

The Affiliation Imperative: The Office's New Purpose—What the Data Shows



Part 4 of our 2026 Global Workplace & Occupancy Insights series

Introduction

Over the past several years, CBRE has tracked occupancy insights across 1.2 billion sq. ft./111.5 million sq. m. of its global client accounts. This global historical trend data has illustrated the historic transformation of the office from a default workplace to a deliberate choice. It has also measured how organizations have reconfigured space, renegotiated expectations and reimagined bringing people together.

This fourth and final installment of the 2026 Global Workplace & Occupancy Insights series builds on that foundation through the lens of affiliation as an organizing principle. The data increasingly reflects this concept in space allocation, rising utilization and workplace design. The office of the future will succeed because it does something a home office can't: foster human connections that drive engagement, performance and organizational resilience. The data suggests this shift is accelerating.

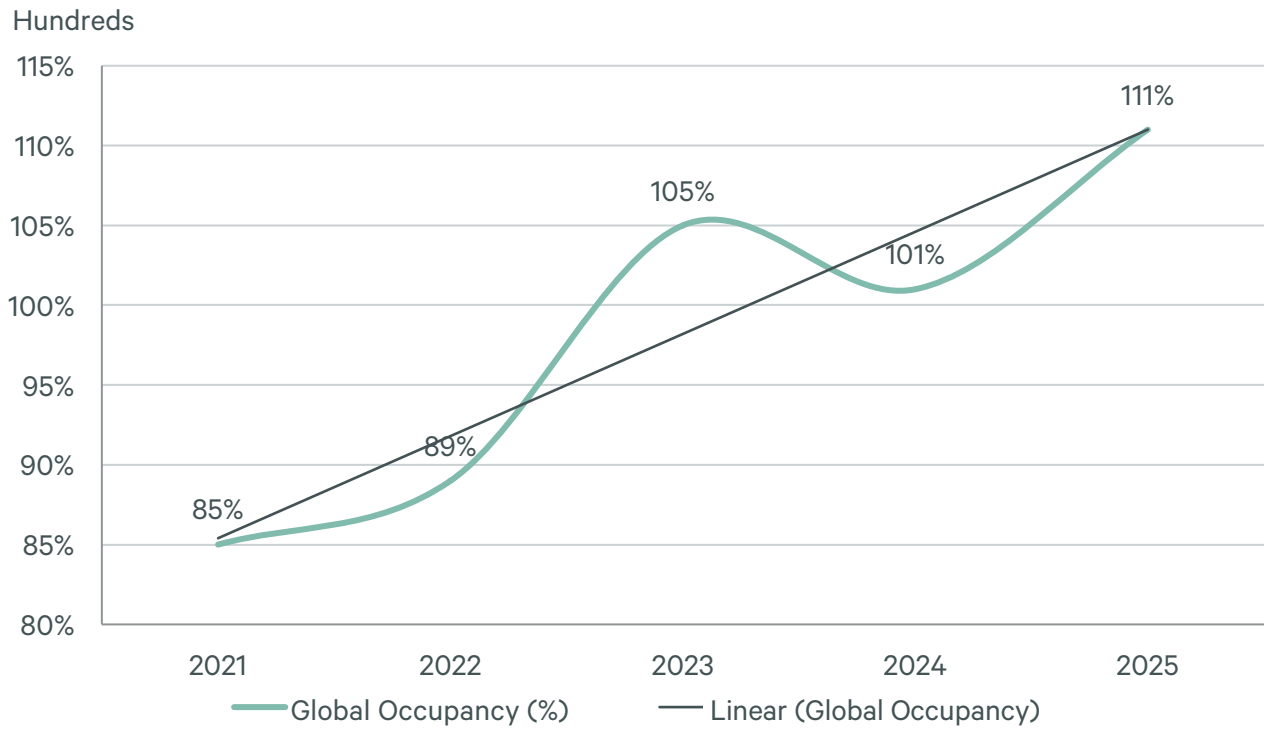
Utilization Is Rising, but Context Matters

The headline of CBRE's 2026 Global Workplace & Occupancy Insights series is striking: global average office utilization (defined as the number of people using a space) surged to 53% in 2025, up from 38% in 2024. This marks the largest annual gain since 2021.

