

New Zealand Office Occupier Sentiment Survey 2025

REPORT



SEPTEMBER 2025



The evolution of
New Zealand's
office workplaces

The challenges facing office occupiers today are no longer new. We are now several years removed from the initial disruption caused by widespread remote working during the pandemic, and many organisations have settled into hybrid models as the new normal. Yet the cause and effect of these changes continue to unfold, bringing fresh challenges as businesses seek the right balance between flexibility, productivity, and culture.

Now in its third year, the CBRE New Zealand Office Occupier Sentiment Survey captures the views of 94 corporate real estate executives across 15 industries, representing over 247,000sqm of office space and more than 22,000 employees across Auckland, Wellington, and Christchurch.

This year, we've taken a closer look at the growing desire among organisations to boost office attendance and the factors driving this shift. To support this, we've explored how markets such as Australia and the Americas are responding to similar challenges. These regions are frequently referenced by local industry and media, which has shaped perceptions of workplace trends here in New Zealand. Our insights help this discourse by objectively placing New Zealand trends into the global context. They also expand our understanding of how occupiers are navigating hybrid working, space utilisation, and real estate strategy in a time of economic uncertainty and climate change.



How New Zealand businesses are fine-tuning hybrid working

93%

Of organisations support hybrid working, up from last year's 91%

3.3 days

Spent working from the office during a typical working week, no change from 2024, but up on 3.2 days in 2023

64%

Is the average office utilisation across a typical week, up from last year's 62%

11%

Of organisations have formal incentives or consequences relating to how often employees work from the office

31%

Of organisations have plans to relocate office premises, down from last year's 39%

25%

Of organisations plan to adjust their workplace as a result of hybrid working, and another 40% have already done so

Contents

01	Hybrid Working	02	Workplace	03	Real Estate Strategies	04	Considerations for Occupiers	05	Survey Participant Profile
	Pages 6 to 11		Pages 12 to 15		Pages 16 to 22		Pages 23 to 24		Pages 25 to 26

01

Hybrid Working



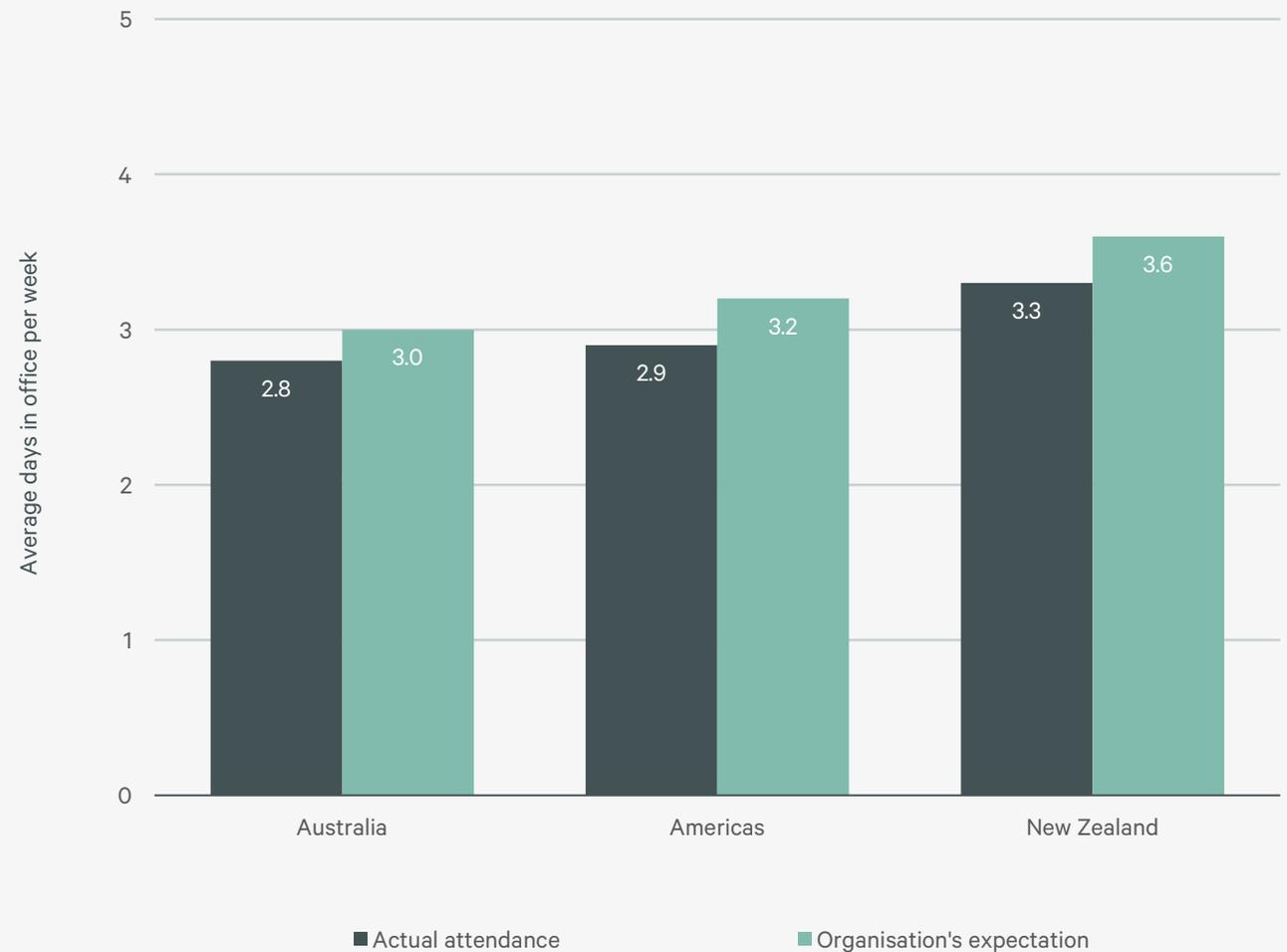
New Zealand Office Attendance Surpasses Regional Aspirations

Office attendance is gaining ground in New Zealand's hybrid work mix, with patterns varying by industry, organisation size, and decision-making structures. The national average sits at 3.3 days per week, unchanged from 2024, but up from 3.2 in 2023.

CBRE's 2025 US and APAC Regional Office Occupier Surveys show a consistent employer push for more in-office time. Notably, New Zealand's actual attendance (3.3 days) is ahead of Australia (2.8 days) and the USA (2.9 days) and even exceeds the aspirational targets set by employers in those countries.

While a gap between employer expectations and actual attendance remains across global markets, New Zealand stands out for having actual office attendance that exceeds the aspirational targets of its regional peers.

FIGURE 1: Average days in office by country or region



3.3 Days and Rising: Leadership Pushes Office Attendance

Decision-making around hybrid work has shifted upwards, with senior leadership and HR now playing the central role in setting attendance expectations. While many organisations establish minimum in-office days, they often leave room for team managers to tailor arrangements to their teams.

Where decisions are made at the team level, average office attendance is 3.4 days (unchanged from 2024). When led by the organisation, attendance averages 3.3 days, up 0.1 day from last year, indicating a subtle but steady push toward more in-office time.

This trend spans industries and office sizes. Law firms lead with the highest actual attendance at 3.8 days, and a minimal gap (0.1 day) between expected and actual attendance.

In the public sector, the Government has articulated the expectation for public sector workers to work predominantly in the office. In our survey results, leadership has set this expectation at 3.4 days, while actual attendance averages 3.0 days, reflecting a moderate gap despite clear government direction.

The largest attendance gap, nearly one full day (0.9 days), is seen in both the technology sector and organisations with over 1,000 employees. These results highlight the challenge of aligning leadership expectations with employee behaviour in larger or more flexible work environments.

* *Work from Home / Work from Office*

Organisation-led
▲ 3.3 days

When leadership set hybrid work pattern, up 0.1% from 2024

Team-led
▬ 3.4 days

Teams set hybrid pattern in 2025, no change from 2024

Individual-led
▼ 3.0 days

When individual employees set hybrid pattern in 2025, down 0.2% from 2024

FIGURE 2: Decision-making around hybrid work patterns

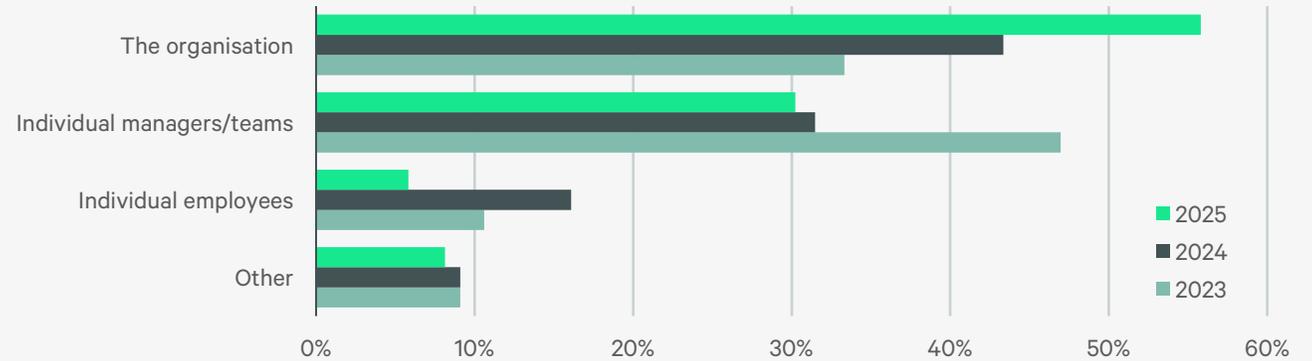


FIGURE 3: The gap between actual days in office compared to organisation's expected attendance



Hybrid Holds Strong, Even as Four Days Gains Ground

While three days remains the dominant hybrid pattern (48%), four days is also widely adopted (31%). Very few organisations operate at either extreme of just one or two days in the office, or a full five-day return. Interestingly, two days is more popular than five, reinforcing that hybrid working remains the norm, even in cities like Christchurch.

