

An aerial photograph of a modern office space. In the foreground, a man sits at a desk working on a laptop. In the middle ground, a woman sits on the floor, looking at a laptop. In the background, a man stands and points at a whiteboard while a woman sits on the floor, also looking at the whiteboard. The office has large windows and a wooden floor.

# From Lagging to Leading: How Smart Collaboration Redefines Work in Asia/Pacific



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# Executive Summary



The nature of the workplace is changing with enterprises giving employees the flexibility of working from any location. This presents organizations with an unprecedented set of challenges of creating a workforce with a strong corporate identity, while ensuring a high level of productive interaction. This is particularly important when managing a geographically dispersed workforce, especially during team meetings.

In Asia/Pacific, despite the persistence of remote work, the number of employees returning to the office is increasing, spurring organizations to continue investing in their work facilities and co-working spaces, primarily driven by client expectations.

This IDC InfoBrief highlights key takeaways from a survey commissioned by Neat, showcasing the evolving nature of work, and the growing reliance on AI-infused meeting room technologies to meet productivity demands. IDC surveyed 1,080 executives across 14 countries, grouped into six markets in Asia/Pacific.

## Key Asia/Pacific Research Findings:



1/3 of Asia/Pacific-based organizations have 50% of team members located remotely.



On average, organizations are losing an estimated 4.5 man-hours per week per employee due to challenges with outdated meeting room technologies.



Almost 50% are investing in new meeting room technologies such as videoconferencing solutions.



Meeting client expectations is the top driver for the adoption of advanced videoconferencing hardware.



Top video conferencing features believed to have the most significant impact on redefining workplace communication in the next five years:

1

Superior audio quality (spatial audio, etc.)

2

Superior visual quality (4K video, etc.)

3

AI-driven features (real-time transcriptions, meeting summarization, etc.)

# The IDC Asia/Pacific Team Collaboration Survey 2025 Methodology

## Research Objective:

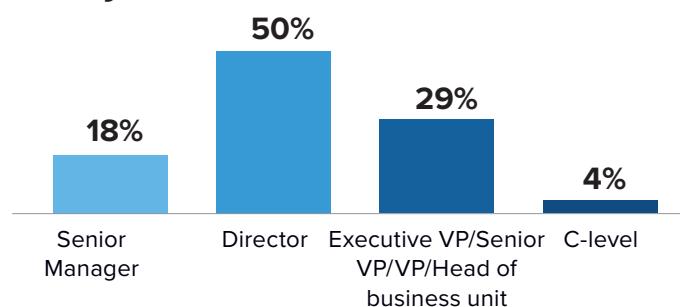
To understand the evolution and changes in team collaboration within organizations in Asia/Pacific, and to gain insights into the drivers and challenges.

**Total sample size:** 1,080

**Methodology:** Online survey

**Respondent profile:** Senior Manager and above

## Seniority Level



## Company Size:

Number of employees	0%
0 - 999 employees	45%
1,000 to 2,499 employees	25%
2,500 to 4,999 employees	18%
5,000 to 9,999 employees	9%
10,000 or more employees	3%

## Survey Area:

Asia/Pacific, distributed across six sub-regions:

### ASEAN

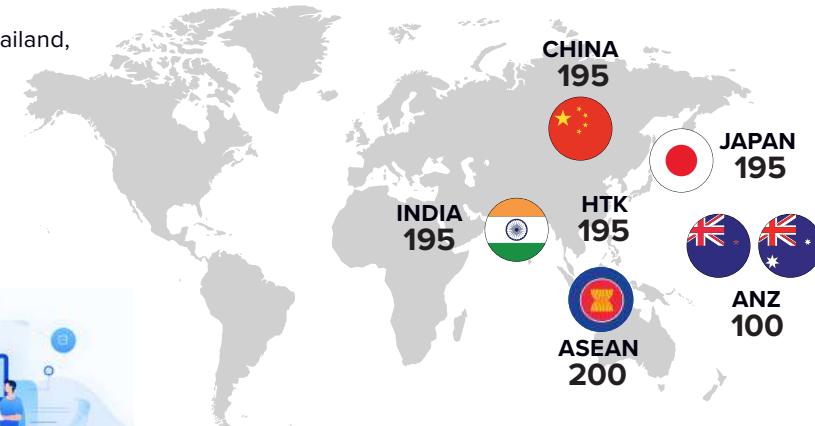
(Malaysia, Vietnam, Indonesia, Thailand, and the Philippines)

### HTK

(Hong Kong, Taiwan, and Korea)

### Asia/Pacific total

n = 1,080



Manufacturing	12%	Media & Entertainment	5%
Financial Services	10%	Healthcare Services Providers	4%
Software and IT services	8%	Education	4%
Professional Services	8%	Oil & Gas	4%
Insurance	8%	Life Sciences	4%
Transportation and Logistics	7%	Wholesale Distribution	4%
Retail or Wholesale	5%	Others	17%

# The Modern Workforce: Shaping a Collaboration Continuum

According to surveyed organizations, most employees in Asia/Pacific now spend a significant portion of their workweek at the office, fostering creativity, collaboration, and organizational culture. Nevertheless, the persistence of hybrid work models underscores the continued need for collaborative technologies to support a unified workforce.