Peak utilization now averages 80% globally, surpassing the pre-pandemic average of between 65% to 70% for most organizations. Even more notably, global occupancy has reached 111%, reflecting a more dynamic workplace model with increased desk sharing.

Rotating schedules and flexible arrangements are managing this density today, but the trend line is clear. Organizations are increasing their use of flexible office space to drive greater utilization and vibrancy.

FIGURE 1: Global Occupancy Rates



Source: CBRE Workplace & Occupancy Benchmarking Program, 2026.

What’s driving this acceleration? The share of global organizations actively enforcing attendance policies [doubled to 37%](#) in 2025 from 17% in 2024, while the share measuring policy compliance rose to 69% from 45%.

What Our Data Shows

The office is winning over employees with the promise of connection, not attendance mandates. Employees are significantly more likely to work in the office when a majority of their colleagues are present. This finding is consistent with broader research showing that team presence and opportunities for collaboration are the key drivers of workplace attendance, suggesting that affiliation may be a stronger motivator more than policy alone.

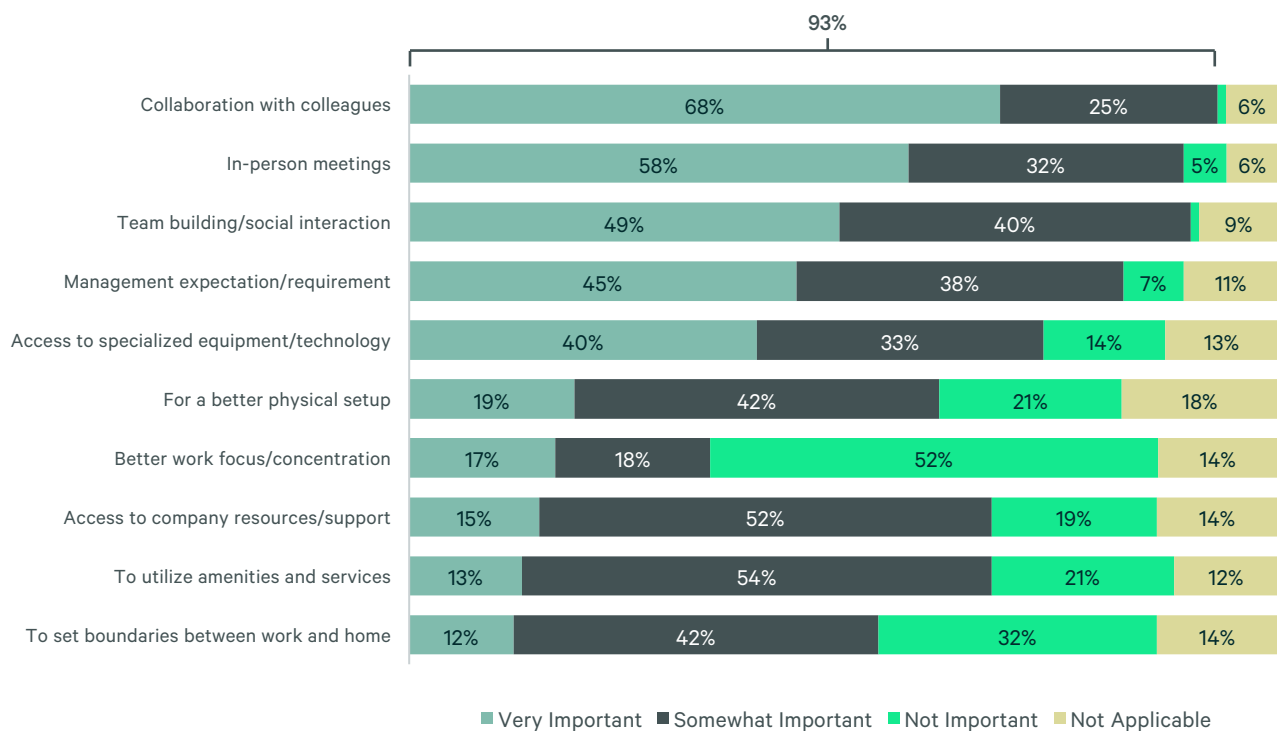


93%

