VANTAGE POINT

WHAT OCCUPIERS WANT 2025

Metrics that Matter

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CORENET GLOBAL

INTRODUCTION

GLOBAL SURVEY RESPONSES

Distribution of 2025 Survey Respondents

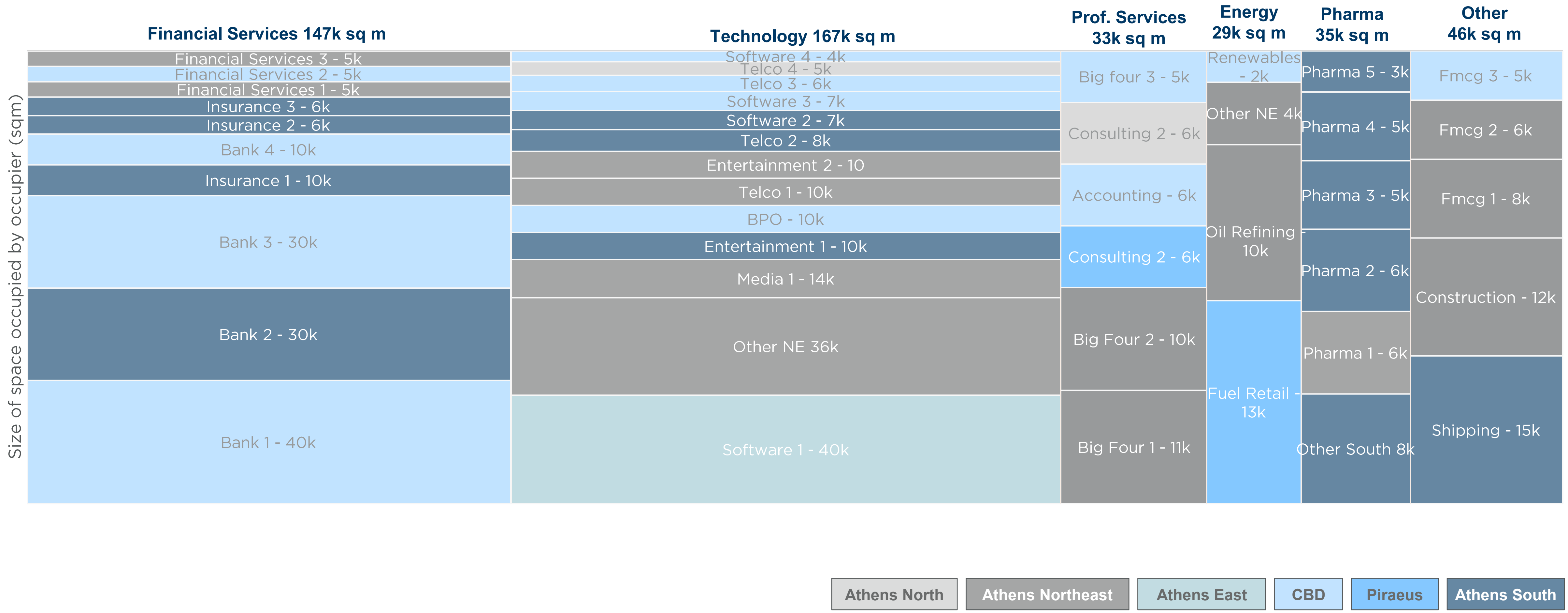
AMERICAS 52%	Finance / Banking / Accounting / Insurance	**22%**
	Real Estate	**18%**
	Technology	**13%**
EMEA 34%	Business / Professional Services / Consulting	**11%**
	Engineering / Architecture	**6%**
	Healthcare / Medical	**5%**
APAC 14%	Biotechnology / Life Sciences / Pharmaceutical	**4%**
	Energy / Utilities	**4%**
	Manufacturing	**3%**
	Aerospace / Aviation / Automotive	**2%**
	Media / Printing / Publishing / Telecommunications	**2%**
	Retail / Wholesale / Consumer Goods	**2%**
	Legal	**2%**