## What's Changing Now?

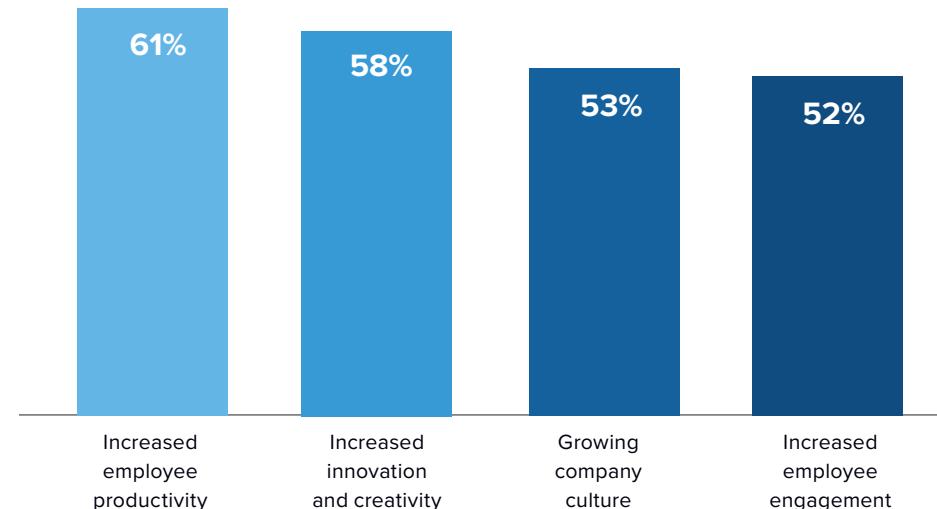
-  More than 65% of employees spend 3 to 4 days a week at the office
-  More than 50% of organizations in the region upsized office spaces
-  40% implemented office workspace/room booking technology

## Expected Employee Work Model Change Over the Next 18 Months:

-  29% of Singaporean organizations expect to shift to 100% in-office work.
-  24% of Japanese organizations see an increased shift to working from the office (2–3 days in the office weekly).

Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080

## The Top Benefits of Working from the Office:



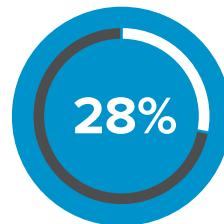
The survey found that returning to the office offers several key benefits that are largely driven by the in-person work environment, which supports focus, real-time collaboration, and team connections — helping to build a motivated and cohesive workforce.

# What Does the Modern Workforce Look Like?

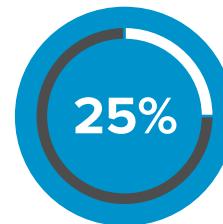
While it is known that working from the office is not new, the modern return to the office is not about reverting to old ways. Instead, it's about rethinking work with collaborative intelligence that enhances productivity, creativity, and connection in hybrid-first contexts. Investments in intelligent collaborative technologies are therefore crucial to fostering creativity, embedding company culture, and ultimately overcoming any barriers to productivity.

Despite increased office attendance, Asia-based enterprises believe hybrid work is here to stay, owing to tech-enabled recruiting flexibility across regions.

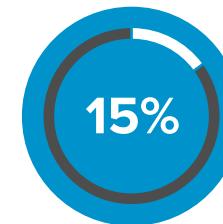
## Remote Work Will Persist



continue using hybrid



increased shift in working remotely



increased shift to working in the office

## The IDC Neat Asia/Pacific Team Collaboration Survey shows that

- 1 in 3 Asian organizations have half their workforce working remotely.
- Still, 85% of teams interact daily or more, showing strong engagement in hybrid setups.

## Expected Employee Work Model Change Over the Next 18 Months



56% of Australian organizations will continue to use a hybrid work model.



Similarly, 38% of New Zealand organizations plan to maintain a hybrid work model.

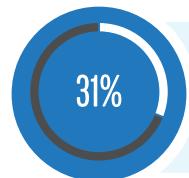


**By 2028, 70% of G1000 employee content will be enhanced with visual, auditory, and/or tactile modalities that will boost effective collaboration, create new insights, and drive time-savings.**

Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080

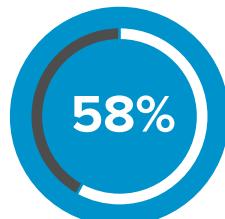
# Overcoming Productivity Hurdles Through Greater Collaboration

For Asia-based organizations, the biggest challenge to productivity is the lack of engagement among employees. This is one reason why team building activities and teaming behaviors are the top metrics to measure employee productivity. Companies must work on how to support increased team collaboration and review their current technologies and physical meeting spaces.



of organizations in the region consider enabling team collaboration as one of the biggest organizational concerns relative to flexible work models.

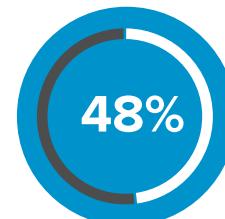
## Top Challenges in Enabling Productivity and Efficiency



Lack of engagement

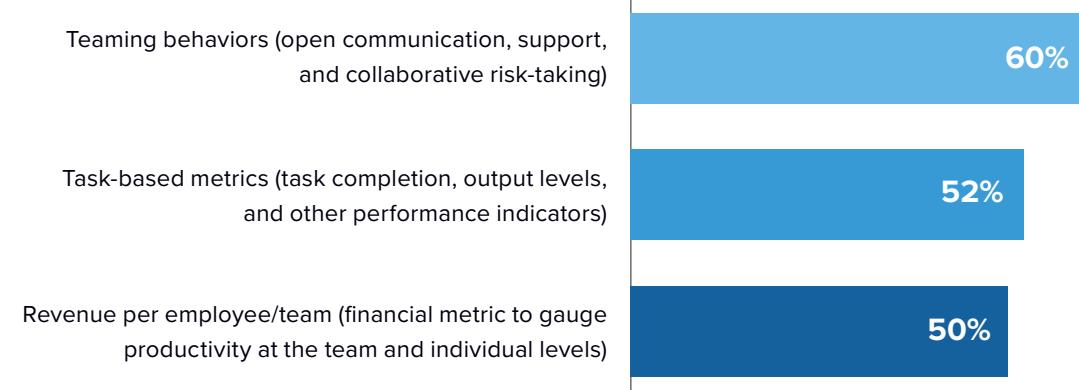


Inadequate or outdated tools and tech resources



Shortage or lack of physical meeting spaces

## Top Metrics to Measure Productivity



Source: Source: IDC Future of Work Survey, 2024, n = 1,370; IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080

# Are Physical Meetings Contributing to Productivity and Team Collaboration?

Physical meetings, once central to workplace collaboration, are losing efficiency in today's hybrid work model due to outdated tools and technical hurdles. The future is not about replacing them, but enhancing them with AI-powered, seamless technology to drive smarter, more effective collaboration.



