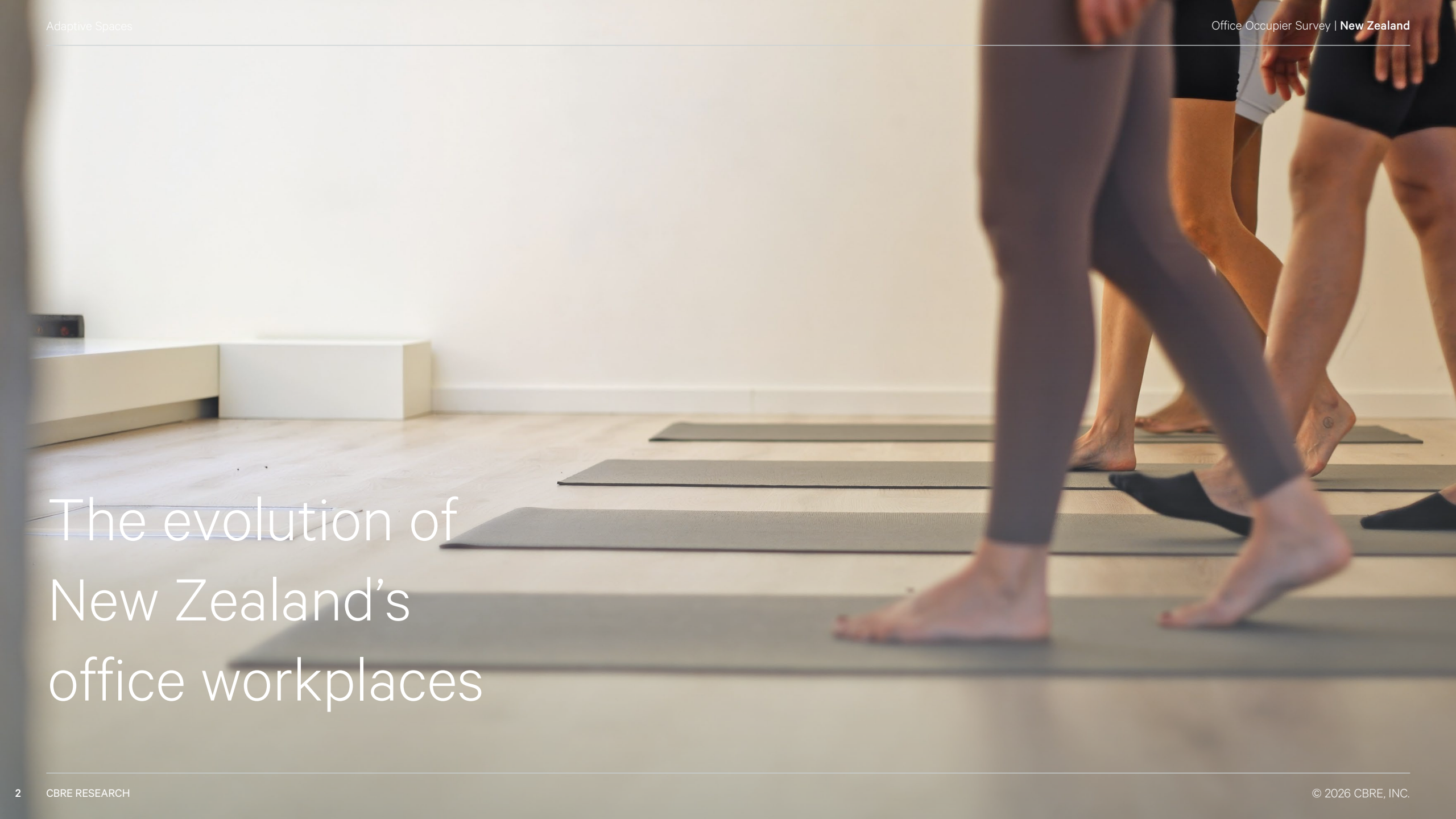


New Zealand Office Occupier Sentiment Survey 2026

REPORT

SEPTEMBER 2026





The evolution of New Zealand's office workplaces

A market maturing: What four years of survey data tells us

This year's findings point to a hybrid market approaching equilibrium. Average office attendance has lifted to 3.6 days per week, up from 3.4 days in 2025 and close to organisational leadership expectations. Behind the headline, the lift reflects closer links between attendance and enforcement.

Dealing with growth is becoming an increasingly important consideration. Nearly a third of occupiers now operate above 80% workplace utilisation, up from 24% in 2025 and 18% in 2024. For occupiers approaching the top end of the utilisation curve, the practical questions are becoming more urgent: are current desk allocations, neighbourhoods and shared amenities enough to absorb intensifying demand on peak days? Rising utilisation coincides with a growing share of five-day attendees, and the two together will test the design assumptions of workplaces built for lighter, more flexible use. It also underpins the growing proportion of occupiers looking to increase the size of their office footprint.

We have also introduced a new line of inquiry this year on AI: how occupiers are adopting it, and how they expect it to shape real estate strategies and the workforce. AI is expected to make itself felt through the workforce before it reshapes the space that the workforce sits in. This points to a workplace that continues to serve a similar sized workforce but supports a different mix of tasks: less transactional processing, more collaboration, more skills development. That shift, over time, will feed back into space design, though the pace of that feedback will depend on how quickly AI moves from productivity tool to embedded workflow.



How New Zealand occupiers are fine tuning the office in 2026

3.6 days

Spent working from the office in a typical week, up from 3.4 days in 2025.

76%

Of organisations now set hybrid working requirements at an organisational level, up from 60% in 2025.

32%

Report office utilisation of 80% to 100%, up from 24% in 2025 and 18% in 2024.

44%

Cite business or headcount growth as the primary driver of their real estate strategy.

98%

Of organisations are using AI in some form, though only 13% have embedded it in core workflows.

57%

Are considering relocation for one or more reasons, with higher-quality space the leading driver.

Contents

01	Hybrid Working	02	Workplace	03	Real Estate Strategies	04	AI Adoption and Real Estate Impacts	05	Considerations for Occupiers
	Pages 6 to 8		Pages 9 to 12		Pages 13 to 17		Pages 18 to 21		Pages 22 to 23

