

A photograph of three people sitting on a light-colored sofa in a modern office lounge. A Black man on the left wears a colorful patterned shirt. A woman in the center, with glasses and a tan dress, is gesturing while speaking. A man on the right, with a beard and dark jacket, listens attentively. In the foreground, the back of a person's head is visible, looking towards the group. A small round table in front of them holds a potted plant, a stack of books, and a pink bowl with two pink eggs. Large windows in the background show a city skyline.

2026 Annual
Report

The Workplace Equation

Amplify What's Possible by Bringing People,
Space, and Technology Together as One

logitech®



What's Inside

INTRODUCTION	3
More Than a Place to Work	3
About the Research	4
The Workplace Equation Assessment	4
PART ONE: The Problem	5
Workplace Purpose Continues to Shift	6
Who Owns Workplace Experience (WX)?	7
The Million-Dollar Design Flaw	8
PART TWO: The Solution	9
Flow Starts Where Friction Ends	10
Design for Simplicity	11
Purpose Over Presence	12
Measure What Matters	13
PART THREE: The Path Forward	14
Turn Insight into Continuous Action	15
From Fragmented Silos to Advanced Flow	16
Solve Your Workplace Equation	18
APPENDIX: Methodology and Regional Data	19

More Than a Place to Work

The workplace sits underneath the day, quiet and constant, shaping productivity, cost, talent, and wellbeing. Yet many only see it in pieces. HR manages people, Real Estate manages space, IT manages technology. Three silos. Three budgets. Three strategies that rarely speak to each other.

Logitech set out to measure what happens when those three pieces instead work seamlessly as a system. To holistically look at what a high performing workplace is made of, how it's run, and how to maximize its impact. Because when people, space, and technology align — performance multiplies.

We surveyed 1,700 workplace experience (WX) decision-makers in 11 markets, and the data showed a disconnect between the business value expected from the workplace and the return on investment (ROI).

Leaders believe a strong workplace experience delivers outcomes such as improved collaboration and productivity. However, technology issues, inconsistent setups, and poor support create friction.

The result? More than 9 in 10 leaders (94%) say the WX has failed at some time to support work and the organization.

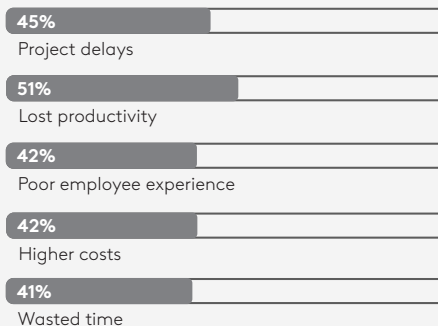
The data indicates the highest-performing workplaces don't just invest in people, space, or technology. They invest in the intersections — where these three forces meet, align, and amplify each other.

When technology removes friction, people collaborate more freely. When space is designed with intention, technology disappears into the background. When people feel supported, they bring purpose to every room they enter.

This is the multiplier effect. And it's hiding in plain sight.



WHERE WX FAILURES SHOW UP



TOP IMPROVED OUTCOMES FROM STRONG WX



27%

Only 27% of organizations **treat workplace experience as a core business strategy**, despite its clear influence.

Q: To what extent do you believe that a strong workplace experience leads to improvements in each of the following?
Base=1,700 (All respondents)

Scores shown are Top 2 Box on a 5-point scale: 5 - A great deal, 4, 3, 2, 1 - Not at all

Q: Thinking about the last time workplace experience failed to support work at your organization, what did it cost? Select all that apply. Base=1,700 (All respondents)

Q: To what extent are workplace experience decisions treated as a core business strategy vs an operational function?
Base=1,700 (All respondents)

About the Research

We commissioned The Harris Poll to survey workplace experience decision-makers at companies with 500 or more employees. The 1,700 respondents were leaders across four key roles: workplace experience (375), real estate/facilities (441), IT (442), and HR (442) across 11 markets: Canada, France, Germany, India, Japan, Philippines, Saudi Arabia, Singapore, United Arab Emirates, United Kingdom, and United States.

The survey was conducted from May 13 to June 4, 2026. Raw data was not weighted. [See the full methodology statement](#) in the appendix.

The Workplace Equation Assessment

Based on the data, we identified four stages of organizational maturity connecting measurement, operations, and strategy into a performance multiplier.

The levels of organizational maturity are:

- 1. Fragmented:** Teams operate in silos and are more reactive (18% of respondents).
- 2. Aligned:** Teams and signals (feedback, usage, performance, and other data) are starting to connect (45%).
- 3. Optimized:** Measurement, governance, and consistency are stronger (27%).
- 4. Advanced:** There is a proactive, measurable, continuously improving system (9%).

Organizations can take the [Workplace Equation Assessment](#) to identify a starting point and focus on specific gaps to level up. As organizations mature, they are more likely to connect signals, prove ROI, involve technology earlier, set standards for all workspaces, and reduce complexity.

QUESTIONS WE ASKED WHEN DEVELOPING THE ASSESSMENT

- **Measurement:** Can the organization connect signals and prove ROI?
- **Operations:** Can the organization deliver a consistent, lower-friction workplace experience?
- **Strategy:** Is workplace experience planned proactively, with standards and early technology involvement?