98%  
of people have physical meetings in meeting rooms, with almost 25% having more than six meetings a week



72%  
of meetings involve using some form of videoconferencing technology to connect with colleagues in other locations

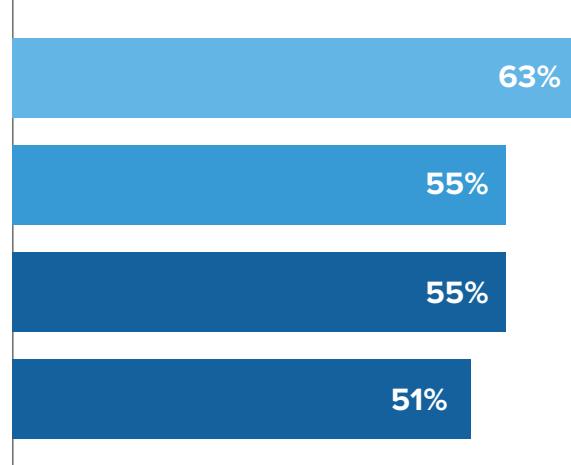
## Top Factors Negatively Impacting Productivity of Physical Meetings

Technical issues when using videoconferencing, AV equipment, etc. (audio or video keeps dropping)

Using outdated technology (laggy teleconferencing equipment, etc.)

Difficulty in setting up/using meeting equipment (not simple or straightforward — multiple cables, etc.)

Missing equipment (whiteboards, markers & erasers, etc.)



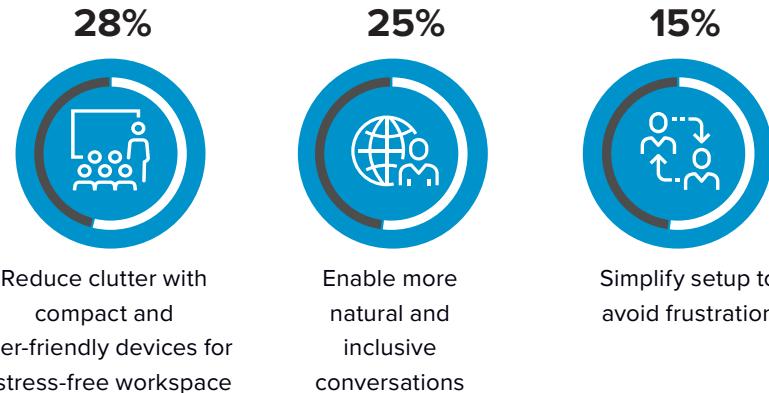
**Videoconferencing technology has become a standard fixture in any meeting, whether physical or online. However, technical issues with the hardware (among other factors) impact the overall effectiveness of these meetings.**

Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080

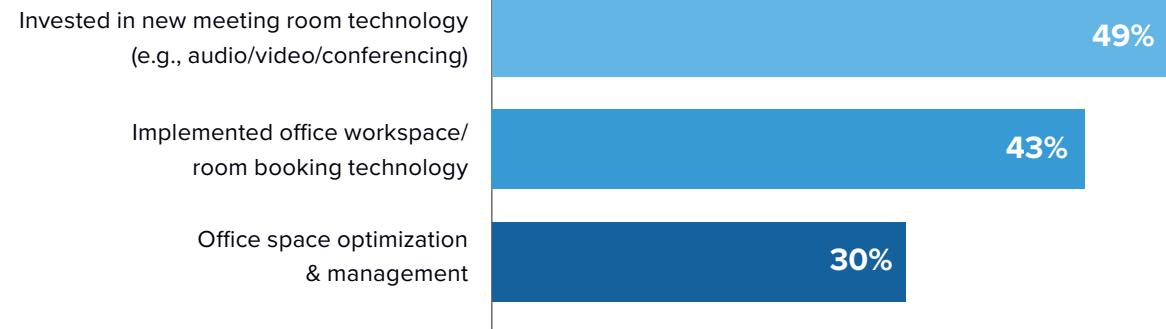
# Videoconferencing Technology Issues Hinder Productivity

Videoconferencing is a key contributor for workplace collaboration, even contributing to employee well-being and engagement, especially in a hybrid environment.

## The Role of Videoconferencing Hardware in Improving Employee Well-Being and Engagement in Hybrid Work



## Changes in Work Facilities over the Last 18 Months



Organizations in the region are recognizing the importance of videoconferencing technology, going so far as prioritizing investments in this space over other work facilities initiatives.

Source: IDC Future of Work Survey, 2024, n = 1,370; IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080

# Lagging Behind: The Real Cost of Outdated Videoconferencing Tools

Outdated videoconferencing technology is a hidden productivity drain that costs organizations time and money. Frequent technical failures, slowness, and poor audio/video quality result in considerable wasted time per employee per week, which translates into big financial losses when viewed on an enterprisewide level.



**1** On average, for Asia/Pacific-based organizations, **each employee loses an estimated 4.5 hours PER WEEK** due to challenges from setup, technical, and technology-based issues in meetings.

**2** With employees working an estimated total of 2,080 hours per year, this equates to **11% total lost man-hours per employee.**

**3** Applying this lost man-hour percentage to an employee who earns \$75,000/year results in a **cost of \$8,524 per year per employee.**

**4** For an organization based in Asia/Pacific with 1,000 employees, the **overall cost of outdated videoconferencing technology** is an estimated:

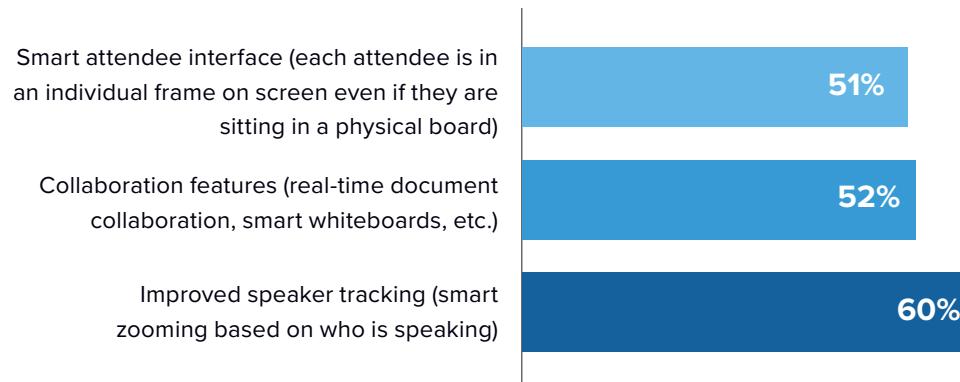
**$\$8,524 \times 1,000 = \$8,524,000$  annually**

Source: IDC Future of Work Survey, 2024, n = 1,370; IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080

# Videoconferencing + AI = The Next Step in Collaboration Technology

With the introduction of AI functionality, collaborative technology has advanced beyond simple videoconferencing, creating a more immersive and interactive experience. Organizations in the region realize the benefits of AI-infused technologies in boosting productivity, specifically in areas of improved speaker tracking for enhanced personal engagement and smart whiteboards for seamless collaboration.