Globally, over 230 CRE leaders completed the What Occupiers Want Survey in H1 2025

The views represent 8.1 million employees globally and approximately 34m sqm of floor area

Financial Services and Technology, key sectors in Athens office market

Overview of key occupiers in Athens by sector and by submarket



STRATEGIC DRIVERS

COST CONTINUES TO DOMINATE REAL ESTATE STRATEGY

Key Drivers of Office Real Estate Decisions by Region

GEOGRAPHIC SCOPE OF ROLE

	1	2	3	4	5
AVERAGE	Cost Pressure	Talent Sourcing & Retention	Operational Excellence	Growth / M&A	Corporate Brand
GLOBAL (42%)	Cost Pressure	Talent Sourcing & Retention	Growth / M&A	Operational Excellence	Customer Relations
AMERICAS (25%)	Cost Pressure	Growth / M&A	Talent Sourcing & Retention	Operational Excellence	Corporate Brand
EMEA (21%)	Talent Sourcing & Retention	Cost Pressure	Corporate Brand	Growth / M&A	Operational Excellence
ASIA PACIFIC (11%)	Cost Pressure	Talent Sourcing & Retention	Operational Excellence	Growth / M&A	Customer Relations

Previous Survey Global Ranking

1. Cost
2. Operational Excellence
3. Talent Sourcing & Retention
4. ESG
5. Innovation

BARRIERS FOR CHANGE

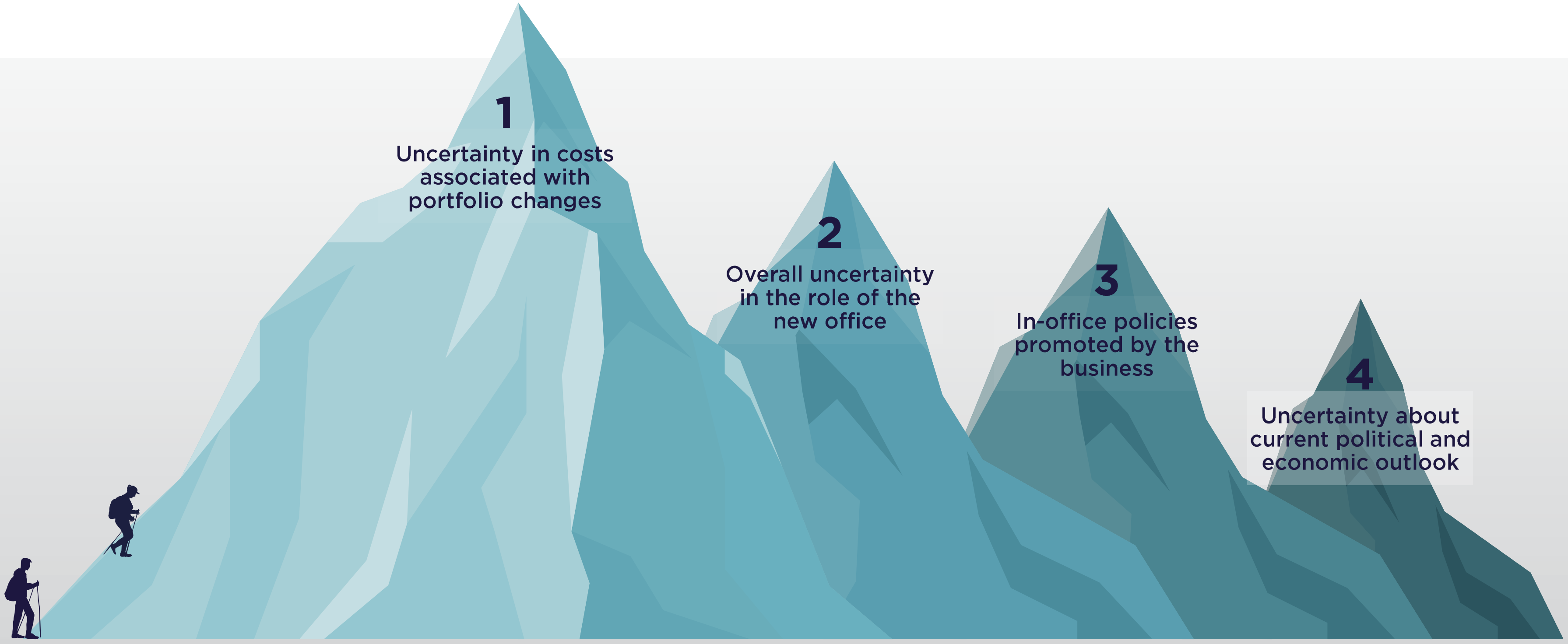
IT'S NOT JUST COST THAT'S THE PROBLEM, IT'S UNCERTAINTY

Top three drivers to make changes in the portfolio

#1 **Cost**

#2 **Talent**

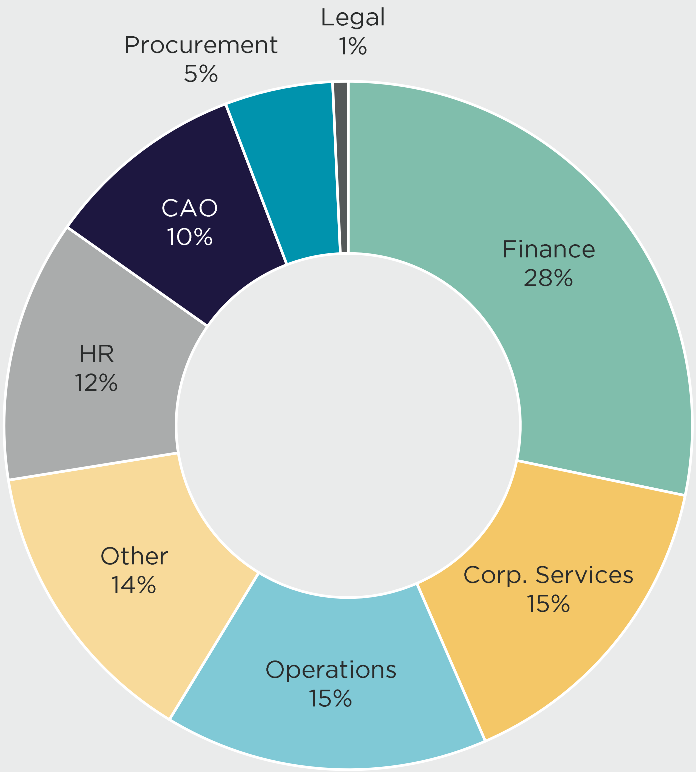
#3 **Operational Excellence**



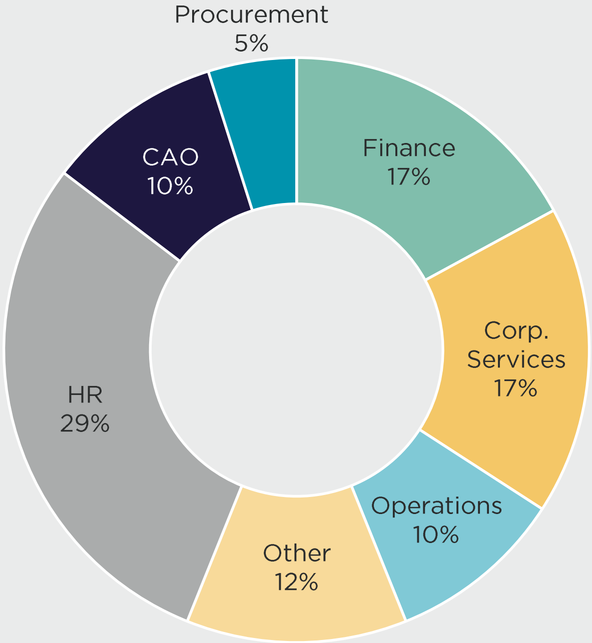
BUSINESS LINE REPORTING

CRE IS MOVING CLOSER TO THE PEOPLE AGENDA BUT HAS A WAYS TO GO

2025 Business Line for CRE Reporting