About the research

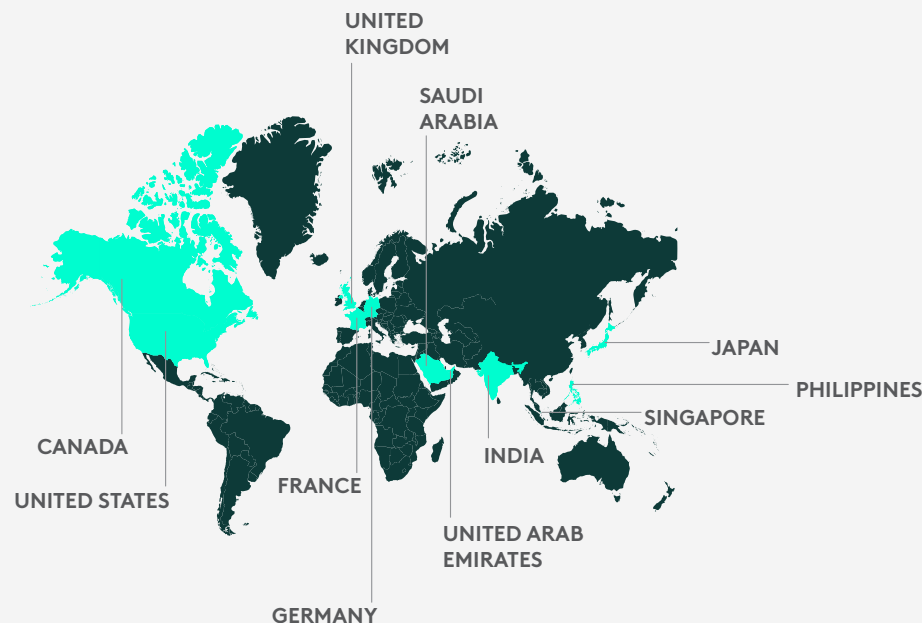
Global survey of workplace experience decision-makers across IT (442), HR (442), Real Estate (441), and Workplace Experience (375)

11

Markets

1,700

Decision makers



PART ONE:

The Problem

Workplace Purpose Continues to Shift

We are in the middle of a monumental evolution in how we work, and the spaces that work today may not be the ones we need tomorrow. Employees want to be productive wherever they are, across every setting, remote, on-site, or split between, and those expectations keep moving. The real question for WX leaders is whether their spaces and technology are built for what's next.

These evolving workplaces shape not only how people get things done, but also how they feel.

To support continued changes, space and technology must be agile. When people, space, and technology are architected to work together, the workplace elevates what people can do.

For WX leaders, this is an opportunity to lead or risk falling behind. The right conditions sharpen focus, bring people closer whether they're across the table or across the screen, and give ideas room to come alive.



Is your job supported by the space that you are in? Is it supported by the benefits you have? By the amenities provided? By the tools, whether digital or physical?

FACILITIES / DESIGN STANDARDS LEADER

The reason people come to an office is expected to shift

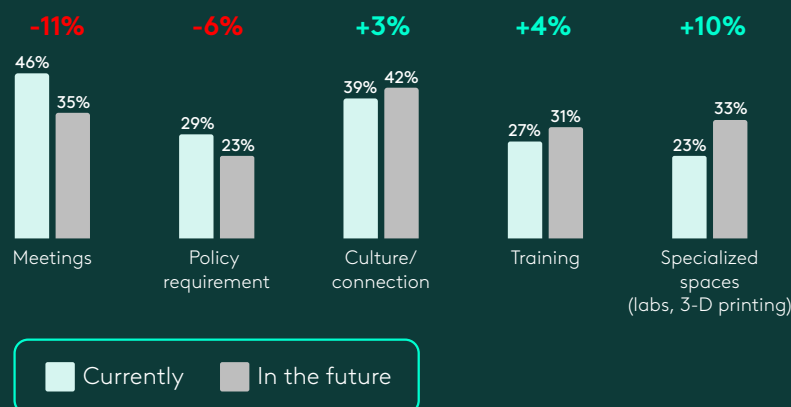
The experiences that define office life are evolving. Collaboration isn't going anywhere, but over the next few years, WX leaders expect the physical workplace to pivot with new priorities.

Notable shifts in the primary reasons employees come on-site

(today versus expectations three years from now)

- **Away from:** Meetings (-11 percentage points)
- **Toward:** Specialized spaces (+10 points)
- **Toward:** Hands-on training (+4 points)

Primary reasons employees come on-site



Q: Thinking about your organization's physical office(s), what are the primary reasons employees come on-site today? Select up to 3. Base=1,694 (Not fully remote)
Q.: Looking ahead three years, what should be the primary reasons employees come on-site? Select up to 3. Base=1,700 (All respondents)

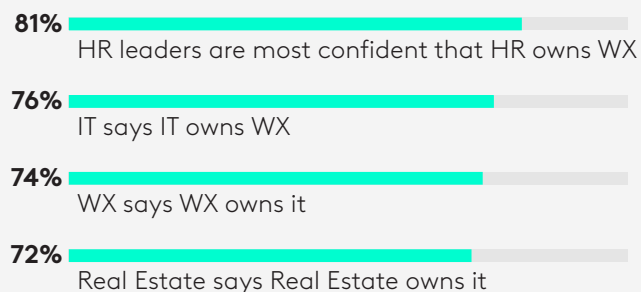
Who Owns Workplace Experience? Everyone and No One.

People, space, and technology can only work together if the teams behind them do too. When these teams align, the workplace works, and the proof shows up in improved collaboration and employee experience. When they don't, WX is owned in pieces and planned in parts, and the outcomes are greatly diminished.

We discovered a misalignment between WX decision-makers' priorities and execution.

Cross-functional collaboration is not the only thing missing. There's no consensus among the different roles about ownership.

Ask the leaders who has the clearest day-to-day authority to make WX decisions, and the majority point to their own function:



Priorities vs. execution

87% say collaboration between IT, HR, and real estate/facilities is very or extremely important for improving WX.

Only 34% say a unified WX function owns the shared roadmap for workplace investment decisions.

Full response breakdown: Who has the clearest day-to-day decision-making authority for workplace experience in your organization?

	TOTAL	Respondent Role			
		Human Resources	IT/AV	Workplace Experience	Real Estate/Facilities
Human Resources	57%	81%	51%	53%	43%
IT/AV	47%	38%	76%	43%	30%
Workplace Experience	45%	31%	40%	74%	40%
Real Estate/Facilities	38%	16%	19%	47%	72%
Operations	36%	33%	40%	38%	34%
Finance	21%	22%	24%	24%	15%
Executive Leadership	43%	44%	56%	38%	32%

Decision Making Authority

Q: Which function(s) in your organization have the clearest day-to-day decision-making authority for workplace experience today? Select all that apply.