Office attendance varies significantly by city. Christchurch leads with an average of 3.8 days in the office, ahead of Auckland (3.1 days) and Wellington (3.0 days). Christchurch's higher attendance reflects its status as a more traditional office-centric city, shaped by fewer lockdowns during the pandemic and newer office stock following the earthquake rebuild. Greater car parking availability in the city will also contribute to easier commutes, a practical factor that continues to influence attendance

In the public sector, Christchurch employees average 4.0 days in the office, fully aligned with leadership expectations. Auckland shows the largest gap, with 3.0 actual vs. 3.5 desired, while Wellington, home to the highest concentration of public sector organisations, averages 2.8 actual vs. 3.2 expected. Wellington, which has the lowest actual attendance at 2.8 days, compared to a 3.2-day expectation, may be experiencing broader morale or engagement challenges that go beyond hybrid policy alone.

FIGURE 4: New Zealand average days in office by city

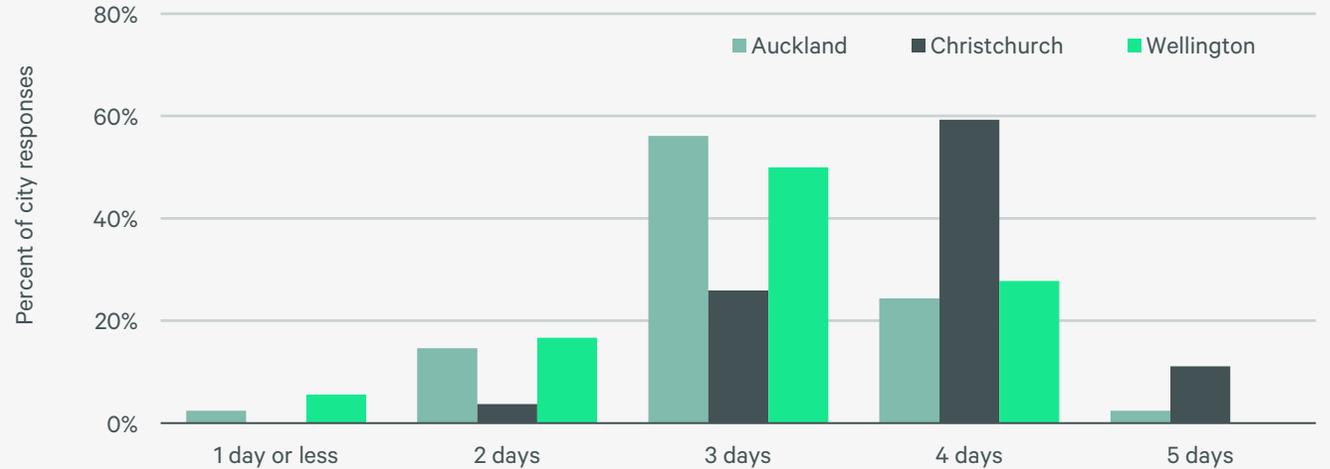
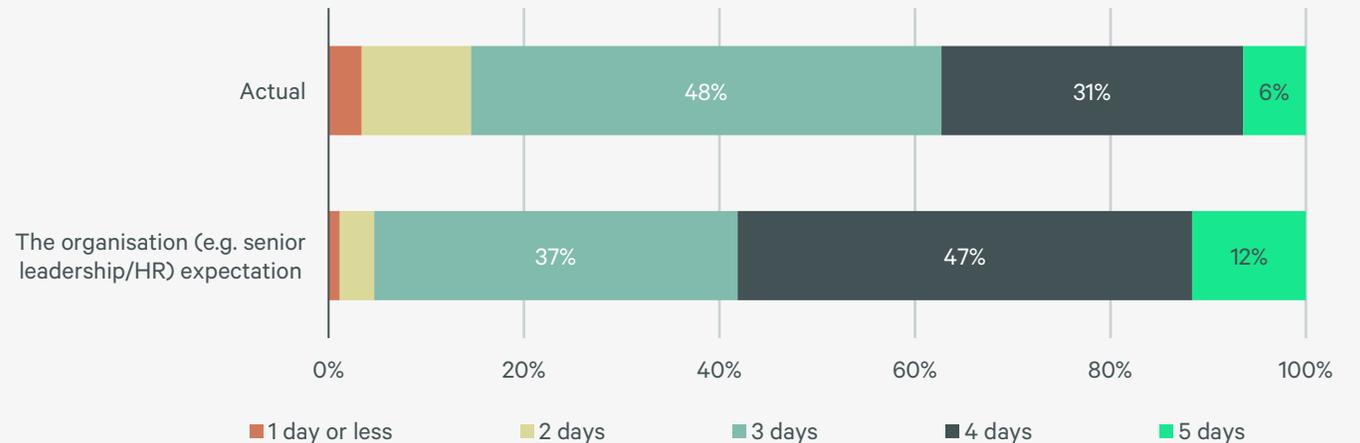


FIGURE 5: Days in the office – Actual & Leadership desired attendance



Supporting the Next Generation in a Hybrid World

Supporting junior employees is now the leading concern for organisations navigating hybrid work. This option was newly added to this year's survey, based on feedback from previous participants and its #1 ranking confirms it's top of mind for many employers.

Junior employees benefit from being in the same physical space as experienced colleagues, where they can receive real-time feedback, hands-on guidance, and observe workplace norms in action. This exposure is essential for learning tools, techniques, and behaviours that are hard to replicate remotely. For those whose education or early work experience was shaped by remote environments, this presents a unique challenge, and organisations are increasingly recognising the value of physical proximity in accelerating development and cultural integration.

Maintaining a strong culture remains a significant challenge, ranking second this year after topping the list in 2023 and 2024. These people-first concerns reflect the importance of ensuring employees are well supported and aligned, both for wellbeing and productivity.

Measuring productivity, both workplace and individual is also a growing focus. This is reflected in the increasing number of organisations adopting systems to regularly track office space utilisation.

Meanwhile, there is now less emphasis on attracting employees back to the office, developing new protocols, or managing mental health issues. These shifts suggest that hybrid working is no longer seen as a temporary adjustment, but as business as usual.

FIGURE 6: What are the top challenges your organisation has faced in relation to hybrid working?

	2025	2024	2023
Mentoring and guidance for junior employees	# 1	-	-
Keeping/building strong culture when people are in the office less	# 2	# 1	# 1
Accurately sizing capacity and rethinking design of productive hybrid workplaces	# 3	# =5	# 4
Measuring impact of home and hybrid working on productivity	# 4	# 2	# 6
Deciding when/how often employees come to the office (optimise space use and productivity)	# 5	# =5	# 3
Attracting employees to spend more time in the office	# 6	# 3	# 2
Developing new workplace protocols and behaviours to optimise hybrid work	# 7	# 4	# 5
Identifying and supporting hybrid work related mental health issues	# 8	# 7	# 7

Hybrid Work isn't Going Anywhere, it's Evolving

Despite a renewed focus on productivity and increased in-office expectations, hybrid work remains firmly embedded in workplace strategy. 93% of organisations surveyed support hybrid working, up slightly from 91% in 2024.

Furthermore, participants overwhelmingly identified two key drivers for supporting hybrid working – employee satisfaction (42%) and talent attraction and retention (33%).

With hybrid working so clearly linked to employee satisfaction (and by inference morale too), it is unlikely that hybrid working will dissipate. Hybrid working is an employee benefit that is generally of low cost to the organisation and of high value to employees.

Hybrid work is now seen as a high-value, low-cost benefit, one that boosts morale and supports recruitment in a market where skilled talent remains scarce, despite elevated unemployment rates.

Interestingly, few organisations cited competitive pressure, space optimisation, or cost management as reasons for offering hybrid work. This reinforces that the model is being sustained not for operational efficiency, but because it supports people and performance.

