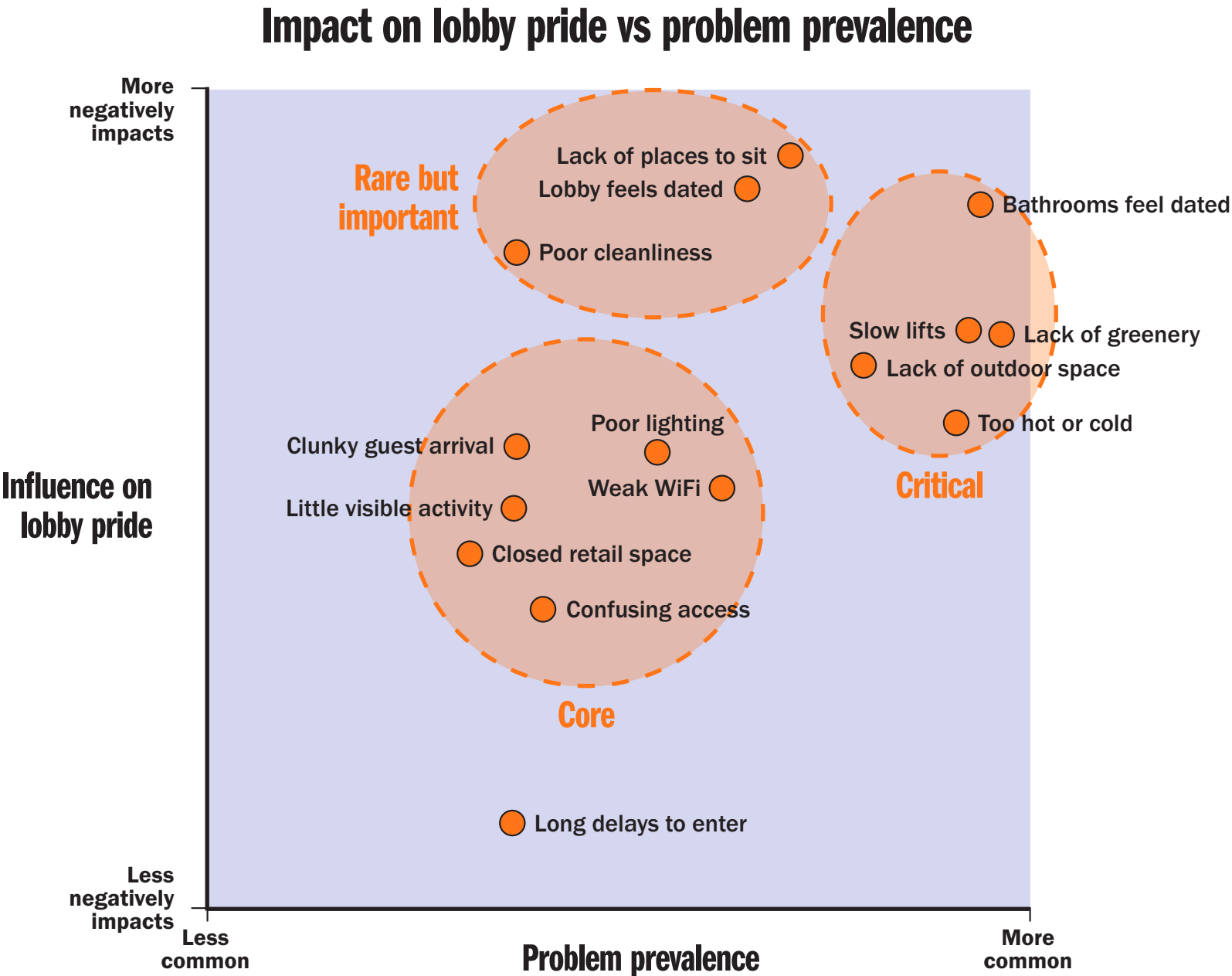
Of all the questions we asked people about their office buildings, one stood out: How proud would you feel bringing a visitor into your building's lobby? People's answers had the strongest relationship with how they perceived the building overall.

In our survey, 88% of people who said they felt extremely proud bringing a visitor into their lobby also described their overall building as better than others in the area. But among those who weren't proud, that figure fell to 7%.

This does not mean that a new lobby suddenly turns a building into a premium asset. Instead, the relationship may reflect the lobby's role as one of the few spaces almost every worker and visitor experiences. It is a signal of quality, care, and identity – and of whether someone is paying attention.

Pride in the lobby also provides a useful way to prioritise improvements. The graph to the right compares how often different base-building problems occur with how strongly they impact lobby pride. The issues labelled 'critical' are both relatively common and closely tied to poorer perceptions.

For owners, these are sensible places to start. A good lobby isn't about gimmicks. It's about getting the basics right – comfort, cleanliness, greenery, places to sit, a bit of liveliness, and spaces that feel considered and cared for.



Source: Hassell Workplace Futures Survey 2026. Includes all data globally. 'Problem prevalence' measures how frequently people reported having a given issue. 'Influence of lobby pride' shows how strongly a problem is linked to people's pride in their building's lobby, based on a regression analysis.

