

2026 Vietnam Office Workspace Survey

Identifying Key Trends in The Workplace

REPORT

CBRE RESEARCH
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Key Highlights



Collaborative Spaces & Social Zones

- **92%** of respondents mentioned in our survey that the workspace features that most enhances culture, morale and productivity most includes collaborative spaces and social zones.
- **64%** agreed that Green Design, as well as Natural Lighting & Ventilation, are the most important features to enhance culture, morale and productivity.



Transport Habits are Shifting

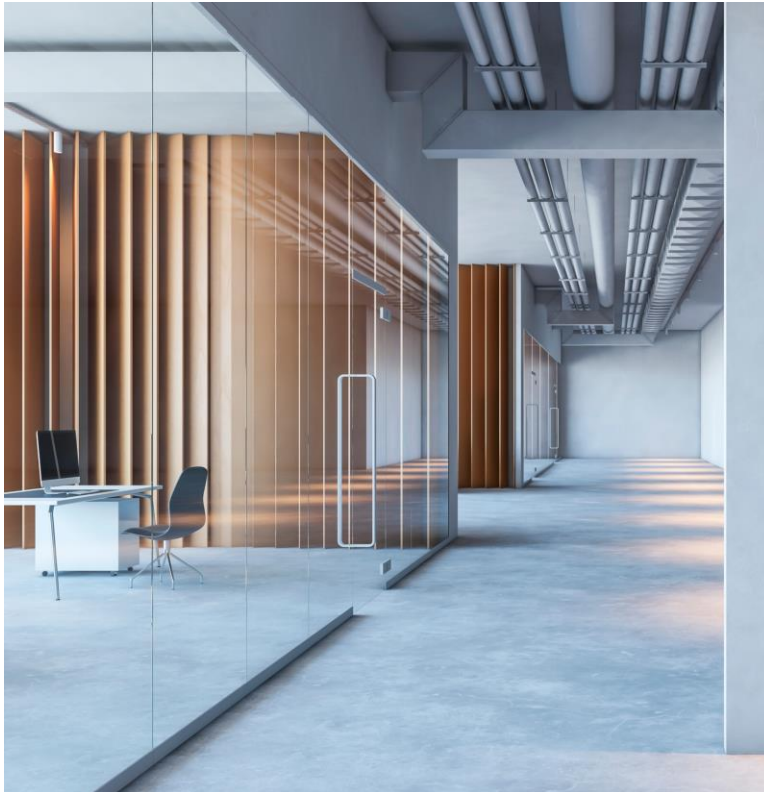
- More than **50%** of respondents confirmed that they use a motorcycle to travel to work.
- A total of **42%** of respondents believe that commuting changes will influence their workplace location strategy. Such changes include greater use of public transport, environmental considerations and the preference for shorter commutes.



Technology Outpacing People Systems

- **47%** of respondents claimed that they are already experiencing a significant impact to operations from AI, with another **32%** believing that it will have an impact in the next 1-3 years.
- When asked which areas of operations are most expected to be impacted by AI, **79%** answered Data Analysis & Decision-Making. While **63%** answered Customer Service & Support.

Workspace Culture & Design



Companies are actively rethinking workplaces as tools **for culture, collaboration, and wellbeing** - but currently many offices underperform.

Workforce models are **collaboration-heavy and digitally enabled**, yet still office-centric.

Skills transformation is well understood but underfunded, especially in **leadership, digital fluency, and adaptability**.

Sustainability is present, but not yet strategic – focused more on wellness than resilience or climate risk.

Commutability and mobility pressures are emerging but not yet decisive.

AI is already impacting core operations, with significant untapped potential in HR and workforce strategy.

From Space to Experience: Workplaces as Culture, Collaboration, and Wellbeing Engines

Companies are aspirationally aligned around experience-led, human-centric workplaces but execution remains uneven. Culture is no longer driven by branding or image alone - employee experience is the dominant decision driver (84%).

Figure 1. Which workspace features most enhance culture, morale, and productivity?