While expectations for office attendance are rising, only 1 in 4 organisations have formal mandates, and just 11% link attendance to KPIs, bonuses, or restructuring decisions. However, this may shift. As employers seek productivity gains, we expect more to adopt monitored attendance policies with clearer incentives or consequences.

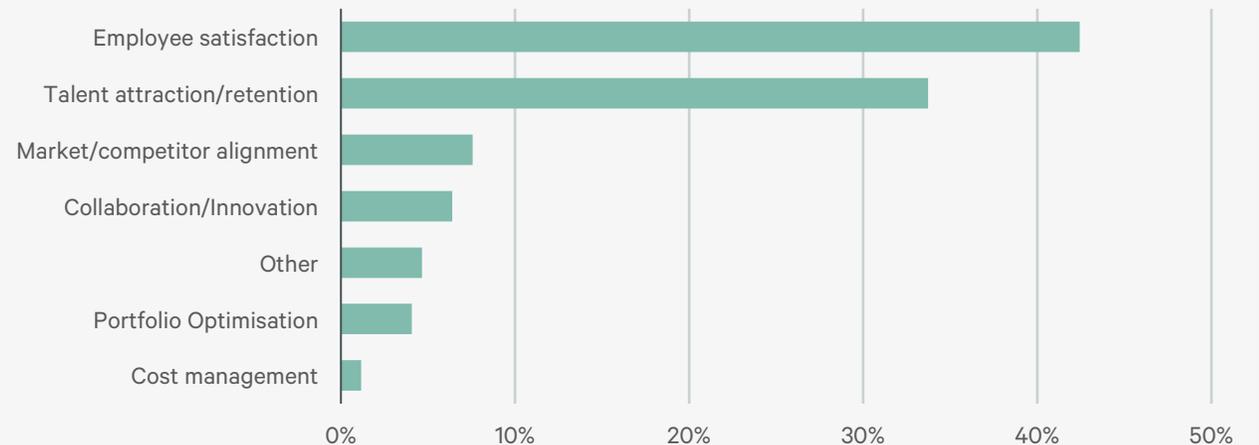
93%

Of participants support hybrid working.

11%

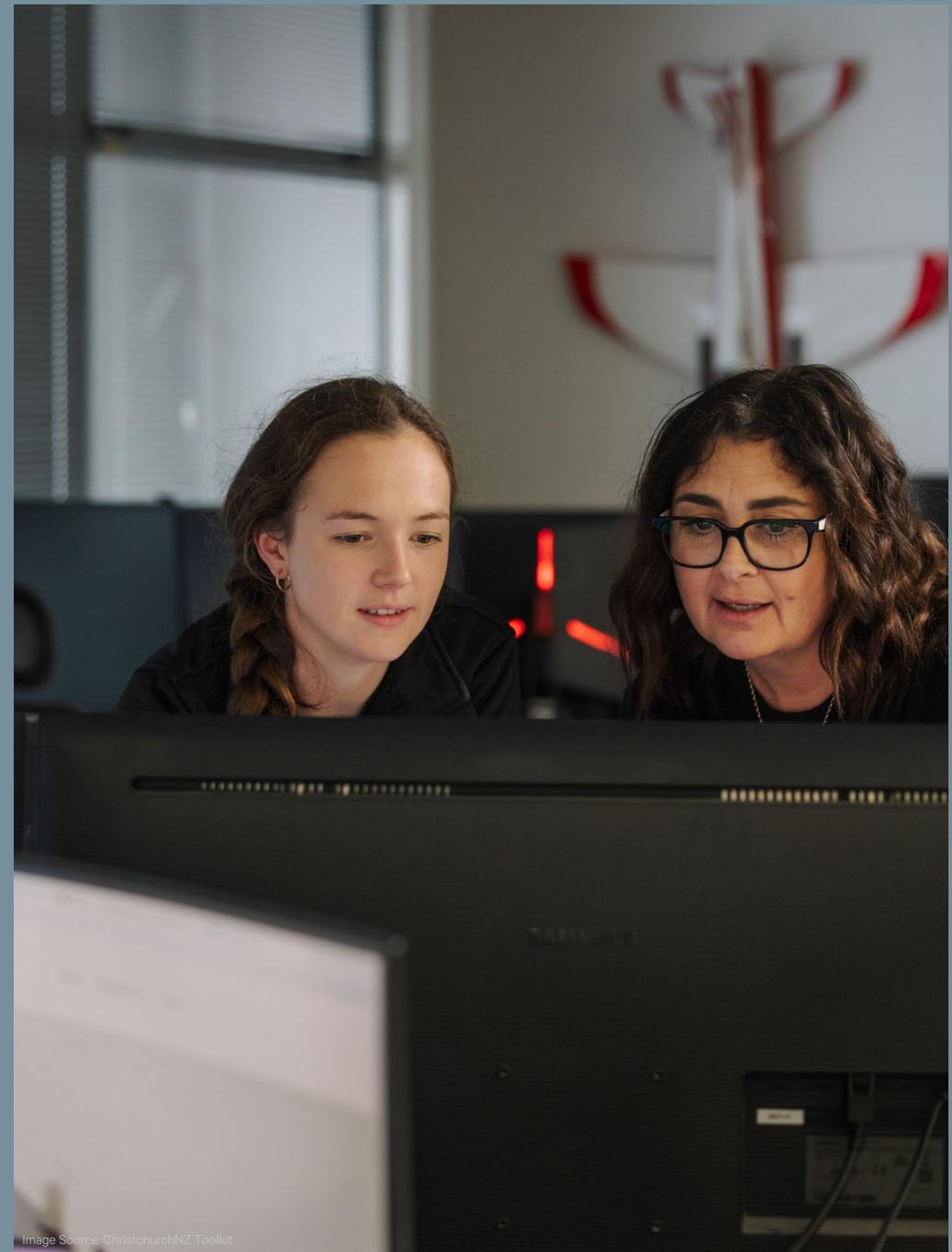
Of participants have formal incentives and/or consequences relating to how often employees work from the office.

FIGURE 7: Drivers for hybrid working



02

Workplace



Office Utilisation Rates are Rising

New Zealand’s average office utilisation has increased slightly, from 62% in last year’s survey to 64% in 2025. This refers to the percentage of office space occupied during a typical work week, and it’s notably higher than the averages in Australia (52%) and the Americas (51%).

87% of survey participants reported that their organisation regularly tracks office utilisation. Tracking utilisation enables organisations to identify attendance patterns over time. This data can support workforce attendance planning including anchor days, and informs decisions around workplace design and space requirements.

We also asked occupiers how they’re managing overcrowding, a topic that has gained attention in international case studies. While some have taken steps to manage attendance, 60% of respondents said they haven’t needed to. Among those who have, the most common strategies include:

- Rostered anchor days (11.6%)
- Mandatory office days (9.3%) to flatten attendance peaks
- Alternative work points (9.3%) to ensure employees have a place to work when desks are full

These findings suggest that while utilisation is rising, most organisations are not yet experiencing overcrowding at a scale that requires major intervention.

FIGURE 8: What is your current level of office utilisation for your organisation?