01

Hybrid Working

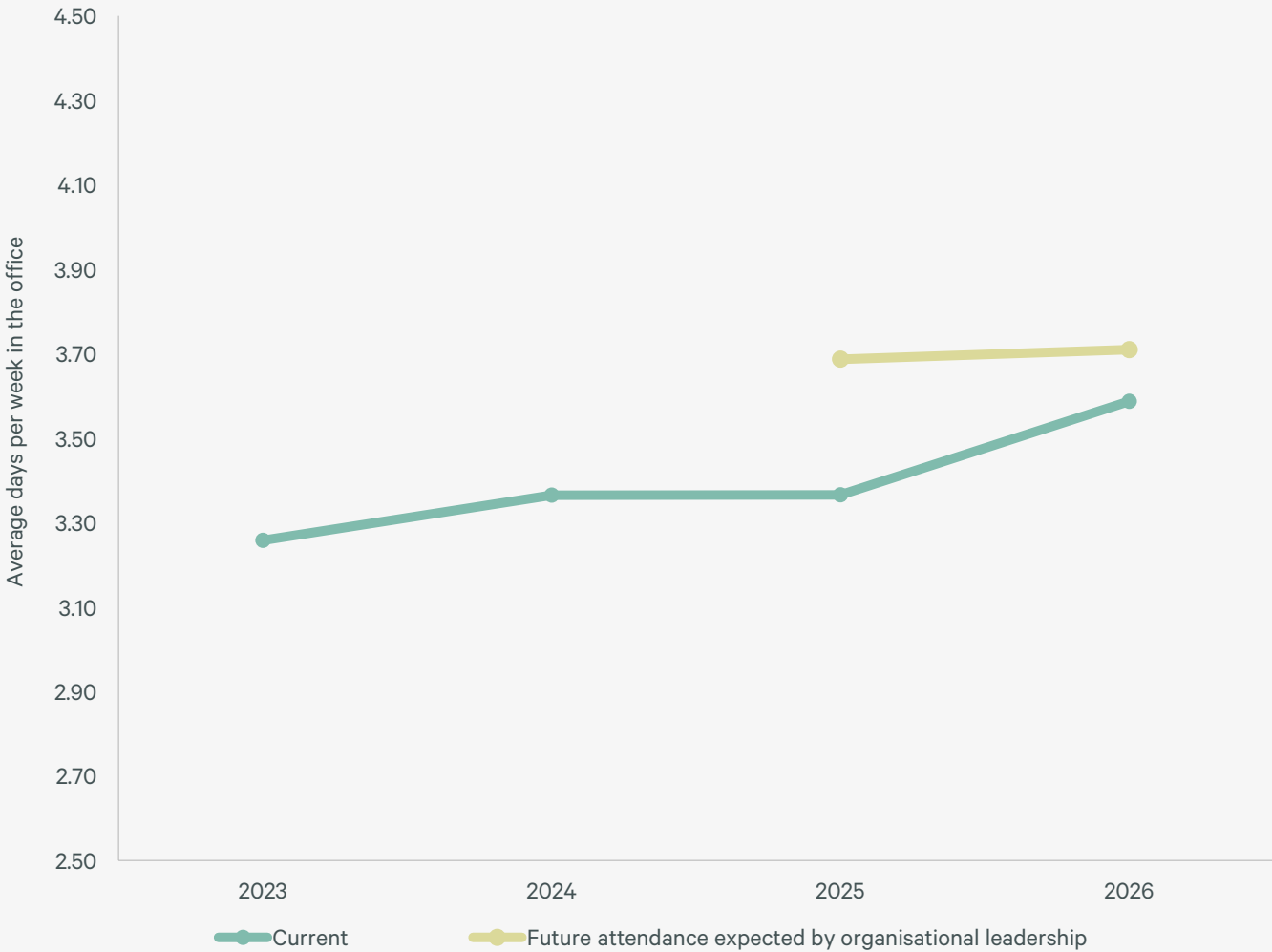


Office attendance leaps, closing the gap to organisational leadership expectations

Office attendance posted its largest increase in three years, with the average number of days worked in the office rising to 3.6 per week in 2026, compared with 3.4 in 2025 and 3.3 in 2024. The upward lift is not a return-to-office snapback. It reflects a market where hybrid is now the settled norm, and leaders are tuning the dial. Attendance is closer than at any point in the last four years to where leadership wants it to be.

Three days in the office is still the most common pattern of working (49%), but the number of people reporting attending the office for five days has increased. Four-day attendance has fallen, showing a clear split emerging in hybrid working patterns: the majority of workers continue with the three-day routine, while a higher number of them have returned to the traditional full-time presence in the office.

FIGURE 1: Average days in office

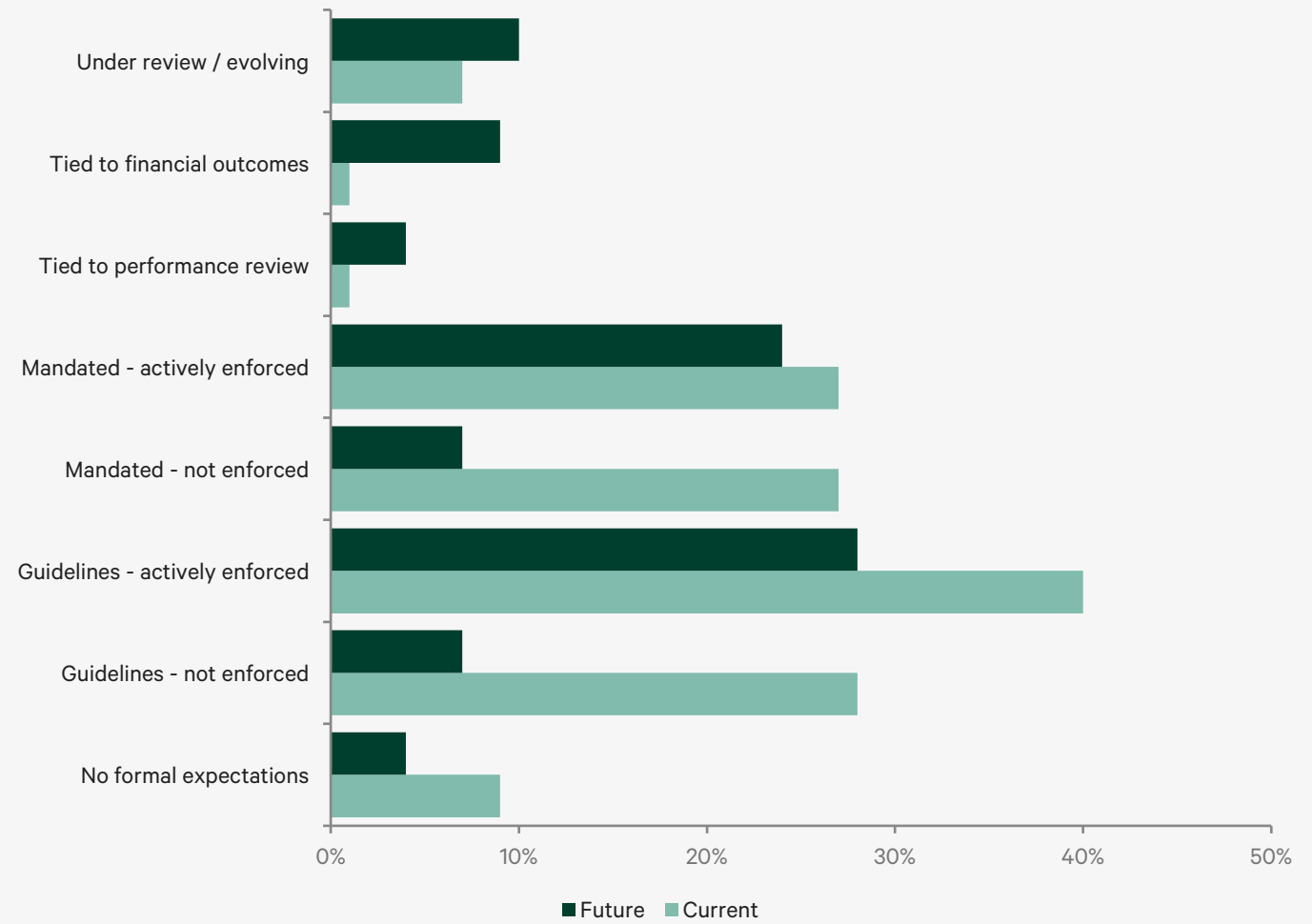


Attendance enforcement is moving from guidelines to mandates, and towards performance levers

Occupiers employ a combination of guidelines, mandates, and increasingly, performance levers to shape policy. Actively enforced hybrid work policies are most common, used by 40% of surveyed organisations. Non-enforced guidelines account for 28%. Mandated policies are evenly split: 27% are not actively enforced, and 27% are. Very few office occupiers report having no formal office attendance expectations.

Looking ahead, the picture changes. Only 7% expect to keep using non-enforced guidelines. Overall, the market is shifting from softer to firmer policies. Organisations are taking the view that hybrid work policies need real consequences to be effective and are moving towards linking attendance to performance reviews and financial outcomes.

FIGURE 2: Attendance enforcement approach - current vs future



02 Workplace



Utilisation is intensifying, with Christchurch leading

Nearly a third of occupiers now operate above 80% utilisation, up from 24% in 2025 and 18% in 2024.

Office utilisation, the share of workstations occupied during a typical work week, continues to climb. The 40% to 60% band remains the most common (33% of respondents in 2026), but the share operating at 80% to 100% is showing a consistent growth trend.

Christchurch is the standout, with 42% of occupiers operating at 80% utilisation or higher, compared with 31% in Auckland and 19% in Wellington. The Christchurch reading is consistent with its office-centric attendance culture and its newer, more efficient office stock.

For occupiers approaching the top end of the utilisation curve, the practical questions are becoming urgent: are current desk allocations, neighbourhoods and shared amenities enough to absorb intensifying demand on peak days? Rising utilisation coincides with a growing share of five-day attendees, and the two together will test the design assumptions of workplaces built for lighter, more flexible use.

