

Adaptive Spaces

2025

Asia Pacific Office Occupier Survey

Accelerating the Return to Office; Elevating the Workplace Experience

REPORT

CBRE RESEARCH
AUGUST 2025

CBRE



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Key highlights



Tighter office attendance protocols

- **82% of occupiers** state there are consequences for employees who do not comply with office attendance protocols, a rise of 16 percentage points (pp.) y-o-y.
- **50% of occupiers** indicate that failing to follow office attendance protocols **affects performance reviews**, an increase of 21 pp. y-o-y.
- **Office utilisation rates show further improvement in 2025.** 55% of occupiers achieve higher than 80% **peak utilisation**, while **28%** exceed 80% **average utilisation**, up 12 pp. and 7 pp. respectively, y-o-y.



Preference for core and quality but mismatch in availability

- **Smaller-sized companies** (less than 1,000 employees) display the strongest appetite for office footprint growth, with **48% expecting expansionary demand to increase** over the next three years.
- Occupiers' top workplace priorities in 2025 are **enhancing employee experience (58%)** and **optimising workspace for better performance and efficiency (58%)**.
- **65%** of occupiers planning to move would **prefer to relocate to CBD core**. However, core vacancy remains tight, with **most availability concentrated in non-core** locations.



Strategies to increase workplace effectiveness & efficiency

- Respondents identify **insufficient small rooms (48%)** and **a lack of vibrancy (35%)** as their top challenges to achieving higher office attendance.
- Adjusting and monitoring workspace metrics such as **workstation sizes** and **desk sharing ratios** can help increase workplace effectiveness.
- More occupiers prefer a **lower staff-to-desk ratio**. 82% of respondents prefer a **sharing ratio of 1.5 or less**, a rise of 10 pp. y-o-y.

01

Tighter office attendance protocols

Tighter office attendance protocols

With many occupiers in Asia Pacific adopting lax return-to-office policies as the region exited the pandemic, the pace of returning to office-based working has been slow, particularly among international companies. Even though many companies set their employees targets for working in the office, rules were not strictly implemented.

This year's survey reveals occupiers have adopted a more stringent stance, with 82% of respondents saying there are consequences if employees do not follow return-to-office protocols, up from 66% last year. Around half of respondents say that office attendance levels affect employees' performance reviews, up from 29% in 2024.

Despite signs of the broader Asia Pacific region heading towards stronger enforcement of return-to-office protocols, government policies on flexible working in markets such as Australia and Singapore offer protection for employees' rights to work outside the office, provided they meet certain criteria.

Figure 1. Are there consequences for employees who do not follow office attendance protocol?

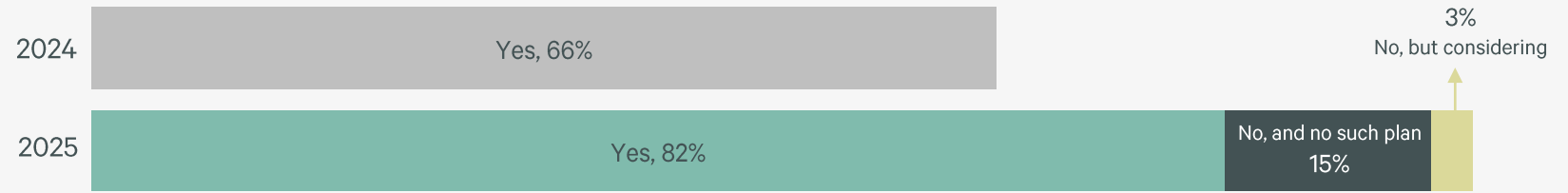
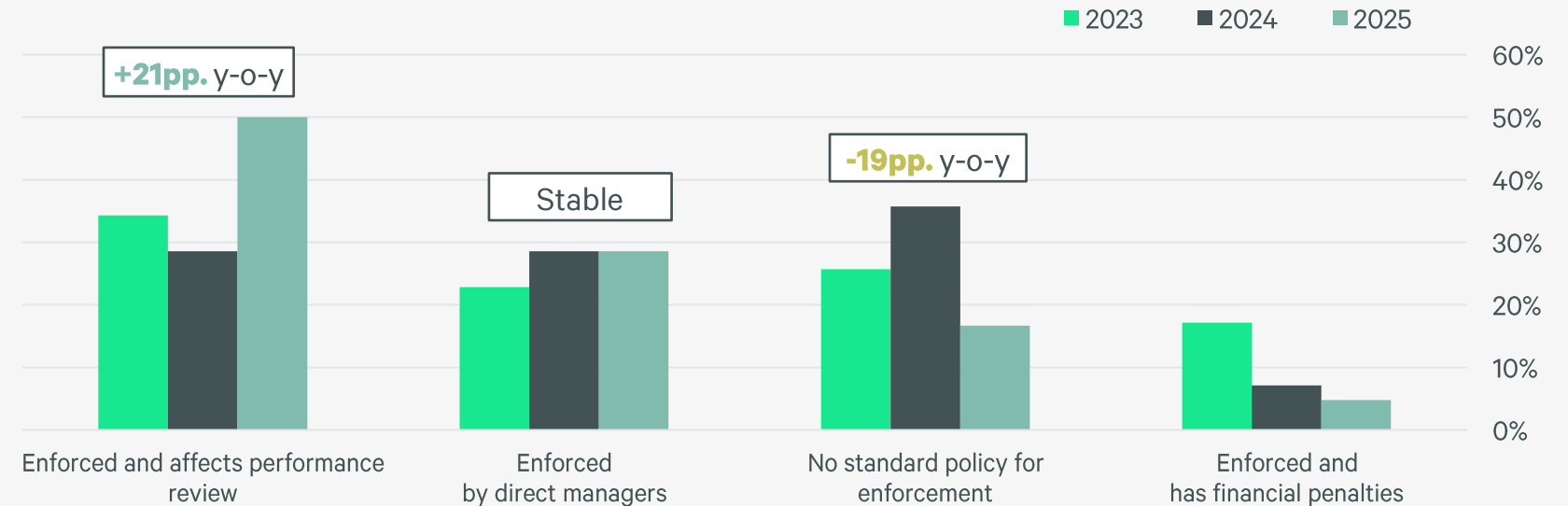


Figure 2. Consequences and enforcement of office attendance protocol



Note: N=69. Survey in mainland China and Australia did not include these questions.
Source: CBRE Research, May 2025.

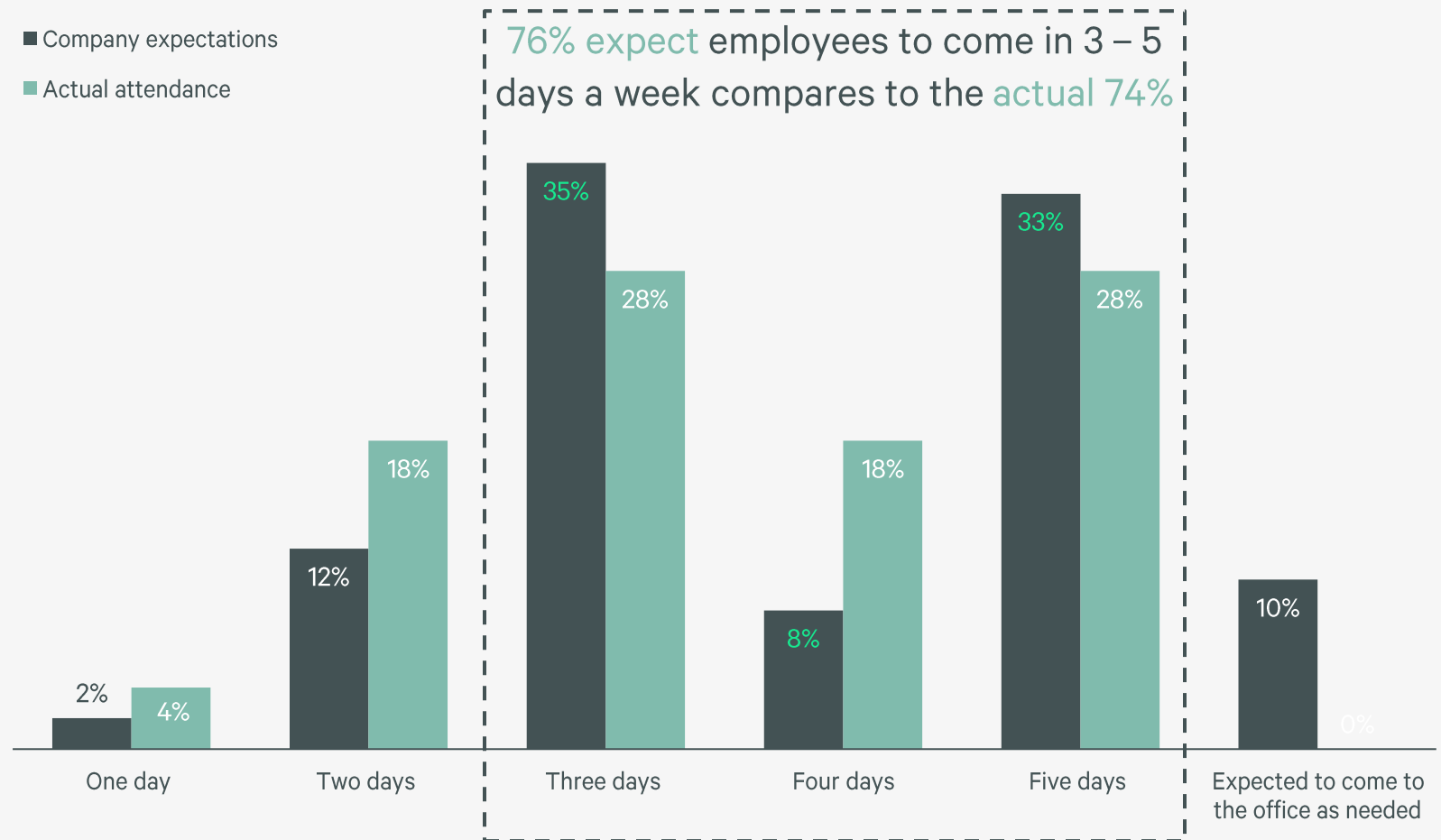
Companies expect more frequent office attendances

Stricter enforcement of return-to-office protocols indicates that companies expect employees to work in the office more frequently compared to last year. Around 76% (vs. 70% in 2024) say they expect employees to work in the office three to five days a week, an increase of 6 pp. y-o-y.