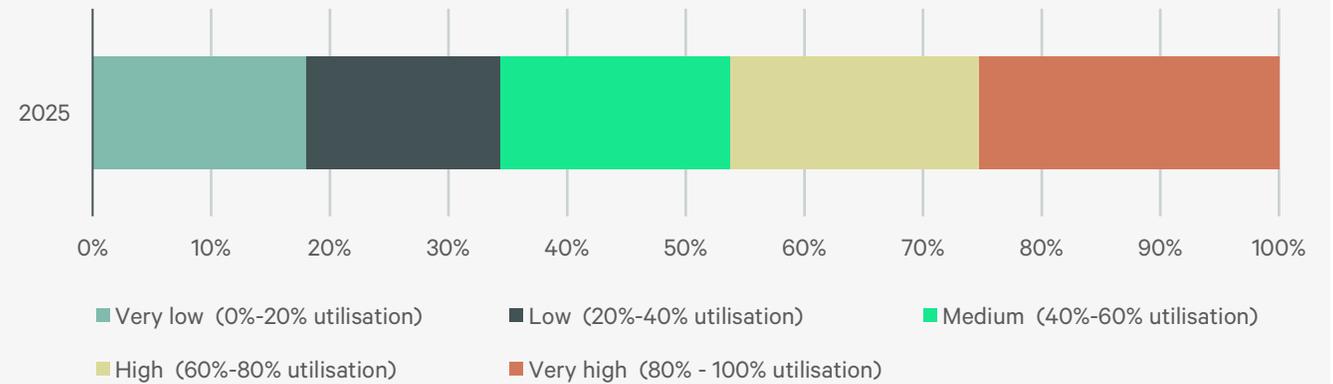
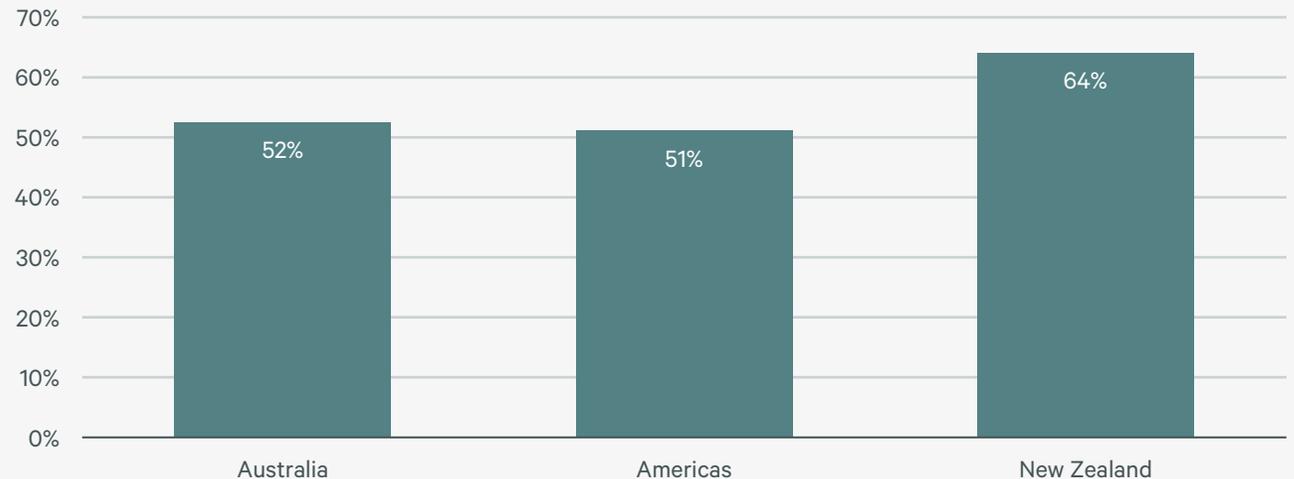


FIGURE 9: Average weekly office utilisation by country or region



Sensors & Sensibility

With office space representing a significant cost for occupiers, monitoring utilisation is essential for informed workplace planning. It helps organisations understand when and how often overcrowding or under, utilisation occurs, and respond accordingly.

While 87% of occupiers track utilisation, 12% do not. Reasons may include operating on a high-trust model, using productivity-based performance metrics instead of attendance, or simply having a small office footprint.

Among those who do track attendance:

- 43% use technology-based methods (e.g. access cards, desk booking, Wi-Fi or network data).
- 44% rely on visual observation or what's now colloquially known as the 'meerkat approach'.

A downside of the 'meerkat approach' is that it is infrequent and dependent on random variation, unlike real-time/continuous automated monitoring, such as access card data, desk booking systems, or Wi-Fi/network data.

Many occupiers already have access to valuable data sources; they just need to tap into them. Leveraging existing systems can significantly improve attendance insights and support smarter space decisions.

FIGURE 10: How does your organisation track office utilisation?



Workplace Practices are a Function of Industry & Location

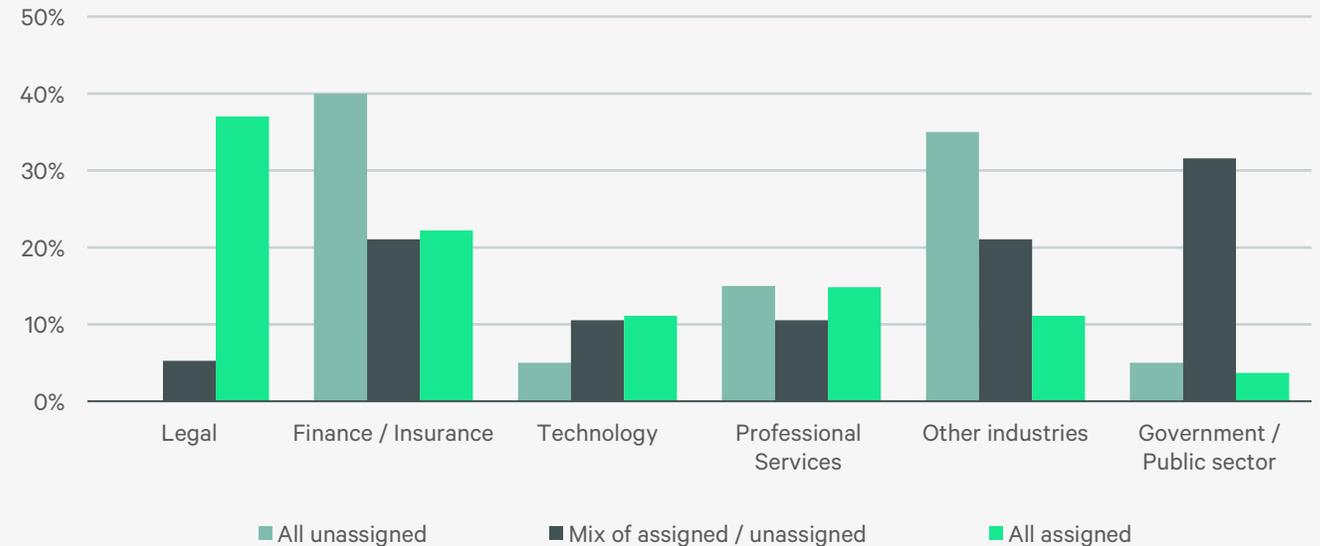
While organisations are responding to changing work styles with workplace design changes that offer greater flexibility and a better workplace experience, desk-sharing practices have seen little change. In 2025, 47% of organisations still assign all desks, compared to 45% in 2024 – a negligible shift.

There are, however, significant differences across industries:

- In finance and insurance, 44% of organisations do not assign desks, while 22% use a mixed model based on role.
- In the public sector, 75% adopt a mixed approach.
- In contrast, the legal sector remains highly traditional, with 91% assigning desks to all employees.

It seems that even as work practices and workplaces evolve, deeply ingrained ways of working, not just within organisations but across industries, remain difficult to break. In combination with the drive towards greater employee presence in the office, this implies that the full extent of space usage efficiencies facilitated by the combination of widespread hybrid work and adaptive workplaces are unlikely to be realised.

FIGURE 11: How are desks assigned within your organisation?