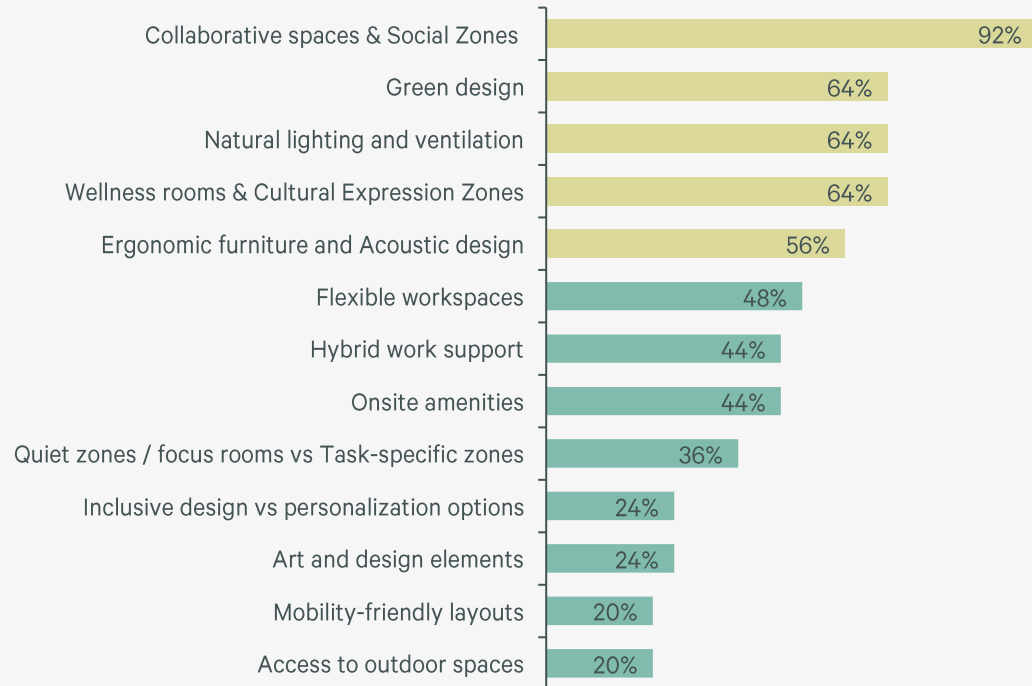
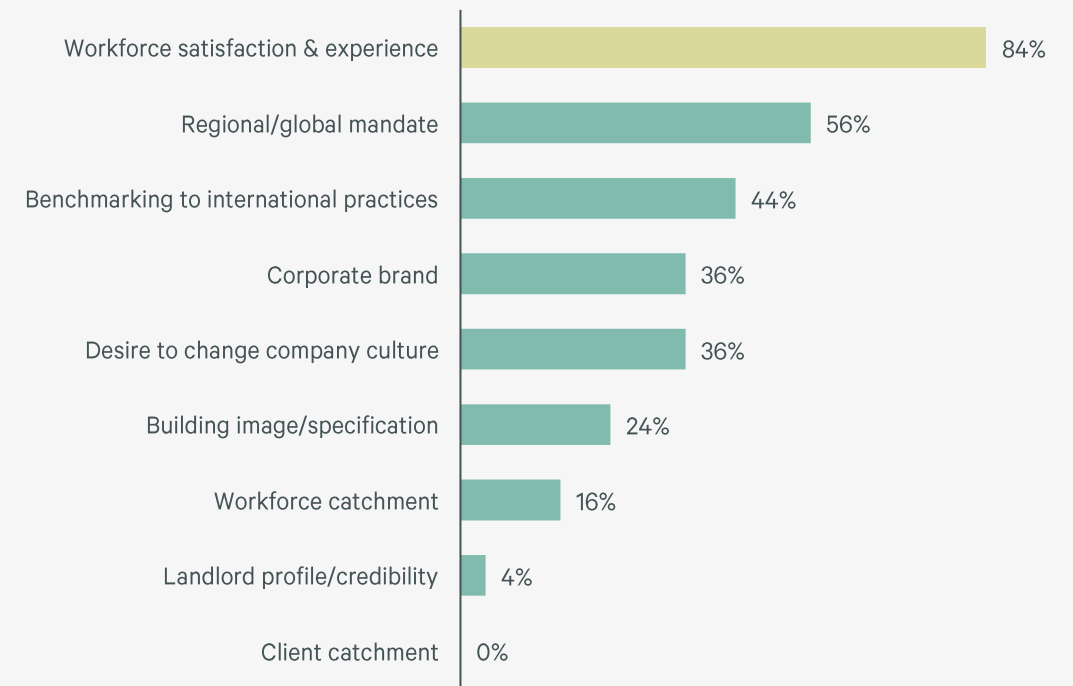


Figure 2. What factors most influence your workspace strategy and decisions?



Note: Survey responded by selected multinational companies from key industries operating in Vietnam