When everyone owns a piece, no one owns the problem. With fragmented WX ownership, issues inevitably fall through the cracks. The friction impacts both workplace flow and the teams architecting the experience.

The Million-Dollar Design Flaw: Involving IT/AV Too Late



CASE IN POINT

A leading grocery retailer's corporate real estate team avoided \$1.5M in per-floor expansion costs after data revealed they could rebalance their existing space, rather than pay for more space as recommended by their real estate consultant.¹

The design gap

Architecting the workplace for elevated experiences requires proactive planning. Yet, only 1 in 4 WX leaders (24%) involve IT and AV before space planning begins. That means most organizations design the office before thinking about the technology that has to support the people working in it. Organizations end up with workplaces where the design intent and employee experience don't align.

Cross-functional ownership

Cross-functional committees also create a WX maturity advantage. These committees are not just aligned in theory. They are more likely to report the behaviors that make workplace experience work in practice: earlier

IT/AV involvement, more integrated measurement, stronger ROI data, and less frequent technology friction.

Signals of cross-functional WX ownership:

- **Confidence in WX success:** +5 percentage points
- **Predictive maintenance practices:** +9 points
- **The right ROI data:** +5 points
- **Decreased frequency of tech friction:** -9 points

The findings suggest that workplace maturity depends not only on who owns WX, but on how those functions collaborate.

At what stage are IT and/or A/V teams typically involved when new office, meeting room, or workplace redesign projects are planned?

Only

24%

Before space planning begins

39%

After initial concepts but before final design

17%

After plans are mostly finalized

7%

During installation

13%

Varies by project

PART TWO:

The Solution

Flow Starts Where Friction Ends

Friction is the nemesis of workplace flow. When systems are aligned, work just moves. When it fights back, the cost travels well past the room it started in.

WX failures turn into real business costs by:

- Slowing meetings
- Creating support burden
- Interrupting collaboration
- Creating employee distrust

Our data shows that these failures are common.

Solution:

Friction is a design choice, not a fact of life. Quantify friction costs in your organization and build the business case for alignment by connecting workplace investments to measurable outcomes. This includes:

1. Building a **friction map**: Identify where employees lose time, such as starting a meeting, audio/video, room booking, device connection, space availability, meeting equity, or complex setups.
2. Designing rooms for zero-extra-effort: Workspaces should **support both in-person and remote participants** without requiring employees to troubleshoot the experience.
3. Using IT signals as workplace signals: Treat tech issue frequency, ticket volume, device performance, and meeting start delays as **workplace experience metrics** — not just IT metrics.



If I can remove an ounce of friction, it pays back the organization even more so than having the latest greatest tools.

HR / EMPLOYEE EXPERIENCE LEADER



Tech troubles

71%

say employees experience technology issues at least sometimes, with 30% saying they experience them often or very often

Productivity loss

94%

say WX failures have created at least one business cost, with 51% citing productivity loss when WX fails

Time loss

16+
Minutes

30% report 16+ minutes lost per person when a meeting technical issue occurs (median loss is 12.2 minutes)

Data gaps

58%

feel confident they possess the right ROI data to justify workplace experience and technology investments

Design for Simplicity

When evaluating workplace technology, top priorities include ease of use (82%) and reducing friction (77%). These design choices separate the organizations pulling ahead.

Consistency is key in ensuring successful experiences at scale. Employees don't distinguish between buildings, meeting rooms, or devices. They expect technology to work the same way across the workplace.

Standardizing across all experiences requires built-in principles. However, organizations struggle in this area: while 65% have office-level standards in place, fewer than 50% extend those standards to other key areas.

Solution:

To create a frictionless workplace, simplicity must be engineered into enterprise standards, from individual desks to large conference rooms and everywhere in between. This includes:

1. Creating **consistent experiences** across home-office setups, rooms, floors, and locations.
2. Prioritizing **technology that is easy** to deploy, use, manage, and scale so employees can focus on work, not troubleshooting.
3. Ensuring layouts, standards, and tools can **flex based on usage** and feedback.

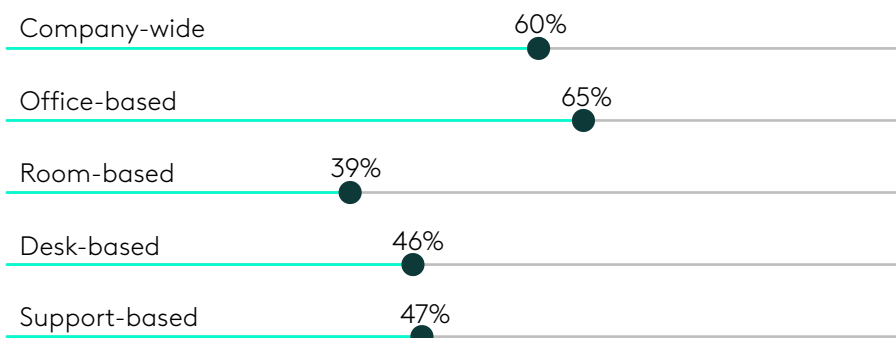
CASE IN POINT

For Swiss Federal Railways (SBB), a national railway company with 35,500 employees, effective collaboration across locations and business units is essential. To meet this need, SBB implemented a usage-based Room-as-a-Service model with Logitech and AV integrator Auviso, treating meeting rooms as an ongoing service rather than a one-time investment.² This resulted in:

- Modernized 600 meeting rooms without complex investment decisions.
- Completed the rollout two years ahead of schedule.
- Ensured the rooms are standardized, easy to use, and always up to date.
- Today, employees have a consistent experience wherever they work, while the company simplified workplace management.

[See the full case study here.](#)

Which workplace technology or experience standards, if any, does your organization currently have in place?