22%

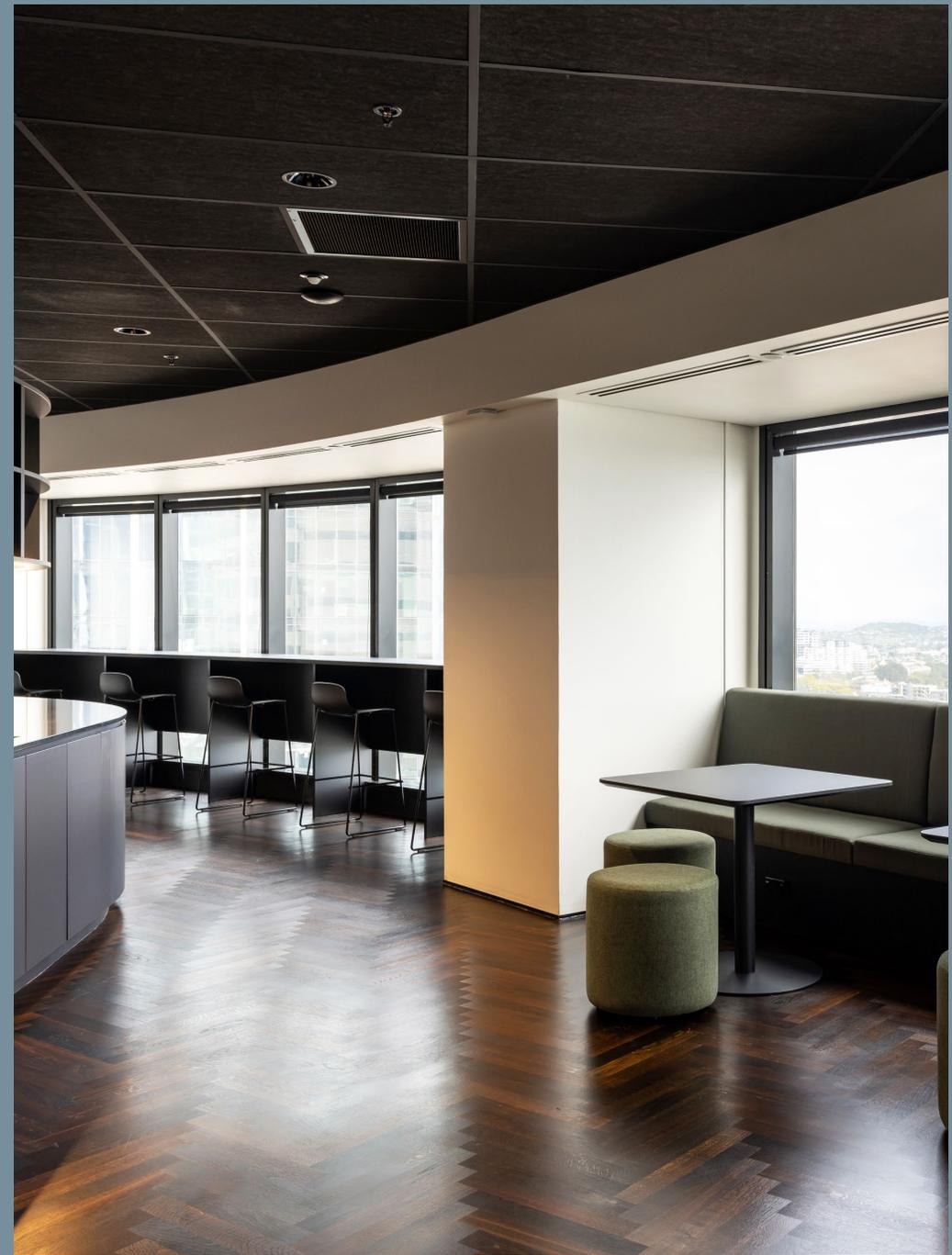
All unassigned desks

30%

Mix of assigned & unassigned desks

03

Real Estate Strategy



Fundamentals First: What Occupiers are Prioritising in 2025

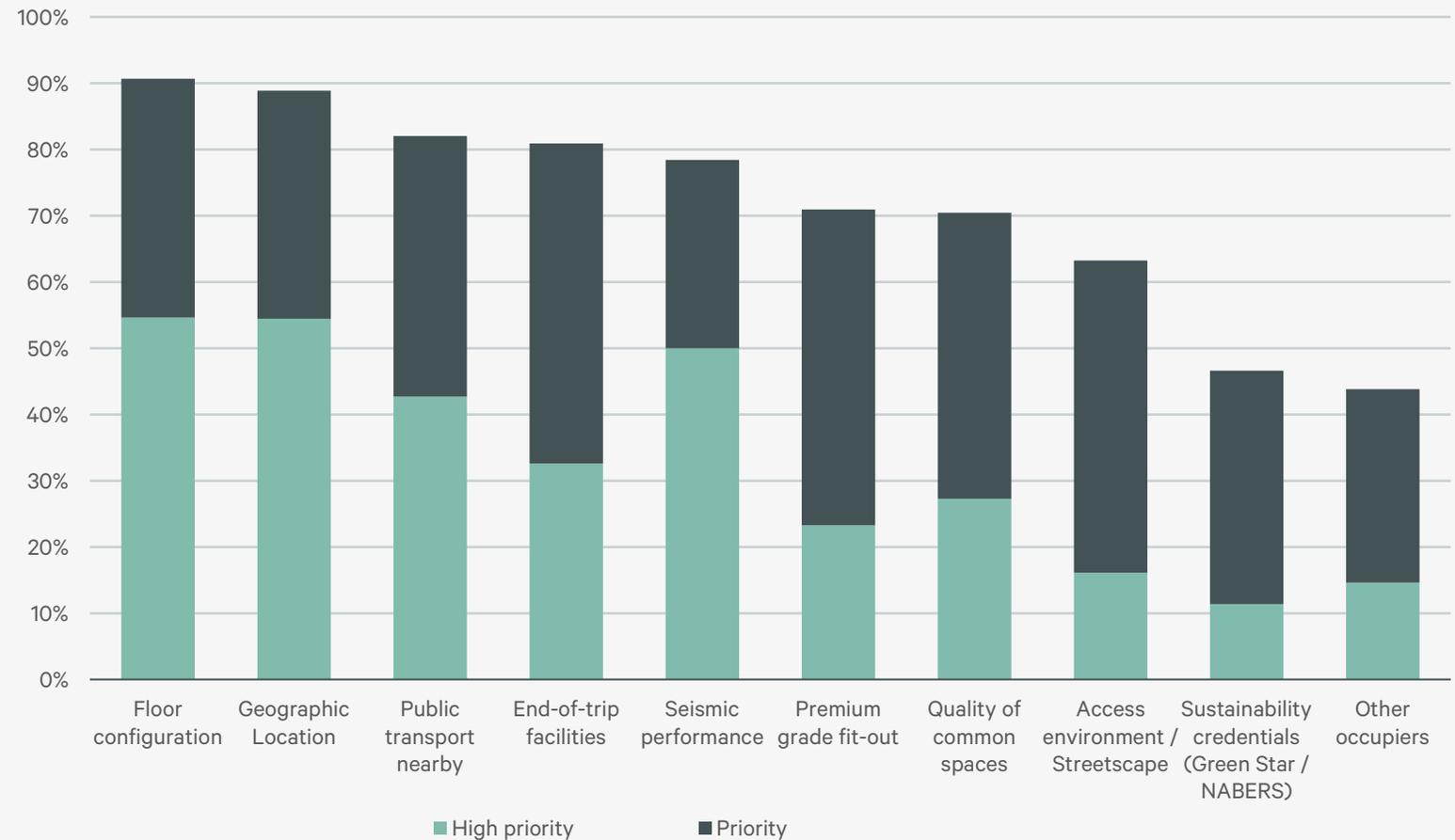
The fundamentals of space and location remain central to occupier decision-making in 2025. Floor configuration, location, and proximity to public transport are the top-ranked features, reflecting the continued importance of accessibility and functional design.

End-of-trip facilities are becoming increasingly important to occupiers whose staff are shifting to active modes of transport or otherwise integrating exercise into workdays. This reflects occupiers' growing detachment from cars, as both car parking and proximity to arterial roads placed outside the top 10 features in 2025. Car parking ranked 10th in 2024.

Seismic performance has an unshakeable hold on occupiers and remains a top 5 feature. Half of occupiers rated this feature a high priority, although seismic performance ranked 5th when both priority levels are combined.

Occupiers value high quality both within and around office buildings, from tenancy fit-out to lobby areas and the streetscape. As in our 2024 survey, sustainability is in 9th place, indicating that while an important consideration, it's behind the fundamentals of place and space.

FIGURE 12: Which location and building features are most important to your organisation? (Displaying top 10)



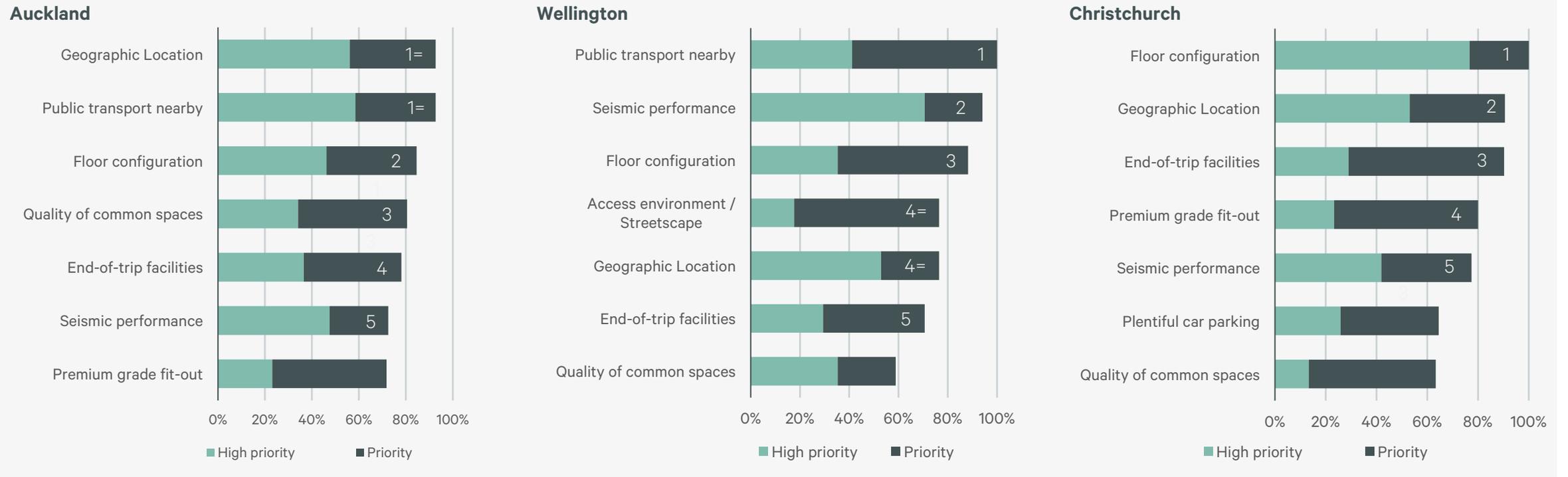
What do Occupiers Really Care About?

