

Adaptive Spaces

2025 *India Office Occupier Survey - Infographic*

Portfolio expansion, experiential workplaces & green assets at the forefront of corporate agendas

CBRE RESEARCH | SEPTEMBER 2025





HYBRID WORKING

'Office-first' policy leading to strong office utilisation rates



Office-first

94%

Of all respondents including 94% of the GCC occupiers prefer at least three days in the office per week



Fully office

52%

respondents prefer to work from office all the time

Rising workplace utilisation



2025

55%

respondents indicate an average office utilisation of more than 75%

2021

11%

The sharp rise in utilisation rates from 2021 to 2025 underscores a decisive **shift towards normalisation in office attendance post the pandemic.**



PORTFOLIO STRATEGIES

Business confidence continues to drive portfolio expansion

72%

Office occupiers expect to expand their portfolio by 10% or more over the next two years

78%

large-sized occupiers

76%

small-sized occupiers

Plan to expand office footprint 10%+ in 2 years



About 65% of the GCC firms intended to increase their office portfolio by over 10%

Crucial criteria while considering office space within the chosen city



92%

Access to commute infrastructure



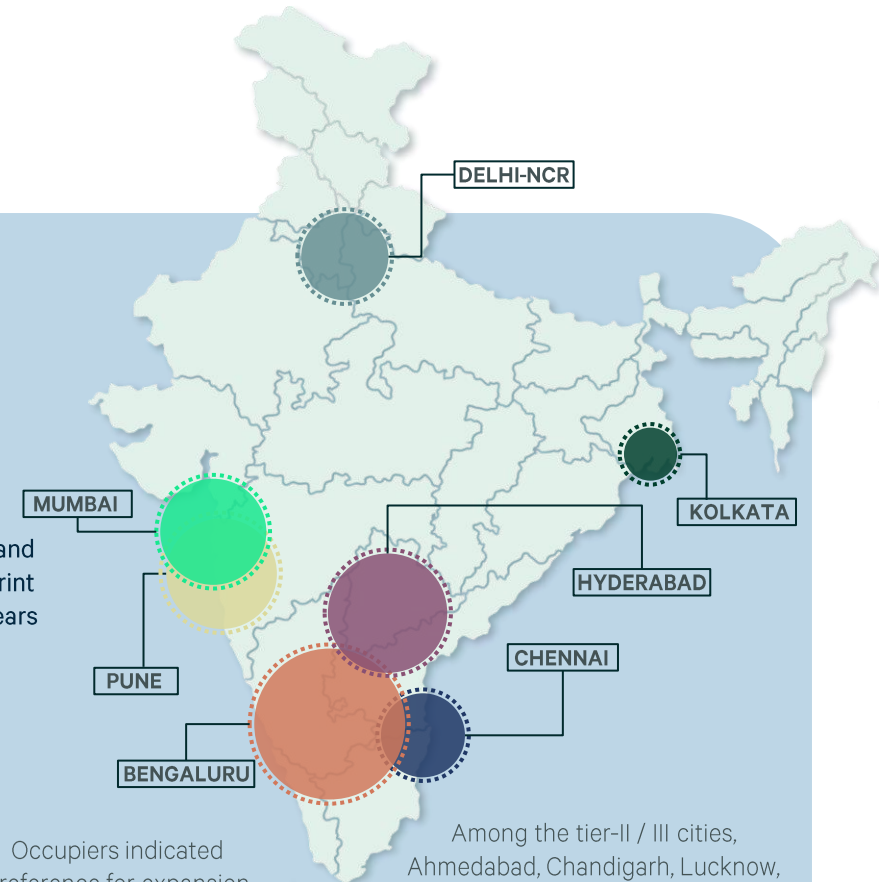
63%

Access to talent



44%

Asset safety / security



Occupiers indicated preference for expansion (refer to map)

Among the tier-II / III cities, Ahmedabad, Chandigarh, Lucknow, Indore, Coimbatore and Kochi are the most sought after to expand in



FLIGHT-TO-QUALITY

'Flight-to-quality' fuels leasing in next-gen properties

67%

of respondents would likely relocate led by **better quality buildings / 'flight-to-quality'**

69%

of leasing from 2020-H1 2025 took place in green-certified assets less than 5 years old within integrated tech parks

57%

of occupiers relocated with a need to upgrade in 2024

83%

of occupiers relocated to buildings constructed post 2021 in 2024



FLEXIBLE WORKSPACE STRATEGIES

Sustained preference for flexible workspaces



55%

respondents have flexible workspaces in their office portfolio **now**

65%

occupiers expect to have flexible workspaces in their office portfolio **by 2027**

43%

of all respondents, including 43% of GCC firms, prefer fully private managed office spaces as their top flexible office option



WORKPLACE STRATEGIES

Key focus areas in improving workplace experience

73%

Using physical workplace design of an office to communicate the company's identity, values, culture etc.