2025 Business Lines for CRE Reporting: Firms Changing Reporting in Past Two Years



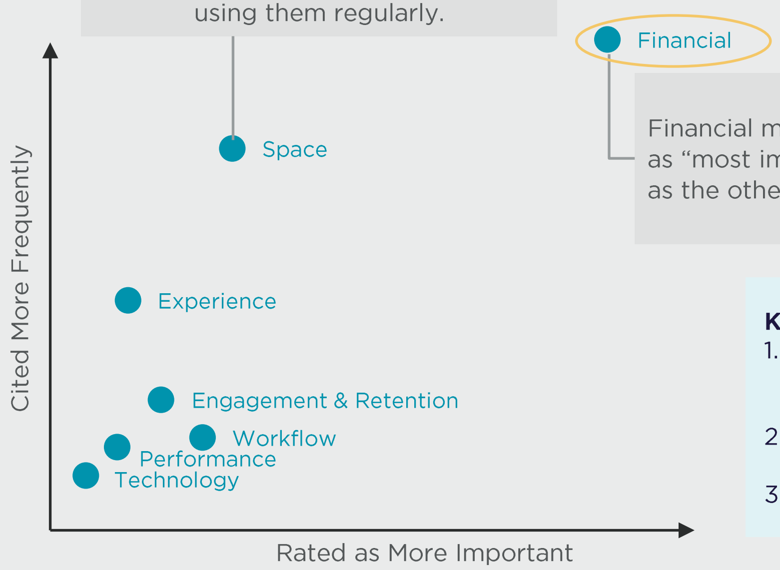
The importance of aligning corporate real estate with people is evident in recent shifts in CRE reporting lines, as nearly a third of companies (29%) that changed who CRE reports to moved CRE to HR.

CRE REAL ESTATE METRICS

FINANCIAL METRICS DOMINATE CRE DECISIONS

Ranking the Most Important Metrics

Space metrics—physical environment features like climate, space types, amenities and utilization—rank second, with 62% of CRE departments reporting to the CAO using them regularly.



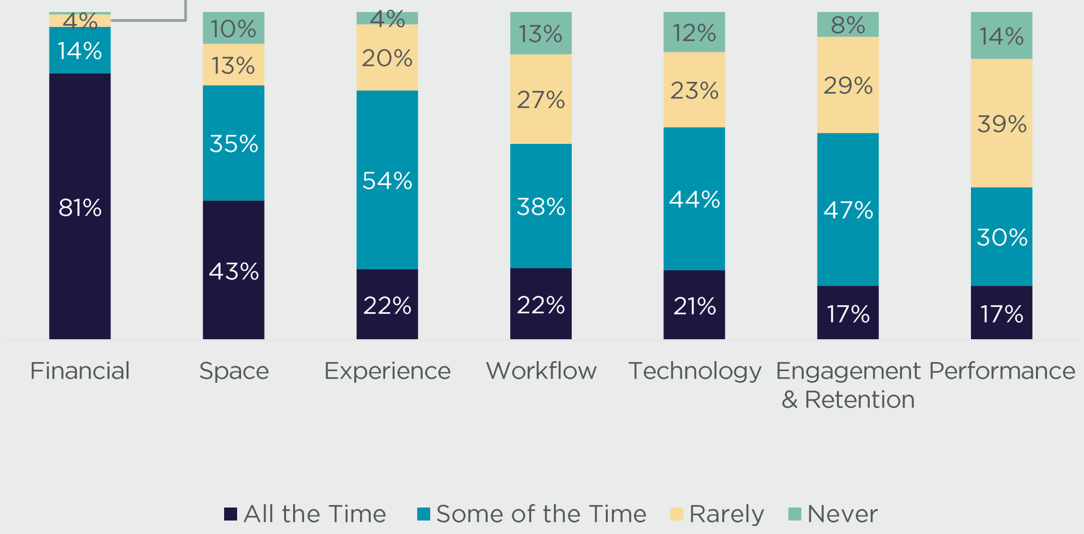
Financial metrics top the list, cited as "most important" twice as often as the other six metrics combined.