Respondents reveal that actual attendance of three to five days a week reached 74% (vs. 73% in 2024), indicating that companies are leading office attendance expectations and employees' actual attendance is closely following suit. This close gap between the two indicators could be due to the in-office culture being more prevalent in Asia Pacific than other regions.

CBRE's 2025 Americas Office Occupier Survey found 77% of companies expect employees to come back to the office three to five days a week, while actual attendance stood at around 70%, showing a 7 pp. divergence gap, compared to Asia Pacific's 2 pp. This demonstrates that tighter return-to-office protocols in Asia Pacific have been relatively successful in bringing employees back to the office.

Figure 3. Office attendance expectations and actual visits in a typical week



Note: N=110. Survey in mainland China did not include this question.
Source: CBRE Research, May 2025.

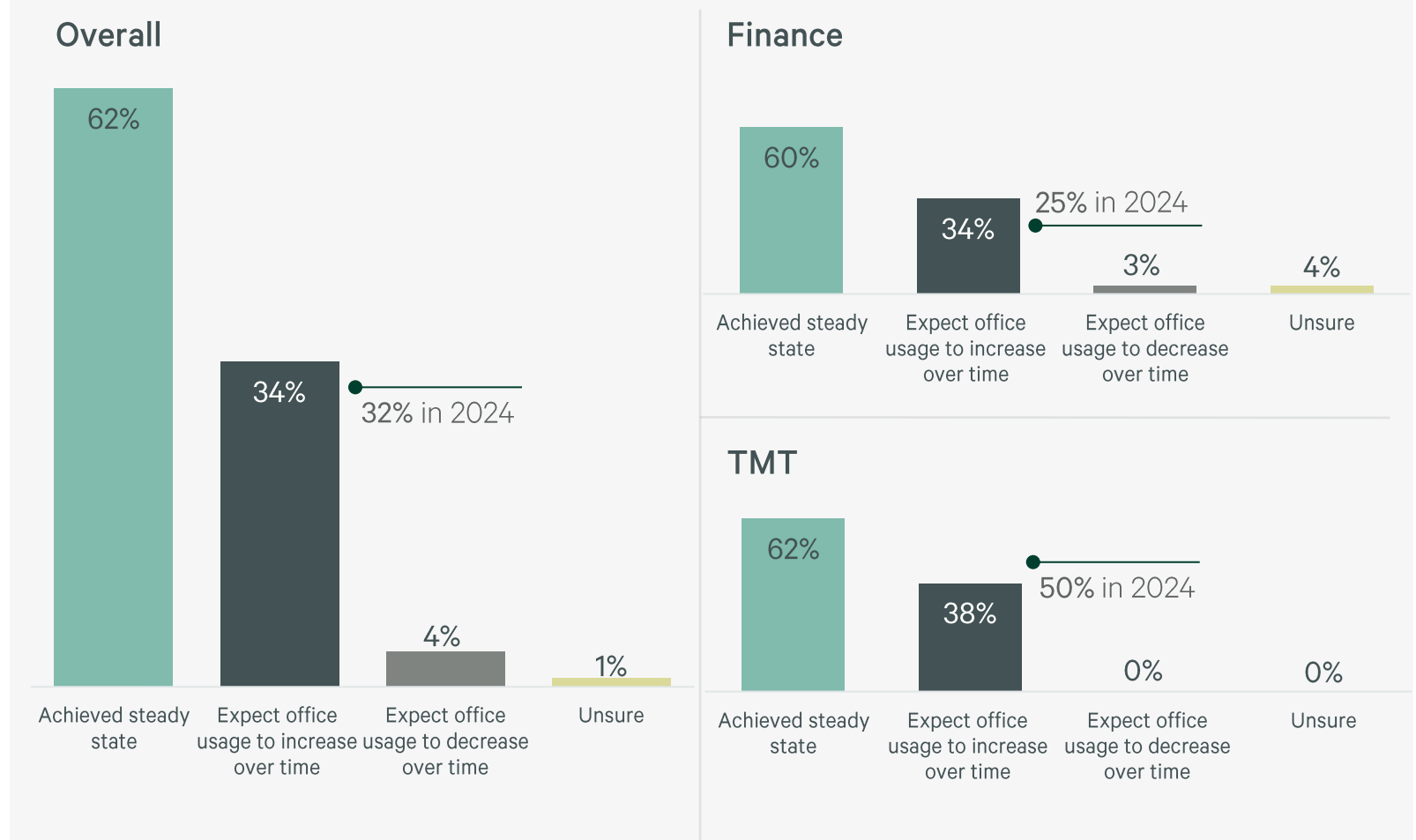
Office attendance stabilises but finance occupiers expect office usage to rise

The close alignment between company expectations and actual attendance (Figure 3) reflects companies' current acceptance of office attendance. Around 62% of respondents state that office attendance has reached a steady state, while 34% (vs. 32% in 2024) expect office usage to increase over time, aligning with last year's result.

By sector, 34% of finance industry respondents (vs. 25% in 2024) expect office usage to increase over time, up 9 pp. from the 2024 survey. Some global banks have publicly initiated the resumption of a five day office-based working week, while others have tied employee attendance to performance reviews. Tighter return-to-office policies, particularly for roles related to trading and other sensitive on-site work, will result in higher in-office attendance.

In contrast, 38% of TMT sector respondents (vs. 50% in 2024) expect office usage to increase over time, a decline from last year's result but still higher than other sectors. Amid the rapid development of new technologies such as AI and robotics, tech firms believe that ensuring teams are collaborating in-person in the office is essential to promoting bonding and innovation.

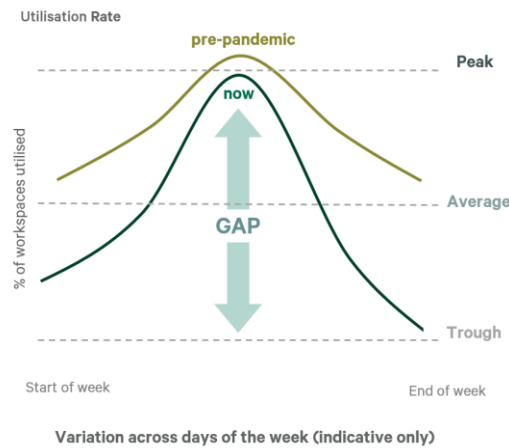
Figure 4. Acceptance of current state of office attendance by overall and selected industries



Note: N=110. Survey in mainland China did not include this question. Source: CBRE Research, May 2025.

Office utilisation further improves

Last year's [survey](#) indicated that occupiers regard an office utilisation rate of over 80% as a benchmark to ensuring a vibrant and efficient office. This year's survey found that office utilisation in Asia Pacific continues to rise alongside tighter return-to-office protocols, with 55% of occupiers reaching peak utilisation of 80%+ and 28% of occupiers reaching average utilisation of 80%+. While these figures marked an improvement on 2024 levels, the uneven increase, with peak utilisation increasing by 12 pp. and average utilisation rising by 7 pp., may indicate that the gap in attendance on peak and quiet days is widening. Companies must therefore consider how to restack their offices to accommodate fluctuating attendance.

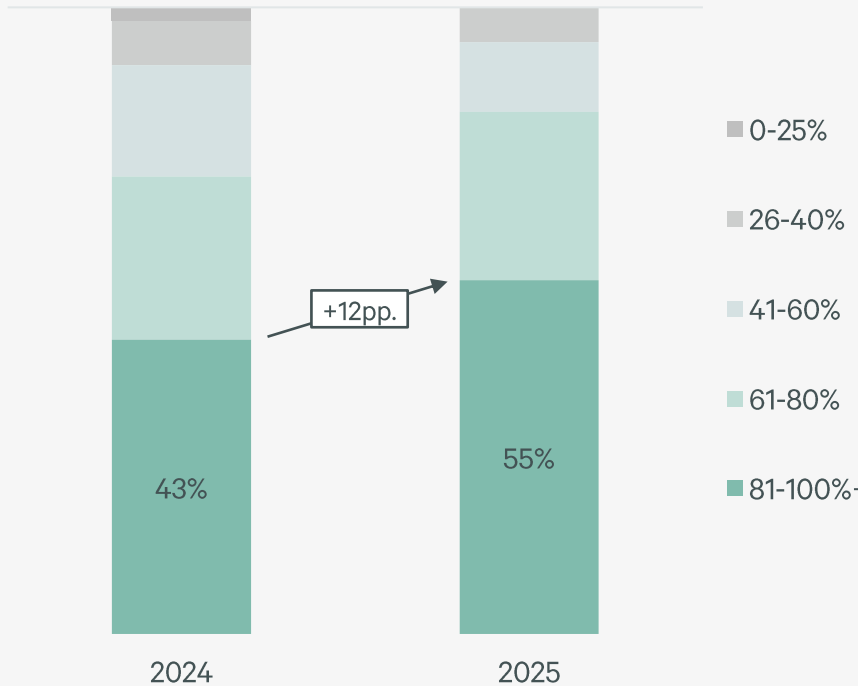


¹See 2024 Asia Pacific Office Occupier Survey for definition on different utilization rates