## The Top Benefits of AI in Videoconferencing Technology



## Top Primary Driver for the Adoption of Advanced Videoconferencing Hardware



**Driven by facility staff reductions and an increasing appetite for flexible work environments, 45% of G2000 organizations will use AI-infused applications to optimize the workplace by 2028.**

Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080; Source: IDC Future of Work Survey, 2024, n = 1,370

# The AI Frontier: Redefining the Next Era of Workplace Collaboration

Workplace collaboration is evolving into a multisensory, AI-augmented, immersive experience. Organizations planning for 2030 should look at modular systems, which are already laying the groundwork for smart presence, hybrid room intelligence, and immersive environments. AI is transforming collaboration platforms by interpreting tone, body language, and attention during meetings, providing real-time feedback, enhancing emotional intelligence, and boosting engagement and well-being.

## Most Important Technology Investments to Support Employee Engagement — Next 18 months



- 53%** Smart/Interactive whiteboards
- 50%** Project management software
- 48%** AR/VR equipment
- 44%** Analytics and feedback tools
- 42%** AI-enabled collaboration tools (automated note taking and summary, etc.)

Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080; Source: IDC Future of Work Survey, 2024, n = 1,370

## Future Trends in Workplace Collaboration: Beyond 2028



**AI-enhanced presence and sentiment analysis:** Real-time interpretation and tone of behaviour.



**Cross-device spatial collaboration ecosystem:** Seamless workflow across VR, AI systems, and smart room systems.



**Immersive VR meetings:** Team collaboration in shared 3D workspaces.



**Holographic communication:** Executive- and client-level engagement through holographic projection.

# Empowering the Future of Smart Collaboration

Next-generation smart collaboration is more than better meetings—it's about transforming how businesses interact, innovate, and grow.

## The Future of Work Requires Intelligent Simplicity



**Built for Hybrid Environment:** All-in-one technologies that adapt to hybrid meetings with smart video, audio, and inclusive framing—ensuring fair and equal participation for all attendees.



**Seamless User Experience:** Plug-and-play deployment, intuitive user interface, and minimal IT support requirements streamline setup and reduce stress for users and IT teams alike.



**AI-Powered Presence and Intelligence:** Advanced features such as automatic speaker tracking, noise reduction, and intelligent framing enable more natural and engaging remote and in-room collaboration.



**Scalable and Flexible Deployment:** Versatile solutions that fit huddle rooms, boardrooms, and every space in between—ensuring consistent quality and performance across diverse environments.



**Enterprise-Grade Security and Sustainability:** Built-in compliance features and energy-efficient design help meet corporate security standards and sustainability goals.

## Expected Outcomes



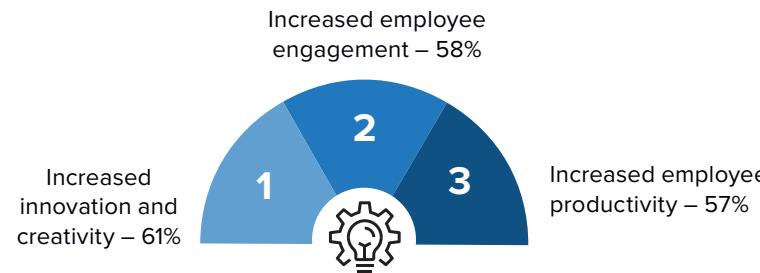
Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080

# In Focus: China

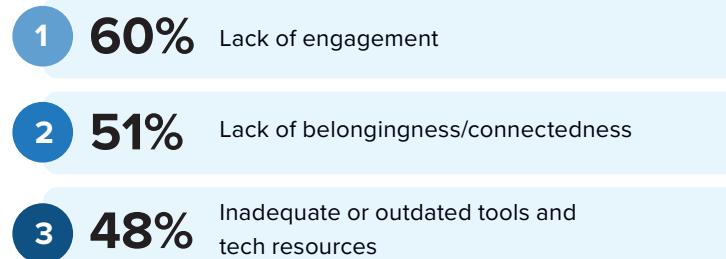


Compared to their regional counterparts, China-based organizations are the most committed to having employees working from the office in the belief that this will drive increased innovation and creativity rather than productivity. Interestingly, China is also one of the only countries in the region where employees have a greater reliance on virtual meetings, with some employees not attending any physical meetings during their work. This is likely why China-based organizations see the key role of videoconferencing equipment as enabling natural and inclusive conversations.