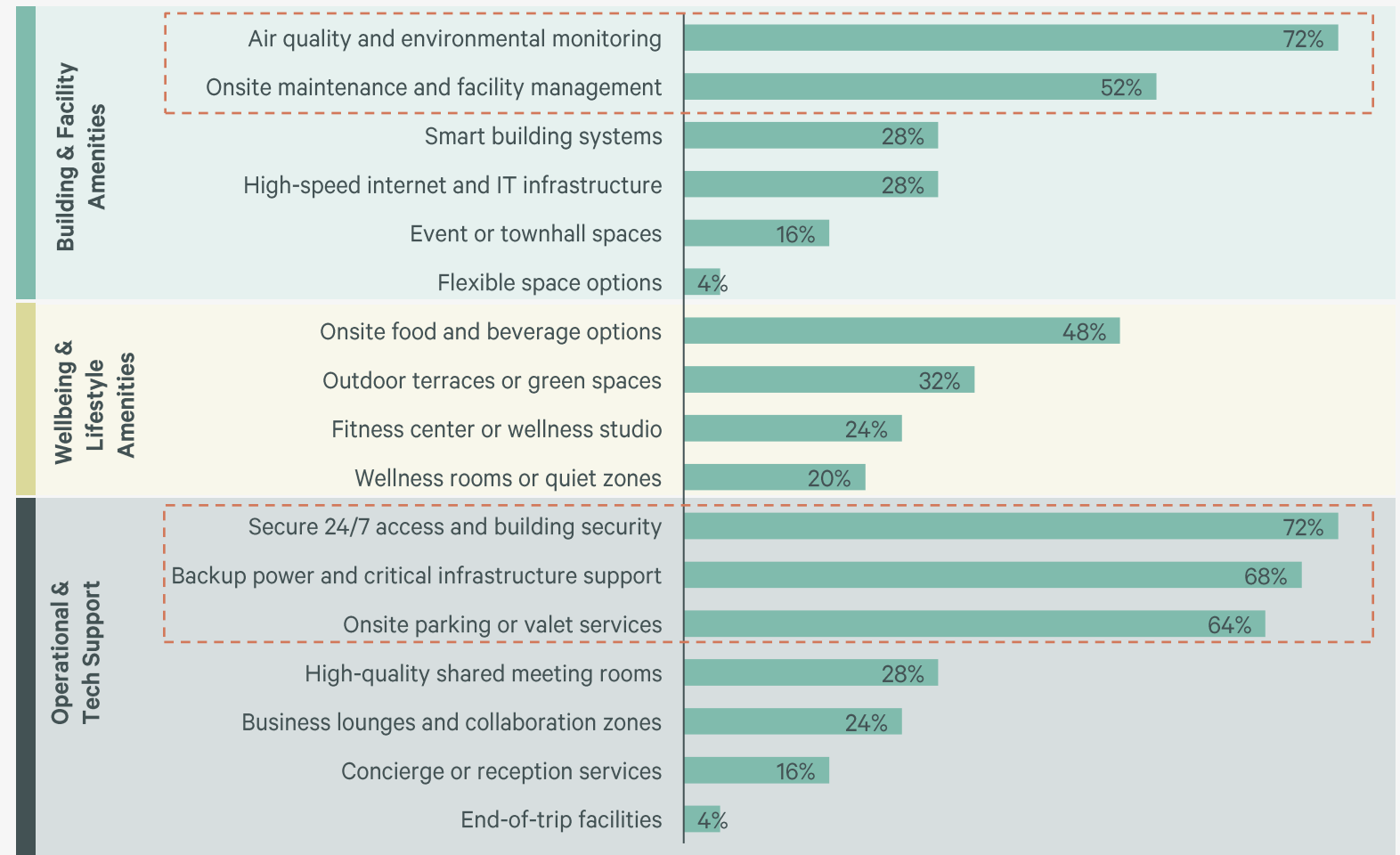
Source: CBRE Research Vietnam, Nov 2025

Reframing Workplace Investment: Health, Security, and Reliability Lead Demand

Companies place the highest value on landlord-provided amenities that ensure operational stability, safety, and employee health, rather than premium or experiential features. Air quality monitoring, 24/7 security, and backup power infrastructure emerge as top priorities, reflecting a strong focus on risk management and business continuity. Wellbeing is perceived more through everyday convenience and access to green spaces than through formal wellness facilities.

Overall, the findings suggest a shift towards a fundamentals-first workplace approach, where reliability and resilience form the foundation prior to enhancing employee experience.

Figure 3. Which landlord-provided amenities are most valuable to your operations?



Note: Survey responded by selected multinational companies from key industries operating in Vietnam

Source: CBRE Research Vietnam, Nov 2025

A Young, Collaborative Workforce Driving New Ways of Working

Figure 4. What is your current headcount?

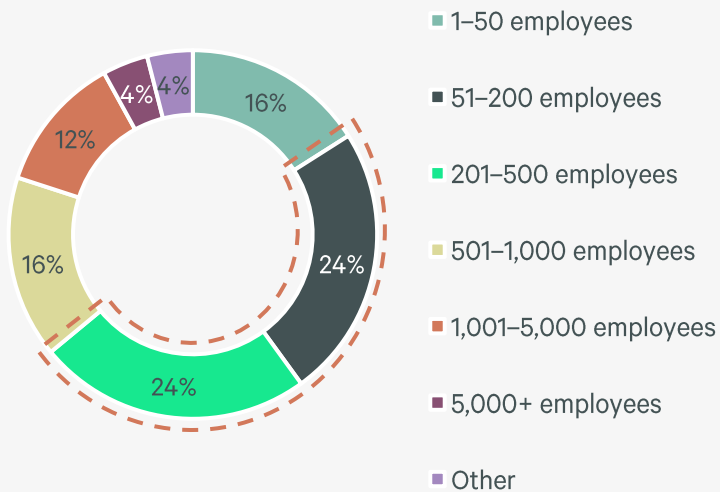


Figure 5. What is the age distribution of your workforce?

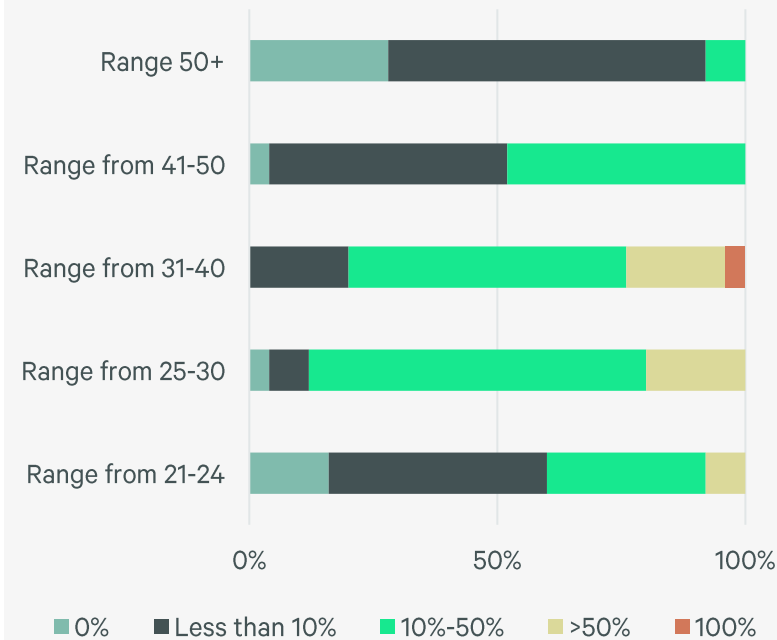
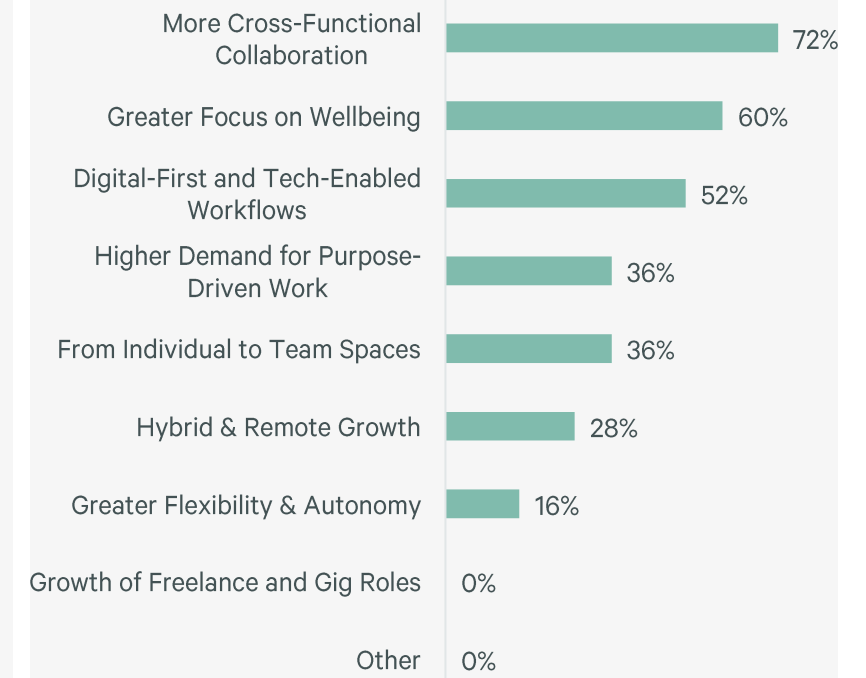