FIGURE 3: Office utilisation trend (share at each band)

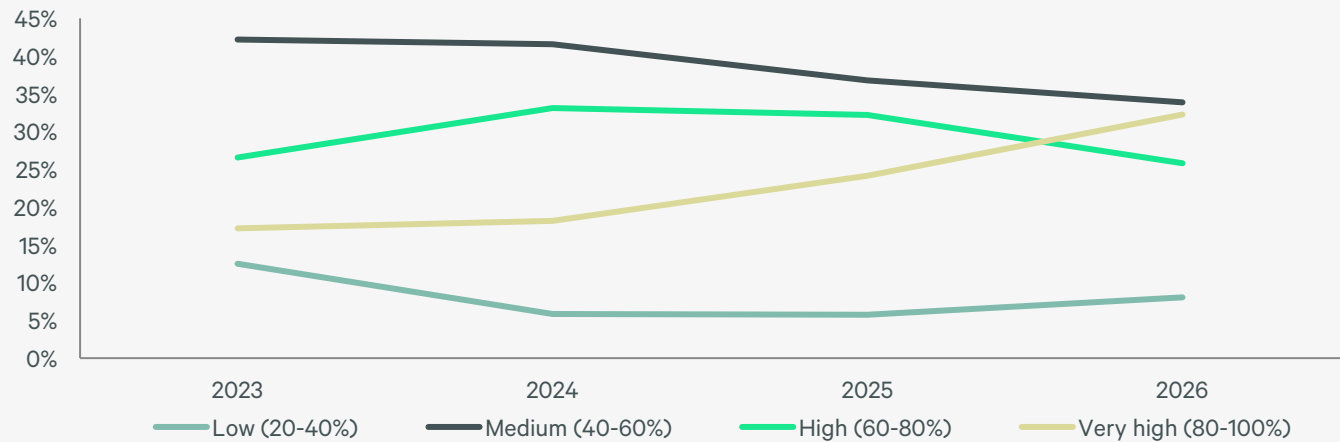
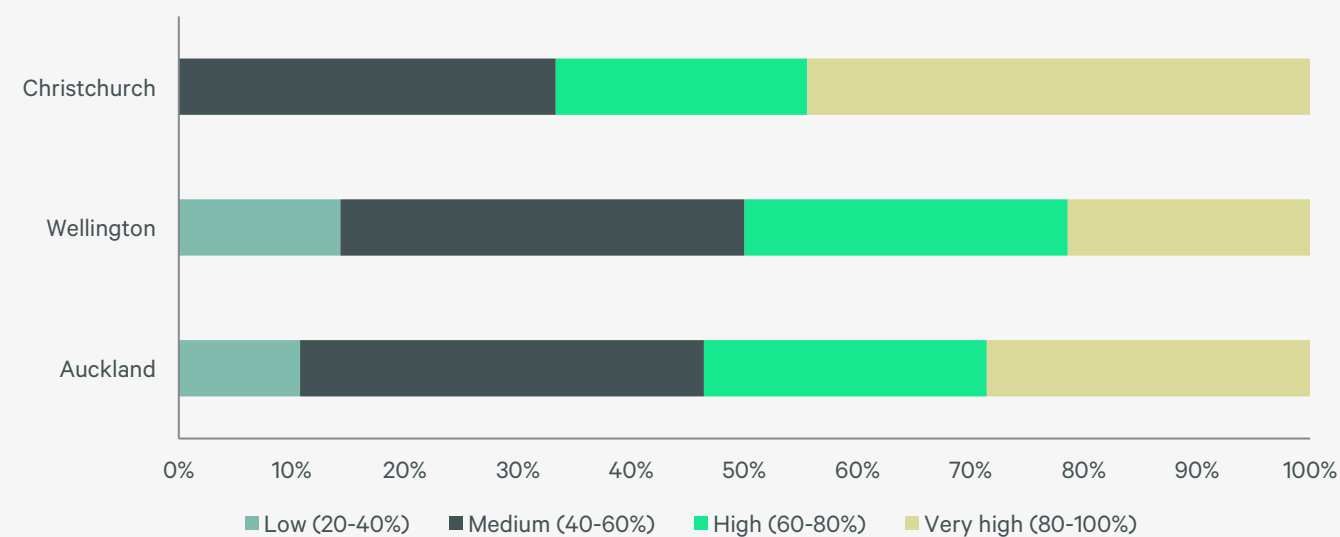


FIGURE 4: Office utilisation by city



Fully assigned seating is receding in favour of blended models

The way in which desks are allocated is changing. 45% of office occupants are using a combination of assigned and unassigned seating, up from 30% in 2025, making it the most common method. The proportion using fully assigned seating has dropped to 36%, down from 47% in last year’s survey.

The industry split is stark. 100% of Legal sector respondents assign every desk, unchanged from previous years, and consistent with the sector's attachment to individual spaces. The Technology sector is at the other end: 50% of respondents operate fully unassigned, and only 25% assign every desk. The Government and Public sector is fully in the mix camp (100% mixed model), a byproduct of scale and the accelerating shift to activity-based working.

Overall, the workplace is moving away from fully assigned desks but not fully adopting unassigned seating. The mixed model, where teams have assigned areas but flexible seating, is becoming the common compromise.

FIGURE 5: Desk allocation approach by industry sector

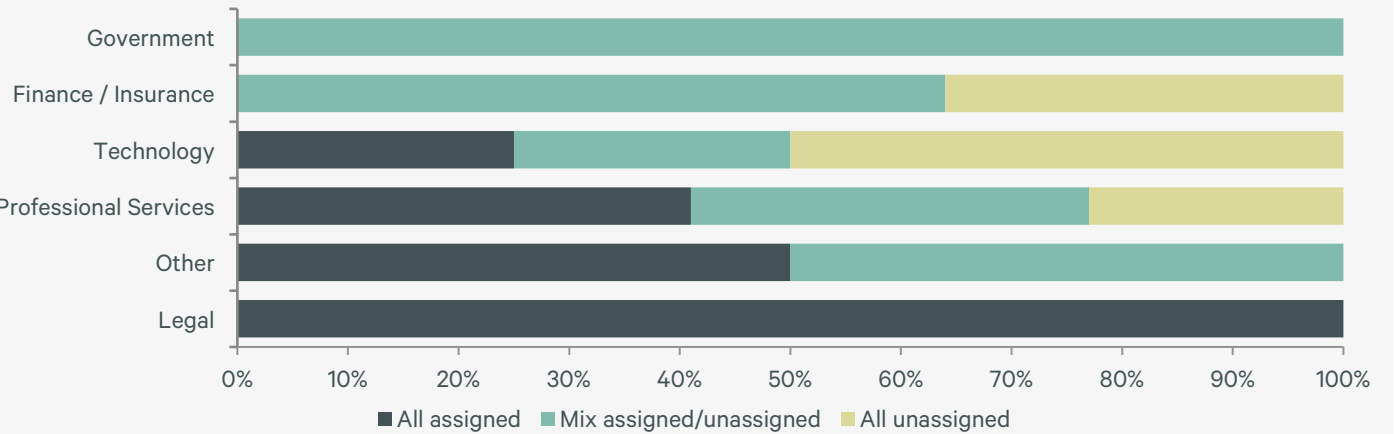


FIGURE 6: Desk allocation trend



A third of occupiers are in workplaces due for a refresh

The age profile of New Zealand's office workplaces points to a potential wave of upcoming refurbishment activity. 31% of occupiers have been in place for six years or more, putting them in the window where an office refresh or relocation typically becomes a consideration.

The response to changing ways of working is visible in the data. 45% of occupiers have already made workplace changes as a result of new ways of working, and a further 9% have plans for future changes. Together, more than half of the market has actively adjusted, or is preparing to adjust, its workplace to hybrid demand.

45%

Of occupiers have already made workplace changes as a result of new ways of working.

FIGURE 7: How long has your workplace been in its current form?