of respondents cite collaboration with colleagues as a very or somewhat important reason to be in the office.

— [CBRE 2026 Global Workplace & Occupancy Insights, Part 2](#)

FIGURE 2: How important is it to be in the office for the following reasons?



Source: CBRE Workplace & Occupancy Benchmarking Program, 2026.

Redesigning Space Around a New Purpose

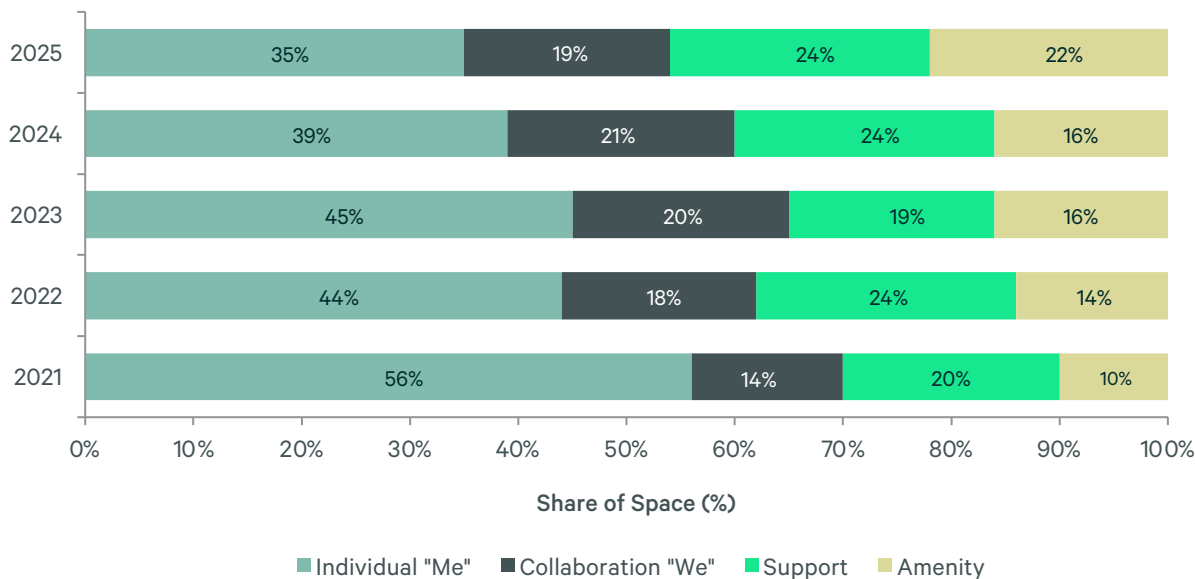
If utilization data indicates that people are returning to the office, then space allocation data indicates what they expect when they get there. Both narratives show that the office's value proposition has fundamentally shifted from processing work to building relationships.

CBRE's Americas benchmarking data reflects a clear trend across organizations:

- **Individual workstations**—designed for heads-down, task-focused work—declined by 10% since 2023. Moreover, individual “Me” space fell to 35% of total space composition in 2025 from 56% in 2021, declining each year.
- **Shared support spaces**—meeting rooms, project rooms and informal gathering areas—increased by 35% in the same period.
- **Amenity spaces**—designed for social connection, shared experience and informal interaction—were the fastest-growing category, surging by 120% since 2021. This growth reflects organizations' rising conviction that culture is cultivated, not assumed.