WHERE UPGRADES MATTER MOST

Which building factors matter most to the end-user experience? When we tested them together, six priorities stood out for their relationship to how people perceived the building and whether they preferred office-based work.

To arrive at the ranking, we built a statistical model that brought together the building characteristics, reported problems, and experience measures captured in the survey. We then identified the factors most strongly and consistently associated with perceived building quality, lobby pride, and preference for office-based work.

The list reinforces the importance of getting the fundamentals right. There is no novel amenity or magic formula here. Most of the priorities are much more basic. For landlords, the list provides a practical way to prioritise improvements to the end-user experience without losing what makes a building distinctive.

Source: Hassell Workplace Futures Survey 2026. Includes all data globally. This analysis uses an ordinary least squares regression to estimate associations between building-related factors (building characteristics, reported problems, experience measures, amenity packages, and nearby context) and outcome measures (perceived building quality, lobby pride, and preference for office-based work). The models control for respondent age and country, and employer industry and size. Priorities reflect both the strength of each factor’s relationship with the three outcomes and how consistently that relationship appeared when the analysis was repeated with different samples of the data. The findings show associations rather than causal effects.

- 1

 **Make the lobby visitor-worthy**
- 2

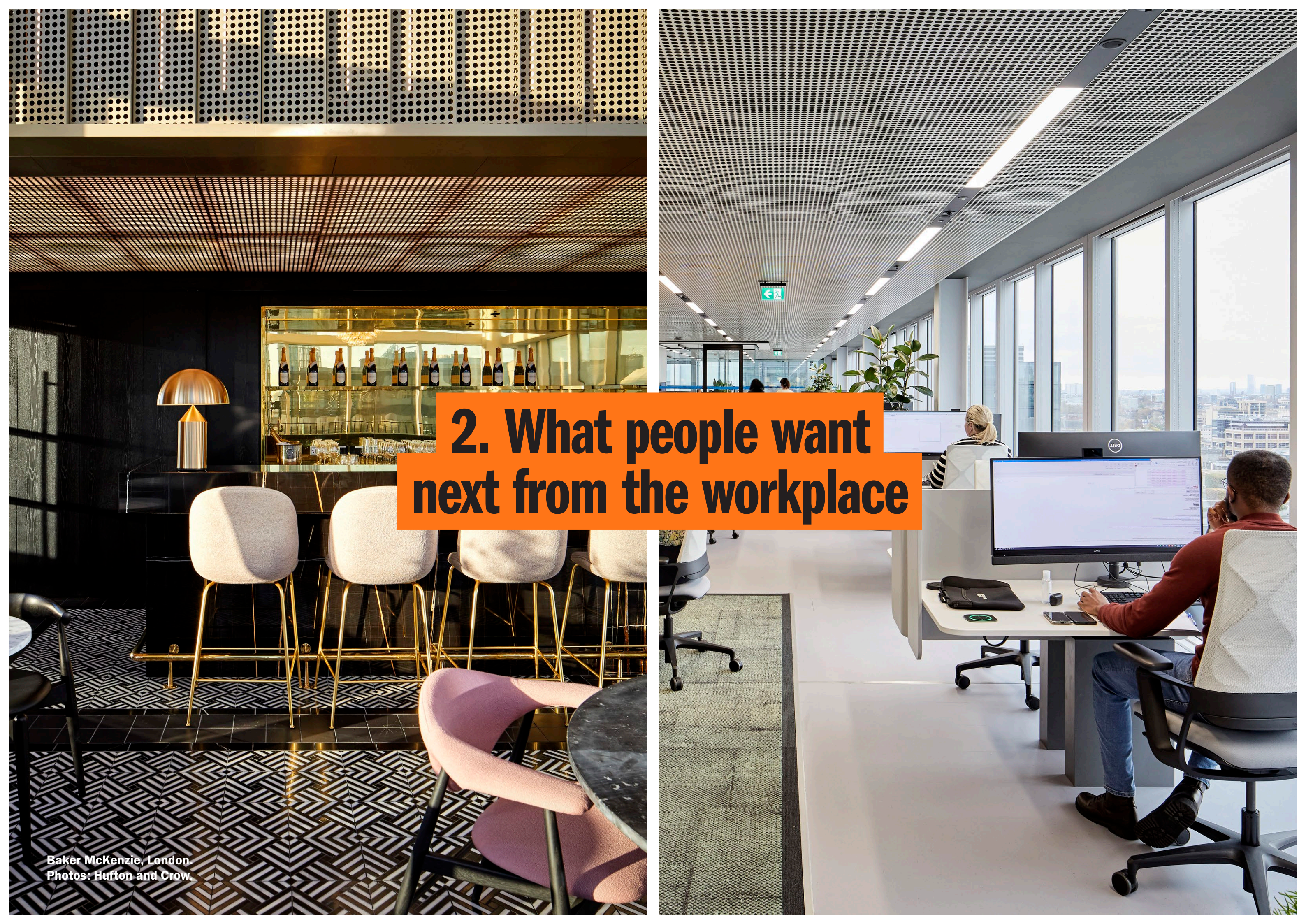
 **Add seating, greenery, and outdoor cues**
- 3

 **Modernise older stock**
- 4

 **Fix comfort problems**
- 5

 **Create a reason to dwell**
- 6

 **Provide space for exercise and wellbeing**



2. What people want next from the workplace

Baker McKenzie, London.
Photos: Hutton and Crow.