Figure 5. Office utilisation rates across portfolios

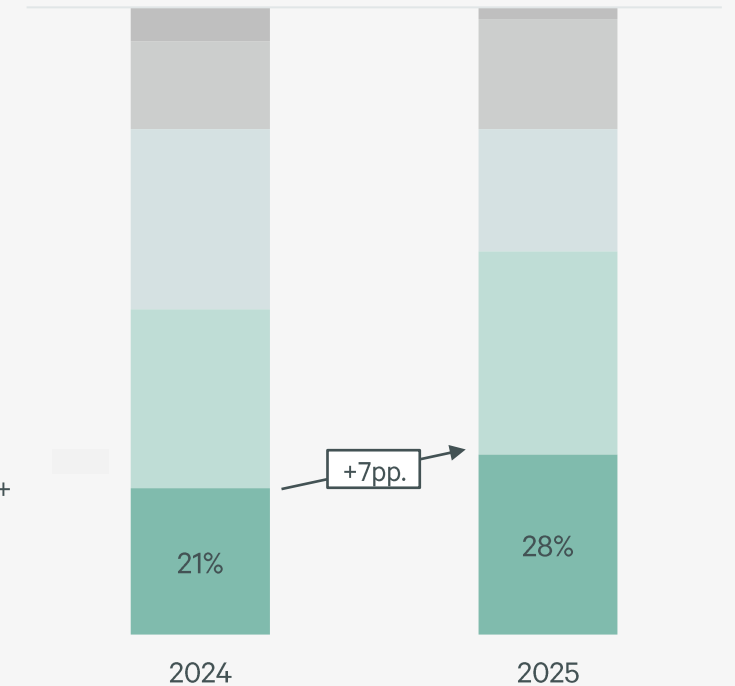
¹Peak Utilisation

The peak utilisation (maximum turn up rate on busiest day) is the key metric driving seat and space forecasting



¹Average Utilisation

Average utilisation was the prevalent metric used before COVID, with fixed desks, but less so in today's unassigned workplaces



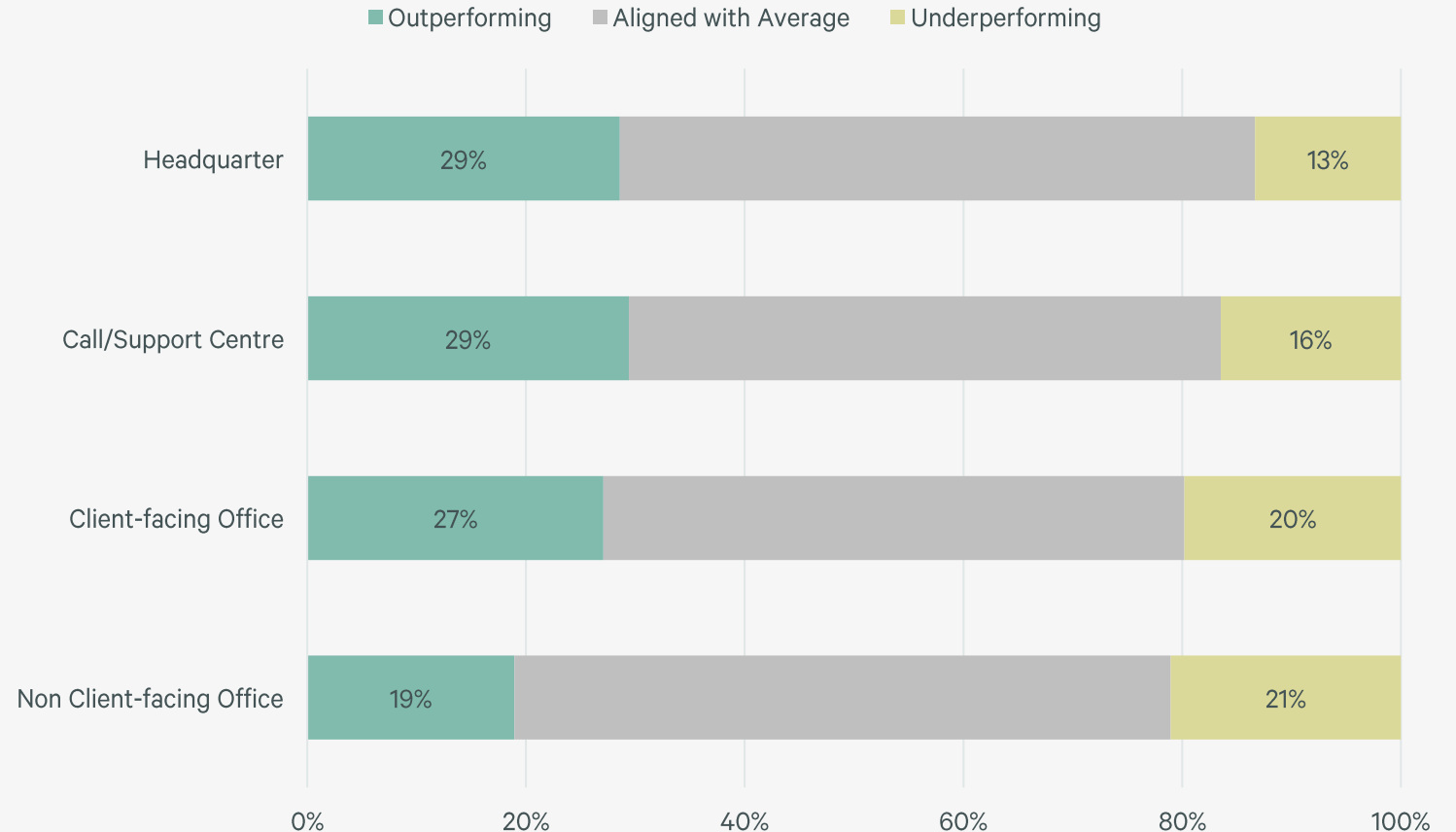
Note: N=110, The option of "unsure" is not included. Survey in mainland China did not include this question. Source: CBRE Research, May 2025.

Utilisation lags in non-client facing offices

Utilisation rates typically vary across office functions due to differences in working patterns. Corporate headquarters usually have the highest utilisation rates due to their better location, quality, and attendance rates, particularly among senior executives and other key employees. Call centres and offices hosting supporting functions also report high utilisation rates, mainly due to India's well developed Global Capability Centre (GCC) industry and the Philippines' Business Process Outsourcing (BPO) sector.

Utilisation is lowest in non-client facing offices, which usually host employees in back-office roles that do not require daily office attendance. CBRE advises companies to consider establishing office attendance protocols according to specific office functions to drive up utilisation in individual offices.

Figure 6. How does utilisation in the following facility type compare to average utilisation across your portfolio?



Note: N=110. Survey in mainland China did not include this question.
Source: CBRE Research, May 2025.

02

Preference for Core and Quality but Mismatch in Availability

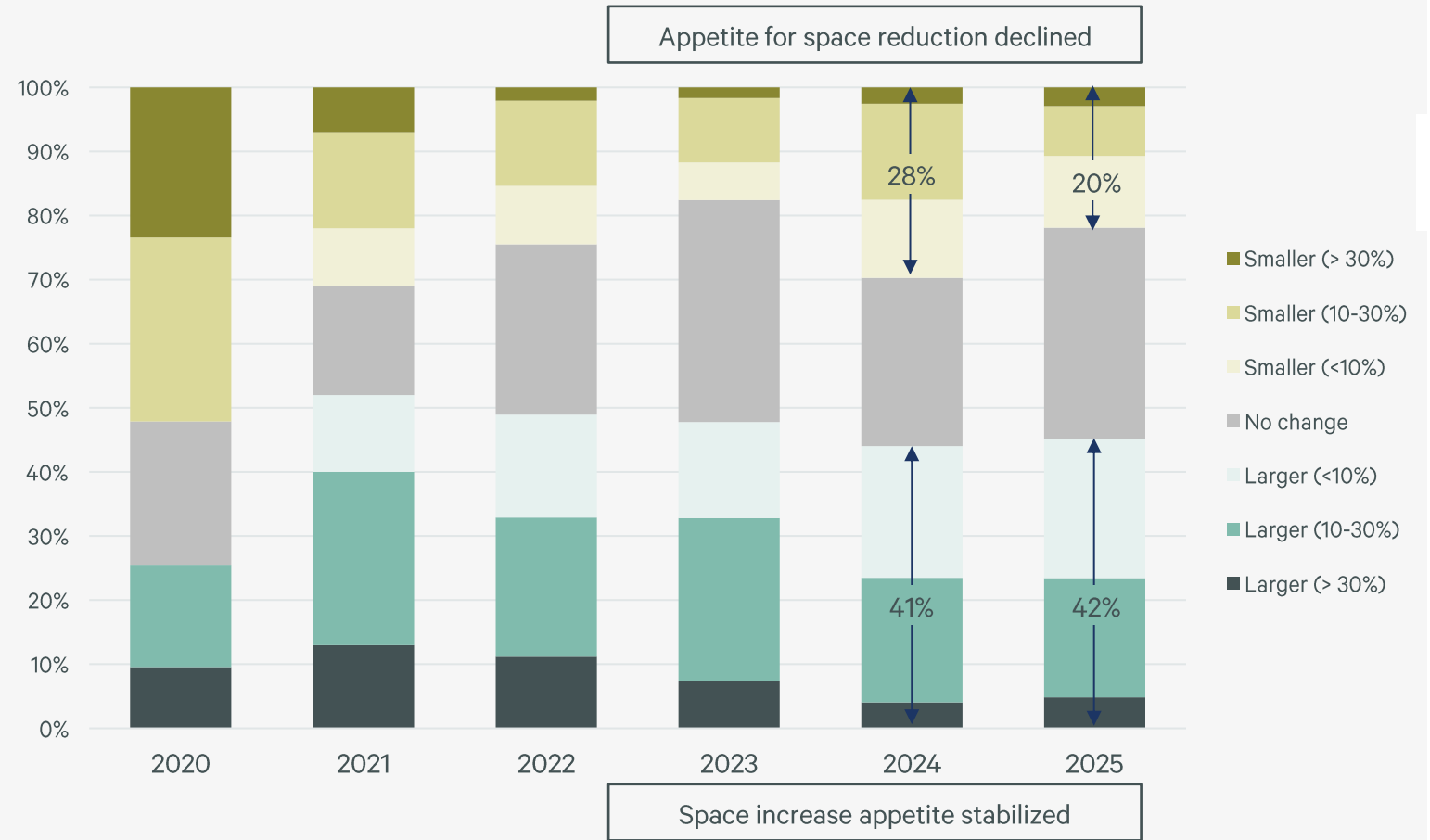
Expansion continues to outpace consolidation

Occupiers' appetite for expansion has largely stabilised since 2022. In this year's survey, 42% of respondents state that they expect to take on more space in the next three years, potentially to accommodate business growth and headcount changes.