Figure 6. What are the top 3 shifts in work style over the past 5 years?

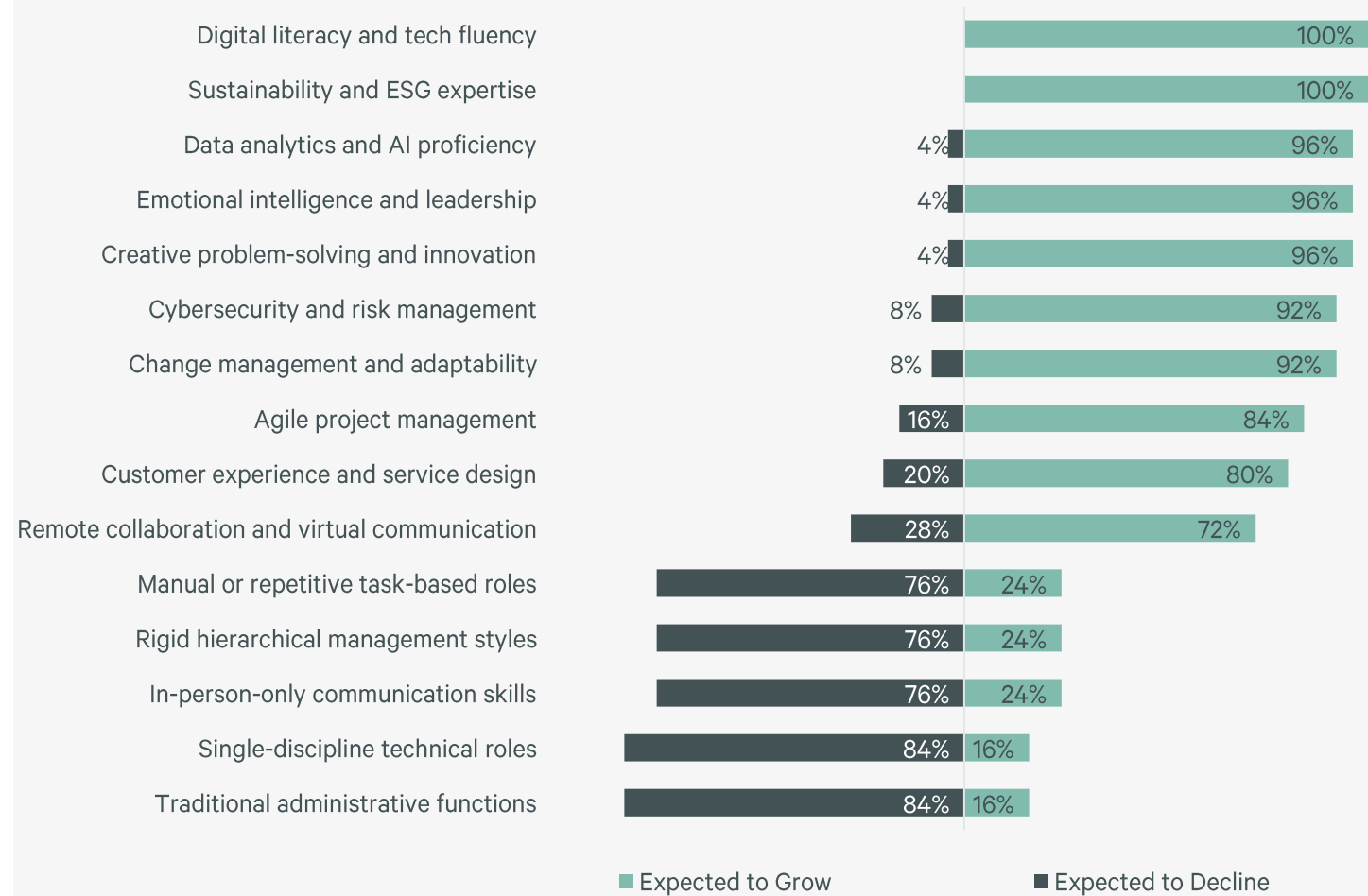


Note: Survey responded by selected multinational companies from key industries operating in Vietnam

Source: CBRE Research Vietnam, Nov 2025

Digital, Leadership, and Adaptive Skills Defining the Next Talent Frontier

Figure 7. Which workforce skills are expected to grow or decline in the next 5 years?