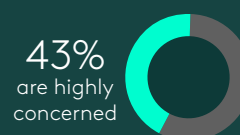


Extending WX strategy to the desk

Leaving personal workspace tools unmanaged leaves security and performance to chance.

4 out of 5

WX leaders say high-quality personal peripherals directly drive daily employee productivity across the organization.



about security risks related to peripheral devices and personal equipment used for work.

Purpose Over Presence

Even as people shift the way they work, in-office experiences remain important.

Nearly 9 in 10 leaders (89%) agree that the office environment provides experiences employees can't get anywhere else.

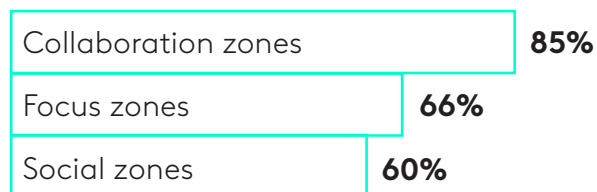
Not surprisingly, collaboration zones are the top priority for redesign. But focus still matters, and daily productivity depends on the whole environment, from meeting room tech to air quality to personal peripherals.

Solution:

As the workplace shifts from a location policy to a performance strategy, the conversation must be reframed around how space and technology can best support the work that needs to be done. This includes:

1. Mapping office spaces to **priority moments**: Identify whether current spaces support the moments employees come in for.
2. Auditing **"wasted presence"**: Look for activities that do not benefit from being in a particular workspace.
3. Designing for trust, not just attendance: Make sure employees understand **why in-person time is being requested** and how the organization is improving that experience.

Office zones prioritized for redesign

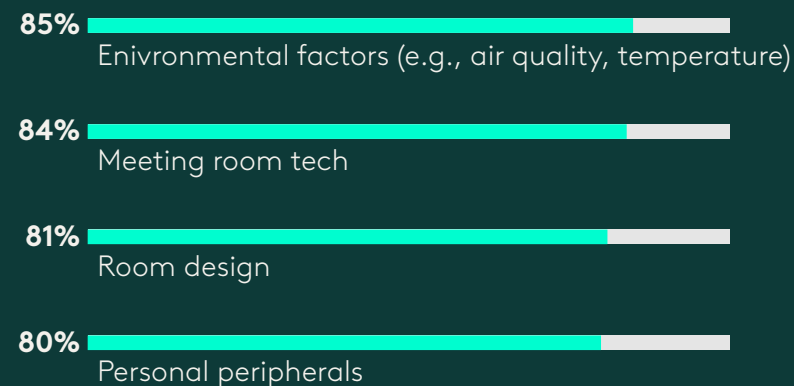


Base = 697 (the 41% prioritizing redesign)

CASE IN POINT

A biotech company found its unassigned seats in its San Francisco headquarters were being held "passively" by personal belongings rather than people, so it added dedicated storage areas to free up workspaces and avoided \$13M a year in expansion costs.³

Workplace elements with the most impact on daily productivity



Measure What Matters

A workplace only gets better if you can tell whether it's working. But our findings indicate that many leaders don't have a clear enough picture to act on, even though they believe WX improves business outcomes.

On average, leaders encounter three barriers to getting the workplace insights they need, ranging from budget limits (40%) and limited utilization data (31%) to poor interoperability (27%). This suggests that leaders are still struggling to collect data and turn it into actionable insights.

Without measurement, leaders are left making decisions based on assumptions rather than evidence.

Solution:

The future-ready workplace is prioritizing data capture and alignment across employee feedback, space usage, and technology performance. This includes:

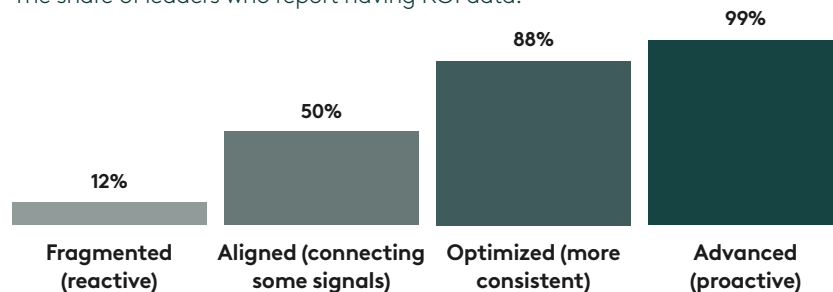
1. Defining the measurement question before adding data sources.
2. Pairing passive signals with human signals: Utilization shows what people do; feedback helps explain why.
3. Prioritizing foundational AI-assisted space optimization, device monitoring, issue prediction, and smarter support.

9/10

More than 9 in 10 WX leaders agree that the clearest picture of workplace health and ROI combines how people feel, how they move through the space, and how the technology works. But only 58% of leaders believe they have the right ROI data to justify WX investments.

Workplace Equation Assessment proof point

The share of leaders who report having ROI data:



Data sources used to understand WX

Employee surveys

62%

Network or device data

49%

Manual observation

40%

Booking data

36%

Badge data

34%

Occupancy sensors

32%

Environmental sensors

31%

Camera-based counting

25%

Not currently measuring, but would like to

Meeting equity: **33%**
 Space use: **28%**
 Talent outcomes: **27%**
 Collaboration: **27%**
 IT burden: **27%**

Employee surveys are the main data source organizations use to understand WX (62%). Surveys are valuable, but they only read the mood. Signals gathered from the space itself add an objective read that a survey can't.

Top influencer, limited use

Environmental factors (e.g., air quality, temperature) ranked as a top workplace element or tool impacting an employee's daily productivity (85%), but fewer than a third (31%) of organizations use environmental sensors.

PART THREE:

The Path Forward

Turn Insight Into Continuous Action

The missed opportunity

The best workplaces continue to improve. Architecting a workplace system that keeps getting better requires connecting measurement, operations, and strategy. But our data reveals that most organizations haven't yet seized this opportunity.

- Only 32% of WX leaders continuously update office layouts or technology standards based on usage data.
- Most (54%) make updates on a schedule instead.