MAKING ROOM FOR INDIVIDUAL WORK

With so much changing in the workplace, we wanted to understand not just where it might be heading, but where people wanted it to go. We showed people six possible futures and asked where they would prefer to work.

The six scenarios combined two dimensions. The first described the workplace’s relationship with technology, from tech-first, through tech-neutral, to tech-retreat. The second described its social orientation, ranging from workplaces centred on individual work to those centred on teams.

Respondents saw two futures at a time and chose where they would rather work. Thousands of these head-to-head choices allowed us to estimate the relative preference for all six.

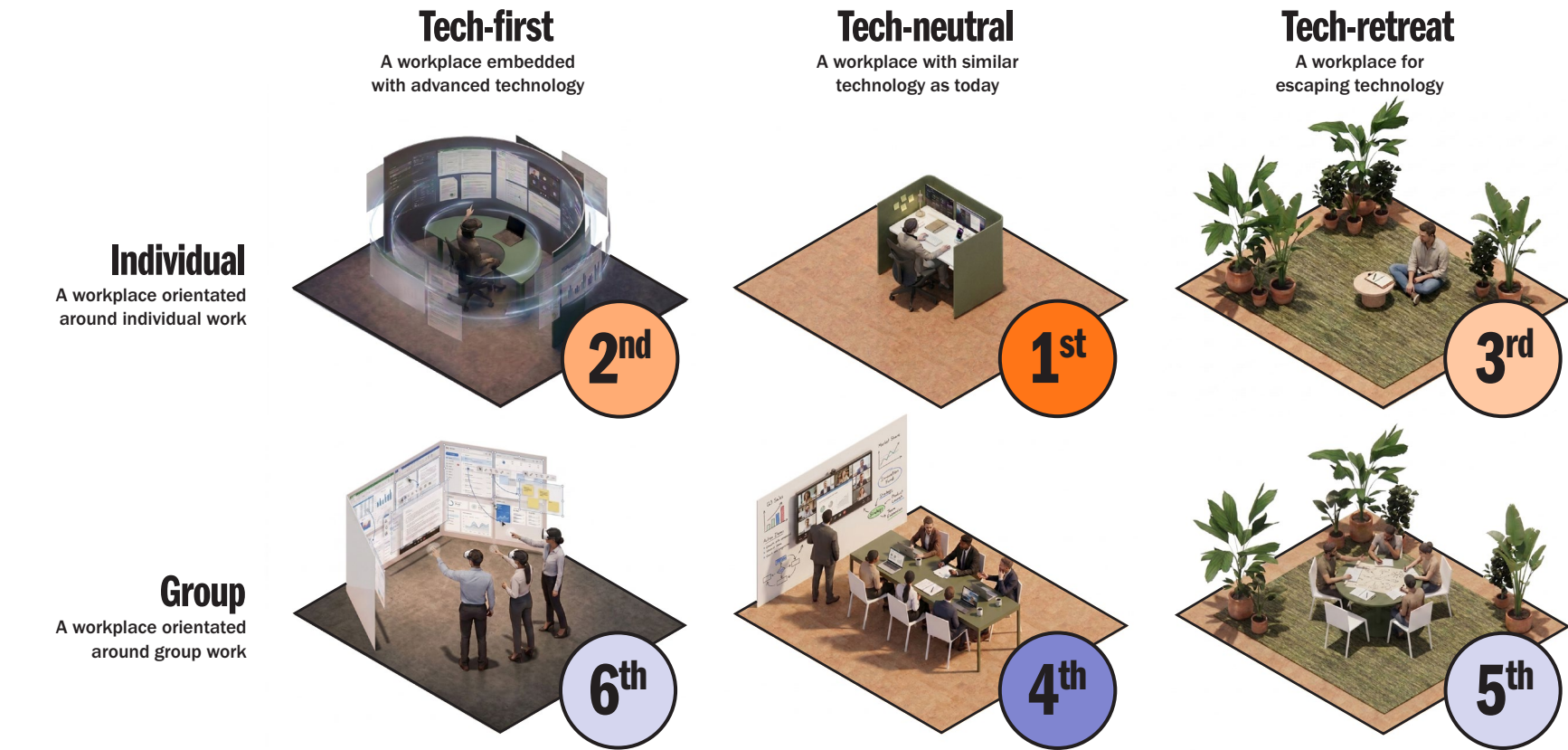
The clearest result was a preference for workplaces designed around individual work. The three highest-ranked futures all fell on the individual side of the diagram. The pattern held regardless of age, gender, country, seniority, personality, industry, or time spent in meetings. Its strength varied slightly, but its direction did not — every group favoured futures centred on individual rather than team-based work.

In some ways, this should not surprise us. Recent analysis [by Leesman](#) shows that office workers spend much of their time working individually. Yet this is not always how we talk about the workplace. Since the pandemic, the office has increasingly been framed as a place for people to come together in person.