Note: Survey responded by selected multinational companies from key industries operating in Vietnam

Source: CBRE Research Vietnam, Nov 2025

High Awareness, Low Readiness: The Growing Skills Execution Gap

Companies know where skills are heading but lack execution muscle. The biggest gap is not awareness—it’s investment, speed, and integration with workplace and culture. Skills strategy must be tied to learning-enabled workplaces, mentorship models, and digital infrastructure—not just L&D programs.

Figure 8. Do you observe a skill or social skills gap in your workforce?

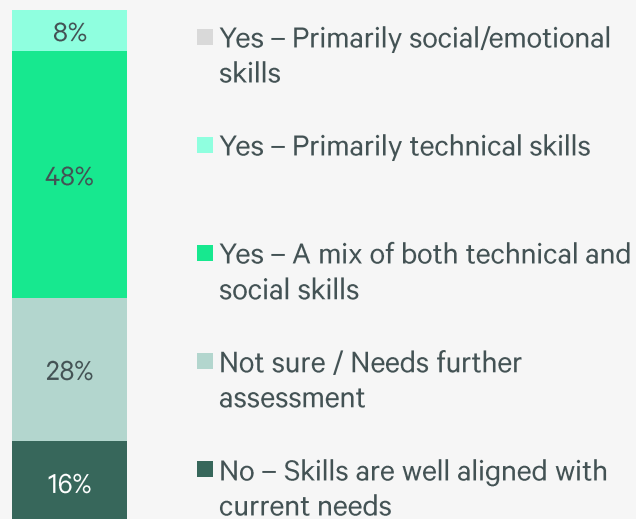


Figure 9. If yes, how well-resourced is your strategy to address it?

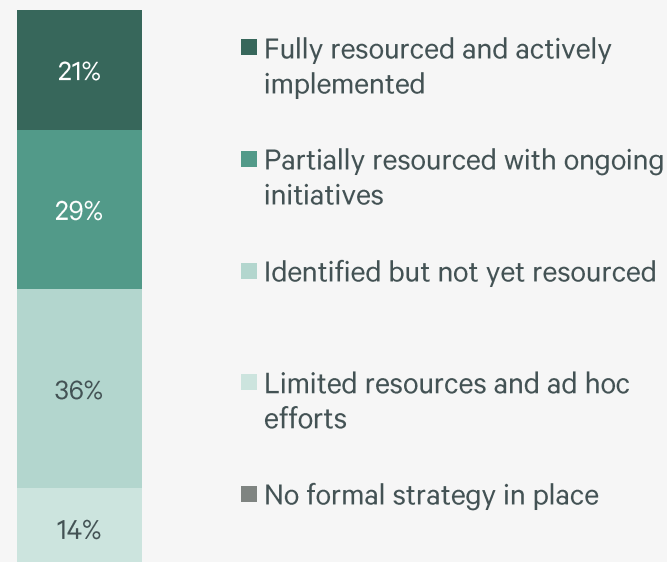
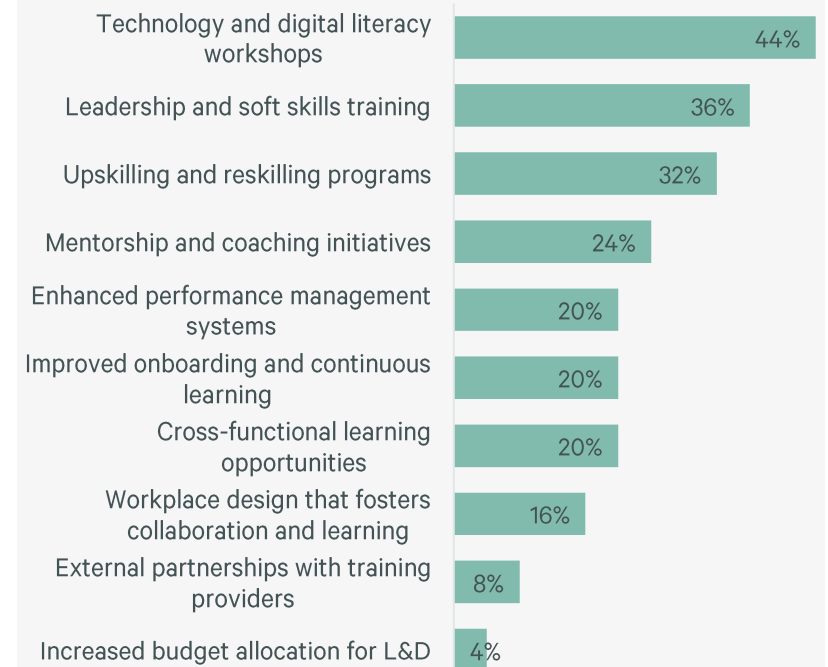


Figure 10. What types of support or investment are needed to close the skills gap in your workforce?



Note: Survey responded by selected multinational companies from key industries operating in Vietnam

Source: CBRE Research Vietnam, Nov 2025

Wellbeing Takes Priority, While Sustainability Remains Emerging

Sustainability is currently framed as wellbeing and workplace quality, not as risk, resilience, or core strategy. There is an opportunity to reframe sustainability from “nice-to-have” to talent attraction, resilience, and cost efficiency - especially in real estate decisions.

Figure 11. On a scale from 1 - 10, How concerned are your workforce with sustainability or climate change?