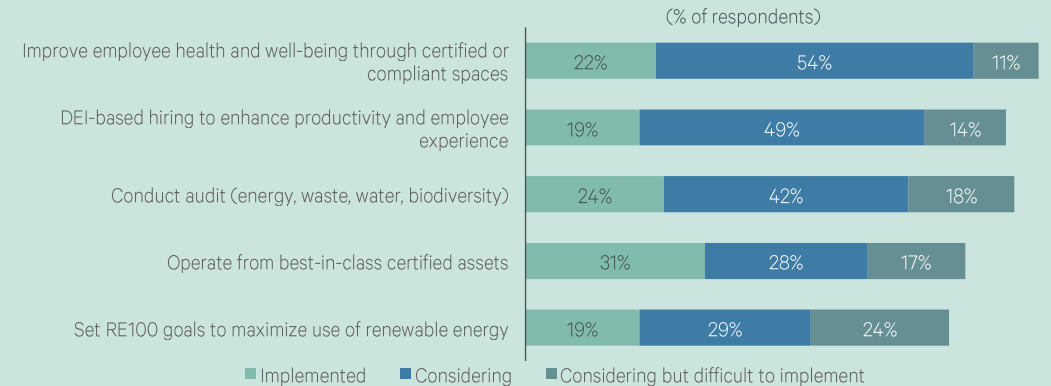
56%

Better organizational productivity through holistic well-being initiatives



VIEW ON ESG

Evolved considerations for sustainability



Top occupier expectations from developers



Safety & security infrastructure



Improving employee experience

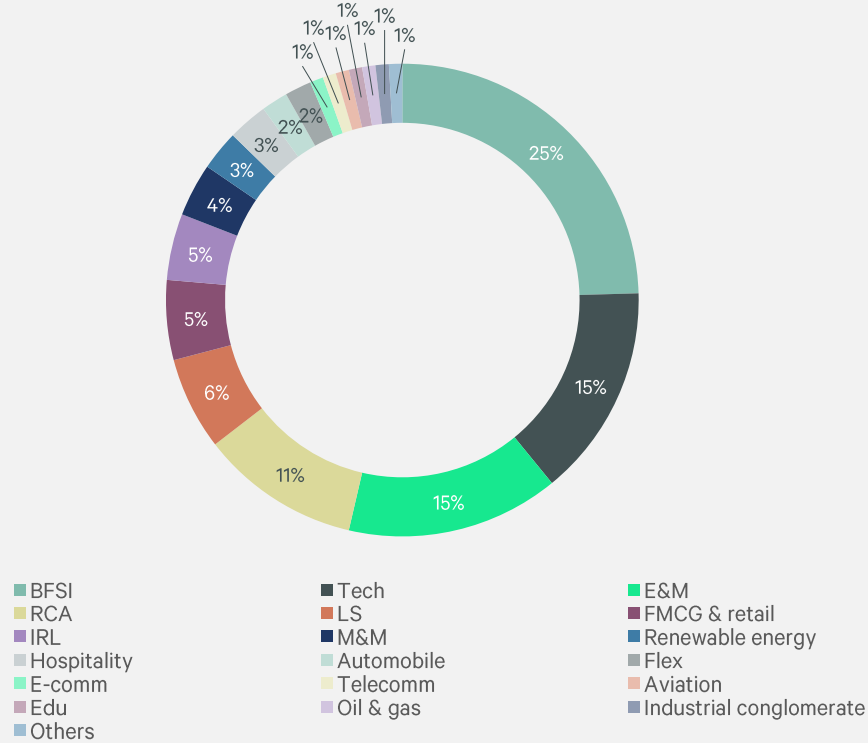


Improved HVAC solutioning for energy efficiency

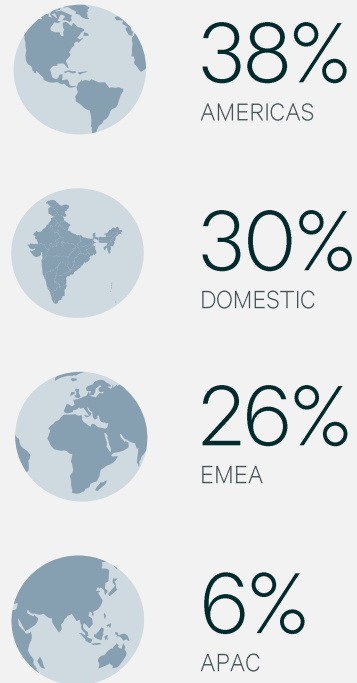


SURVEY PROFILE

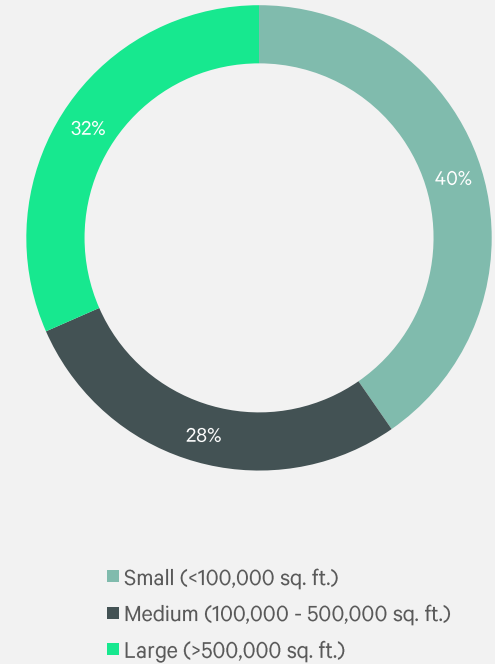
Tenant Sector



Region of origin



Portfolio size



Note: BFSI – banking, financial services, insurance; Tech – technology; E&M – engineering & manufacturing; RCA – research, consulting & analytics; LS – life sciences; IRL – infrastructure, real estate & logistics; M&M – Media & marketing; Flex – flexible space operators; E-comm – E-commerce; Telecomm – telecommunications; Edu - Education

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