Collaboration still matters. But working individually is not the same as working in isolation. The future workplace needs to support collaboration without treating individual work as something that happens elsewhere.

Source: Hassell Workplace Futures Survey 2026. Includes all data globally. The scenarios were shown to participants using paragraph-long descriptions without images. Participants were shown two scenarios at a time and asked, ‘Which of these two places would you prefer to work in?’ The pairwise data were evaluated using a Bradley-Terry model to estimate the overall preference share of each scenario.

Overall ranking of six workplace futures



DON'T BET ON ONE

While people were clear about the need for individual workspace, they were less unanimous on the role of technology. Providing options helps manage that uncertainty. The best workplaces don't anticipate one future; they're ready for several.

There was no single future that everyone agreed on. Even the most popular captured only around a quarter of the estimated preference share. Preferences varied most around how much technology the workplace should embrace.

That makes designing for a single future risky. When we combined compatible scenarios, their potential appeal increased. A workplace might, for example, pair technology-rich settings for individual work with quieter places where people can step away from technology. This does not mean creating six separate workplaces. It means providing a gradient of settings that allows people to choose what suits the task and the moment.

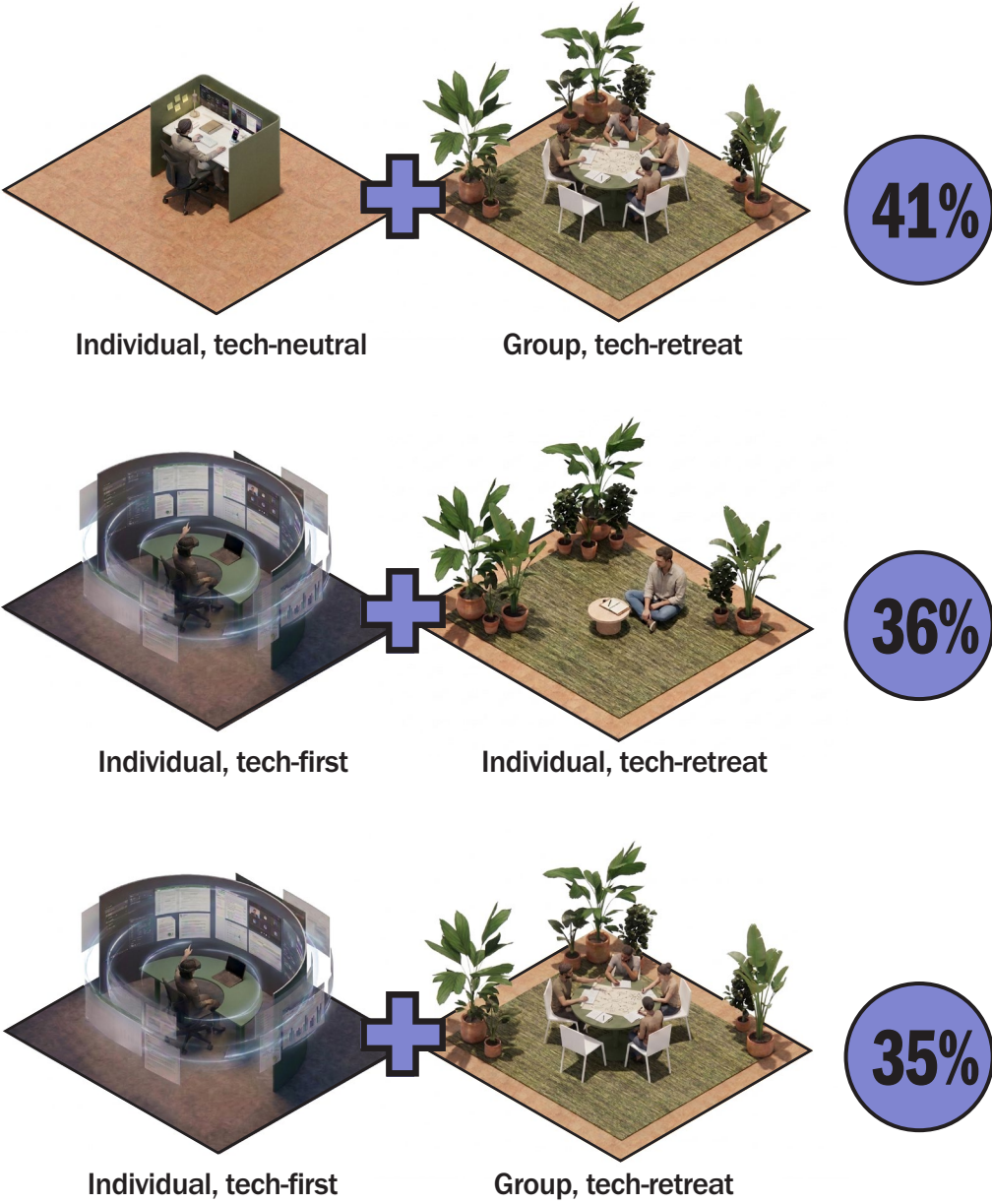
For tenants, the findings suggest that individual work should be the foundation, not the entire brief. Workplaces also need to support different relationships with technology, from highly enabled environments to places where people can disconnect.