The trend toward shared support and amenity spaces is a major reset of the office's purpose. The traditional office was organized around the individual and the task. The emerging office is organized around the team and the relationship.

FIGURE 3: Space Composition by Year: 2021–2025 (Global Filtered Average)



Source: CBRE Workplace & Occupancy Benchmarking Program, 2026.

In EMEA, the pattern is distinct but directionally consistent. Space per seat has increased by 14% since 2021, reversing a long-term trend of densification. Organizations are designing more generous, experiential environments to make the time people spend together more valuable and fulfilling.

In Asia-Pacific, where in-office attendance is higher than other regions, organizations are focused on optimization. Fifty-seven percent of CBRE clients in the region expect to further expand their portfolios, driven by the role proximity plays in high-performance collaboration.

The Desk Sharing Signal

The 1:1 employee-to-desk ratio, once universal, is now the exception. Companies using assigned seating has declined to 55% from 83% since 2021, while the use of hybrid and desk-sharing models rose to 36% from 12%. Most organizations are moving toward higher sharing ratios, targeting between 1.01 and 1.49 employees per seat. One-third of organizations are pushing beyond 1.5 employees per seat, a signal that desk-sharing ambitions are still climbing. Furthermore, 83% of organizations now factor job function into sharing ratios and 78% calibrate these ratios with space utilization data.

The office is being redesigned using evidence, not assumptions, about how people actually work.

Why Employee Engagement Matters Beyond Real Estate

These space allocation trends highlight that employee engagement—underpinned by affiliation and shaped by the physical environment—drives business performance.

The research is unambiguous. According to decades of workplace data from Gallup:

- Employees with a best friend at work are [seven times more likely](#) to be fully engaged in their jobs.
- Engaged teams are [23% more profitable](#) than disengaged teams.
- Global employee disengagement cost the world economy [\\$10 trillion in 2025](#), approximately 9% of global GDP.

For corporate real estate leaders, these statistics reframe the investment case entirely. If the office is the primary way organizations cultivate affiliation—through shared experience, spontaneous conversation and visible belonging—then workspace investment can drive organizational performance.

According to CBRE's benchmarking data, organizations that proactively invested in collaboration and amenity space achieved attendance goals at higher rates, reported greater employee satisfaction with the workplace experience, and saw stronger alignment between leadership expectations and employee behavior. Better spaces increase attendance, and increased attendance justifies better spaces.

The Flight-to-Quality Signal

Vacancy in prime office buildings with plentiful amenities [is measurably lower](#) than the broader market. Occupiers have recognized that the quality of the environment shapes the quality of the experience, which drives affiliation.

AI, Work Patterns and the Future of Occupancy

Any forward-looking assessment of workplace strategy must recognize the accelerating integration of AI into how work is done and what it means for office utilization.

327%

Expected growth of global AI agent adoption

AI Adoption is Growing

The global adoption of AI agents—systems that autonomously perform multistep work tasks—is expected to grow by 327% over the next year, nearly twice the adoption rate of generative AI. Additionally, 79% of organizations already reported some level of AI agent implementation in 2025, and 88% of senior executives said they planned to increase AI-related budgets by the second half of 2026.

The early impact of AI adoption on space demand and office utilization points to a counterintuitive dynamic: the workday isn't shortening, it's intensifying. Employees in roles with high AI exposure are currently working 2.75 hours more per week, not fewer. These employees are also spending more time creating and managing AI outputs, which reduces natural work breaks and leads to greater mental fatigue. Overall, near-term productivity gains are flowing to organizations in the form of output, not to employees in the form of reclaimed time.



The Office is More Valuable, Not Less

Work intensity is not the same as workplace isolation. Early academic research shows that well-designed AI systems may actively nudge people toward [more and better human-to-human interaction](#). When AI assumes the burden of routine, repetitive and process-intensive work, what remains requires qualities that machines can't replicate, such as intuition, judgment, creativity and relationship-building.

