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Asia Pacific Office Markets Enforce Stricter Attendance Protocols with a Stronger Focus on Employee Experience and Workplace Optimisation: CBRE Survey

82% of Companies Enforce Consequences for Non-Compliance with Return-to-Office Protocols

Asia Pacific – August 28, 2025 – Asia Pacific employees are intensifying enforcement of return-to-office protocols, while prioritizing employee experience and workplace optimisation to drive performance and efficiency, according to CBRE's [2025 Asia Pacific Office Occupier Survey](#).

The survey highlights greater enforcement of workplace policies, with 82% of respondents reporting consequences for employees failing to comply with return-to-office protocols, a 16 percentage-point increase from last year. Additionally, 50% of respondents now link office attendance to performance reviews, up from 29% in 2024.

As companies strive to attract employees back to the office, improving the employee experience and boosting work efficiency have emerged as top workplace priorities. These goals are driving occupiers to relocate to better locations and upgrade quality, fostering higher engagement and productivity to support business growth amid global economic uncertainty.

Growing Demand for Office Space

Stricter attendance protocols are translating into increased demand for space, 42% of occupiers planning to expand their office footprint over the next three years to accommodate rising headcount. Meanwhile, the proportion of companies planning space reductions dropped to 20% in 2025, down from 28% in 2024, signaling a slowdown in office consolidation post-pandemic. About one-third of respondents plan no changes to their office footprint, although many are adjusting workplace strategies to support expansion or encourage greater in-office attendance.

Key Drivers of Growth

Smaller firms are leading office demand growth, while larger corporates, particularly in the tech and finance sectors, are rebalancing portfolios and improving space utilisation under stricter return-to-office policies.

The preference for CBD locations remains strong, with around 65% of respondents favouring CBD core areas and 32% opting for CBD fringe, collectively accounting for 88% of preferences. In comparison, fewer than 30% prefer non-CBD locations, as superior infrastructure and connectivity in CBD areas enhance employee experience and attendance rates.

“Securing quality CBD space has become increasingly competitive across Asia Pacific. Success requires proactive planning and innovative leasing strategies that balance cost pressures with the demands of a dynamic workforce and market,” said [Tom Gaffney](#), Head of Leasing, Asia Pacific for CBRE.

Navigating a Tight Market

While most occupiers planning relocations prefer CBD areas, tight vacancy rates in prime locations are creating a bifurcated leasing market. Availability is concentrated in non-CBD areas, making it more challenging for companies to secure high-quality CBD office space.

“Our survey underscores a clear flight-to-quality and flight-to-core trend across the region,” said [Ada Choi](#), Head of Research Asia Pacific for CBRE. “Occupiers are balancing expansion, workplace efficiency, and employee engagement against economic uncertainty, shaping a complex and evolving real estate landscape that demands flexible, forward-looking approaches.”

To read the full report, [click here](#).

Notes to editors

CBRE’s 2025 Asia Pacific Office Occupier Survey was conducted from 9 April to 23 May 2025, featuring insights from over 290 corporate real estate executives in the region.

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