Expectations for space reduction declined to 20% this year from 2024's 28%, mainly due to a rebound in space demand in mainland China. Growth in AI and robotics development is boosting leasing demand in this market, leading to weaker appetite for space reduction.

Some 31% of respondents expect no change to their office footprint over the next three years, indicating that their current space is sufficient to accommodate office attendance and headcount changes in the near term.

Figure 7. Occupiers' appetite for space over the next three years



Note: N=293.
Source: CBRE Research, May 2025

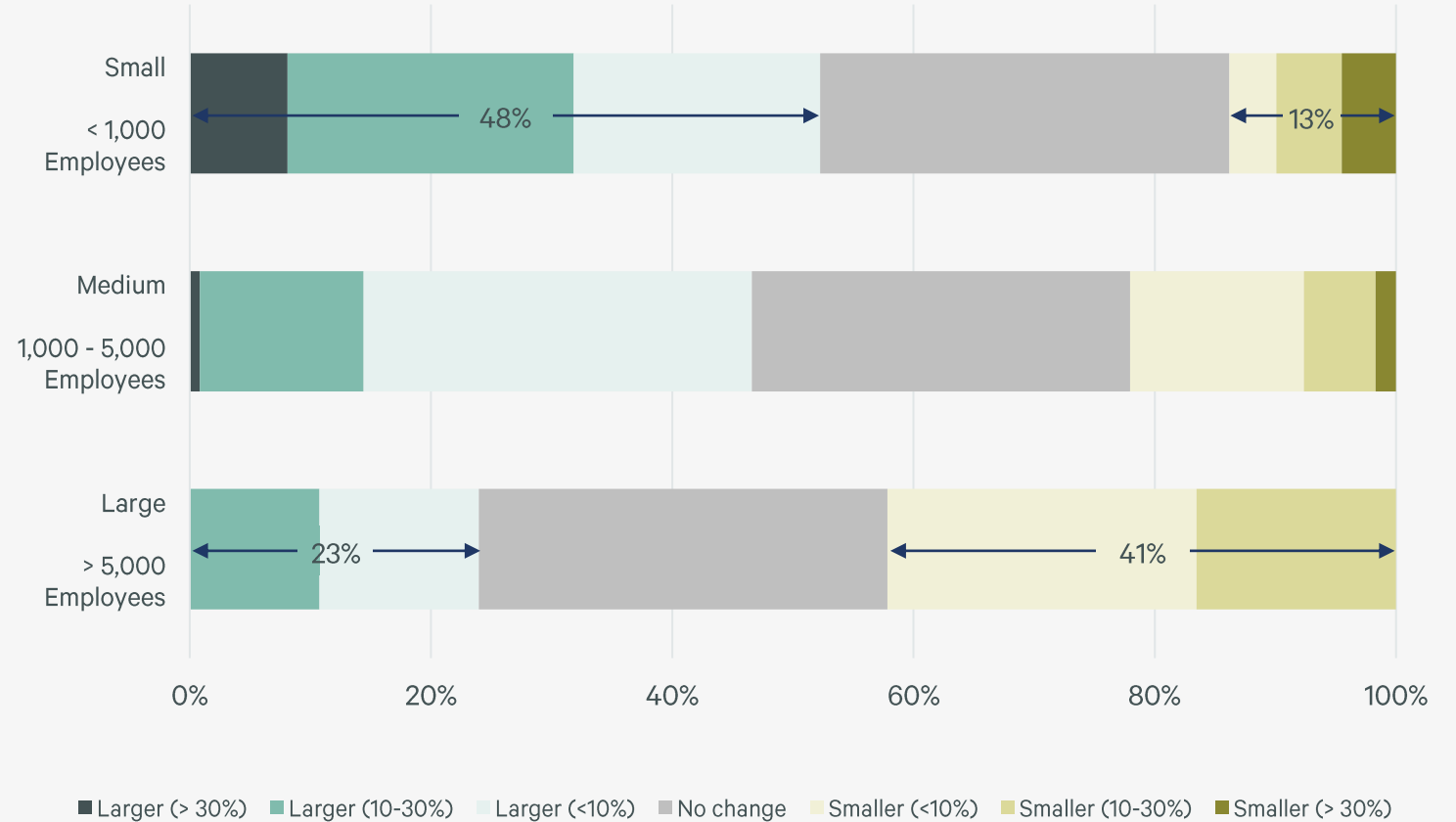
Smaller-sized occupiers drive expansionary demand

Anticipated future space requirements vary according to company size. Smaller sized firms (fewer than 1,000 employees) in the finance (asset management, family office, and private equity), legal, and tech (start-ups and rising AI-related industry) sectors exhibit the strongest appetite for expansion.

Recent years have seen large tech and finance companies (more than 5,000 employees) undergo waves of portfolio consolidation and workplace transformation with the goal of improving utilisation. Within large corporates, individual departments typically set aside buffer space for potential expansion, which over time adds up to what can sometimes be a considerable volume of excess space.

While large occupiers are now rebalancing portfolios, they must assess future space demand while considering stricter return-to-office policies and ensuring an appealing workplace experience.

Figure 8. Expansion demand for different size of occupiers over the next three years

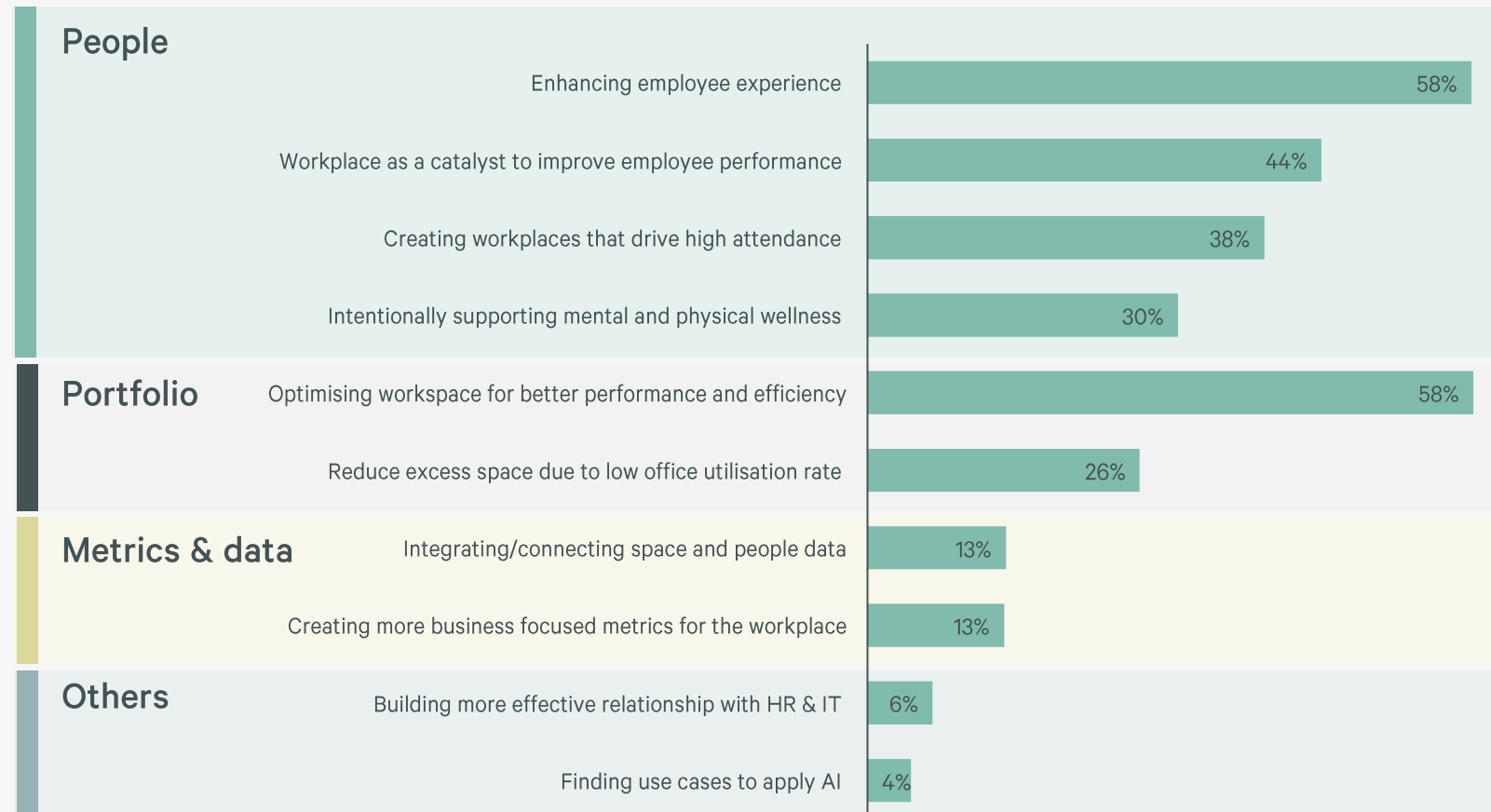


Note: N=293.
Source: CBRE Research, May 2025.

Employee experience and work efficiency are top priorities

The survey reveals that occupiers intend to use their workplaces as a catalyst to enhance employee experience and boost work efficiency. This indicates that occupiers are willing to relocate to better locations and upgrade their building quality with the goal of creating more attractive workplaces to entice staff back to the office and increase space utilisation. Occupiers' ultimate objective is to boost employee engagement and productivity to accelerate business performance amid ongoing global economic uncertainty.

Figure 9. Top three workplace priorities



Note: N=293. Multiple options are allowed.
Source: CBRE Research, May 2025.