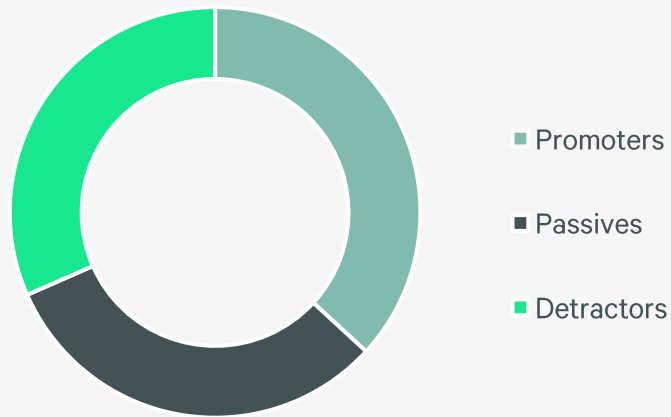


Figure 12. Are sustainability and wellbeing key drivers of business decisions?

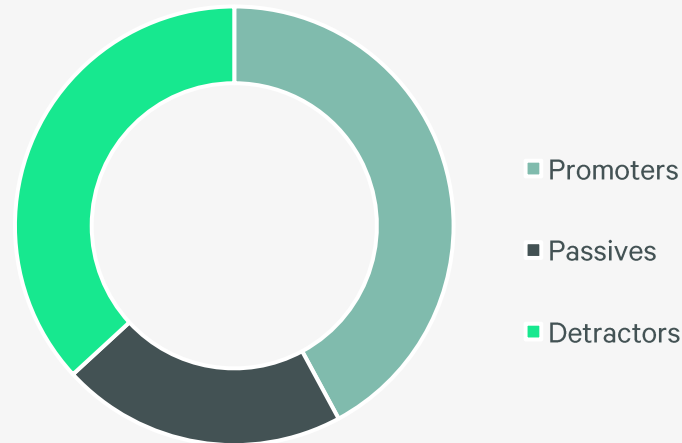
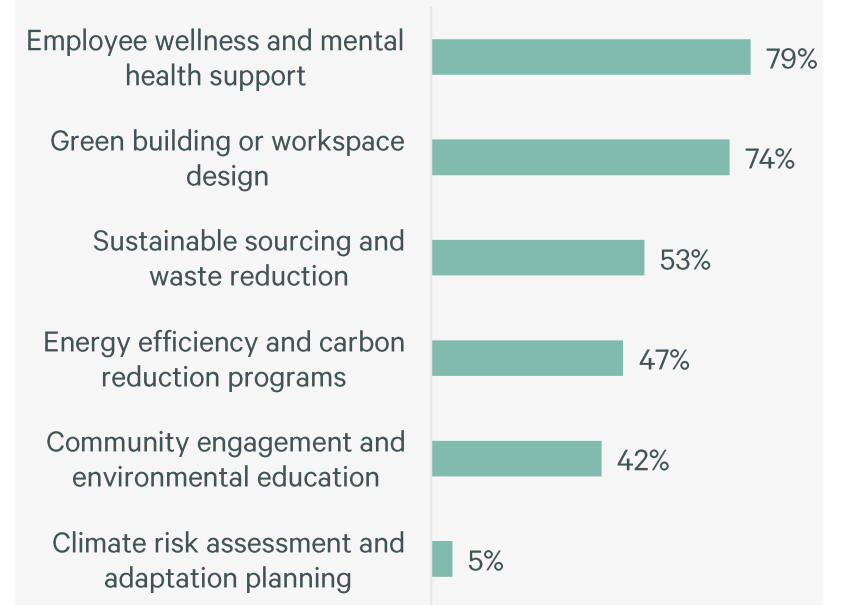


Figure 13. What initiatives are in place for climate, health, and wellbeing?



Note: Survey responded by selected multinational companies from key industries operating in Vietnam

Source: CBRE Research Vietnam, Nov 2025

Mobility Pressures Are Emerging Without Forcing Strategic Change

Mobility pressures are recognized but not urgent yet. Organizations remain reactive rather than proactive in transport-led location strategy. As fuel costs, congestion, and sustainability requirements rise, commute efficiency may quickly become a decisive factor, especially for younger talent.

Figure 14. What is the current commuting breakdown of your workforce?

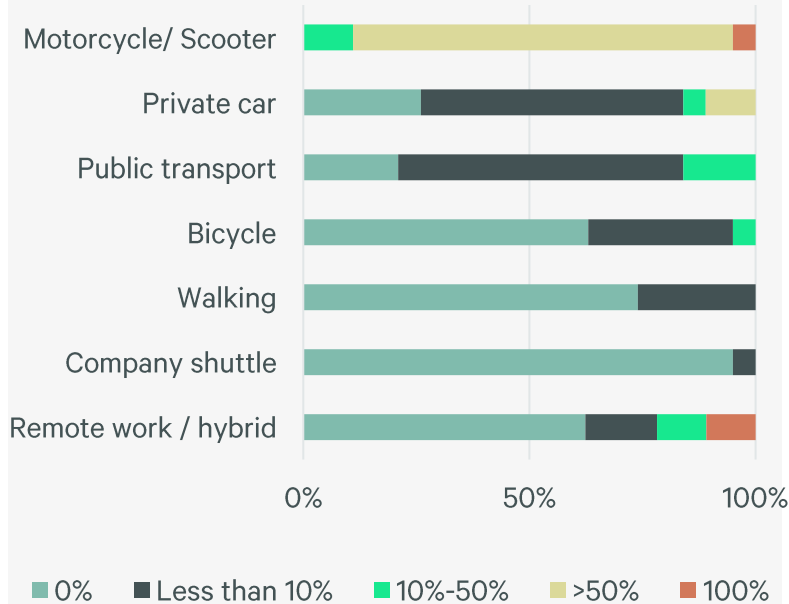


Figure 15. Will commuting changes influence your workspace location strategy?