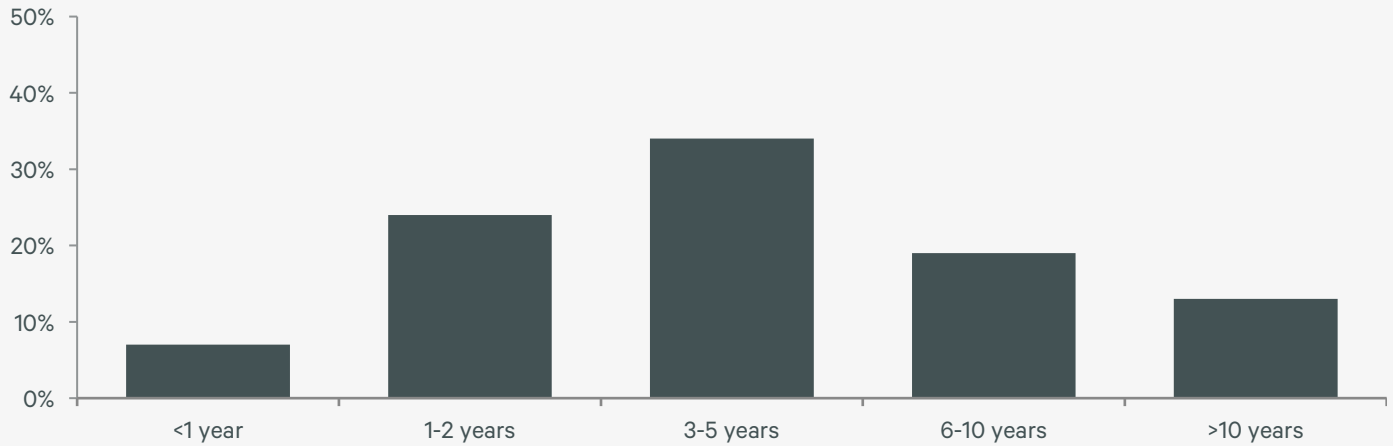
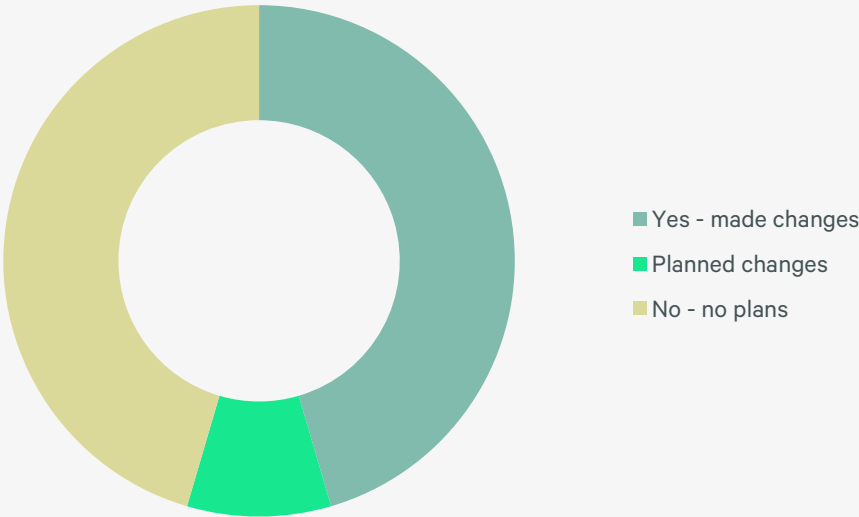


FIGURE 8: Workplace design changes made or planned



03

Real Estate Strategy



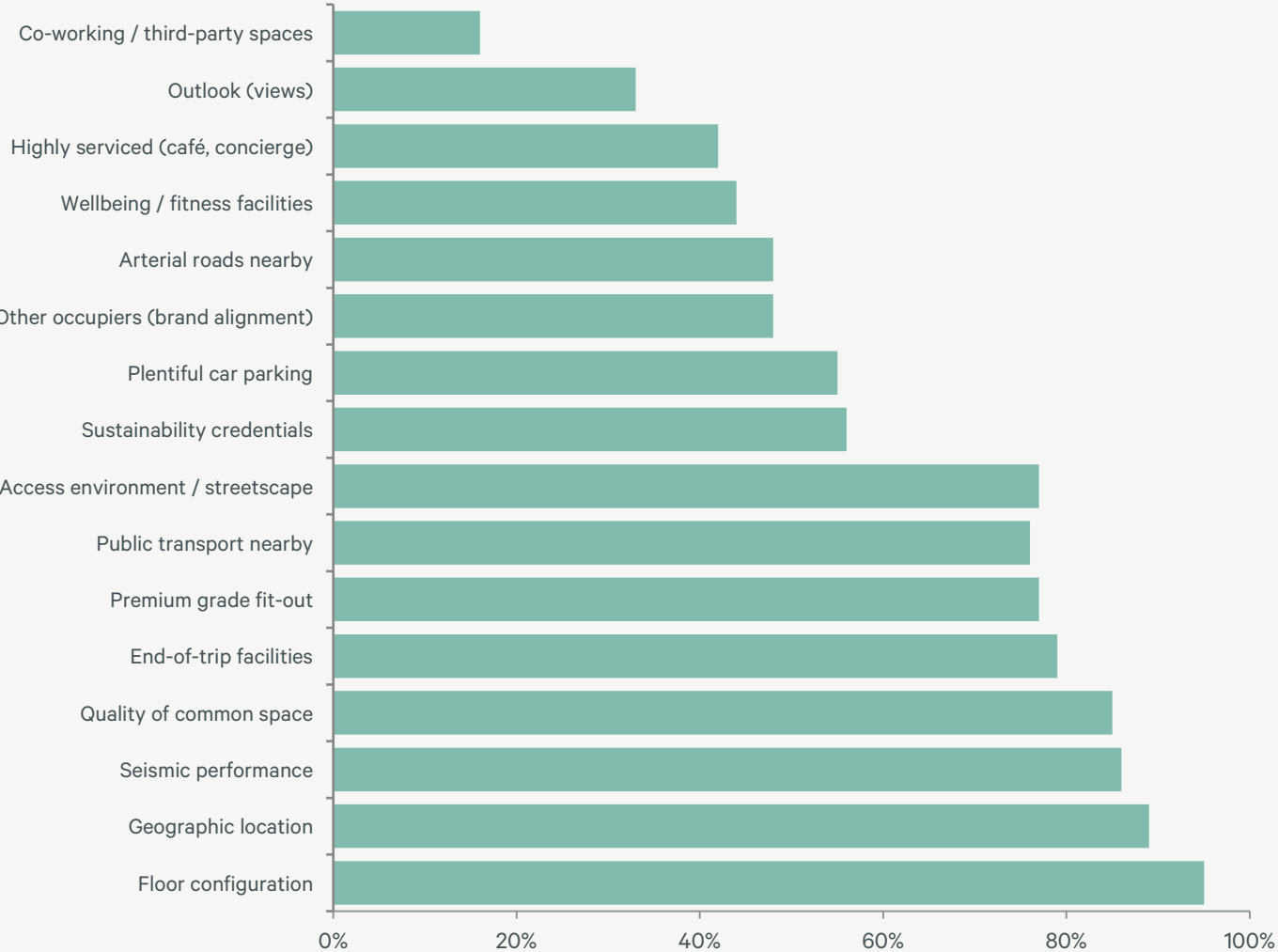
Functionality and location still lead occupier priorities, but amenity considerations are catching up

When occupiers assess a building, the practical leads. Floor configuration is the highest priority feature, with 95% of respondents rating it as a priority or high priority. Geographic location, seismic performance, and quality of common spaces round out the top four.

The next level includes end-of-trip facilities and a premium-grade fit-out, both of which rank higher than in previous years, reaffirming that higher quality and amenity are increasingly important differentiating factors amongst buildings competing for occupiers.

Sustainability credentials rank 12th of 16 features, consistent with previous years: sustainability matters, but the fundamentals of space and location matter more. Co-working and third-party spaces sit at the bottom of the list at 16%, reinforcing that flex is a targeted solution rather than a mainstream requirement, at least for the larger occupiers that comprised most of the survey respondents.