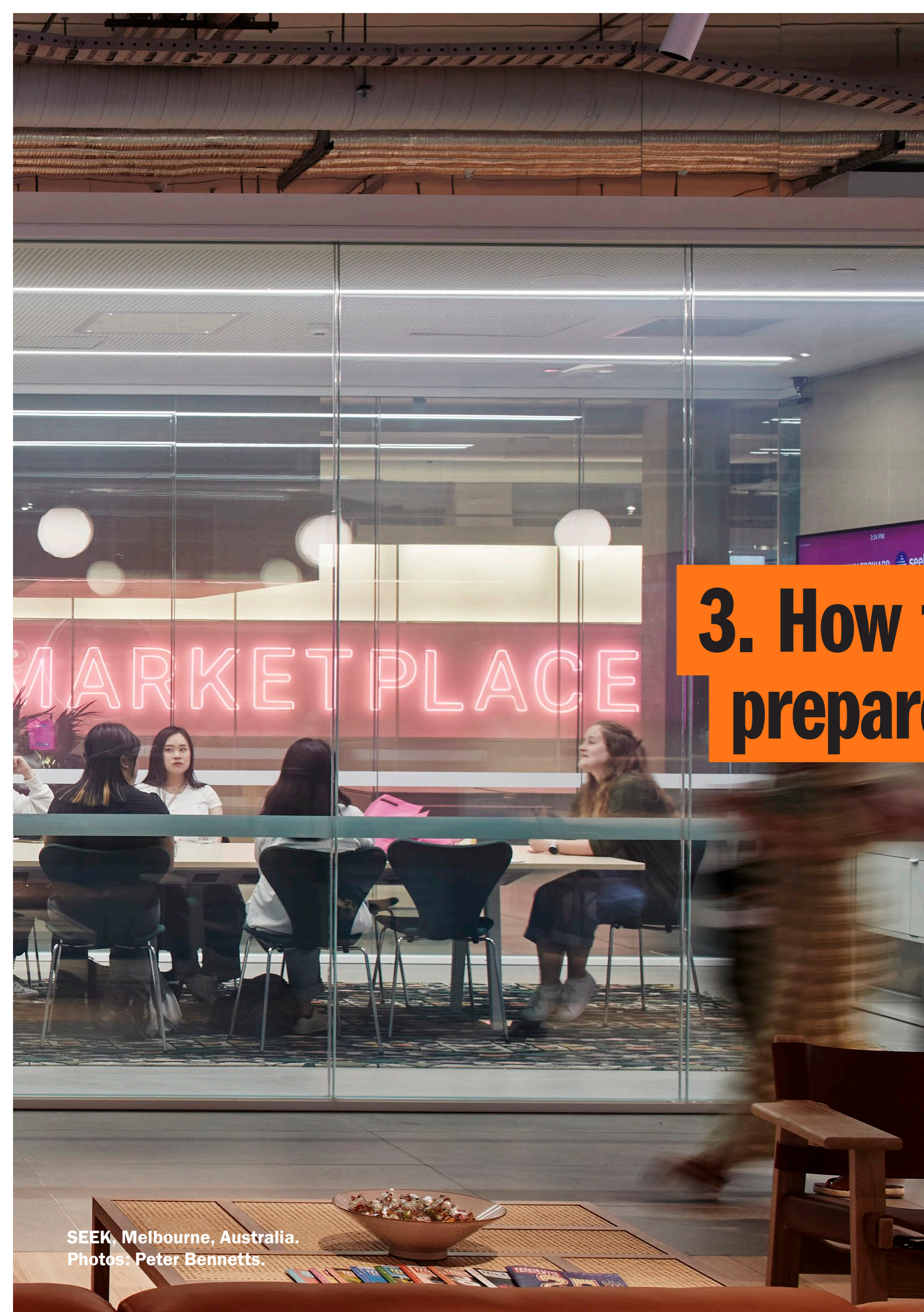
For landlords, there is a related question about where these specialised settings should sit. Do they all need to be inside each tenant's core lease? Or could spaces like wellbeing areas and retreat spaces instead be shared at the building level?

Whether these settings are provided by the tenant or the landlord, the principle is the same: make room for more than one future.

Source: Hassell Workplace Futures Survey 2026. Includes all data globally. Using the six scenarios and pairwise data from the previous page, the analysis estimates the percentage of people whose preferred future is in each combined workplace. Because participants were not shown the futures combined together, these figures are estimates rather than directly measured preferences.

Estimated preference share of workplace combinations





3. How the office prepares for AI

SEEK, Melbourne, Australia.
Photos: Peter Bennetts.