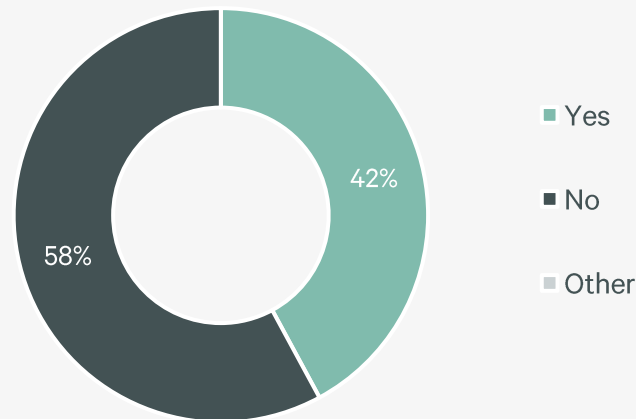
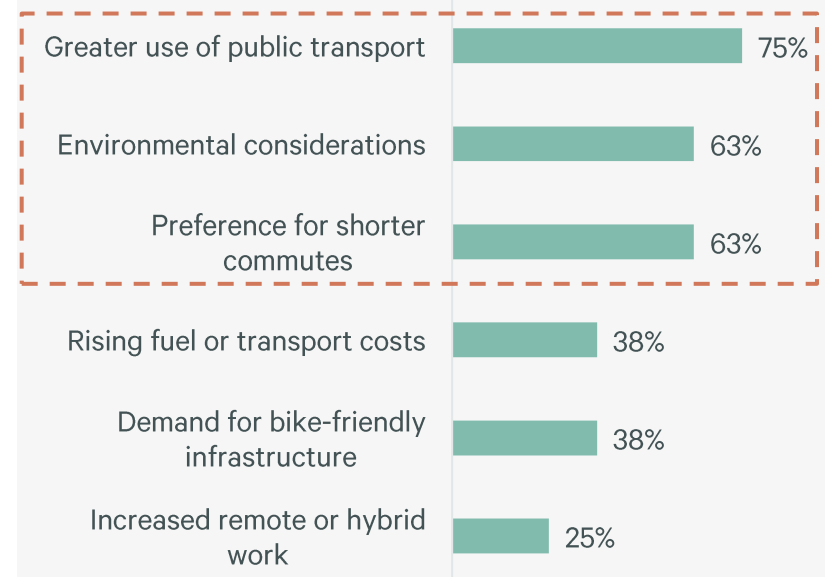


Figure 16. If yes, what specific commuting trends are influencing your strategy?



Note: Survey responded by selected multinational companies from key industries operating in Vietnam

Source: CBRE Research Vietnam, Nov 2025

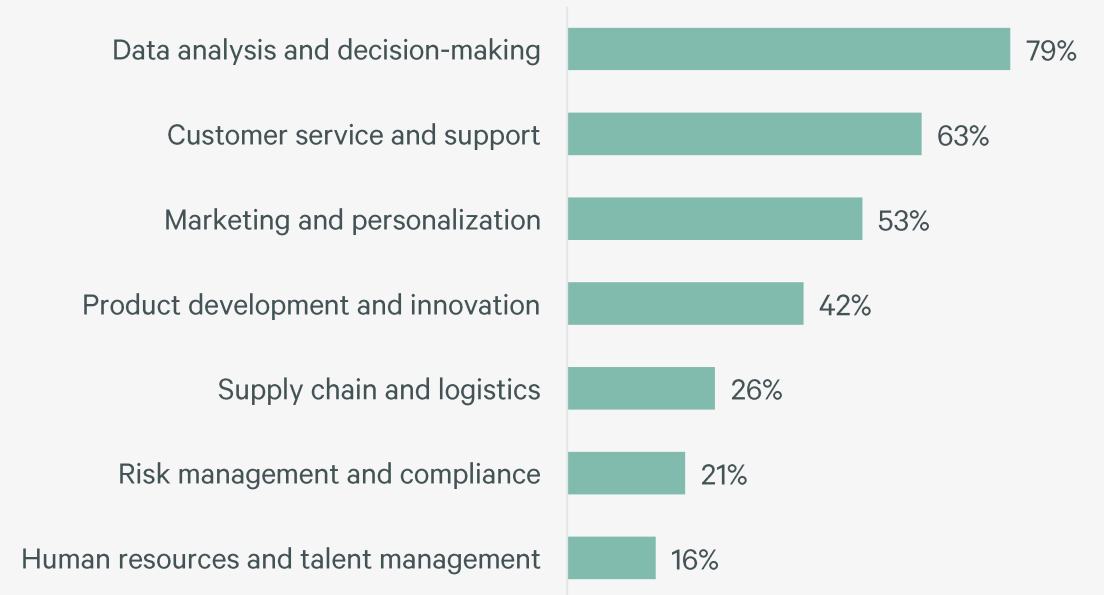
Technology Outpaces People Systems in the Race to Future-Readiness

The impact of AI is already taking place. 47% of respondents have reported already experiencing significant AI impact, with another 32% expecting to feel the impact of AI within the next 3 years. AI is being adopted operationally first, not yet strategically or holistically. Without integrating AI into HR, learning, and workforce planning, companies risk productivity gains without capability maturity.