Scheduled updates are great for progress reports. But adaptive systems that constantly optimize based on real conditions move the workplace forward.

Designing for what's next

When you design a system that proactively adapts, you can head off problems before they land rather than reacting to what's broken. Use workplace data to adjust layouts, technology standards, and support models over time. Operational AI makes this practical, and is already entering the workplace system:

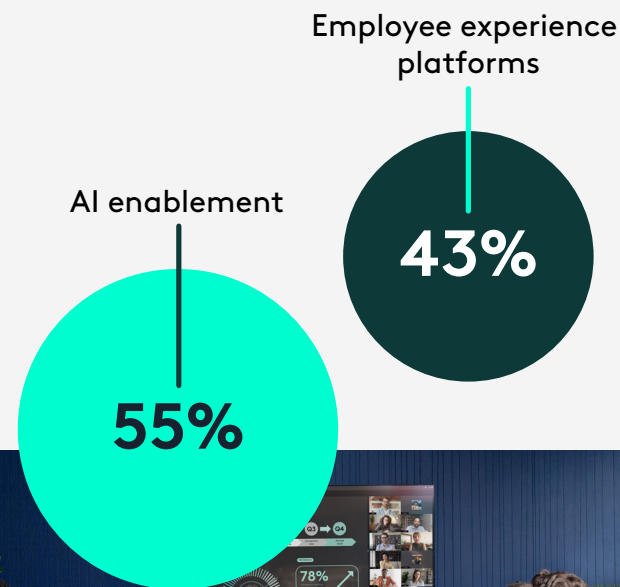
- More than half of WX leaders use AI for alerts (62%), predictive maintenance (57%), and space optimization/workspace planning (54%).
- Leaders see ample opportunity, with AI enablement topping investment priorities over the next two years.

Continuous optimization is emerging as a defining characteristic of workplace maturity. Confidence in workplace decisions (97%) is already high, but the capabilities to measure, adapt, and improve those decisions need to catch up.

CASE IN POINT

One of the largest banking institutions saved \$2 million a year on cleaning and cut energy costs by 30% by aligning building operations to actual occupancy.⁴

Where WX leaders expect to invest in the next two years



From Fragmented Silos to Advanced Flow

For organizations that know workplace experience is not working as well as it should, the path forward depends on maturity: what to fix, what to connect, and what to scale. As organizations progress through the The Workplace Equation Assessment, workplace systems become more connected, measurable, and proactive. The gains are cumulative.

CASE IN POINT

Mars, a global manufacturing giant with 3,700 collaboration spaces worldwide, standardized hardware for specific room sizes and centralized device monitoring with remote management. The result was a 70% decrease in the mean time to repair (MTTR).⁵

[See the video interview here.](#)

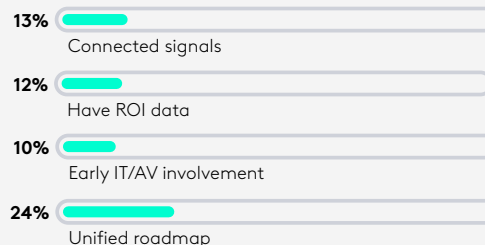
Where organizations are today

The difference between fragmented organizations and advanced organizations is not adding more tools; it's about making the workplace simpler to run and easier to use.

Fragmented

18% of organizations

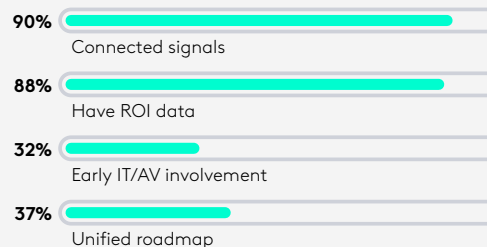
WX decision-makers measure some workplace signals, but the data remains siloed. Without a connected view of the workplace, teams spend most of their time reacting to what needs to be fixed.



Optimized

27% of organizations

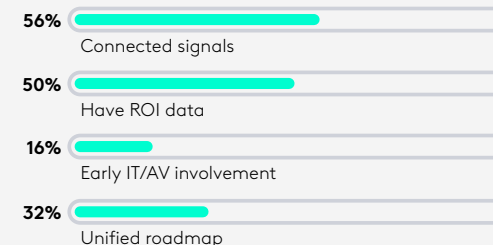
WX leaders have connected the core elements of the workplace system. Measurement, governance, and standards work together to reduce friction and support more consistent experiences.



Aligned

45% of organizations

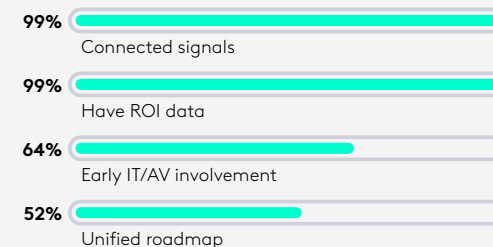
Cross-functional teams are starting to work together and connect data across functions. Collaboration is more likely to be episodic than embedded in day-to-day operations.



Advanced

9% of organizations

WX leaders are continuously measuring, optimizing, and using intelligent automation. They can remove friction proactively, anticipate issues, and adapt as workplace conditions and needs change.



Choose Your Next Move

The next step depends on where your organization is today. Strengthening the workplace happens in stages:

- Lower-maturity organizations need to stabilize the basics.
- Mid-maturity organizations need to connect teams, data, and decisions.
- Higher-maturity organizations need to optimize, automate, and scale what works.

Your organization may not fit squarely into one category—and that's normal. Most organizations show strengths in some areas while still developing others. Use these stages as a guide, not a rigid framework, to identify where focused action will have the greatest impact.



1 —

FRAGMENTED

Address the basics

- ✓ Define ownership.
- ✓ Establish minimum standards for technology.
- ✓ Start ROI measurement.
- ✓ Bring IT/AV into planning earlier.

2 —

ALIGNED

Connect the operating model

- ✓ Move from informal collaboration to shared governance.
- ✓ Strengthen cross-functional planning.
- ✓ Connect HR, IT, and space data.
- ✓ Create a repeatable decision map.