Key metric challenges:

1. Ability to balanced financial and non-financial metrics
2. Multiple stakeholder involvement
3. Data quality issues

How Organizations Use Key Metrics

Nearly 80% of firms use financial performance metrics, like revenue and cost.



LOCATION HIRING TRENDS

FLEXIBLE LOCATION STRATEGIES ARE THE NEW TALENT IMPERATIVE

Hiring Strategies Implemented in Response to Increased Flexible Work

61% implemented more location flexible recruitment strategies

32% Have not changed	**20%** Hybrid Country- Level Hiring: any city in the country where the hiring team has an office	**17%** Hybrid Global Hiring: any city in the world where company has an office	**13%** Defined Remote: hired from specific geography defined by company	**11%** Truly Remote First: roles can be hired from anywhere, not tied to company presence

24% implemented strategies where office presence is not required

Hybrid country-level hiring strategies are dominating the landscape in the Americas region.

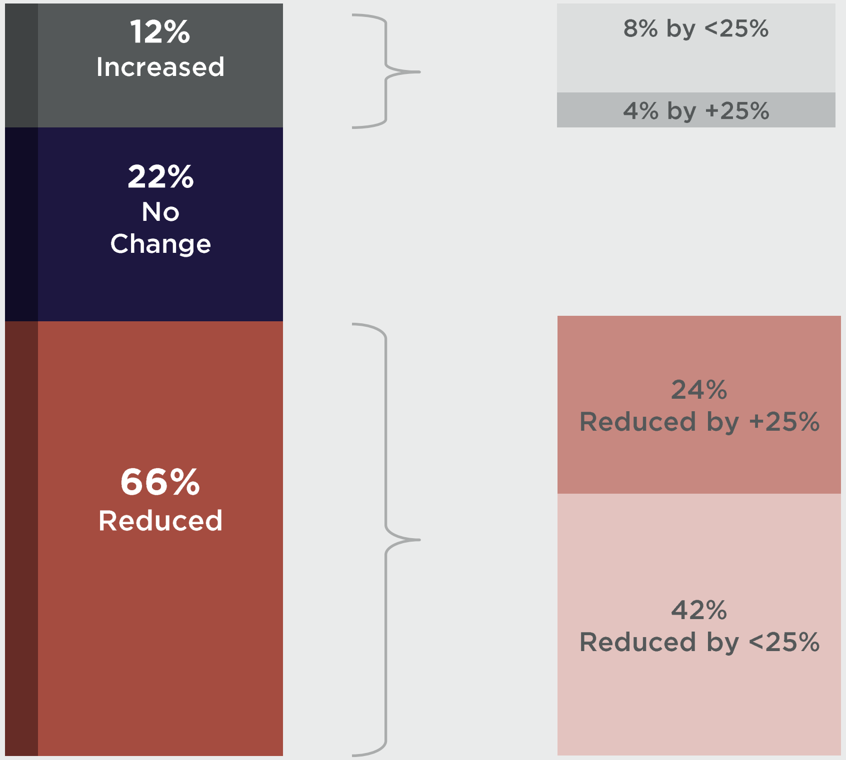
Occupiers in the EMEA region are more likely to implement more global hiring strategies if there is a local company presence.

Hybrid hiring strategies are the most common in the APAC region, however, remote hiring strategies are also in place.