Across New Zealand’s main office markets, occupiers share similar priorities when selecting buildings – but transport preferences and seismic considerations reveal some regional differences. The clearest distinction lies in transport access. In Auckland and Wellington, proximity to public transport is a high priority, while in Christchurch, car parking remains more important. This reflects the cities’ differing infrastructure and commuting patterns. Seismic performance now features in the top five features in Auckland, with 73% of Auckland occupiers considering it at least as a priority, up from 61% in 2024. Due to the large number of new builds in Christchurch, seismic performance is ‘baked in’ now, but still

contemplated by occupiers, while in Wellington, it is one of the ‘must-have’ features, with 95% of occupiers considering it a priority.

There are also similarities across the three cities which highlight attributes which are of fundamental importance to occupiers. Floor configuration is one of these, with 91% of occupiers rating it as a priority to high priority, alongside location. End-of-trip facilities are now a top-5 feature in all three cities, reflecting increasing interest in active modes of transport, even in Christchurch.

FIGURE 13: Which location and building features are most important to your organisation?

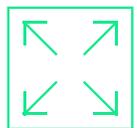


Aspirations Drive Relocation Demand

Relocation is the most frequently cited way for occupiers to meet their office premises aspirations, with 31% of participants currently pursuing or planning one or more relocation strategies. Occupiers looking to move most frequently cite better quality space, amenities, or spaces supporting seismic performance or sustainability goals.

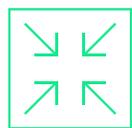
Around 1 in 5 occupiers is looking to either expand their existing footprint (7%) or consolidate (13%), while an additional 11% seek to restructure their existing leases to meet their requirements, while staying in the same space. Around 1% plan to switch to a co-working solution to accommodate their office space requirement, with a further 3% planning to use co-working spaces as a flex tool to deal with demand fluctuations.

The number of occupiers taking a wait-and-see approach has declined from over 20% to less than 5% over the past year, although this change may be due to an increase in survey options, which now include that their current requirements are met, and that they may have recently moved or renewed. Combined, the latter two options were selected by 26% of participants.



7%

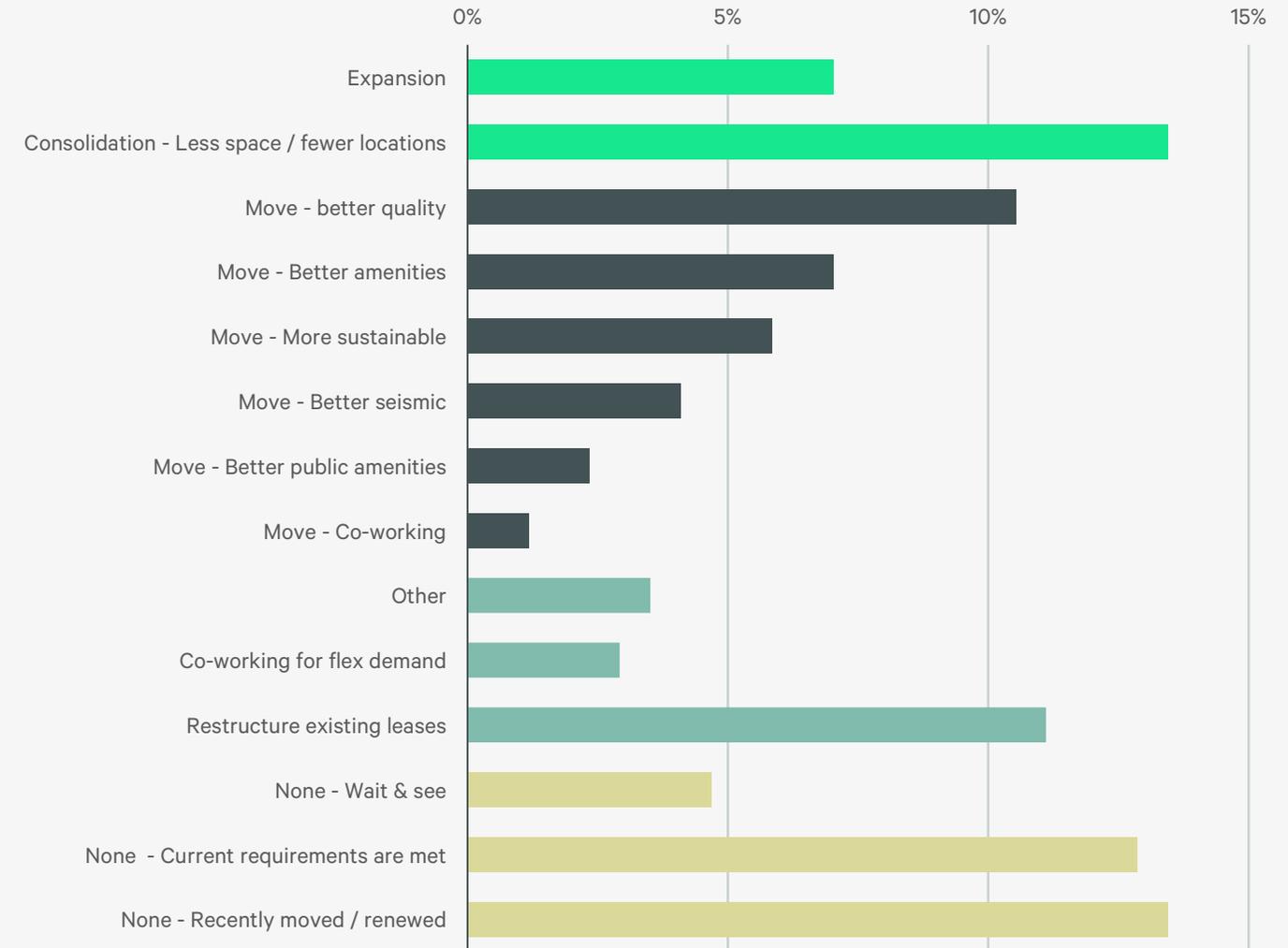
Occupiers are looking to expand



13%

Occupiers are looking to consolidate

FIGURE 14: Which real estate strategies are currently being pursued or planned by your organisation?



Persistent Economic Headwinds Delay Demand Recovery

Christchurch stands out as New Zealand’s most economically confident office market in 2025, with expansion plans outpacing contraction. 39% of organisations in Christchurch plan to expand their footprint, the highest of any city surveyed.

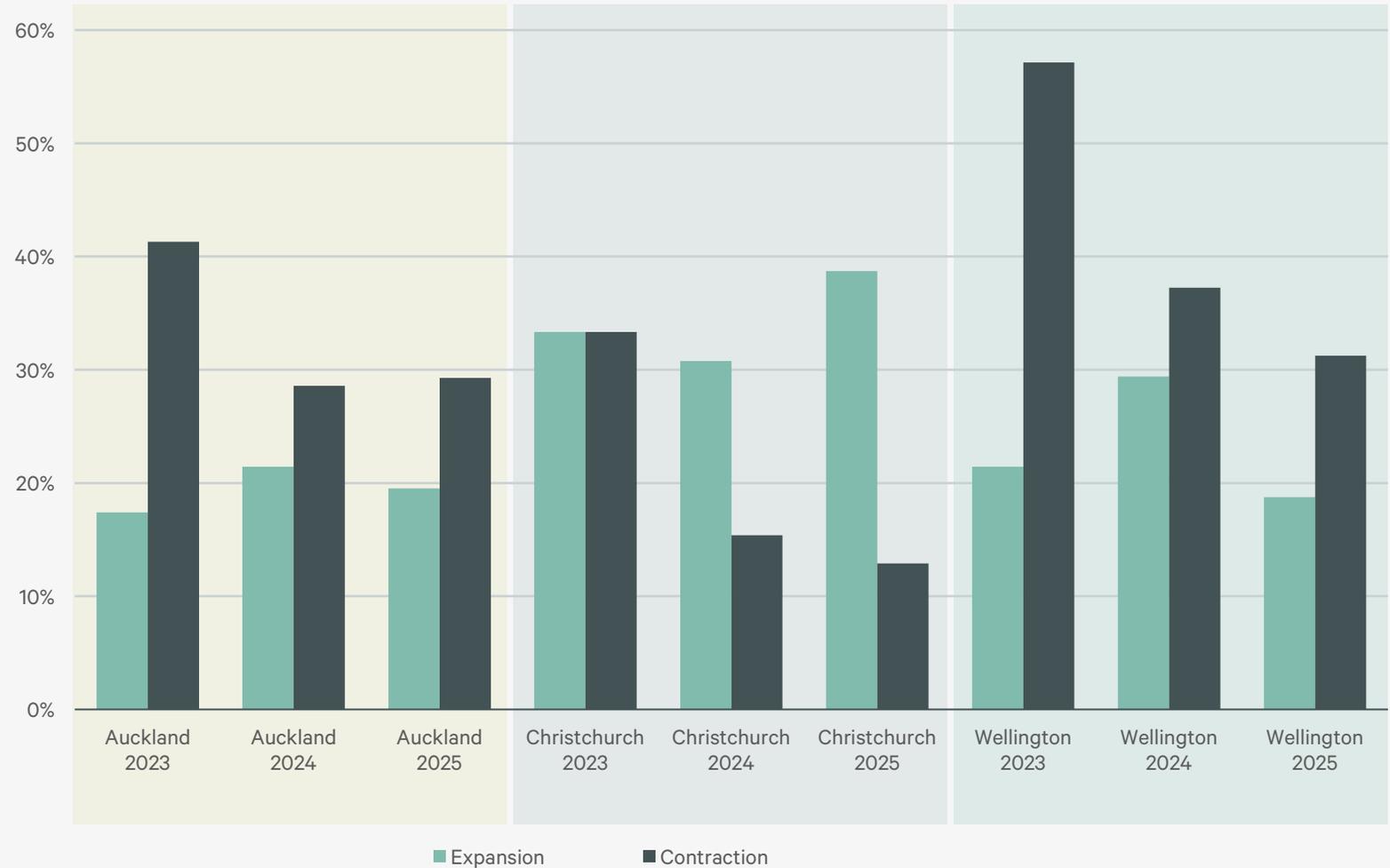
Wellington and Auckland have similar levels of expansion planned, at 19% and 20% respectively. The amount of contraction planned is also similar at 31% (Wellington) and 29% (Auckland).