3 —

OPTIMIZED

Refine workplace flow

- ✓ Build friction maps.
- ✓ Expand continuous optimization.
- ✓ Measure unmet outcomes.
- ✓ Standardize room and device experiences.

4 —

ADVANCED

Scale intelligent systems

- ✓ Use AI to monitor signals and plan spaces.
- ✓ Implement predictive maintenance.
- ✓ Automate support to make the workplace simpler to run.
- ✓ Scale standards intelligently.

Solve Your Workplace Equation

The workplace is never neutral. It either holds your people back or amplifies what they're capable of.

The workplaces that amplify are the ones built with purpose. They're intentional and measurable, connected rather than siloed, and consistent for every employee, wherever and however they work.

How well the environment, technology, tools, and physical space come together depends on how well the teams behind them align and share WX ownership. When those pieces work together, workplace experience becomes a business capability that drives real outcomes.

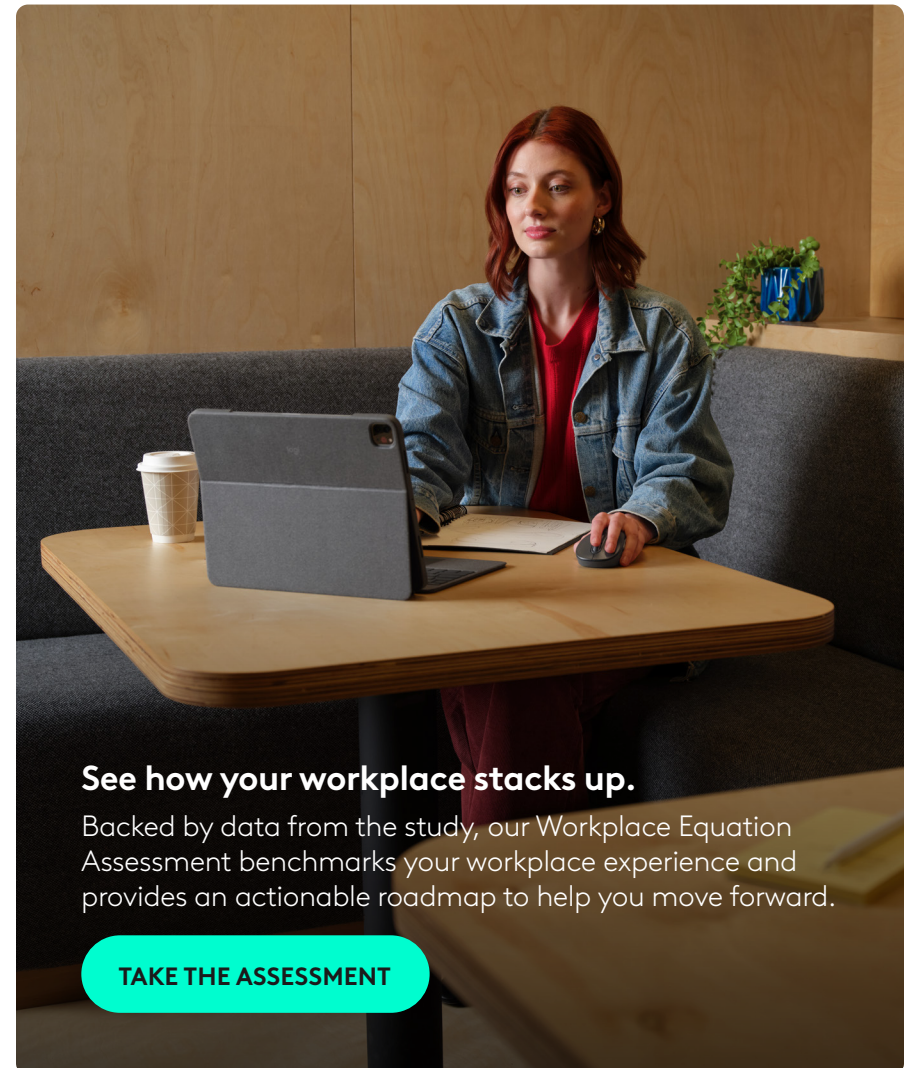
The mandate now is to build a workplace that keeps getting better.

And better doesn't mean more complicated. The organizations leading the way are creating workplaces that adapt proactively, remove friction, and give people the conditions to do their best work.

Does your workplace perform, or simply just function?

Ask yourself these questions:

- Is technology supporting work or interrupting it?
- Are decisions based on connected signals or assumptions?
- Are teams designing together or in silos?
- Is the workplace adapting continuously or only during scheduled refreshes?



See how your workplace stacks up.

Backed by data from the study, our Workplace Equation Assessment benchmarks your workplace experience and provides an actionable roadmap to help you move forward.

[TAKE THE ASSESSMENT](#)

Appendix

Methodology and Sources

Harris Poll quantitative survey

The research was conducted via a 17-minute online survey by The Harris Poll on behalf of Logitech among 1,700 individuals who are workplace experience decision makers at companies with 500 or more employees in Canada, France, Germany, India, Japan, Philippines, Saudi Arabia, Singapore, United Arab Emirates, UK, and US. The survey was conducted May 13 to June 4, 2026.

Respondents for this survey were selected from among those who have agreed to participate in our surveys. The sampling precision of Harris online polls is measured by using a Bayesian credible interval. For this study, the sample data is accurate to within +2.4 percentage points using a 95% confidence level. This credible interval will be wider among subsets of the surveyed population of interest.

All sample surveys and polls, whether or not they use probability sampling, are subject to other multiple sources of error which are most often not possible to quantify or estimate, including, but not limited to coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Raw data were not weighted and are therefore only representative of the individuals who completed the survey.

The Workplace Equation Assessment

The assessment is a composite score that is based on responses to 11 questions about workplace experience, each with varying importance weights. Depending on responses, the final score will range from 0 to 100, with 100 being the most advanced. The questions are organized into three pillars (Measurement, Operations, and Strategy). The three pillars are calculated individually and weighted equally in the Workplace Equation.