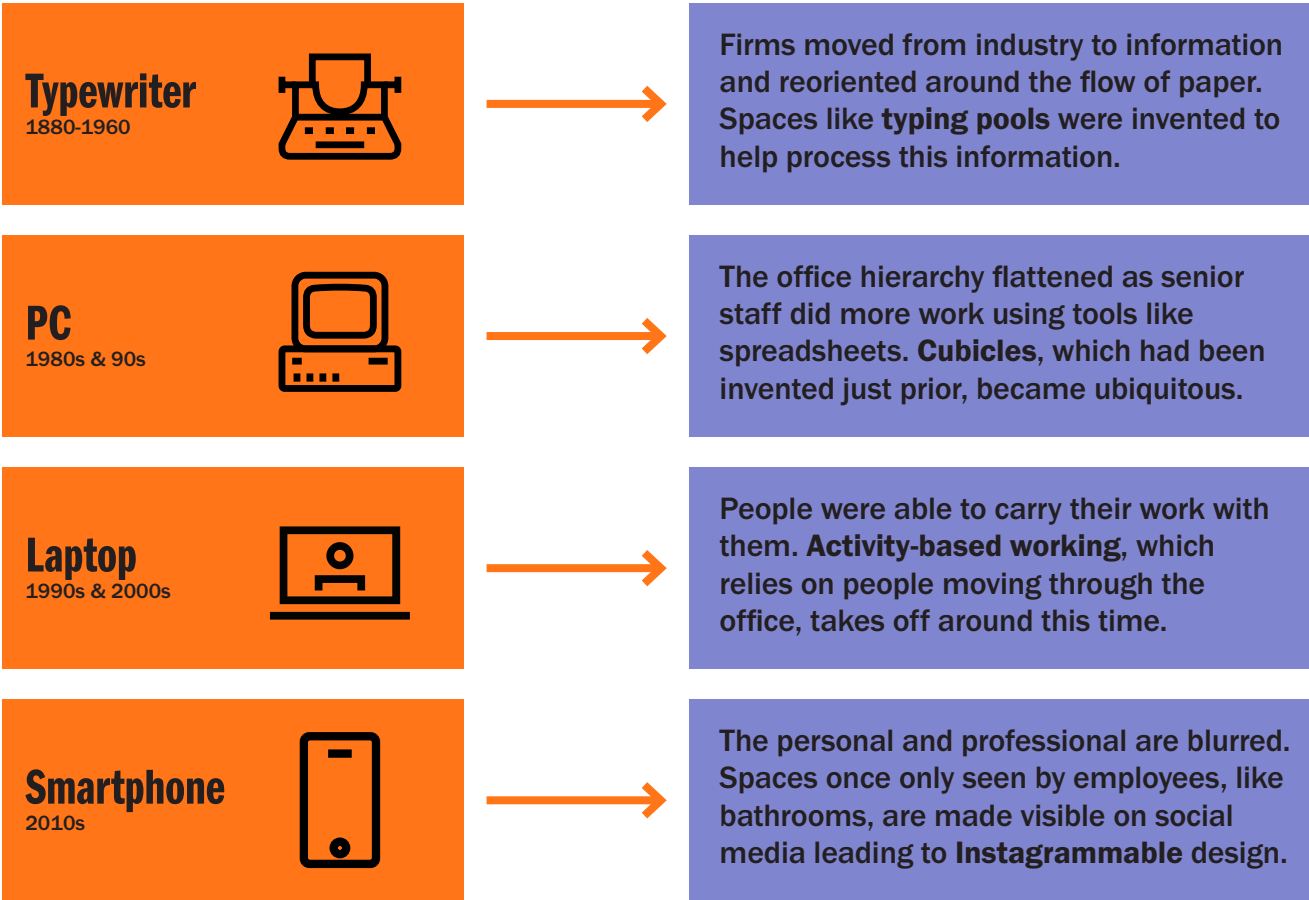


TECHNOLOGY CHANGES SPACE FOLLOWS

Technology has repeatedly reshaped not only how office work is done, but the spaces needed to support it. There is no reason to think AI will be different.

The history of the workplace can be told through technological developments. Typewriters resulted in typing pools. Laptops untethered people from desktop computers and helped activity-based working take off. Smartphones blurred our personal and professional lives, with offices becoming ‘Instagrammable’ backdrops for a wider audience.

AI is the next major shift. Adoption is moving quickly, and work itself is beginning to change. Already we’re seeing early signals that space requirements are changing. The question for tenants, owners, and designers is how to prepare before the answer becomes obvious.