FIGURE 9: Importance of building and location features (% rated priority or high priority)



Wellbeing amenities are fit-for-purpose today, but the bar is rising

This is the first year the survey has asked about employee experience and wellbeing amenities, spanning end-of-trip facilities, fitness spaces and provisions for mental and physical wellbeing. The picture is one of adequacy today with rising expectations tomorrow.

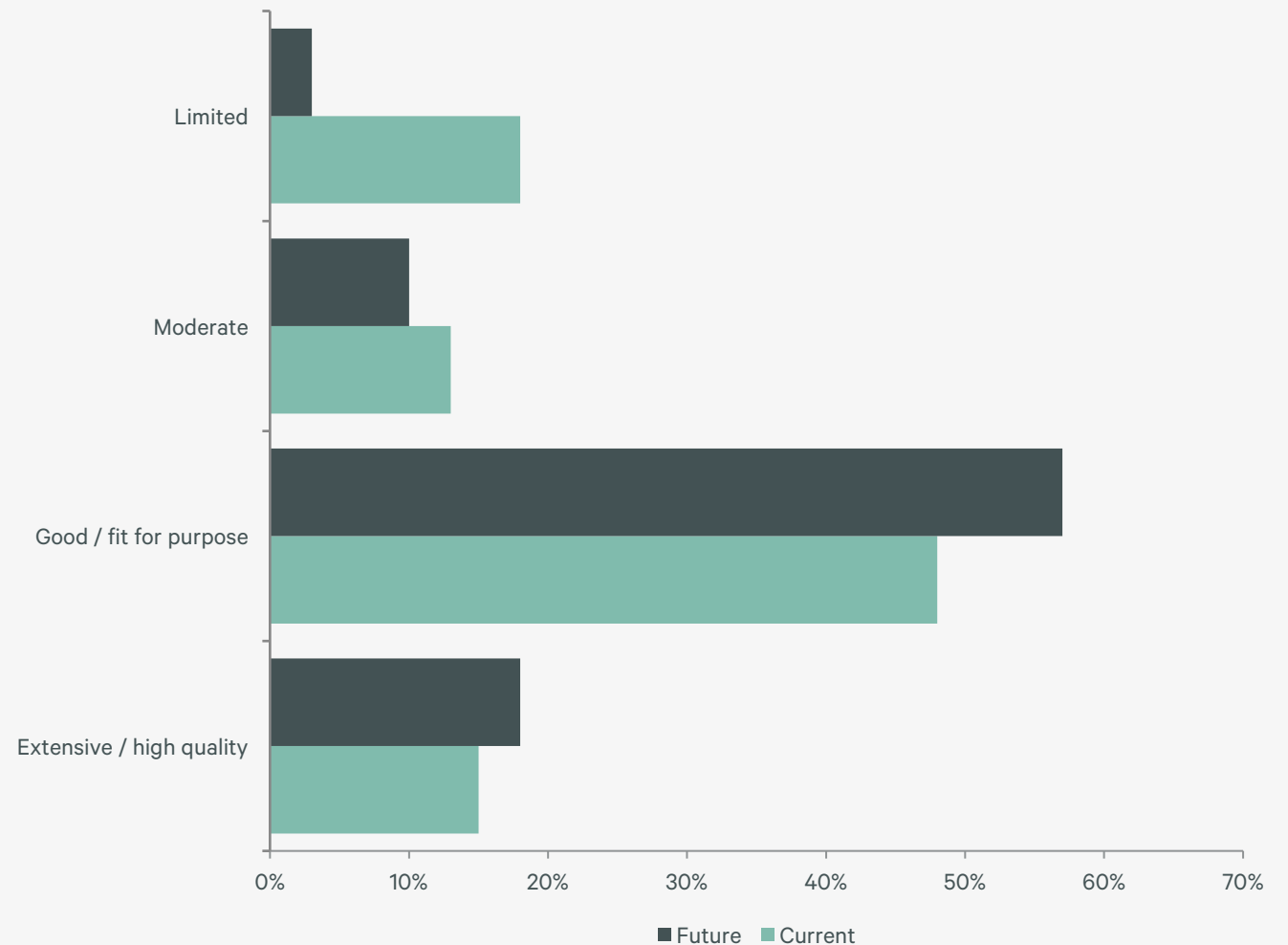
48% of occupiers rate their current amenities as good or fit for purpose, and 15% describe them as extensive or high quality. 18% rate provision as limited, and just 1% say amenities are not required.

Looking forward, 57% expect to have good or fit-for-purpose amenities, and 18% expect extensive or high-quality provision. The portion reporting limited provision falls sharply. The direction is a lift in the base quality of amenity offerings, with fewer occupiers content to operate at the lower end of the scale. For landlords and developers, this shows that end-of-trip and wellbeing provision is moving towards a baseline expectation.

57%

Of occupiers expect to have good or fit-for-purpose amenities.

FIGURE 10: Employee experience of wellbeing amenities - current vs future



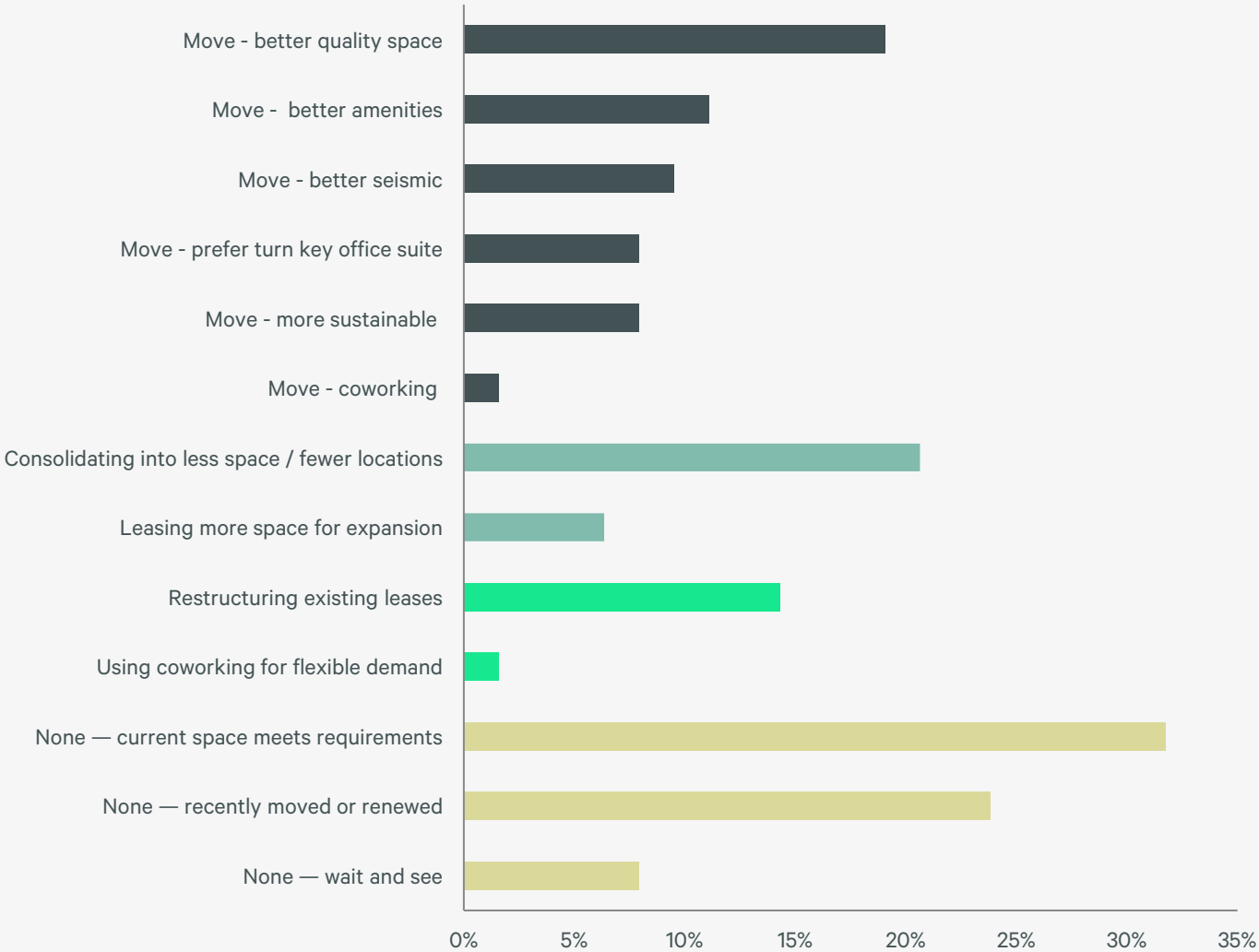
A third of occupiers feel that their current premises meet their requirements, while 57% are planning for a relocation

Real estate strategies fall into three camps. About one third of occupiers report that their current space meets requirements. The remainder are pursuing an active strategy, most often centered on relocation.