For any questions about the assessment, please contact Logitech or the Harris Poll.

Additional sources

¹ Based on customer case study data provided by VergeSense, a Logitech alliance partner, 2026. [\[Link\]](#)

² Logitech, SBB CFF FFS (Schweizerische Bundesbahnen / Swiss Federal Railways), 2026. [\[Link\]](#)

³ Based on customer case study data provided by VergeSense, a Logitech alliance partner, 2026. [\[Link\]](#)

⁴ Based on customer case study data provided by VergeSense, a Logitech alliance partner, 2026. [\[Link\]](#)

⁵ Mars customer testimonial, 2026. Mars Achieves 70% Reduction in MTTR with Logitech | Logitech for Business LinkedIn post. [\[Link\]](#)

HOW TO READ THE MARKET DATA

Please read before citing any market-level figure.

- Figures are raw and unweighted, taken directly from the Harris market crosstabs. They may differ by a point or two from the rounded figures in the narrative.
- Bases get small: 400 for US/Canada, 200 for Germany, France, UK and Japan, and 100 for India, Singapore, Philippines, Saudi Arabia, and UAE. The +/-2.4 point margin widens sharply on these subsets (roughly +/-10 points at n=100), so market numbers are directional.
- The survey covered 11 markets, but Harris reports the country data with the US and Canada combined into one column, so the tables show 10 columns.



Regional Breakdowns

Each table shows the total result and the ten reported regional columns. Base sizes (unweighted n) are shown under each table. Read regional figures as directional given the small bases.

64% of organizations' workplace model is fully/mostly in-office, with 35% hybrid, and only 1% mostly/fully remote | Q1

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Fully/mostly in-office	64%	67%	64%	52%	56%	66%	67%	65%	69%	74%	76%
Hybrid	35%	31%	35%	47%	44%	33%	32%	35%	31%	25%	23%
Mostly/fully remote	1%	2%	1%	1%	1%	1%	1%	0%	0%	1%	1%

70% of leaders rate their organization a success in creating a positive workplace experience today | Q2 Top 2 Box (T2B)

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Rated a success (T2B)	70%	82%	56%	68%	71%	53%	81%	54%	75%	79%	76%

Primary reasons employees come on-site | Q3

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Base (n)	1694	397	199	200	200	200	99*	100	100	99*	100
Collaboration	50%	51%	54%	55%	54%	46%	49%	54%	48%	38%	39%
Meetings	46%	48%	47%	44%	43%	44%	48%	44%	43%	54%	43%
Focused work	43%	44%	33%	34%	42%	52%	45%	38%	53%	42%	52%
Culture / connection	39%	35%	34%	39%	48%	46%	39%	48%	32%	33%	38%
Leadership coordination	35%	36%	34%	36%	33%	30%	44%	28%	39%	39%	37%
Policy requirement	29%	30%	31%	22%	32%	27%	28%	27%	27%	36%	29%
Training	27%	32%	25%	36%	25%	19%	22%	24%	31%	30%	20%
Specialized spaces	23%	19%	32%	25%	17%	22%	18%	23%	24%	20%	35%

97% of leaders are confident they are making the right workplace experience decisions | Q9 T2B

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Confident in WX decisions (T2B)	97%	99%	96%	98%	98%	92%	98%	98%	100%	98%	99%

Only 34% say a unified WX function actually owns the shared roadmap when it comes to workplace investment decisions (Tech + Space + People) | Q22a

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Unified WX function owns roadmap	34%	31%	34%	35%	32%	35%	36%	42%	49%	20%	37%

When new office, meeting room, or workplace redesign projects are planned, 24% involve IT/AV before space planning begins, meaning technology is often asked to support rooms it did not help design. 39% say IT/AV gets involved after initial concepts but before final design, 17% after plans are mostly finalized, 7% during installation 7%, and 13% say it varies by project | Q25

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Before space planning begins	24%	24%	20%	25%	31%	23%	24%	15%	40%	20%	14%
After initial concepts but before final design	39%	37%	42%	38%	39%	37%	36%	41%	34%	43%	52%
After plans are mostly finalized	17%	19%	18%	17%	14%	17%	24%	29%	8%	14%	16%
During installation	7%	7%	9%	9%	4%	7%	6%	5%	8%	7%	8%
Varies by project	13%	12%	12%	12%	13%	18%	10%	10%	10%	16%	10%

Where WX failures show up: the cost of friction to the business | Q28

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Base (n)	1700	400	200	200	200	200	100	100	100	100	100
Lost productivity	51%	55%	42%	45%	57%	49%	55%	46%	54%	44%	62%
Project delays	45%	42%	46%	45%	46%	48%	44%	39%	60%	44%	49%
Higher costs	43%	39%	43%	38%	44%	49%	47%	43%	37%	44%	57%
Poor employee experience	42%	42%	41%	39%	48%	33%	51%	45%	46%	43%	38%
Wasted time	41%	39%	31%	38%	45%	42%	48%	45%	50%	43%	47%
Poor employee retention	32%	35%	29%	27%	30%	29%	33%	37%	29%	46%	31%

71% of leaders say employees experience technology issues at least sometimes, with 30% saying they experience them often or very often | Q31 T3B and T2B

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
At least sometimes (T3B)	71%	68%	71%	72%	74%	77%	67%	78%	61%	73%	72%
Often or very often (T2B)	30%	32%	34%	33%	25%	23%	32%	28%	18%	46%	34%

89% of leaders agree that “Employees have a consistent experience across work settings, whether they are working on-site, remotely, or across multiple locations.” | Q33 T3B

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Consistent experience across settings (T3B)	89%	92%	92%	91%	84%	83%	92%	81%	87%	99%	92%

52% of leaders say workplace technology is more complex than one year ago, while 26% say it is about the same, and 23% say it is less complex | Q41 nets