## Top Benefits of Working from the Office

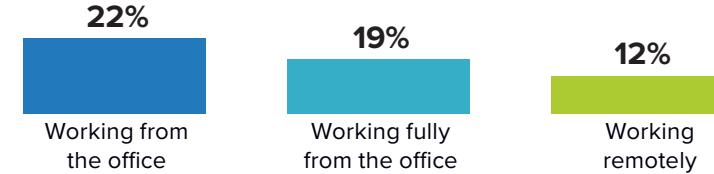


## Top Challenges in Enabling Productivity and Efficiency

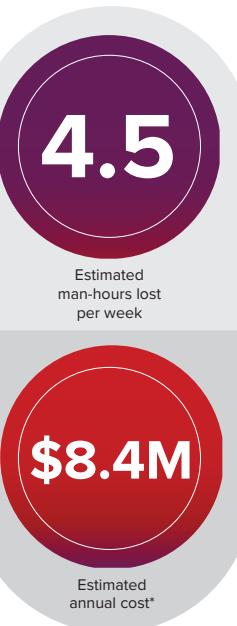


Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080 (China, n = 195)

## Expected Work Model Changes in Next 18 Months



## Top Factors Negatively Impacting Productivity of Physical Meetings



\*Due to outdated video conferencing technology for organizations with 1,000 employees

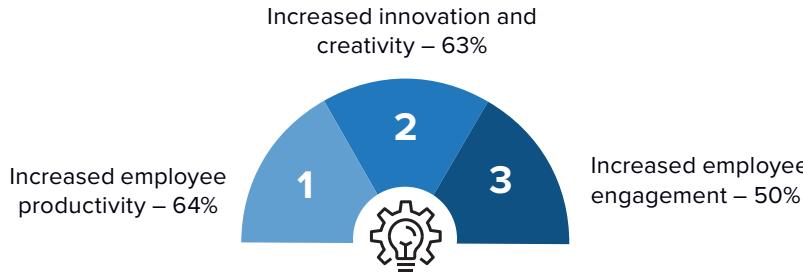


# In Focus: Japan

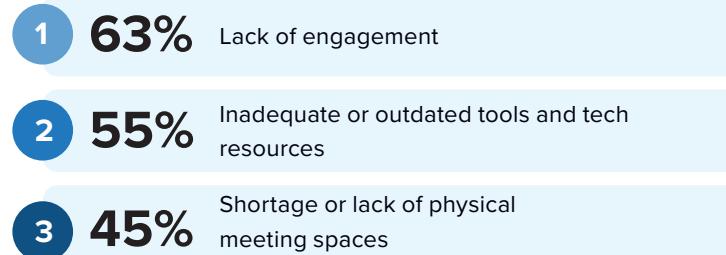


Even though Japan-based organizations lean toward maintaining remote working methods, out of the entire region, they have invested the most in upsizing existing office spaces to ensure their onsite employees have the resources they need to be productive. However, despite these investments, Japan-based organizations are the most impacted by technical issues with videoconferencing equipment during their meetings.

## Top Benefits of Working from the Office

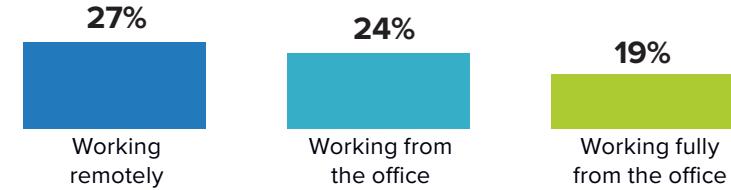


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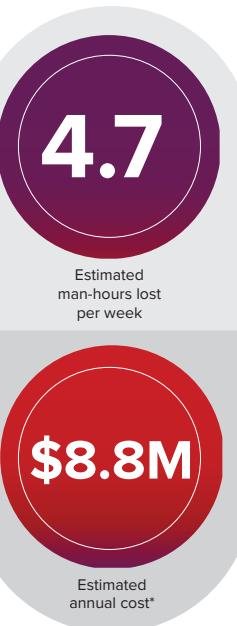


Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080 (Japan, n = 195)

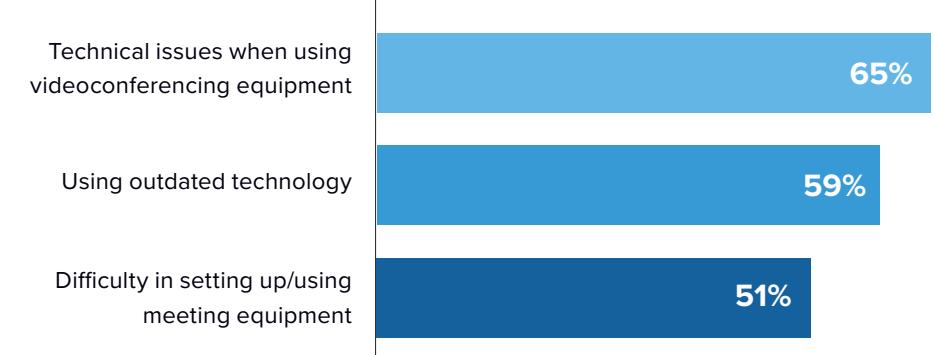
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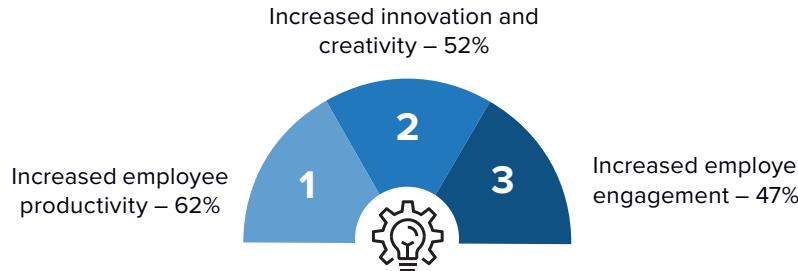


# In Focus: Australia/New Zealand

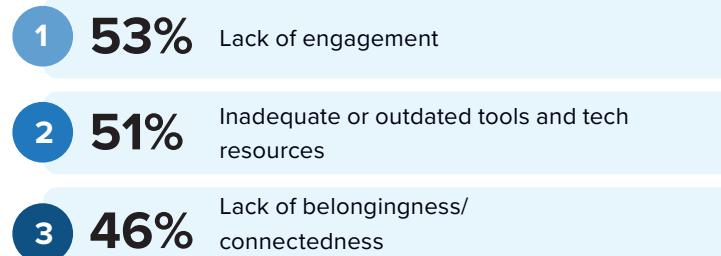


Almost half of Australia/New Zealand-based organizations do not intend to make any changes in their work models, preferring to maintain the hybrid work models. Despite this, these organizations have invested the most regionally in redesigning their office spaces to meet employee needs. This may be one of the reasons they have the lowest man hours lost due to issues with their videoconferencing equipment during meetings in the region.