When the move-related options are combined, 57% of occupiers are considering a relocation for one or more reasons. Higher-quality space is the leading relocation driver, ahead of amenities and consolidation. Sustainability and seismic performance sit in the next tier, at 7% and 9% respectively.

Only 7% are taking a wait-and-see approach, down sharply from previous years and consistent with a market where occupiers are increasingly prepared to make decisions against a settled hybrid policy rather than defer them.

FIGURE 11: Real estate strategies pursued or planned



Expansion is concentrated in Christchurch and growth sectors

Footprint size intentions vary sharply by sector. Finance and insurance show the strongest expansion intent, with 50% of respondents planning growth, followed by professional services (36%) and legal (33%). At the other end, technology and government are the most contraction-focused sectors, with 50% of respondents in each planning a footprint decrease.

By city, Christchurch has the strongest expansion outlook, with 56% of occupiers planning to increase their footprint, compared with 18% in Auckland and 21% in Wellington. Wellington's outlook has softened, with occupiers now more likely to maintain or reduce space than expand. Auckland is close to balanced, with expansion and contraction plans roughly matched.

The patterns of contraction and expansion across industries and cities indicate that sector economics now drive footprint decisions more than a general post-pandemic adjustment.

FIGURE 12: Planned footprint change over next 2-3 years, by industry sector

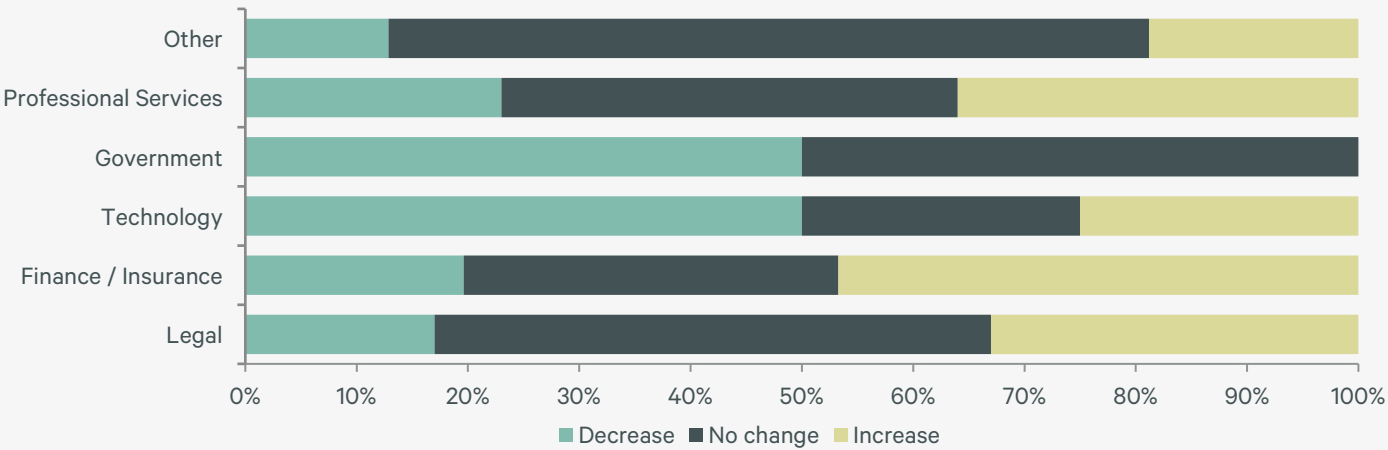
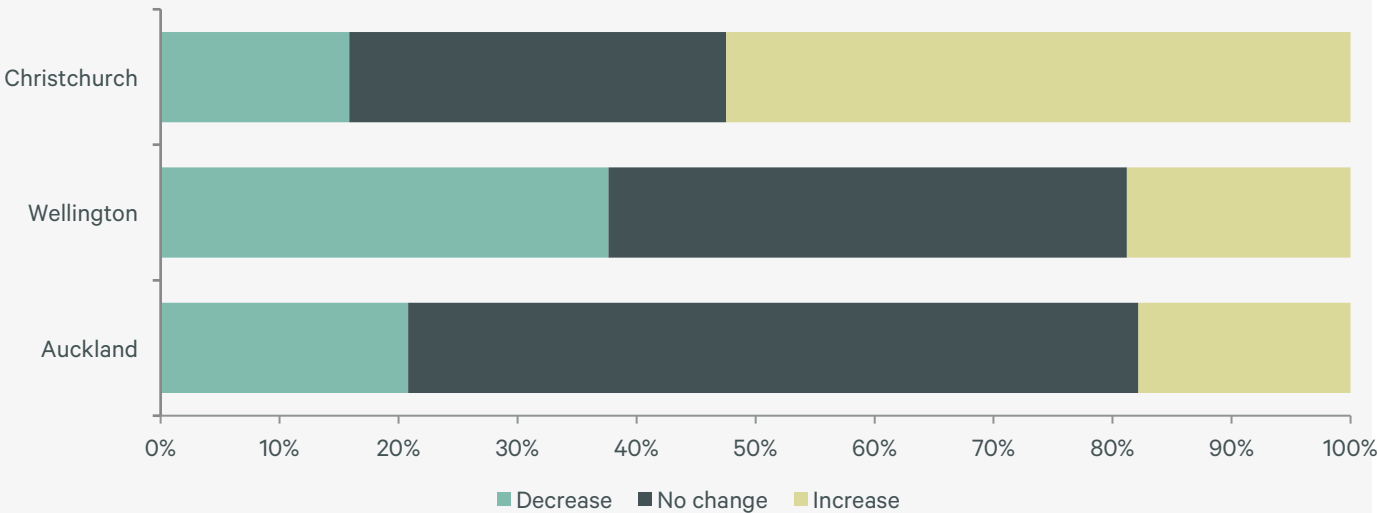