WORK IS LOSING ITS PLACE

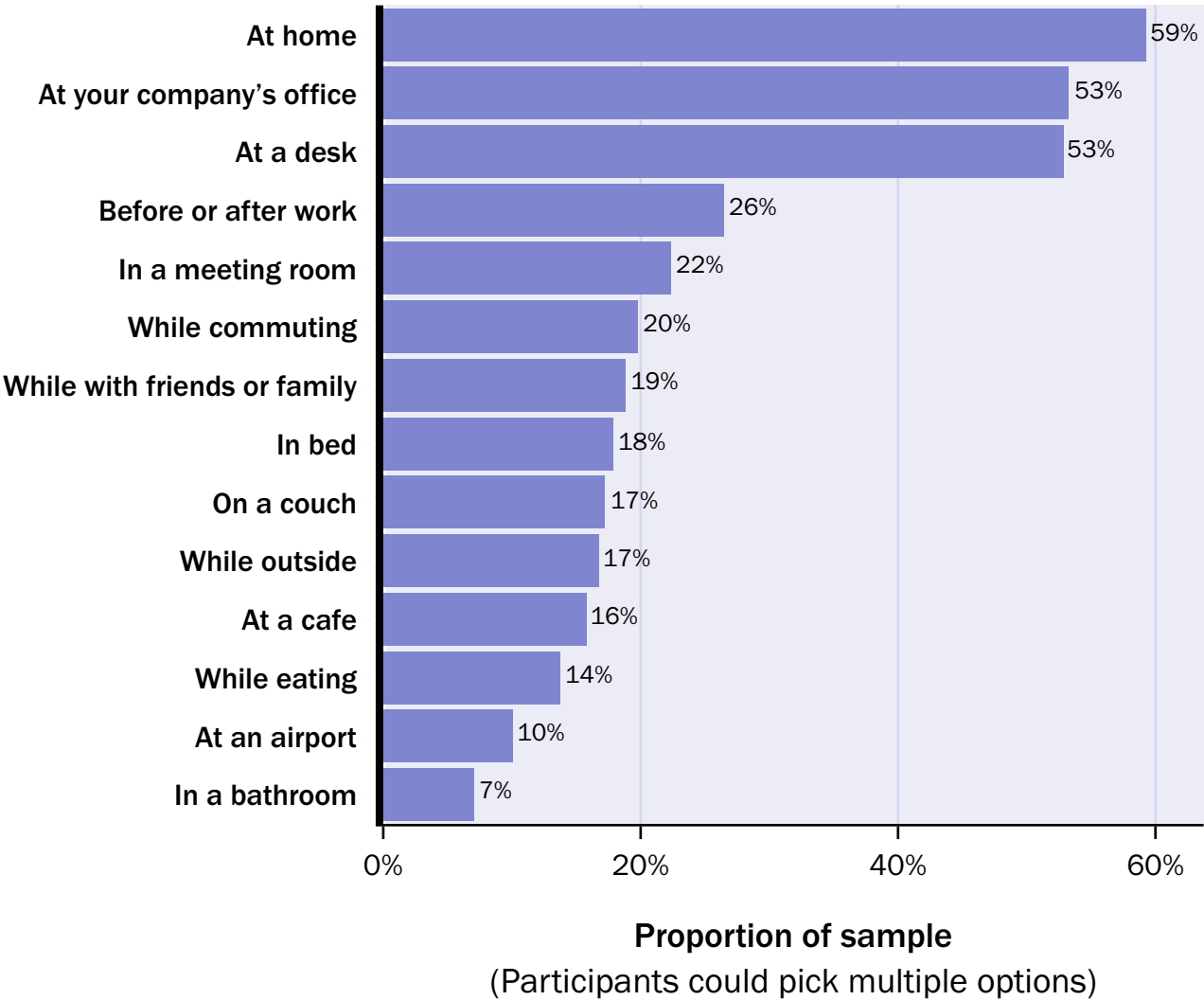
AI is making some work less dependent on specialised settings. Tasks that once required a desk, computer, and monitor can now begin almost anywhere, with a prompt on a phone.

Until recently, writing code generally meant sitting at a workstation, often with multiple monitors, a keyboard, and an ergonomic chair. Companies invested heavily in creating the ideal environments to coax the best performance from developers.

These specialised settings still matter, but they are no longer the only places coding can happen. A prompt on a phone can be enough. In our survey, more than eight in ten people agreed they could use AI effectively almost anywhere, provided they had internet access. People reported using AI in conventional settings such as the office, home, and their desk, as well as less conventional places like sofas and beds, bathrooms, and on public transport.

This behaviour was not evenly distributed. Younger respondents and frequent AI users were much more likely to use AI in atypical settings. These groups are at the vanguard of adoption and may offer an early indication of how work habits will change. If their behaviour becomes more widespread, work could become increasingly piecemeal and less tethered to any one place.

In the past year, where have you used AI for your job?



Source: Hassell Workplace Futures Survey 2026. Includes all data globally.

AI-READY IS NOT TECHNOLOGY-FIRST

If AI makes it easier to work anywhere, the office has to provide what people cannot find everywhere. Learning, mentoring, focus, and privacy remain among its strongest advantages.