In Wellington’s case, contraction is continuing a downward trend from its peak of 57% in 2023. By comparison, Auckland has a similar proportion to last year (20% down from 21% in 2024).

The primary reason for expansion is to accommodate business headcount growth (88%), although a minority (8%) are expanding to support modern workplace design.

For those planning to reduce their footprint, the key factors are the impacts of hybrid working and headcount reduction.

FIGURE 15: Geographic real estate strategy varies by city



Efficient Resource Management is the Strongest Sustainability Focus

Efficient use of resources is the top sustainability priority for occupiers. Building features that monitor and reduce resource consumption are highly sought after when selecting premises. Half of all occupiers expect smart technologies that automate or reduce usage when not needed.

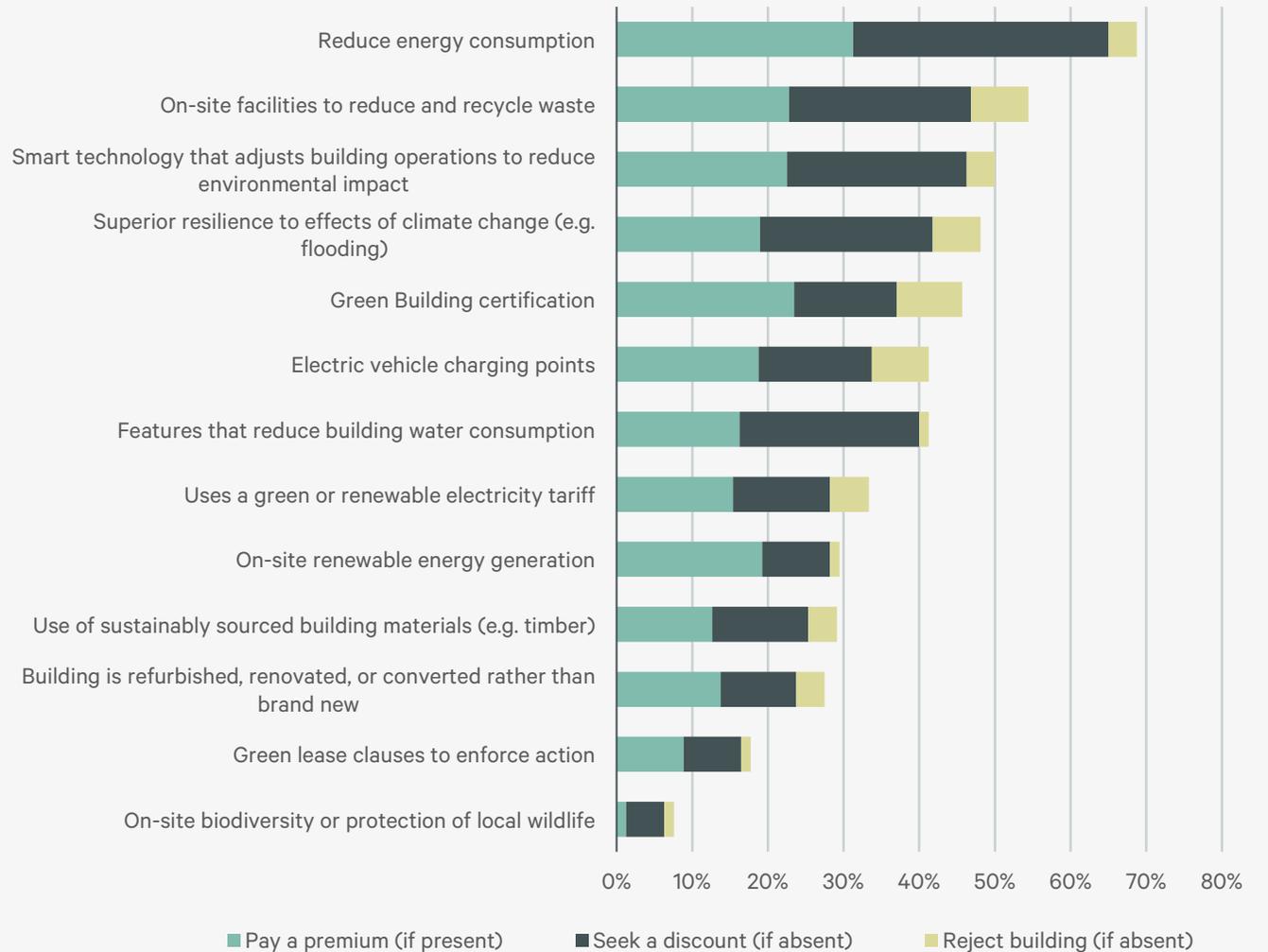
The most targeted resource is energy, with 69% of occupiers seeking to lower consumption. This is followed by waste reduction and recycling (54%), and water use (41%), which remains a lesser consideration.

Green Building certification is expected by 46% of occupiers, a key enabler in meeting internal and external sustainability obligations. Taking Auckland as an example, we know that of the 100 largest occupiers in Prime Auckland office space, 78 have explicit greenhouse gas emission reduction targets and 49 have a commitment to achieving Net Zero. Occupiers with an international presence are more likely to require not just the benefits of sustainable action, but also the accompanying third-party certification of the spaces they occupy. This is likely to grow as mandatory sustainability reporting obligations expand for local organisations.

More than 2 out of 5 occupiers also factor in resilience to climate change as a significant factor, alongside provision of EV charging. More than 1 in 4 occupiers are thinking about the whole building life cycle when selecting space, showing preferences over an existing building over brand-new (29%), and sustainably sourced materials over the alternatives (28%).

While green leases offer a framework for occupiers and landlords to collaborate on sustainability improvements, they are not yet standard practice. Only 18% of occupiers expect them to be part of lease negotiations in 2025.

FIGURE 16: Which of these environmental building features would impact your real estate transactions?