FIGURE 13: Planned footprint change over next 2-3 years, by city



04

AI Adoption & Real Estate Impacts



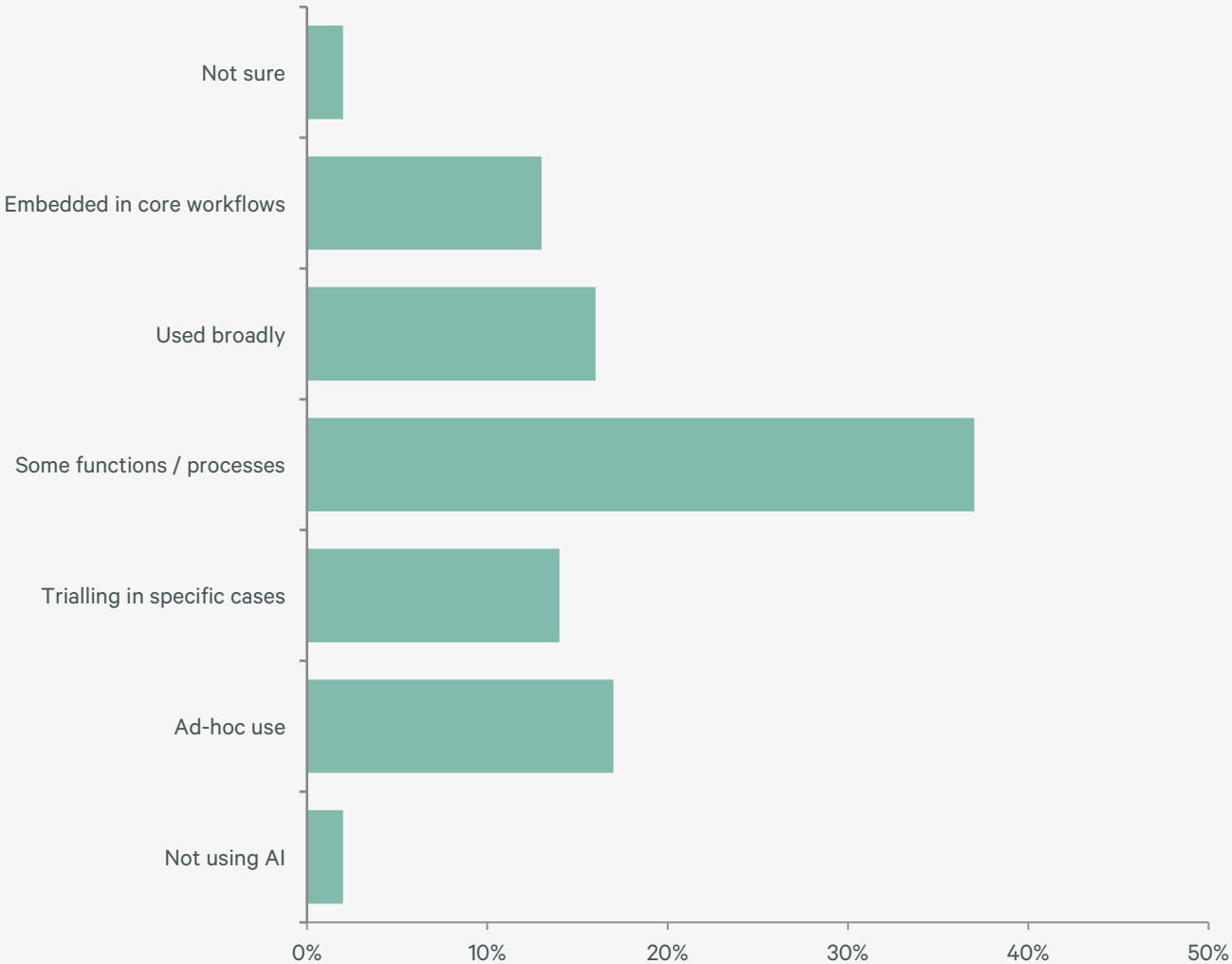
AI is now in use almost everywhere, but embedded in few workflows

AI adoption is now near-universal, with 98% of survey respondents reporting some form of AI use. This survey result is consistent with data from AI service providers; usage analytics by Anthropic show New Zealand as the 13th highest Claude adopter amongst 113 countries.

The distribution of maturity however is uneven. The most common state is AI applied to specific functions or processes, followed by ad-hoc use and trialing in specific cases. Only 13% of our survey respondents have embedded it into core workflows.

Understandably, Technology occupiers are the adoption leaders: 75% report AI as either used broadly or embedded in core workflows. Government and legal sectors show the lowest depth of adoption, consistent with tighter procurement and information-governance regimes. The overall picture is a market in the midst of its AI adoption curve, with most organisations having moved past experimentation but not yet at the point of deeper integration.

FIGURE 14: Current level of AI adoption



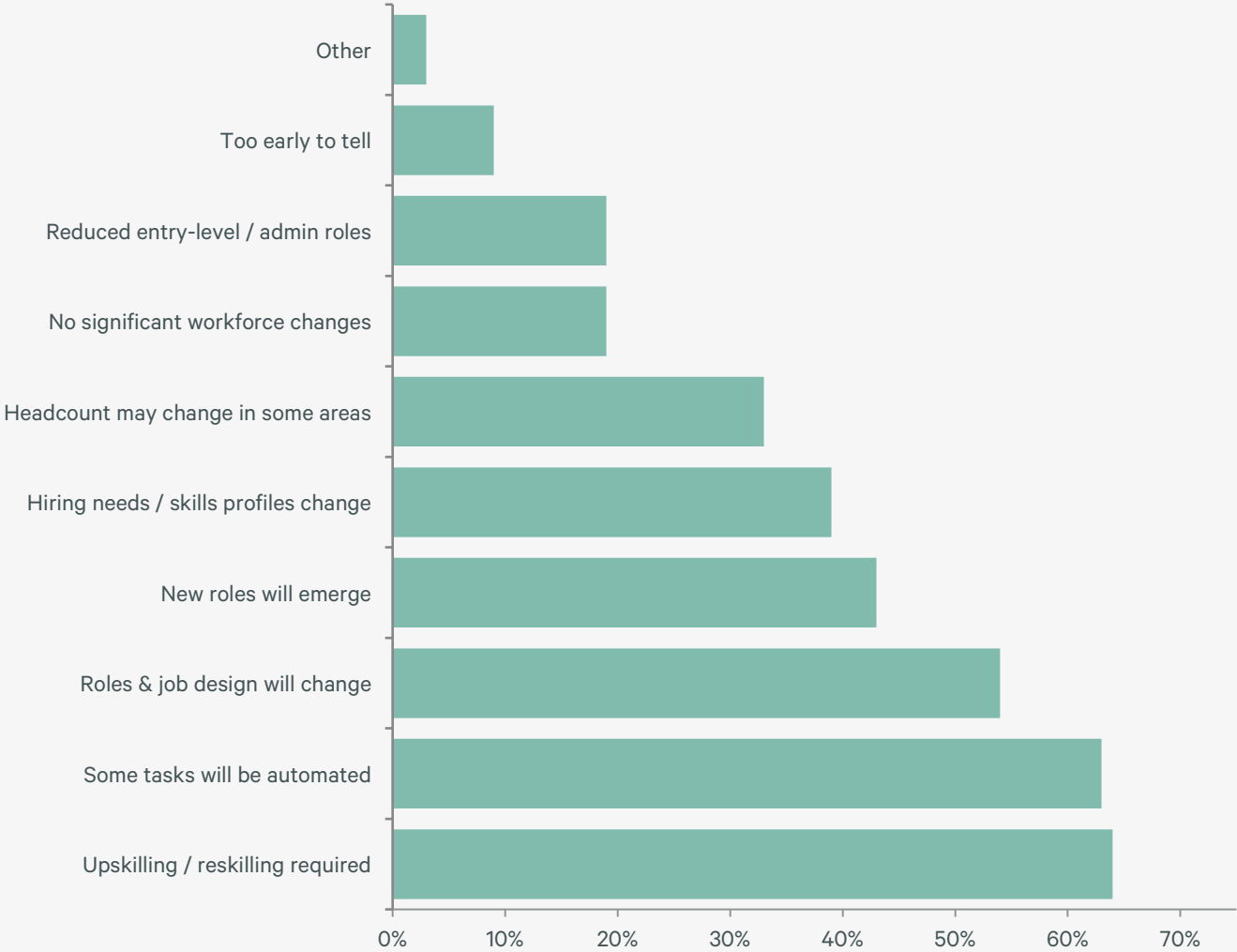
AI is expected to reshape skills, tasks and job design

AI is expected to make itself felt through the workforce before it reshapes the space that the workforce sits in. 64% of occupiers expect upskilling or reskilling to be required, and 63% expect some tasks to be automated. 54% expect roles and job design to change, and 43% expect new roles to emerge.

Perhaps the most surprising finding, given the broader public discussion around AI's impact on entry-level and administrative roles, is that only 19% of occupiers expect a reduction in these positions and only 33% expect changes to headcount in some areas. Occupiers are more likely to expect their workforce to change shape than shrink.

For real estate strategy, this points to a workplace that continues to serve a similar-sized workforce but supports a different mix of tasks: less transactional processing, more collaboration, more skills development. That shift, over time, will feed back into space design, though the pace of that feedback will depend on how quickly AI moves from productivity tool to embedded workflow.