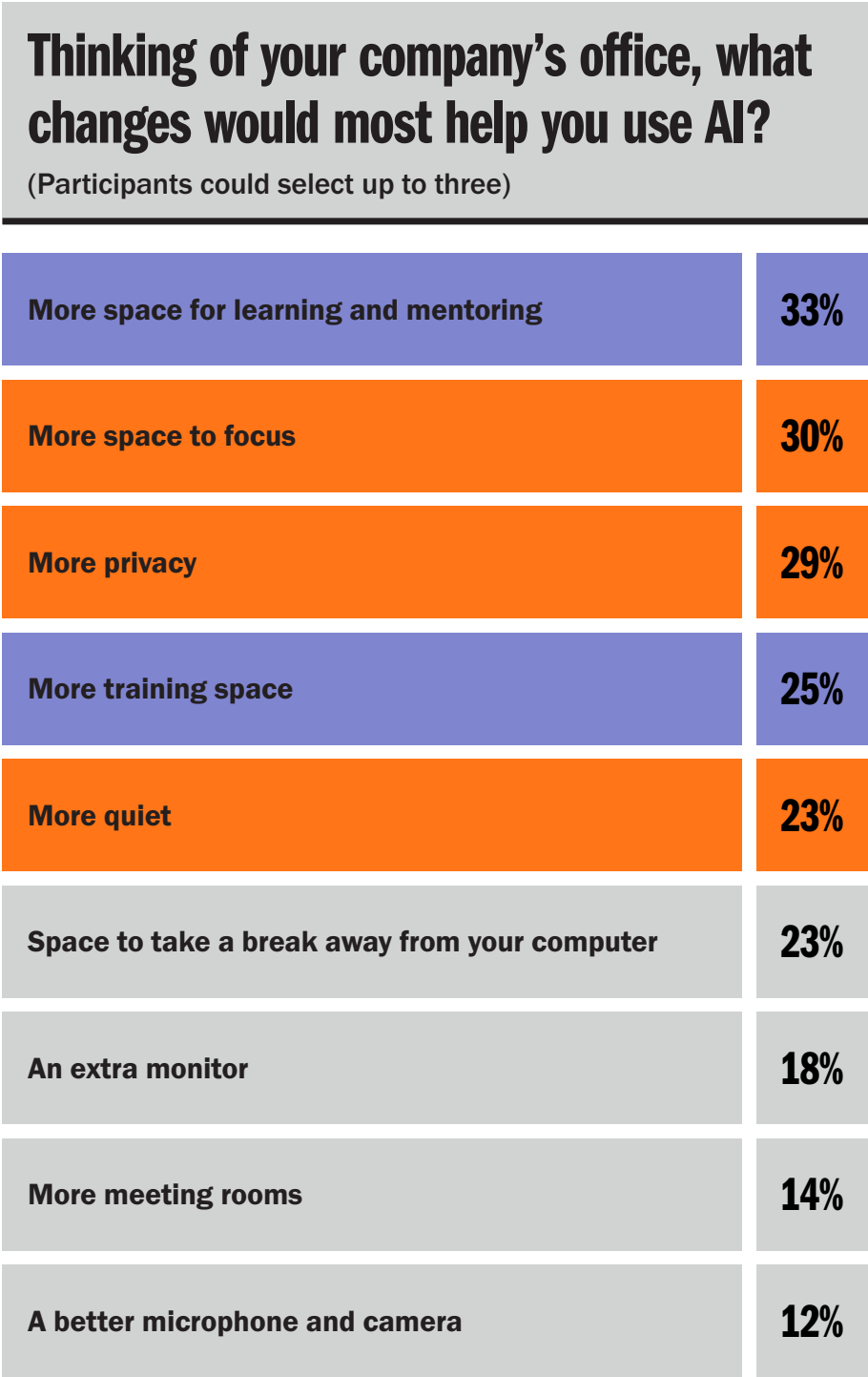
When we asked what changes would help people use AI in the workplace, the leading request was not for more technology. It was for more learning and mentoring space. Given how quickly AI is evolving, it makes sense that people want workplaces that support growth.

Close behind were requests for more space to focus, more privacy, and more quiet. The pattern was the same: people wanted better conditions for using technology, not simply more of it.

For tenants, designing an AI-ready workplace means doubling down on what is difficult to find elsewhere: space to concentrate, learn, think, and seek support from others. For landlords, there is an opportunity to consider how lounges, lobbies, terraces, and cafés could support shorter bursts of work beyond the conventional desk.

Taken together, the chapter points to a more purposeful office. AI is likely to reshape space as earlier technologies did, even as it makes work less tied to any one place. The AI-ready office is not the one with the most technology. It is the one that gives people the best conditions to use it.

Source: Hassell Workplace Futures Survey 2026. Includes all data globally.





IFM, Melbourne, Australia.
Photos: Nicole England.

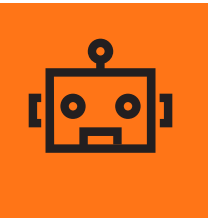


A PLACE WORTH CHOOSING

The workplace is changing at two speeds: a slow physical reset and a much faster digital disruption. Responding to both requires a clearer idea of what the workplace is for and why people would choose to be there.

The chapters in this report operate at different scales, from the first impression made in the lobby to the conditions people need for individual work and for using AI well. Yet they point in the same direction: workplaces need to offer choice, but that choice needs a clear purpose. Better buildings and workplaces are not defined by novelty or the amount of technology on display. They are defined by how deliberately they support the people using them.

For owners and developers, that means making the building worth choosing. For tenants, it means giving people the right conditions to work well once they arrive, with choice in how they focus, collaborate, and use technology. The office does not need to do everything. But when work can happen almost anywhere, the most valuable workplaces will be those that make being there matter.

	The lobby must be visitor-worthy.
	The workplace must get individual work right.
	As work becomes more portable, place must become more purposeful.

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