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
More complex	52%	51%	59%	49%	56%	36%	48%	60%	57%	46%	62%
About the same	26%	26%	25%	34%	27%	24%	20%	28%	21%	21%	23%
Less complex	23%	23%	17%	18%	18%	40%	32%	12%	22%	33%	15%

Companies have multiple levels of workplace technology or experience standards in place, led by office-based (65%) and company-wide (60%), followed by support-based (47%), desk-based (46%), and room-based (39%) | Q43

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Office level	65%	63%	52%	56%	71%	66%	80%	67%	75%	69%	70%
Company-wide	60%	65%	54%	58%	63%	44%	71%	58%	75%	58%	57%
Support layer	47%	51%	38%	40%	53%	34%	59%	48%	52%	52%	64%
Desk-based	46%	51%	38%	51%	51%	41%	49%	41%	50%	42%	36%
Room-based	39%	36%	44%	42%	41%	40%	34%	41%	28%	43%	44%

Only 58% agree that they have the right ROI data to justify investments in workplace experience and workplace technology | Q46 T2B

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Have the right ROI data (T2B)	58%	65%	47%	59%	56%	43%	67%	44%	69%	74%	64%

Data sources decision-makers use to understand WX | Q49

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Base (n)	1700	400	200	200	200	200	100	100	100	100	100
Employee surveys	62%	60%	58%	52%	63%	59%	73%	69%	77%	66%	60%
Network or device data	49%	51%	41%	38%	54%	49%	64%	52%	61%	41%	44%
Manual observation	40%	42%	38%	40%	40%	29%	44%	41%	53%	41%	38%
Booking data	36%	39%	36%	29%	40%	34%	44%	39%	29%	35%	35%
Badge data	34%	30%	24%	42%	40%	46%	38%	18%	30%	31%	38%
Occupancy sensors	32%	33%	29%	31%	33%	24%	27%	39%	34%	38%	35%
Environmental sensors	31%	34%	24%	27%	33%	28%	31%	37%	38%	33%	27%
Camera-based counting	25%	27%	14%	21%	24%	24%	37%	26%	28%	22%	35%

Investment priorities point to an AI-enabled, experience-led workplace, as over the next two years leaders expect to prioritize AI, employee experience platforms, security, redesign, and utilization analytics: AI-enablement 55%, Employee experience platforms 43%, Security tools 41%, Workspace redesign 41%, Utilization analytics 35%, Sustainability initiatives 33%, Personal workspace tools 32%, Managed services 31%, Meeting room A/V 30% | Q51

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
AI enablement	55%	56%	50%	58%	53%	55%	66%	40%	65%	58%	49%
Employee experience platforms	43%	45%	33%	30%	49%	40%	56%	45%	52%	47%	50%
Security tools	41%	43%	34%	40%	41%	41%	59%	41%	52%	22%	47%
Workspace redesign	41%	43%	38%	35%	42%	40%	42%	41%	53%	46%	34%
Utilization analytics	35%	40%	28%	32%	42%	29%	34%	40%	35%	38%	34%
Sustainability initiatives	33%	31%	26%	31%	34%	28%	45%	38%	45%	41%	42%
Personal workspace tools	32%	31%	28%	28%	29%	29%	41%	39%	42%	35%	34%
Managed services	31%	32%	30%	30%	32%	29%	40%	33%	31%	31%	29%
Meeting room A/V	30%	29%	24%	25%	36%	29%	39%	30%	26%	34%	38%

Office zones prioritized for investment (among those prioritizing redesign) | Q51A

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Base (n)	697	172	75*	70*	84*	80*	42*	41*	53*	46*	34*
Collaboration zones	85%	90%	76%	74%	93%	83%	83%	85%	91%	78%	82%
Focus zones	66%	64%	63%	63%	74%	64%	67%	71%	64%	61%	71%
Social zones	60%	62%	55%	66%	68%	43%	69%	59%	68%	54%	53%

Base = The 41% who said they will prioritize workplace redesign. Small bases; directional only.

74% of leaders are concerned about security risks related to peripheral devices and personal equipment used for work | Q54 T3B

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Concerned about device security (T3B)	74%	70%	62%	77%	73%	76%	81%	81%	75%	77%	87%

32% of organizations continuously update physical office layout or workplace technology standards based on usage data, while 54% review and update on a scheduled basis (e.g., quarterly, annually), and 13% are reactive and only make changes when something breaks or a lease is up | Q57

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Continuously update	32%	35%	37%	35%	30%	21%	36%	31%	24%	31%	35%
Scheduled basis	54%	50%	54%	50%	58%	62%	55%	53%	54%	61%	57%
Reactive (when something breaks)	13%	14%	9%	15%	13%	17%	9%	15%	22%	8%	8%

27% treat workplace experience as a core business strategy, while 24% treat it as an operational function, and 48% treat it as both equally | Q59

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Core business strategy	27%	25%	28%	24%	29%	27%	33%	23%	21%	34%	30%

Workplace Experience Maturity Score: Across leaders, the average Workplace Experience Maturity Score is 70.0 (on a 0-100 scale with 100 being most mature)

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Average score (0–100)	70.0	72.6	66.6	68.8	70.0	65.3	74.2	64.9	74.7	74.1	71.1

Workplace Experience Maturity Score Segments: Within the Workplace Experience Maturity Score, 9% are Advanced (85-100), 27% are Optimized (75-84), 45% are Aligned (60-74), and 18% are Fragmented (0-59).

	Total	US/Can	DE	FR	UK	JP	IN	SG	PH	SA	UAE
Advanced (85–100)	9%	14%	2%	6%	12%	8%	15%	4%	16%	9%	8%
Optimized (75–84)	27%	29%	21%	31%	25%	23%	32%	17%	34%	36%	31%
Aligned (60–74)	45%	45%	56%	43%	42%	39%	40%	47%	40%	50%	48%
Fragmented (0–59)	18%	12%	22%	21%	22%	32%	13%	32%	10%	5%	13%

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