## Top Benefits of Working from the Office



## Top Challenges in Enabling Productivity and Efficiency

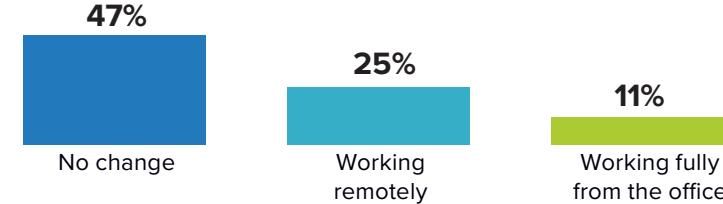


Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080 (ANZ, n = 100)

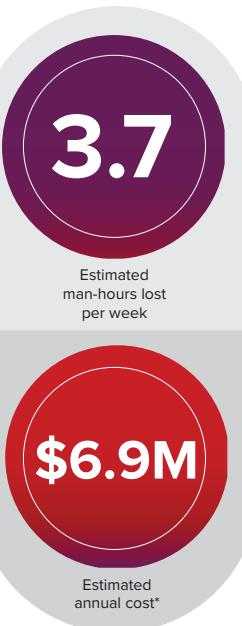


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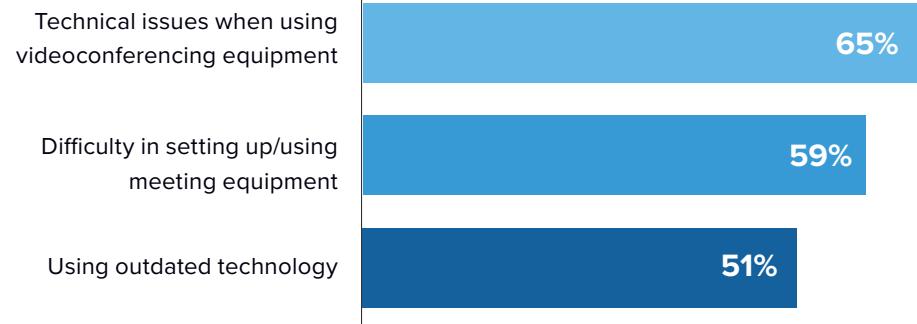
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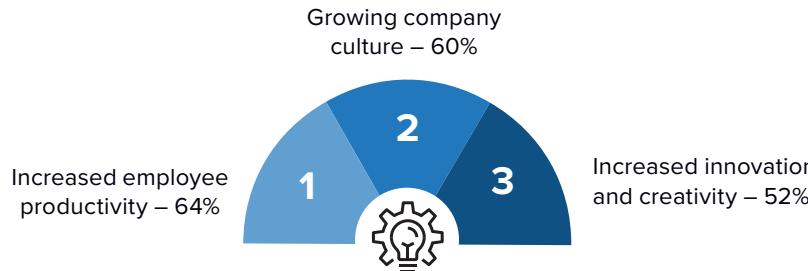


# In Focus: India



In the entire region, India-based organizations have the strongest belief that working from the office will have a direct positive impact on employee productivity. However, given the realities of heavy traffic and long commutes, these companies have adopted remote work as an accepted work model, though they still need to invest more in their equipment as shown by the fact that India has the second highest productivity loss in the region due to outdated videoconferencing technology.

## Top Benefits of Working from the Office



## Top Challenges in Enabling Productivity and Efficiency

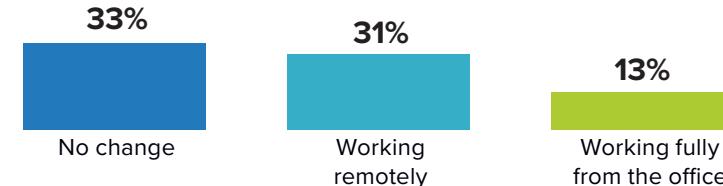
- 1 **58%** Lack of engagement
- 2 **53%** Shortage or lack of physical meeting spaces
- 3 **52%** Inadequate or outdated tools and tech resources

Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080 (India, n = 195)

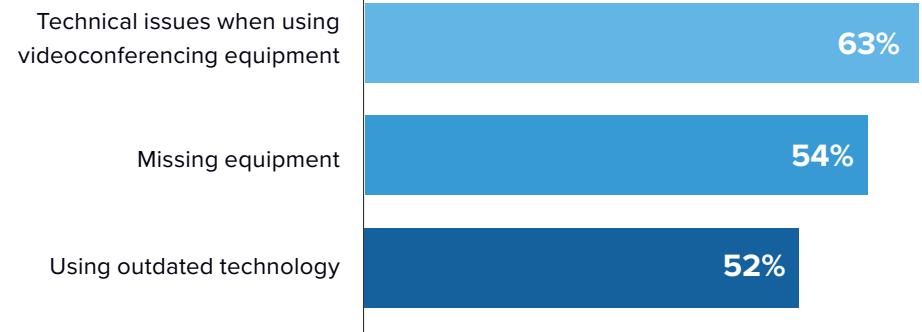


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## Top Factors Negatively Impacting Productivity of Physical Meetings

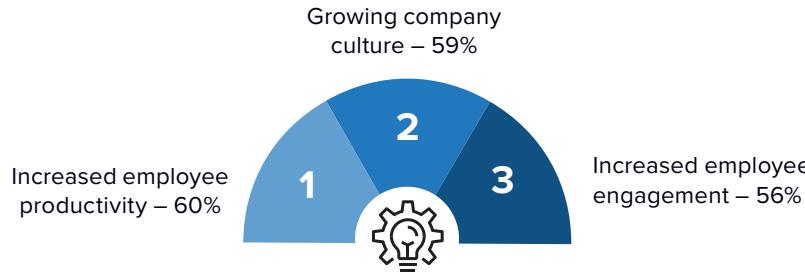


# In Focus: ASEAN



Though ASEAN-based organizations are comfortable with the remote work model and have the second lowest loss in productivity due to outdated videoconferencing equipment, they still rank technical issues as one of the top factors negatively impacting meeting productivity. This indicates that their investments in this area may not be future-proofed, yielding short-term benefits.