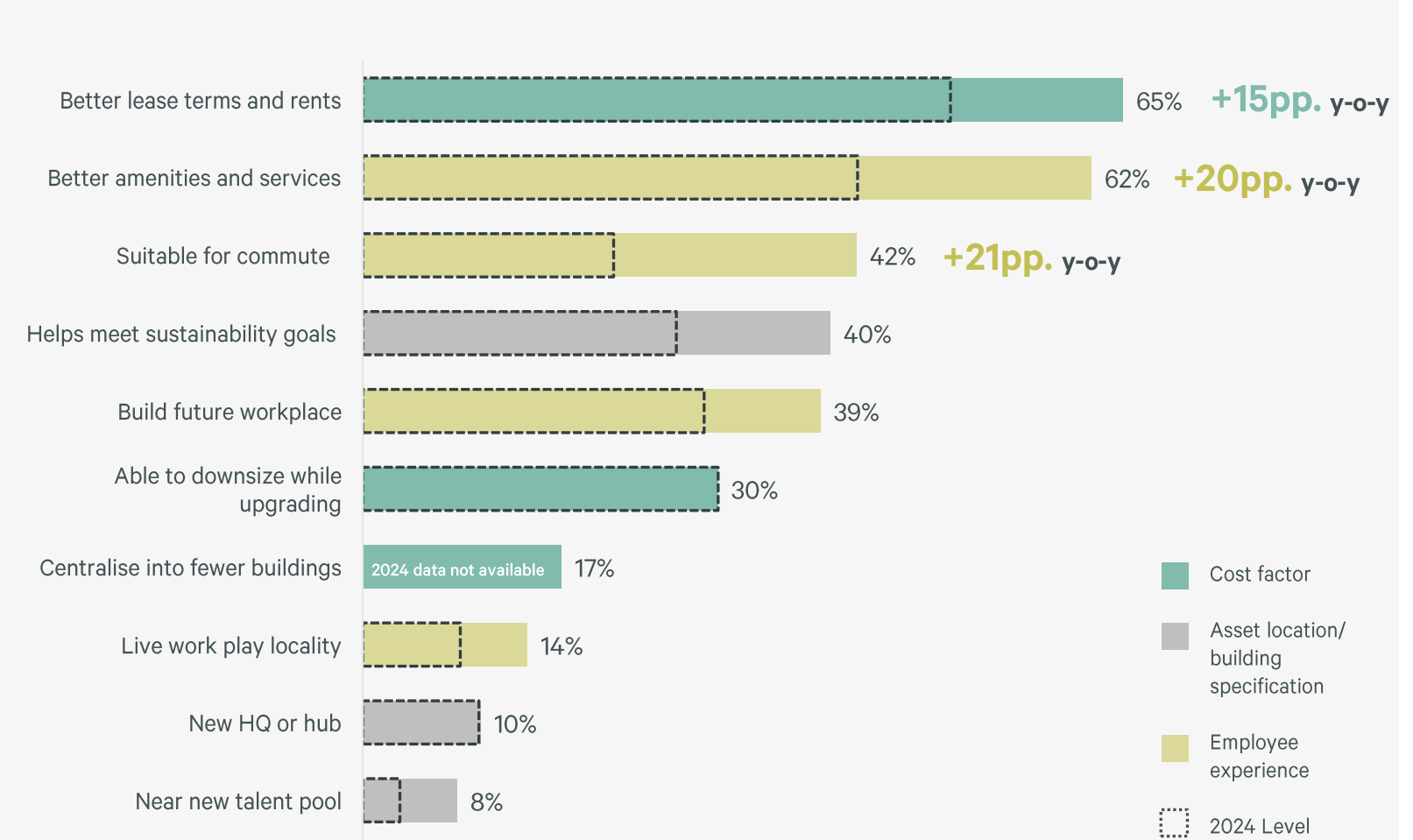
Relocations must balance cost with employee experience

Although rental cost remains the most important factor informing relocation decisions, occupiers are seeking to accommodate this criterion whilst providing an appealing employee experience to attract staff to work in the office and promote work productivity.

Employee experience-related factors such as better amenities (62%) and commuting times (42%) increased the most in importance this year. This reflects a prominent flight to quality trend, with occupiers wanting to improve their employees' journey to and from the office.

With cost remaining top of mind, occupiers are adopting a more creative approach to leasing strategy to maximise the benefits from the capital they spend on new offices. These include smaller companies with limited CapEx seeking turnkey solutions to save costs.

Figure 10. Factors influencing decisions to relocate to new offices



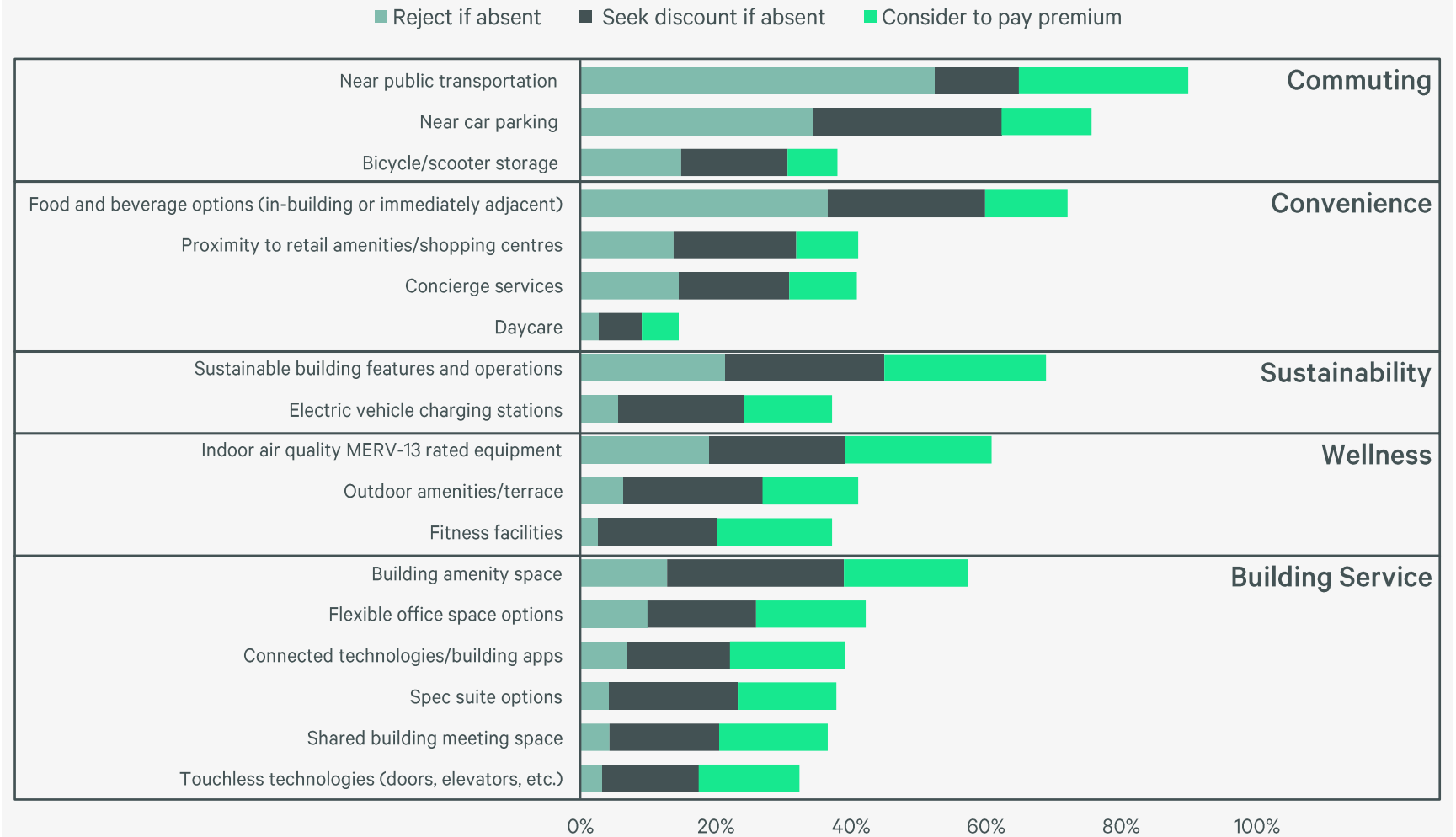
Note: N=293. Multiple options are allowed.
Source: CBRE Research, May 2025.

Buildings with good access, strong F&B and green features most sought after

In addition to relocating to better locations, companies are targeting buildings with a range of attributes that will provide benefits to their employees. These include:

- **Commuting and Convenience:** Buildings near public transportation and with good access to F&B are in demand as these features can directly enhance employees' return-to-office experience.
- **Sustainability and Wellness:** While occupiers are willing to pay a premium for buildings with sustainable features and advanced air quality equipment, CBRE's recent [Decarbonising Asia Pacific's Office Buildings](#) report suggests that green buildings in Asia Pacific command a premium over non-green buildings of just 4%.
- **Building Services:** Large and small size firms often have different requirements for building services, with the former typically incorporating work-life elements such as staff canteens, gyms and event space into offices. Small firms must avail of shared building services to use such features.

Figure 11. Most sought after building features



Note: N=293.
Source: CBRE Research, May 2025.

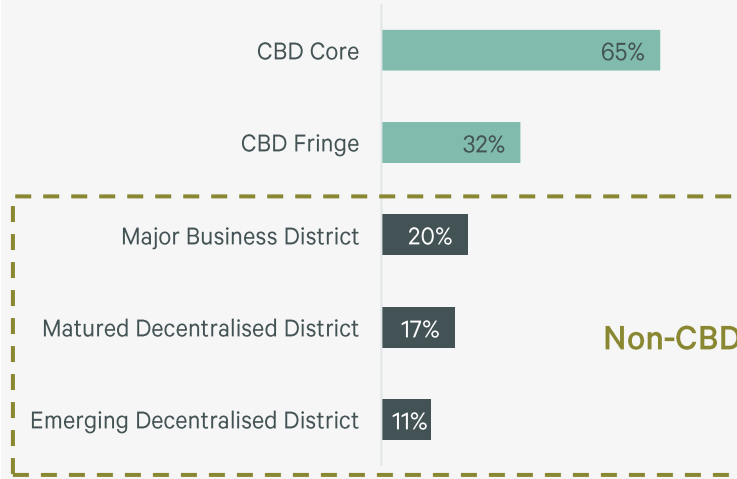
Mismatch between CBD preference and high non-CBD availability

Occupiers with relocation plans say the CBD core is their top choice, with 65% planning to move to such areas. With a further 32% considering CBD fringe areas, a combined 88% of occupiers prefer to relocate to either of these two areas. In contrast, fewer than 30% indicate a preference for non-CBD areas. The CBD remains a clear favourite among occupiers owing to its generally better infrastructure and connectivity to public transportation, which can help increase employee experience and boost office attendance.