FIGURE 15: Expected AI impact on the workforce over next 3 years



AI is not expected to reshape workplace and real estate strategy in the near term

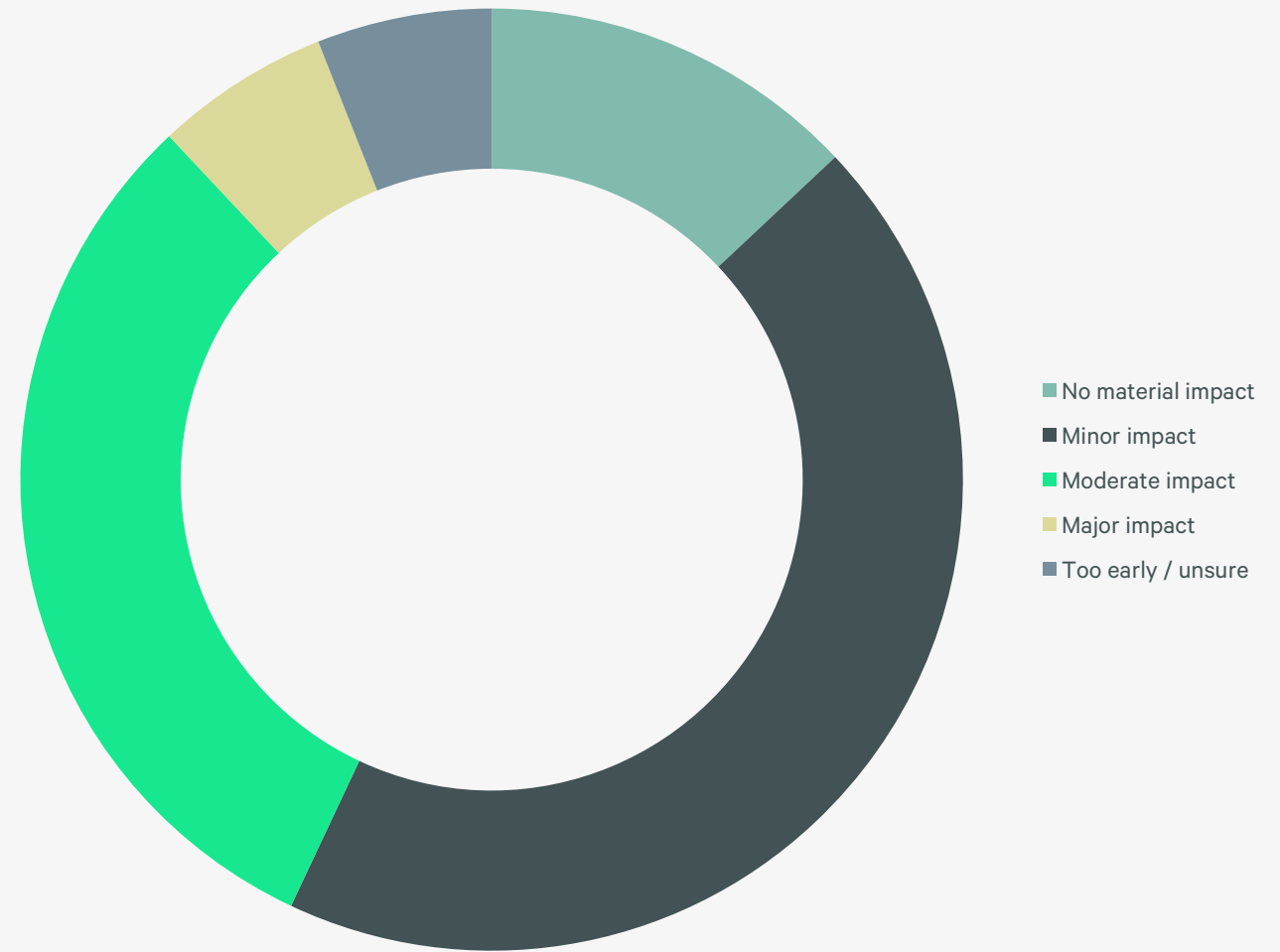
Consistent with how occupiers see AI's workforce impacts, they do not expect it to materially reshape workplace and real estate strategy in the near term, with only 6% expecting a major impact. The reading is also consistent with the current adoption profile. Only 13% of occupiers have embedded AI in core workflows, which is the stage where AI is most likely to change the shape of teams, tasks and the space they need.

The implication is that AI is unlikely to be the near-term driver of change in office demand or design. The near-term influence on real estate strategy will come from hybrid working policy and utilisation trends, not from AI itself. However, the pace of technological change remains uncertain. While occupiers currently expect limited real estate impacts, AI's influence on workforce structure, work patterns and space requirements will become clearer as adoption matures.

Labour market analysis of job task components and their exposure to AI augmentation and automation, combined with our analysis of occupational compositions of different office markets indicates that AI adoption will slow the rate of office based employment growth without reversing it.

The structural shifts that drove office based employment to disconnect from office occupancy are drawing to a close as workplace flexibility and hybrid working practices stabilise. This implies renewed positive connections between employment and office occupancy. While AI adoption will have a suppressing effect on the rate of employment growth, this will be offset by the more direct transmission of this employment growth to office space demand. For further analysis on this topic see our report: [Coming back into alignment: Office demand and employment growth](#).

FIGURE 16: Expected AI impact on workplace and real estate strategy over next 3 years



05

Considerations for Occupiers



Considerations for Occupiers

1

Rising office attendance and utilisation mean space that felt comfortably sized two years ago may now be approaching capacity on peak days.

Nearly a third of organisations are now operating above 80% utilisation, raising important questions about whether current desk allocations, neighbourhoods and shared amenities remain fit for purpose on the busiest days.

Reviewing workplace settings before capacity constraints emerge may help maintain employee experience while avoiding more costly interventions later.

2

As workplace utilisation rises, having a clear understanding of how space is being used becomes increasingly important.

The growing shift toward mixed assigned and unassigned seating reflects a desire for greater flexibility without abandoning structure altogether.

Before committing to additional space, occupiers should use utilisation data and workplace planning insights to ensure existing workplaces are configured to support both current attendance patterns and future growth requirements.

3

The quality of the workplace is becoming a more important differentiator in occupier decision-making.

While location and floor configuration remain fundamental considerations, demand for higher-quality space, stronger amenity offerings and improved employee experience continues to grow.

Organisations approaching a lease expiry should ensure these factors are reflected in their workplace brief alongside traditional real estate requirements.

4

AI is expected to reshape skills, tasks and job design before it materially changes real estate requirements.

While few occupiers expect AI to have a major impact on workplace requirements in the near term, the pace of technological change remains uncertain.

Maintaining flexibility in workplace layouts and lease structures may help organisations adapt as AI adoption matures, workforce requirements evolve, and the long-term implications for real estate become clearer.

06

Survey Profile



Locations and Sectors of Participants

67

Participants

15+

Sectors

22,000+

Headcount

283,000

SQM

Geography of Participants

46%

Auckland

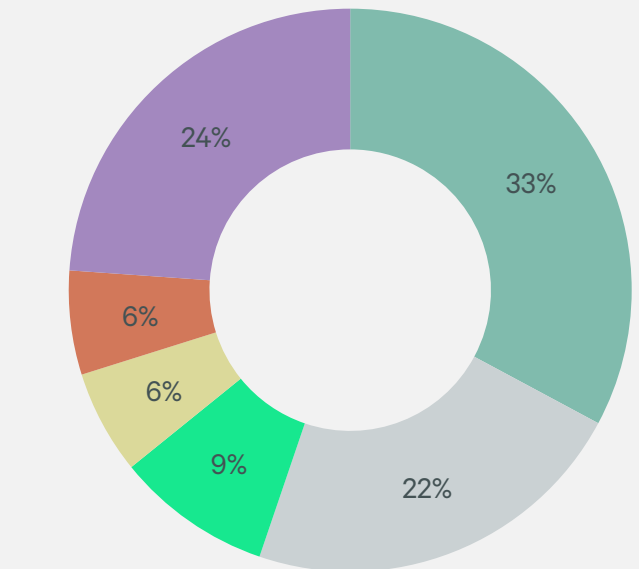
25%

Wellington

29%

Christchurch

Participants by Industry Sector



- Professional Services
- Finance / Insurance
- Legal
- Technology
- Government / Public sector
- Other

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