## Top Benefits of Working from the Office



## Top Challenges in Enabling Productivity and Efficiency

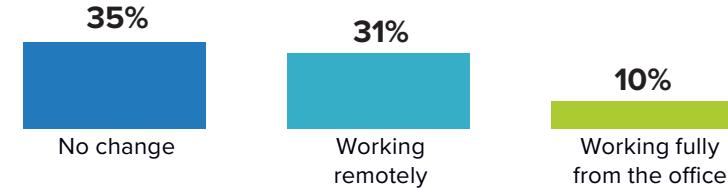
- 1 **60%** Lack of engagement
- 2 **52%** Inadequate or outdated tools and tech resources
- 3 **50%** Shortage or lack of physical meeting spaces

Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080 (ASEAN, n = 200)

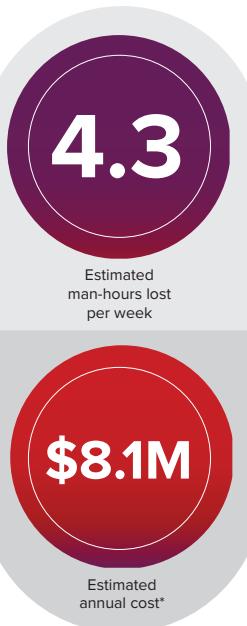


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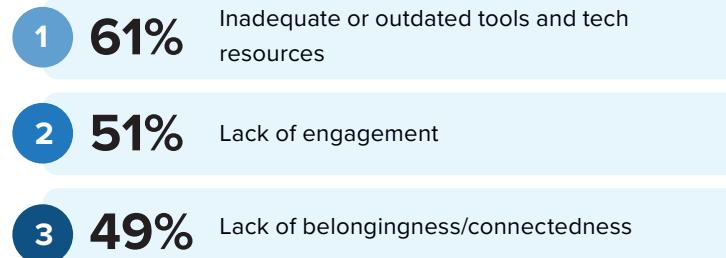
# In Focus: North Asia (Taiwan, Hong Kong, and South Korea)

Organizations in North Asia invest significantly in upsizing and redesigning their office spaces as compared to their regional counterparts. However, their spending on team collaborative solutions is insufficient as proven by the fact that North Asia-based organizations have the highest productivity loss in the region due to outdated videoconferencing technology.

## Top Benefits of Working from the Office

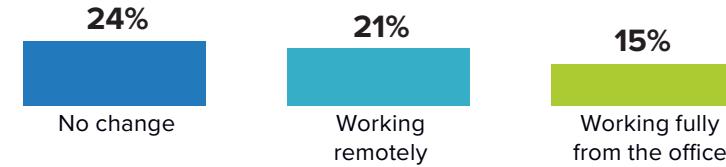


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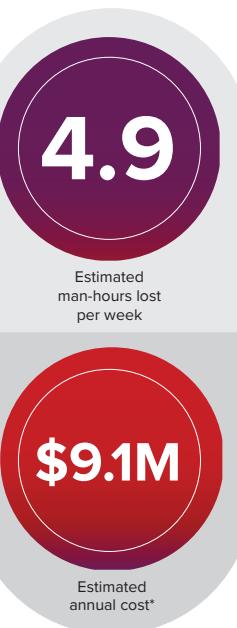


Source: IDC Neat Asia/Pacific Team Collaboration Survey, 2025, n = 1,080 (North Asia, n = 195)

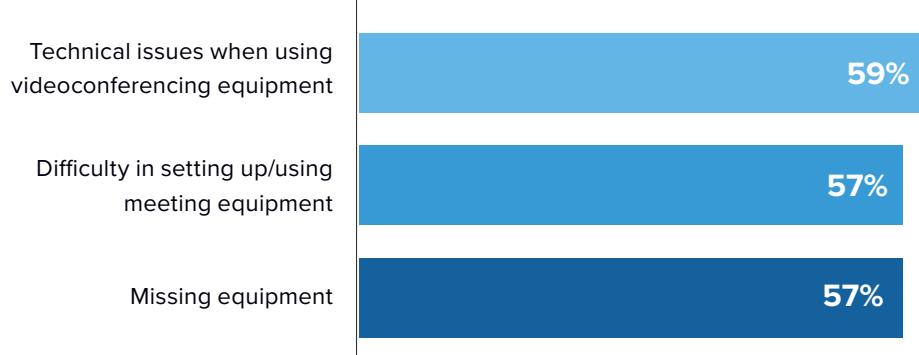
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# Essential Guidance for SMEs

Intelligent meeting room solutions are no longer optional—whether you're a small and medium-sized enterprise (SME) developing foundational digital fluency or a larger organization managing a global hybrid workforce. These tools are critical for enhancing productivity, improving talent retention, and driving competitive differentiation. AI should be embraced not as an afterthought, but as a core strategy to strengthen human connection and operational performance.



## HIGH-IMPACT OFFICE SPACES FIRST

To maximize return on investment without overhauling entire office layouts, prioritize enhancements in high-traffic areas such as huddle rooms and hybrid desks. Focus on scalable, intelligent technologies that align with your organization's size and work style. This approach prepares teams for AI-enabled environments, boosting engagement, productivity, and long-term resilience. Choose affordable, cloud-based platforms with seamless integration and low training requirements to ensure quick adoption.



## AI-INTEGRATED VIDEO COLLABORATION TOOLS

Utilize all-in-one collaboration platforms embedded with AI features — such as speaker framing, noise suppression, and live transcription — to streamline IT management while improving clarity and engagement in hybrid meetings. Prioritize solutions with native integration into core productivity ecosystems like Microsoft 365 and Google Workspace. Cloud interoperability ensures smoother workflows, reduced platform fragmentation, and a more connected digital experience.



## AGILITY and SIMPLICITY

Technology should simplify work, not complicate it. Adopt scalable, plug-and-play solutions that reduce complexity and increase usability. SMEs should focus on systems with intuitive features — such as speaker tracking and interactive whiteboards — that require minimal setup and training. This ensures teams can maximize impact with fewer resources while keeping operations straightforward and efficient.