This has direct implications for the workplace. As AI continues to absorb transactional work, the activities that bring people to the office—and that the office is uniquely positioned to support—become more valuable. The office of the future won't compete with AI-enabled remote work on individual productivity, but on collective capability.

Design for New Ways of Working

The volume and structure of work have shifted significantly. Since February 2020, the time employees spend in meetings has [more than tripled](#). Today, 57% of the average office worker's time is consumed by meetings, email and chat, leaving only [43% for focused creative work](#). Moreover, the share of employees who clearly know what is expected of them [fell to 44% in 2024](#) from 55% in 2019.

These are symptoms of a workforce that is over-coordinated and under-connected—a condition that the right physical environment and more intentional work design are well-positioned to address.



Our Near-Term Projection

Utilization will continue to rise through 2027, driven by a combination of policy enforcement, stronger cultural alignment and the growing recognition that in-person connection is a strategic advantage. Organizations that have already invested in collaborative and social spaces will be better positioned to realize the full value of this trend. Those that haven't will face increasing pressure from both employees and leadership. Employees will vote with their feet for environments that make the trip worth it, while leaders will need the office to deliver on its promise of culture and performance.

What This Means for Occupiers: Five Strategic Priorities

- 1. Redefine the success metric.** The utilization rate is a necessary but insufficient measurement. Organizations seeing the greatest return on workplace investment are those that track effectiveness by the outcomes their space produces. Employee sentiment, collaboration quality, goal clarity and engagement scores are the metrics that matter.
- 2. Design for affiliation.** Space allocation should build human connections that drive long-term performance. Invest in the social and amenity spaces that have historically been underweighted in the budget and that CBRE data shows are growing the fastest among top-performing occupiers.
- 3. Develop a data-led attendance strategy.** The era of broad attendance mandates is giving way to more nuanced, role-based approaches. Benchmarking data shows that organizations with higher in-office requirements for managers, new employees and client-facing roles report stronger attendance than those with uniform mandates. Occupancy data, presence-awareness technology and employee sentiment drive policies that people follow.
- 4. Build the technology backbone.** Smart building technologies like space reservation systems, presence sensing and AI-powered occupancy analytics should be part of every organization's infrastructure. Companies that use these tools are better able to anticipate demand, manage peak-day density and create visibility. Employees come to the office to be with colleagues. Technology that tells them who will be there and guarantees the spaces they need will be available directly supports attendance.
- 5. Treat the office as a strategic asset.** The office is a dynamic platform for organizational performance, culture and talent, not a fixed overhead expense to be minimized. Organizations that have invested in quality, experience and the physical conditions for affiliation are pulling ahead, while those that are still optimizing for efficiency alone are leaving value on the table.



Conclusion

Five years ago, the dominant question in corporate real estate was whether the office would survive. Today, the office is not only surviving but gaining utilization at its fastest rate in years, reshaping its spatial composition and finding a more important role in organizational life. The focus now is on the office's purpose. Organizations that clearly articulate why the office exists and invest accordingly will have a powerful tool for attracting, retaining and engaging their people. The data in this series points the way forward. The next move belongs to leadership.

About the Series

CBRE's 2026 Global Workplace & Occupancy Insights is a four-part series that explores the hybrid workplace and offers a data-driven roadmap for organizations adapting their real estate, operations and culture. The topics covered include recognizing hybrid's evolution, designing a connected employee experience, aligning leadership and employee expectations, leveraging AI and technology for space optimization, and preparing for the future of work. The goal: building a thriving hybrid workplace.

Methodology

The 2026 Global Workplace & Occupancy Insights series summarizes five years of office benchmarking and sentiment surveys on how CBRE clients have adapted their office environments since 2021. The study examines global data from select CBRE clients representing 303 million sq. ft./28 million sq. m., with an average office portfolio size of 5 million sq. ft./465,000 sq. m., and delivers insights by portfolio size, industry/sector and region/geography.

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