About 57% of respondents express concern about the availability of their desired space, regardless of location or asset quality. The sustained flight-to-core trend witnessed over the past few years has led to bifurcated leasing performance and availability in core and non-core areas. Asia Pacific office occupancy data (Figure 14) illustrates this phenomenon. In Australia, companies in Sydney prefer to be in core areas as the best locations are seen as key to attracting and retaining talent. In Hong Kong SAR, net absorption is mostly concentrated in core areas such as Greater Central. Selected Indian markets are bucking the trend, with demand spilling over from core locations to secondary areas due to tight CBD availability.

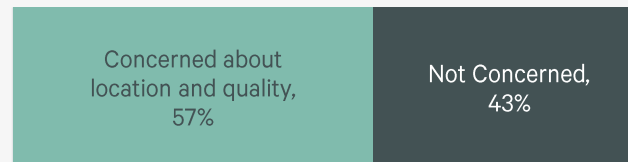
Companies who wish to secure space or expand in CBD areas will either need to plan early and/or pre-commit to new projects. Higher vacancy in non-CBD areas will provide tenants with a stronger bargaining position to negotiate favourable terms.

Figure 12. What location type(s) do you plan to move to?



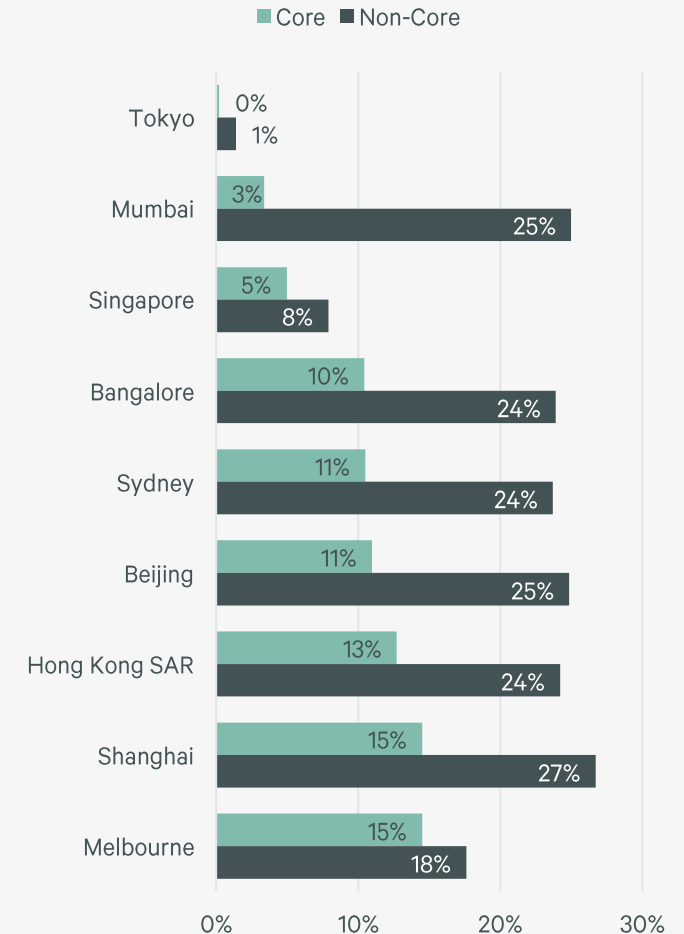
Note: N=247. Multiple options are allowed.
Source: CBRE Research, May 2025.

Figure 13. Are you concerned about the future availability of the type of space



Note: N=100. Survey in mainland China did not include this question.
Source: CBRE Research, May 2025.

Figure 14. Vacancy rate gaps in major cities' core and non-core submarkets



Source: CBRE Research, Q2 2025.

03

Strategies to Increase Workplace Effectiveness & Efficiency

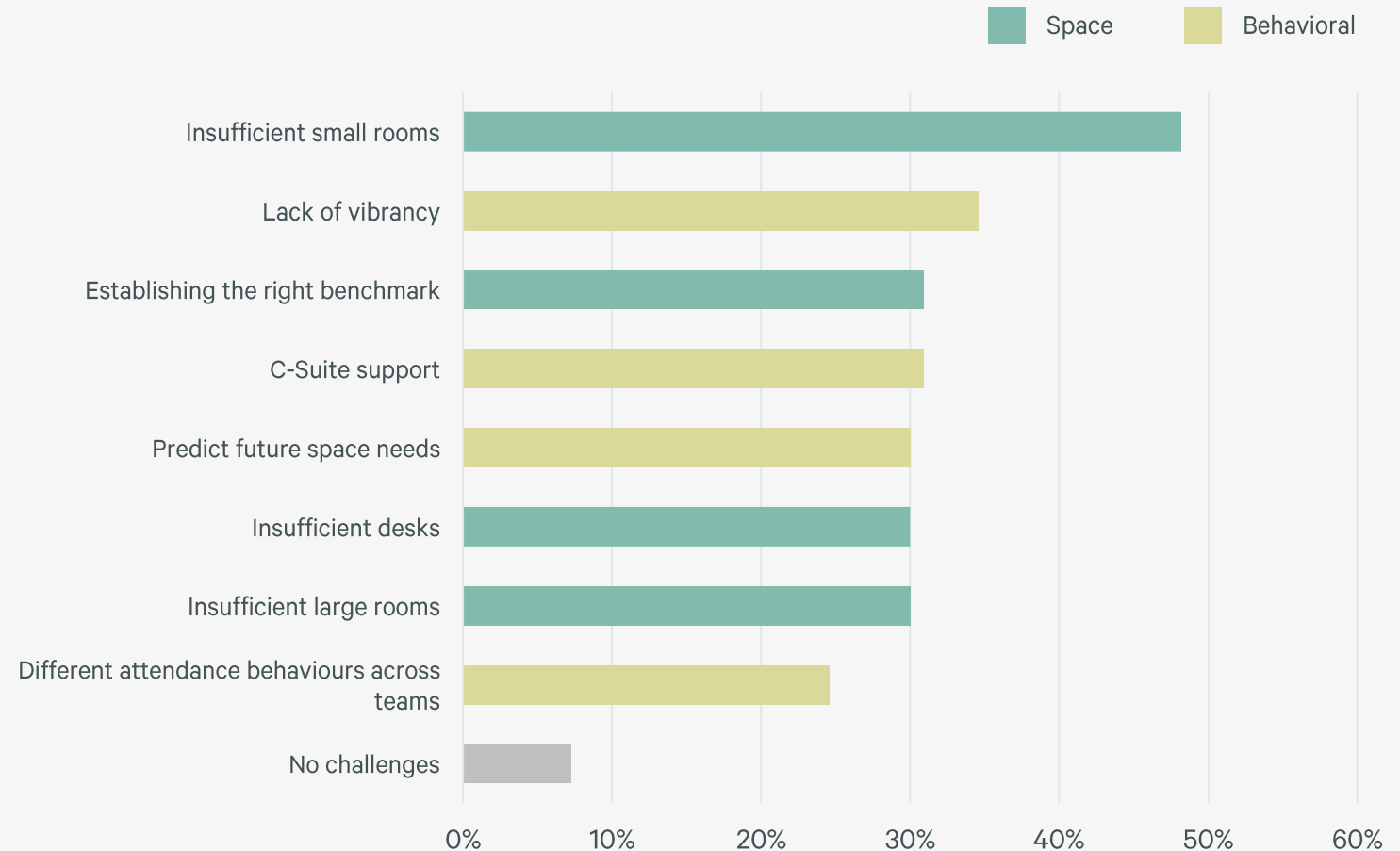
Obstacles to improving office attendance

Prior to the onset of COVID-19, the difference between peak and average office attendance in Asia Pacific during a typical working day or week was within 10%; a gap that has widened since the pandemic-era adoption of flexible working. This is challenging for occupiers seeking to maintain attendance and vibrancy on quiet days and provide sufficient workstations and shared facilities on peak days.

CBRE's [The Math Behind the Hybrid Workplace](#) report defined an office as “vibrant” when it is at least two-thirds occupied. Achieving this status requires both asking employees to return as well as optimising workplace design by including enough individual and collaboration desks; correctly calibrating staff-to-desk ratios; and providing attractive support and amenity space.

Occupiers must establish a clear purpose for their office and consider a broad range of office behaviours. For example, establishing a collaboration-based office involving a hybrid working style with a high volume of collaborative work would require fewer individual seats and more meeting rooms. In contrast, companies with offices which host employees performing more individual tasks, such as those found in a call centre, would require a larger number of desks/workstations and fewer meeting rooms.

Figure 15. Which of the following challenges do you face with respect to office attendance?



Note: N=110. Multiple options allowed. Survey in mainland China did not include this question.
Source: CBRE Research, May 2025.