# Essential Guidance for Large Enterprises

As the modern workforce continues to evolve, organizations must adopt unified strategies that promote seamless collaboration, efficiency, and agility—regardless of employee location. Whether in-office or remote, intelligent collaboration technologies are critical to driving creativity, strengthening company culture, and removing barriers to productivity.



## CONTINUED INVESTMENT IN THE OFFICE

With more employees returning to physical workspaces, ongoing investment in office infrastructure is essential. Modernizing high-usage areas and addressing outdated technologies will help prevent disruptions and support productivity. Organizations should focus on scalable, secure, and modular solutions — such as workspace booking systems — that are adaptable to evolving workforce models and AI advancements, while remaining compliant with security standards.



## INTELLIGENT COLLABORATION TOOLS

Investments should prioritize next-generation AI-enabled collaboration platforms that enhance competitiveness in hybrid work environments. Focus on interoperable systems that integrate with core productivity tools, support inclusive configurations, and offer real-time insights through built-in analytics. Cloud-based solutions with features like transcription, translation, and smart framing can improve engagement and elevate the overall meeting experience.



## SCALABILITY AND STANDARDIZATION

To support global hybrid teams, large enterprises should implement standardized, scalable collaboration ecosystems. Embrace data-driven insights and explore immersive technologies such as AR/VR to enrich hybrid interactions. Unified AI-native platforms with seamless interoperability ensure consistent experiences across regions, promoting inclusivity, operational efficiency, and long-term scalability.

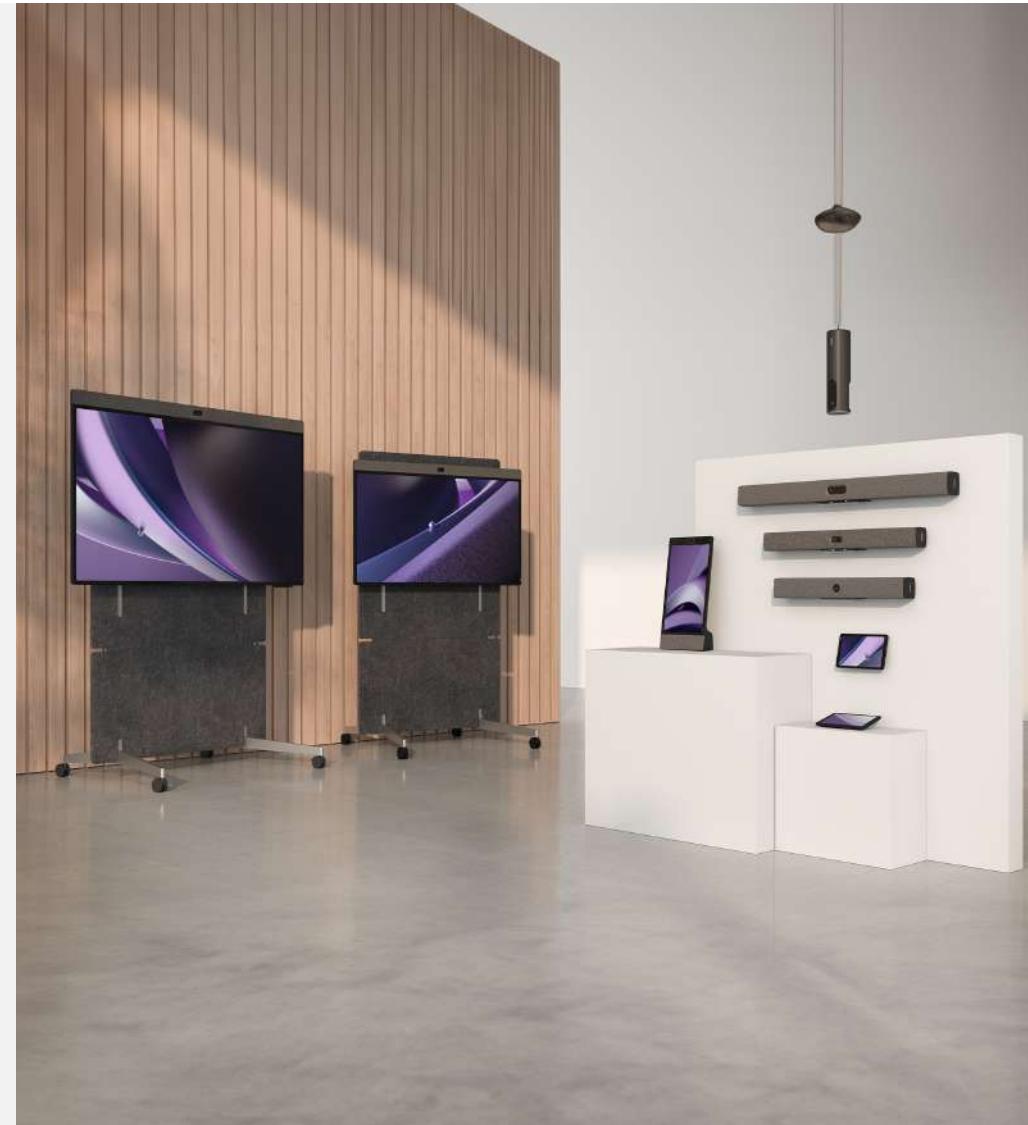
# Message from the Sponsor

## neat.

Neat is a pioneering video technology company transforming hybrid collaboration with beautifully designed, intelligent devices. Purpose-built for Microsoft Teams and Zoom—and soon, Google Meet—Neat delivers first-of-their-kind innovations like patented **Neat Symmetry** and **Neat Boundary**, creating more natural, inclusive, and focused meeting experiences.

Beyond hardware, the **Neat App Hub** enables users to run third-party business apps natively on Neat devices, unlocking new levels of flexibility and productivity. From collaboration and digital signage to workspace management, Neat makes meeting spaces work smarter.

Rooted in Scandinavian design and driven by innovation, Neat builds solutions that are elegant, powerful, and effortless to deploy. With multiple **Red Dot Design Awards** and global recognition, Neat continues to lead the way in redefining the future of work.

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