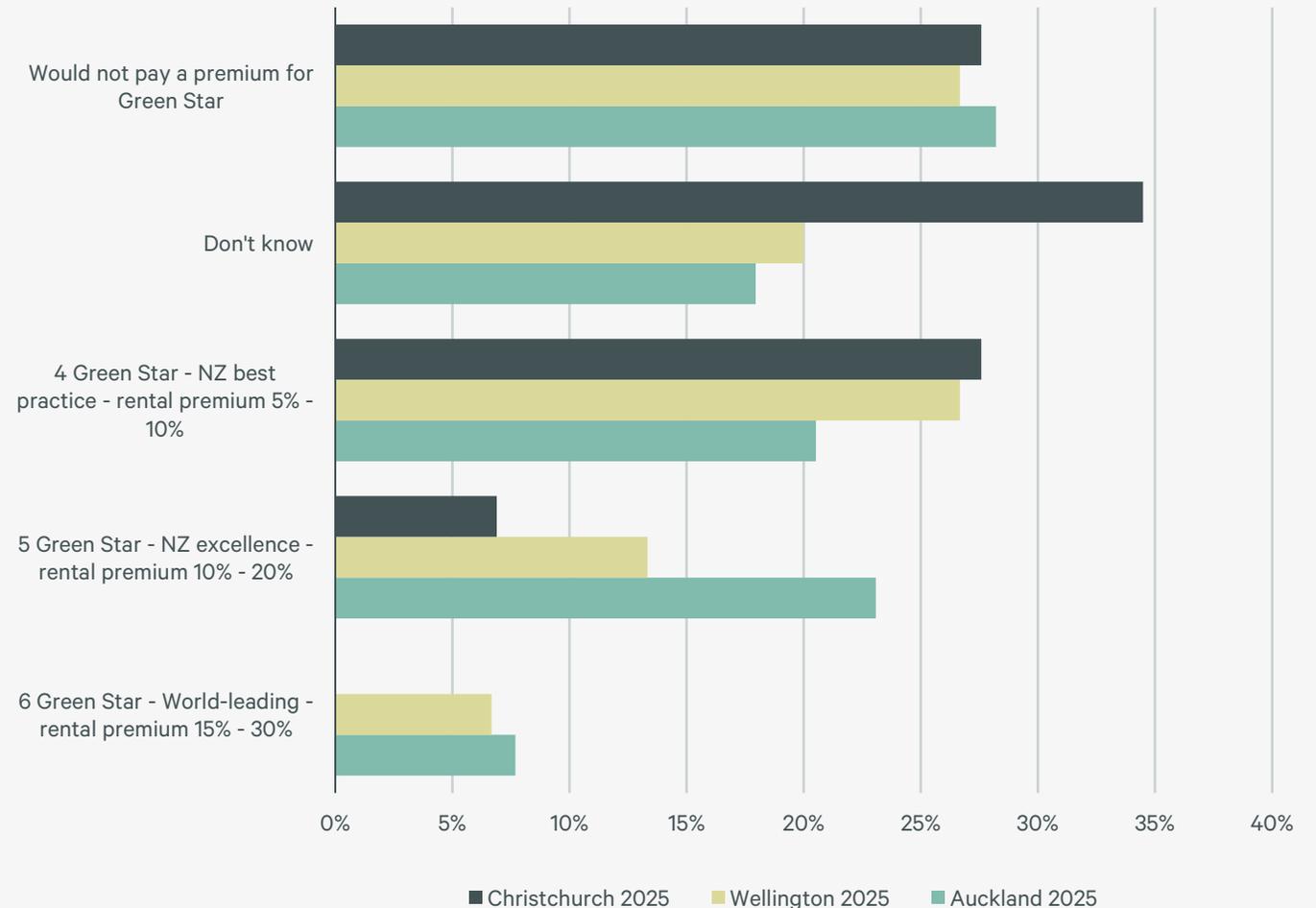
Auckland Leads in Willingness to pay for High Sustainability Credentials

23% of Auckland occupiers are prepared to pay a premium of up to 20% to locate in a 5 green star rated building, with 8% prepared to pay a 30% premium for a 6 green star rated building. At the other end of the scale, in Christchurch there is a lesser willingness to pay for 5 green star (from 7% of occupiers) with none of the occupiers in our survey indicating a desire to pay the likely premium required to support the development of a 6 star rated building.

It appears that, in part at least, this dynamic reflects a lesser focus on sustainability issues by Christchurch occupiers. While the proportion of survey respondents who would not pay a premium for sustainable buildings is fairly uniform across the three main cities at ~27%, the number of occupiers who don't know which sustainability cost/benefit aligns with their real estate strategy varies widely by location. Of the Christchurch respondents, 34% don't know if they would pay a premium for a green star-rated building compared to only 18% in Auckland.

The high proportion who “don't know,” especially in Christchurch, indicates opportunities for better engagement with this segment of the market regarding the rationale and benefits of more sustainable buildings.

FIGURE 17: Which sustainability cost/benefit aligns with your current real estate strategy?



Note: This chart only shows the responses of participants who indicated that sustainability was a focus.

04

Considerations for Occupiers



Considerations for Occupiers

1

With a clear gap remaining between employer expectations of days in office and actual attendance patterns, occupiers need to determine their appetite and approach for bridging this gap – noting that employee satisfaction and talent attraction and retention are the key drivers for supporting hybrid working.

If your organisation aspires to increase office attendance, consider how you would achieve this. Currently, few occupiers report having formal incentives or consequences relating to time spent in the office. However, without more clearly defined outcomes, organisations are unlikely to achieve higher attendance rates in the future.

2

With real estate costs forming a significant proportion of occupier budgets, robust space utilisation data is key to workplace planning and optimisation. However, nearly half the organisations we surveyed are relying on visual observations to inform workplace decisions.

If you want to clearly understand your workplace utilisation and opportunities to use space more efficiently, consider leveraging the various tools and technologies available to provide real time / continuous automated data and insights. Many of these data sources already exist (e.g. access card data, network data).

3

Due to increasing numbers of office commuters shifting to active modes of transport or otherwise integrating exercise into their workdays, end-of-trip facilities have become increasingly sought-after building amenities.

If you have a lease event approaching, ask your staff about their commute and fitness aspirations. This will enable you to provide your leasing agents with a useful brief that includes end-of-trip facilities as well as the right geographic location close to fitness amenities. Agents can also map your commutes against different potential locations and transport modes.

4

Controlling cost remains a key focus for occupiers, and one effective strategy is the integration of efficient, sustainable technologies. These solutions use fewer resources and can help reduce spending on electricity, water, gas, and waste, delivering both environmental and financial benefits.

When considering new premises, occupiers should look for sustainable building features, green leases, and certified green spaces as practical ways to reduce operational costs and climate risk. Collaborating with building owners can be a win-win situation, helping both parties make meaningful progress toward their environmental objectives.

05

Survey Profile



Locations and Sectors of Participants

94

Participants

15

Sectors

22,000+

Headcount

247,000

Sqm

Geography of Participants

46%

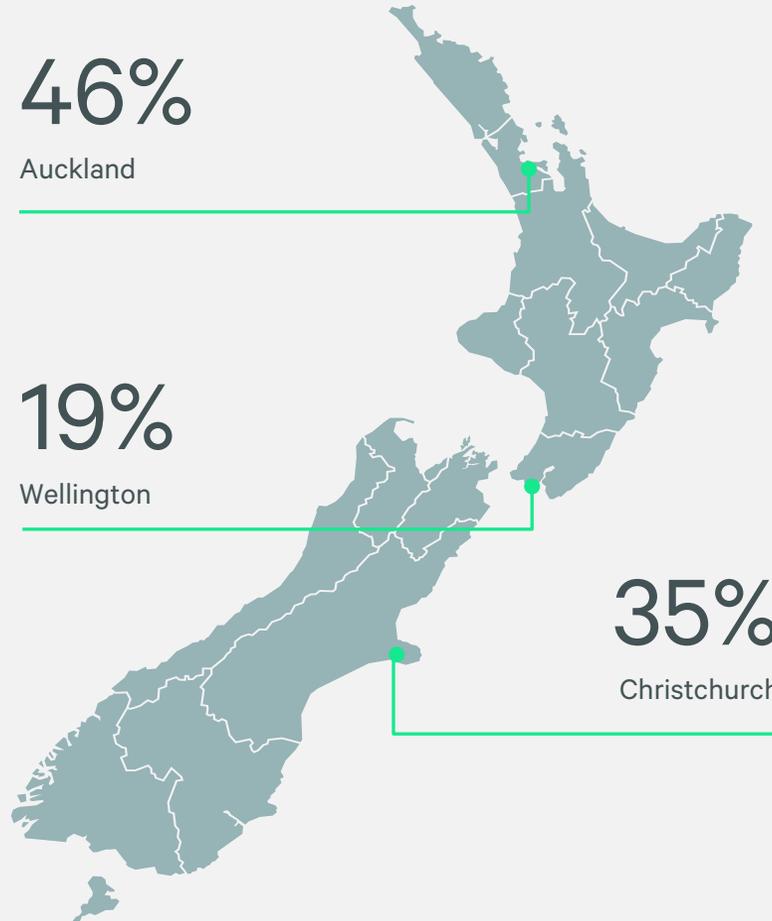
Auckland

19%

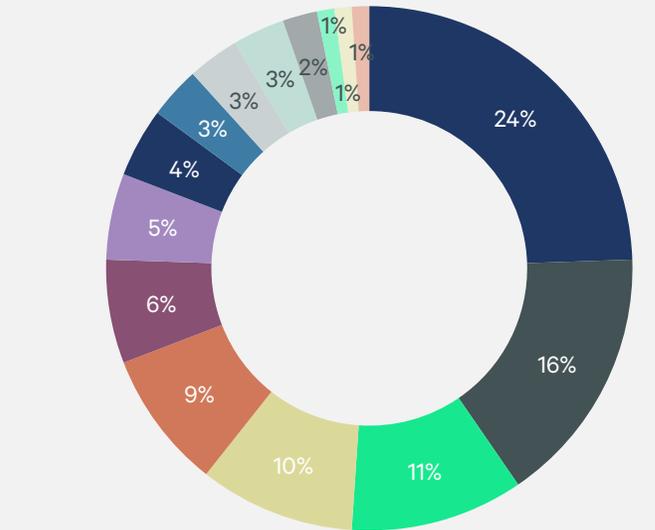
Wellington

35%

Christchurch



Participants by Industry Sector



- Legal
- Real estate
- Government / Public sector
- Finance
- Health care
- Accounting
- Education
- Utilities
- Other professional services
- Technology
- Other
- Insurance
- Construction
- Manufacturing
- Media and telecom

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