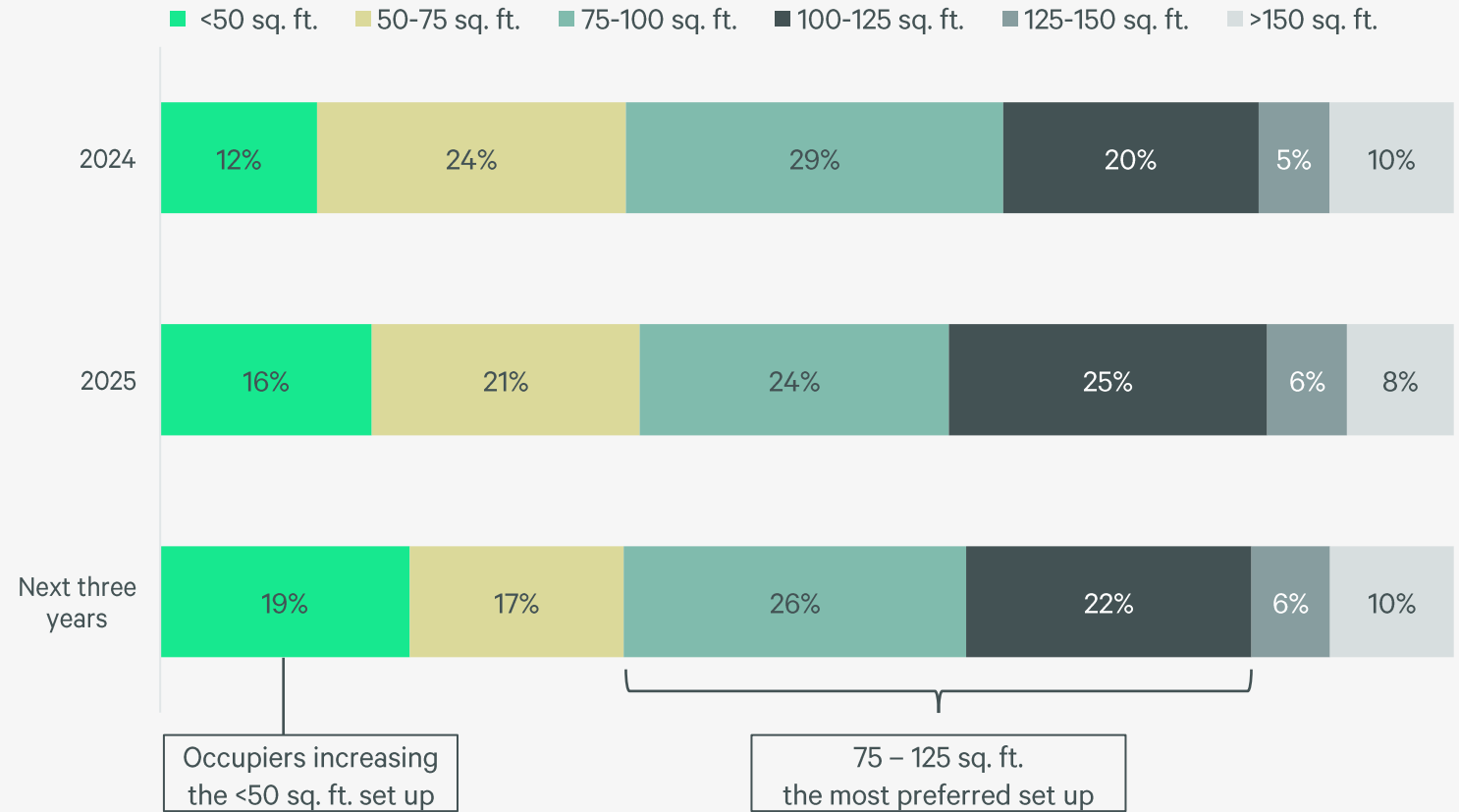
Right-sizing desk size to drive productivity

Over the years CBRE has observed occupiers shifting away from 50-75 sq. ft. workstations and either downsizing to smaller workstations of less than 50 sq. ft. or upgrading to larger size workstations of around 75 – 100 sq. ft. These recalibrations of workstation size indicate that occupiers are establishing workspaces that align with the purpose of their office.

Most occupiers retain a preference for larger workstations of around 75 – 125 sq. ft. Whilst this may result in fewer seats in the same office, with appropriate workplace planning, it could bring about better space efficiency and a more appealing employee experience.

Companies focusing on individual work such as support centres and auditing usually have smaller workstation sizes. The increasing adoption of smaller size workstations may also be due to companies trying to accommodate more seats within the same space. With more occupiers opting to maintain their office footprint at current levels, they must consider how to adjust workplace strategy when planning for future headcount growth.

Figure 16. Preferred size per workstation



Note: N=293.
Source: CBRE Research, May 2025.

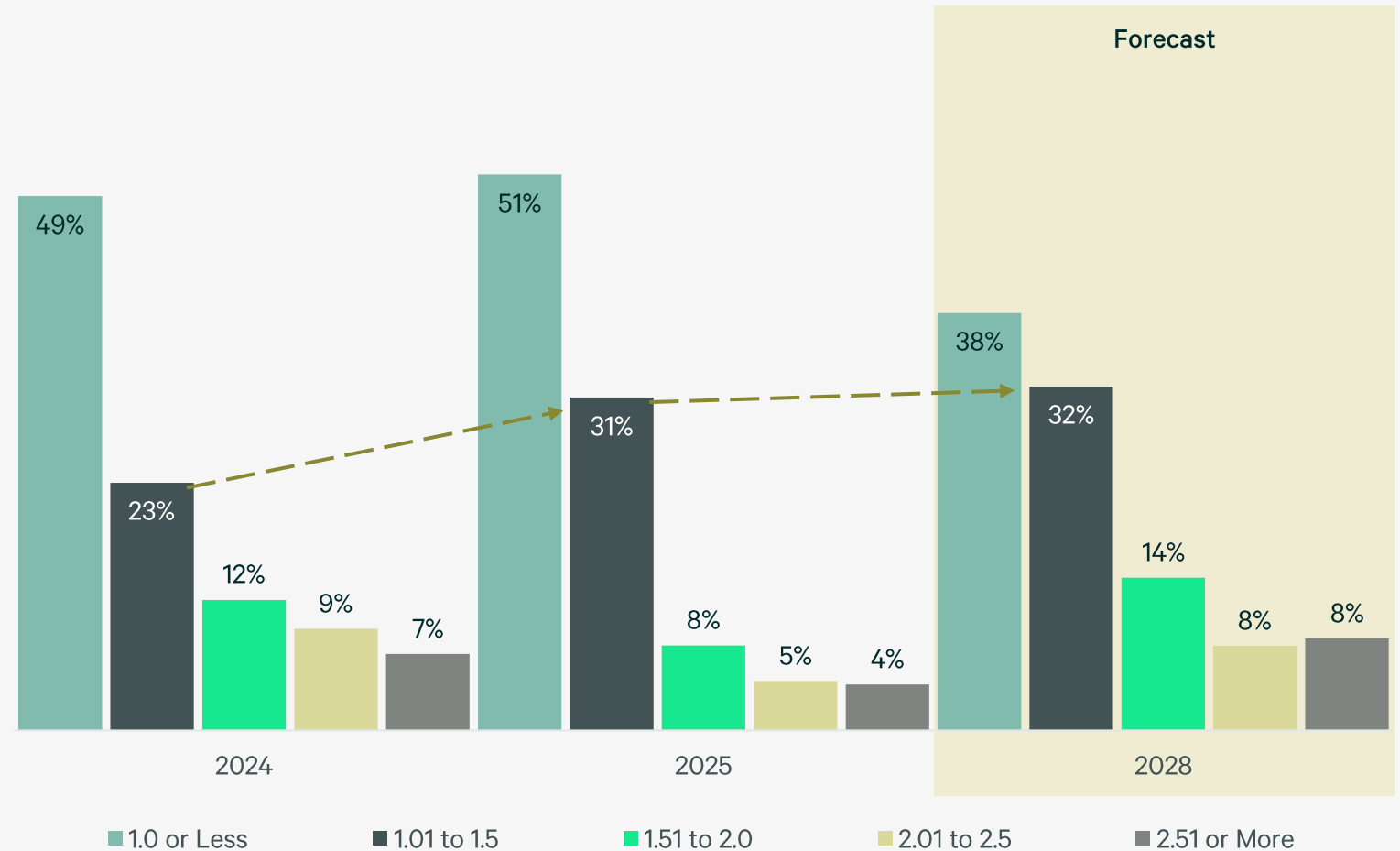
Adjusting desk sharing ratios to accommodate fluctuating attendance

Occupiers continue to adjust desk sharing ratios to optimise employees' experience. In this year's survey, 31% of occupiers selected a 1.01 - 1.5 sharing ratio, a rise of 8 pp. from last year. This increase might be due to some occupiers shifting away from a larger ratio (> 1.5) and returning to less sharing (< 1.5) to accommodate an increase in office attendance resulting from stricter return-to-office protocols.

Smaller companies typically operate a smaller sharing ratio as it is easier for them to manage empty seats. Larger companies prefer a higher sharing ratio due to having more flexible seating and needing to accommodate a range of working patterns in different departments.

As results from changes in planning take time to become visible, desk sharing ratios in Asia Pacific have not changed significantly. CBRE expects occupiers to display a stronger preference for more desk sharing in future as it could lead to higher office utilisation. However, it may take longer than expected for occupiers to reach their desired ratio as planning is a long-term and ongoing process.