Figure 17. When do you expect AI to significantly impact your operations?



Figure 18. Which areas of your operations are expected to be most influenced by AI?



Note: Survey responded by selected multinational companies from key industries operating in Vietnam

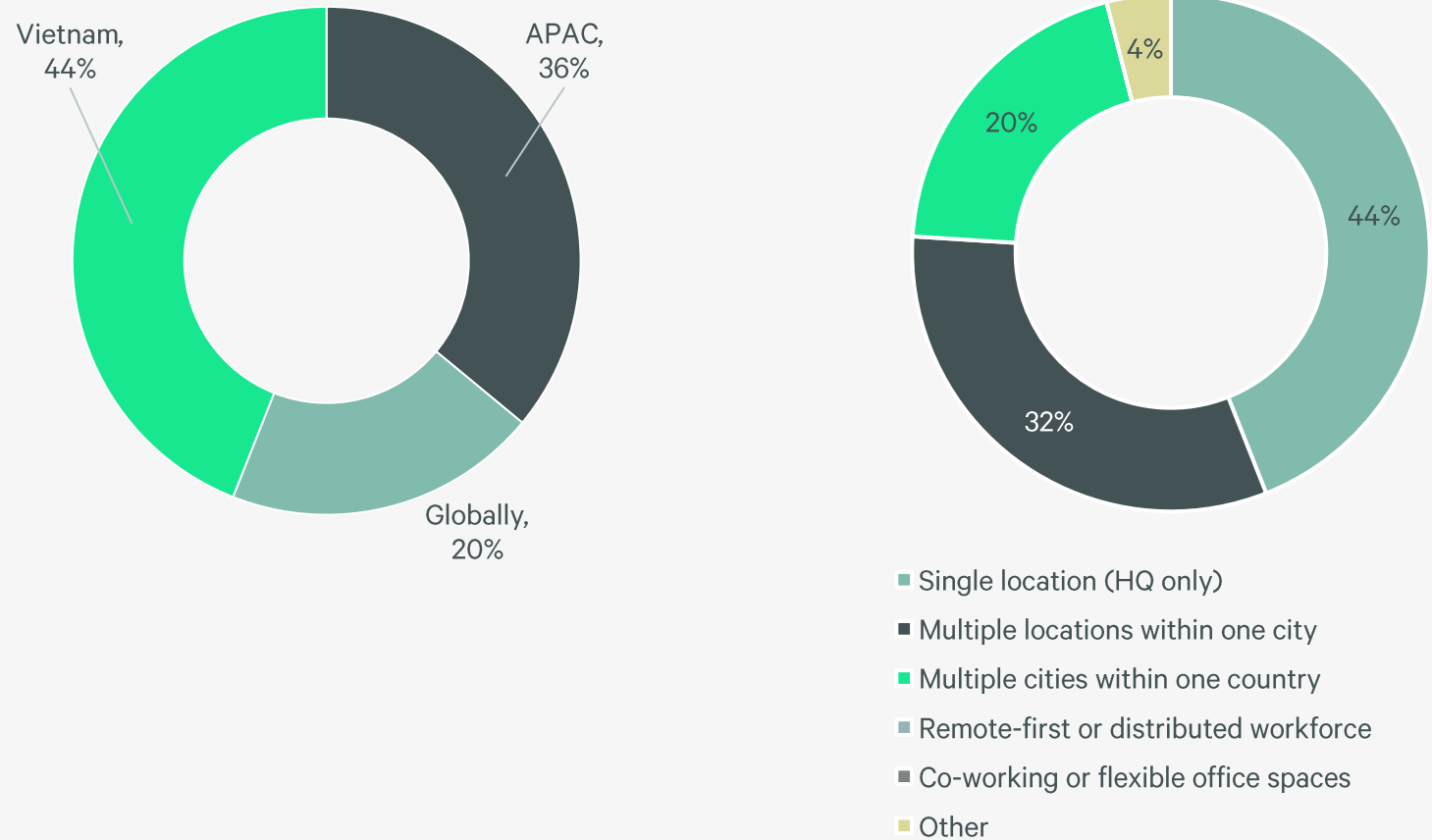
Source: CBRE Research Vietnam, Nov 2025

Survey Profile

This survey draws insights from a carefully selected group of prominent office occupiers, including many large enterprises and multinational corporations. Nearly half of the respondents represent companies operating in Vietnam, complemented by strong participation from organizations across the Asia-Pacific region and global markets.

The respondent pool also reflects a substantial presence of larger employers, with many companies operating sizeable workforces of several hundred to several thousand employees. Together, this group offers a well-rounded and credible perspective from influential occupiers with significant scale and established market presence.

Figure 19. Survey profile



Actions for Landlords & Investors



Collaborate with occupiers to ensure alignment with their needs

- Understand tenant requirements as meeting amenity expectations ensures that leasing demand stays high when marketing space to rent
- Lease conditions including rent-free periods, break clauses, operating expenses, and lease terms & renewal should be revised and in-line with the market average to achieve maximum demand.



Sustainability and technological challenges should be fully considered

- With an increasing focus on sustainability, especially for large corporations, it is important to ensure that the modern workplace aligns with such needs
- Technology benefits occupiers by enhancing comfort, health, security and productivity through personalized, automated environments. A good smart building strategy allows for greater appeal from occupiers in the market



Flight to Quality

- The office "flight to quality" is a market trend whereby companies abandon older, lower-quality (Class B/C) office spaces to lease premium, modern (Class A/A+) buildings
- Consider the net positive benefit of refurbishing dated office space to improve overall building quality and attract a larger pool of high-quality tenants who are part of the "flight to quality"

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