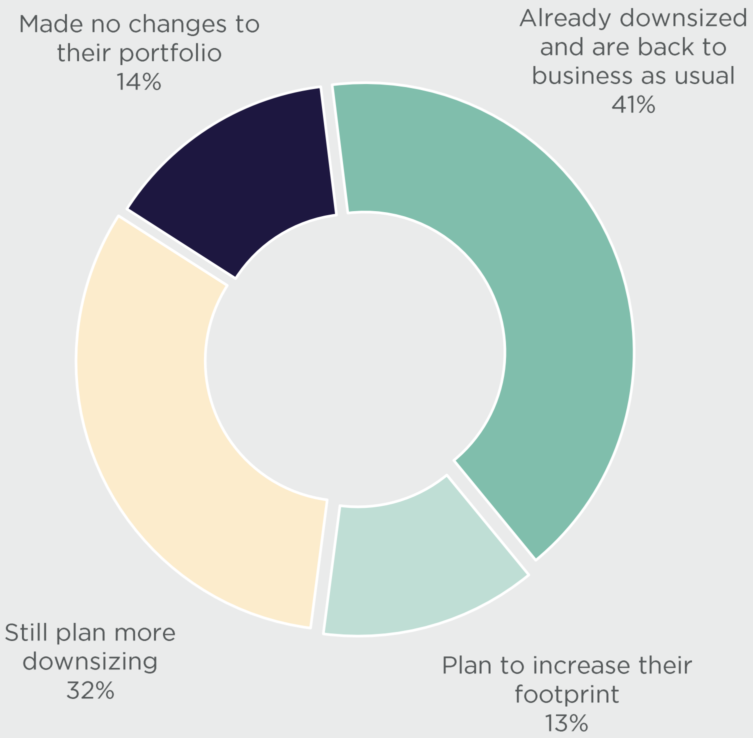
PORTFOLIO CHANGES

DOWNSIZING HAS PEAKED & OCCUPIERS ARE STABILIZING

Key Real Estate Changes Due to Flexible/Hybrid Working



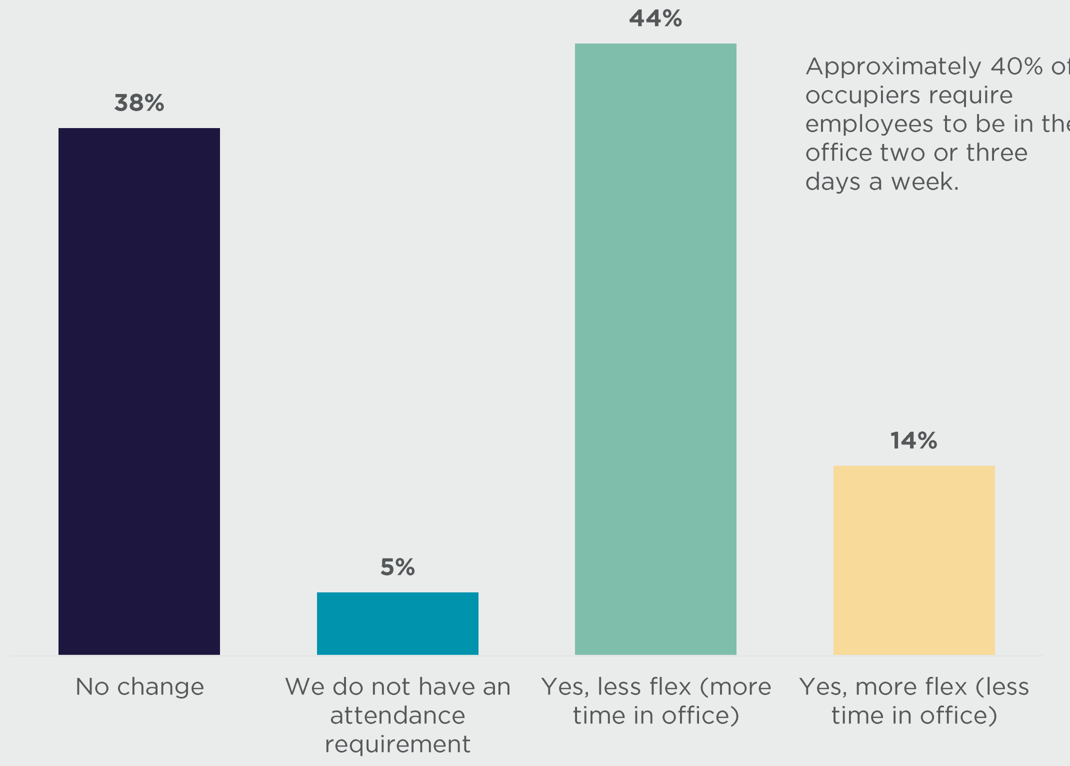
Progress on Optimization Opportunities



PORTFOLIO CHANGES