Figure 17. Change in staff-to-desk sharing ratio



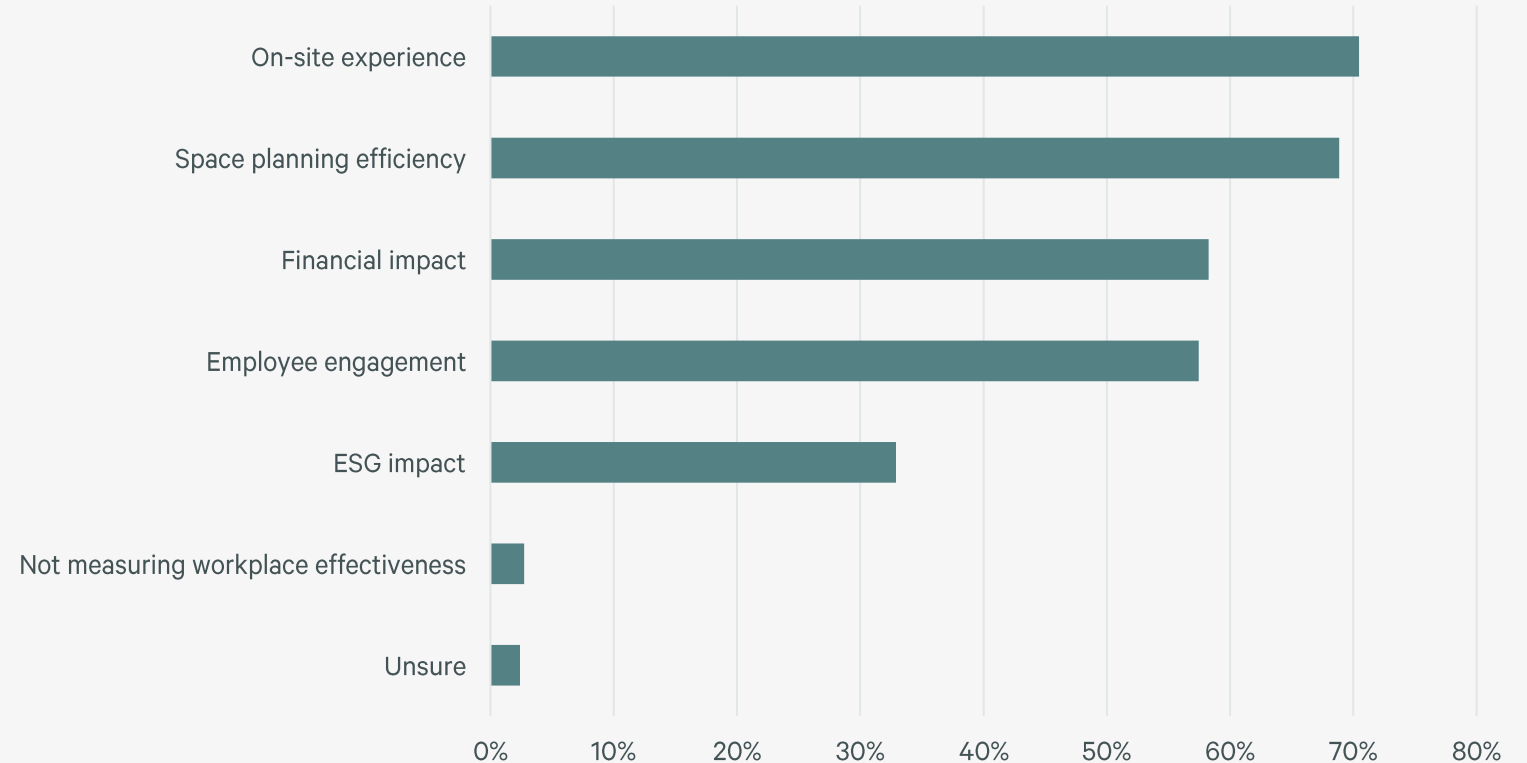
Note: N=293.
Source: CBRE Research, May 2025.

On-site experience and space efficiency will determine workplace effectiveness

On-site experience and space planning efficiency are the most important metrics to determine workplace effectiveness. On-site experience metrics such as site utilisation rates, available amenities, and occupational practice can accurately gauge how well an office is being used. Space planning efficiency metrics, such as space per seat or per person, and collaboration ratios, directly affect the on-site experience. For example, a workplace with smaller spaces per seat and a smaller collaboration ratio is appropriate for a company whose employees engage in more individual work. Offices with more collaboration work adopting the same plan will end up with a low utilisation rate and insufficient meeting rooms.

Creating an effective workplace requires setting the right workplace metrics to improve the workplace experience. Occupiers must ensure workplace decisions translate into higher office utilisation and a better employee experience. Ultimately, these results will influence employee productivity and impact business performance.

Figure 18. How do you measure the effectiveness of your workplace?



Definition:

- On-site experience (site utilisation, available amenities, security and operational practices)
- Space planning efficiency (metrics such as SF/seat, SF/person, collaboration ratio)
- Financial impact (capital costs, operational costs, and investments to occupy space)
- ESG Impact (sustainability practices, building certifications, external community initiatives)

Note: N=293.

Source: CBRE Research, May 2025.

04

Recommendations

Actions for Occupiers

Leverage return-to-office protocols to improve attendance

- Establish clear policies that inform employees when and where they should be working
- Focus on improving the office experience to entice employees back voluntarily

Establish well-located and high-quality offices to drive productivity

- Plan expansion or relocation well ahead to secure desired locations, especially for requirements fall under CBD areas
- Provide attractive amenities to employees and maintain office vibrancy to drive productivity

Optimise desk sizes and sharing ratio to boost workplace effectiveness

- Calibrate desk sizes to suit specific work types and future needs
- Plan adequate sharing ratios to effectively accommodate headcount and department functions

Actions for Landlords & Investors

Collaborate with occupiers to achieve cost and quality balance

- Understand tenants' requirements and offer cost effective measures while balancing the overall quality of offering
- Provide CapEx incentives or turnkey solutions to attract cost conscious occupiers

Integrate amenity space and enhance F&B options to meet tenants' growing requirements

- Deliver and manage amenity space to increase vibrancy and connectivity in shared areas such as reception and foyers
- Provide affordable and adequate F&B and retail offerings that support occupiers' needs

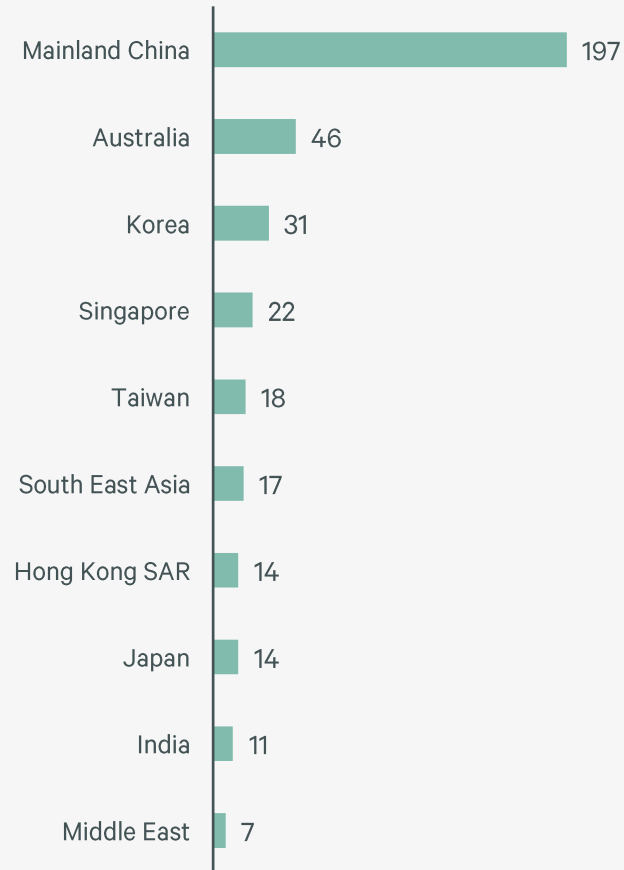
Consider asset enhancement initiatives to stay competitive

- Refurbish dated office space to improve building quality, such as sustainability, wellness, and digital features
- Provide building services that accommodate different modes of working such as flexible and collaboration space

Survey Profile

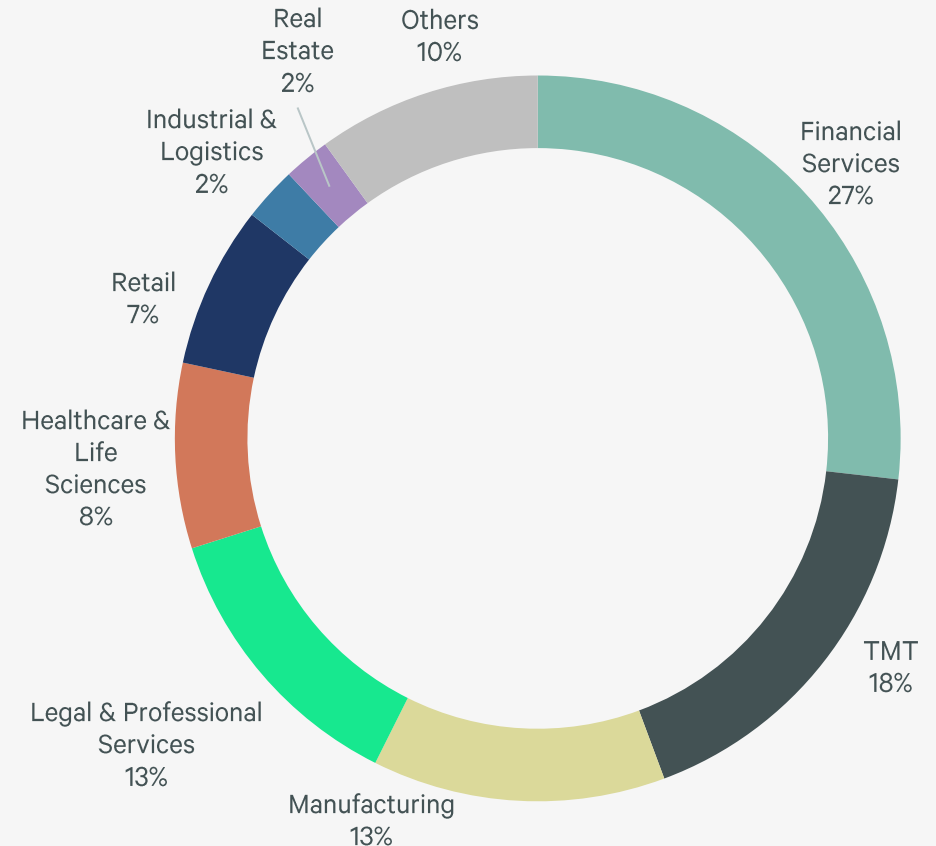
- CBRE’s 2025 Asia Pacific Office Occupier Survey was conducted between April 9, 2025, and May 23, 2025.
- A total of 293 responses were received.
- All responses refer to the company’s overall Asia Pacific portfolio rather than individual markets.
- Mainland China responses are weighted by 25%, reflecting their share of Grade A office stock in Asia Pacific.

Respondents by market covered



Note: Multiple selections apply.
 Southeast Asia refers to the Philippines, Indonesia, Malaysia, Vietnam, Cambodia and Thailand.
 Source: CBRE Research, May 2025.

Respondents by industry



Source: CBRE Research, May 2025.

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