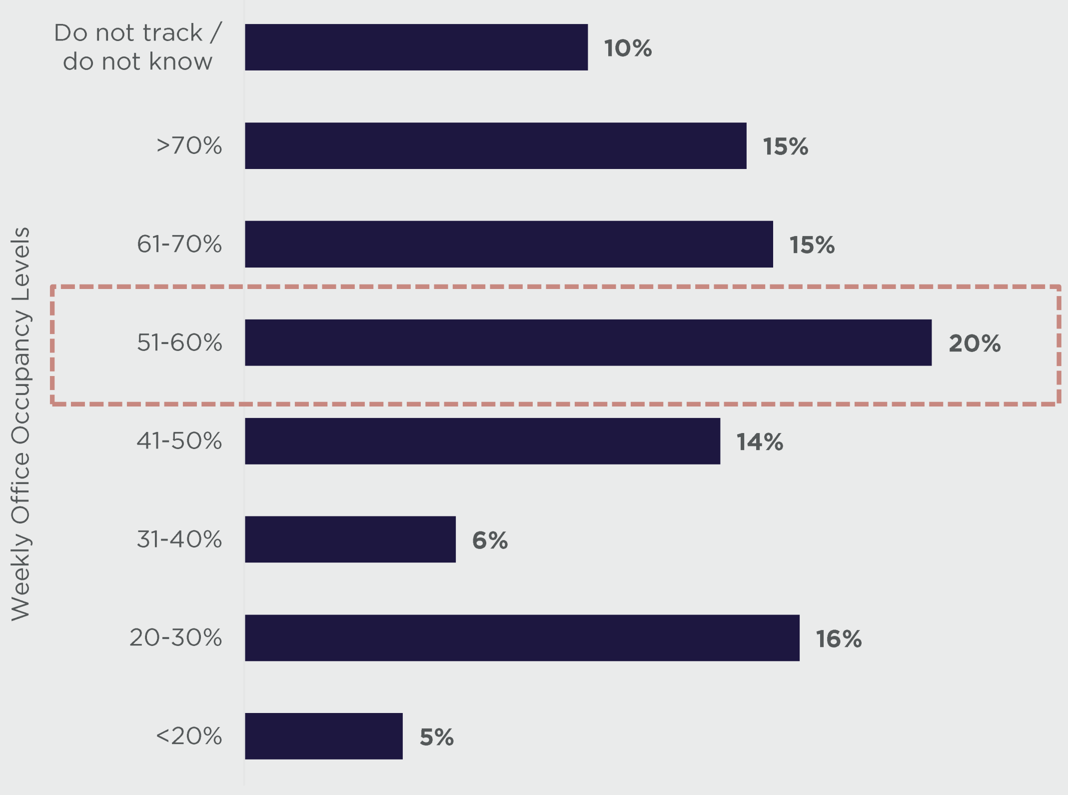
FOOTPRINT RATIONALISATION, AND HIGHER RTO MANDATES, HAVE DRIVEN OCCUPANCY UP

Recent Changes to Office Attendance Policies



Approximately 40% of occupiers require employees to be in the office two or three days a week.

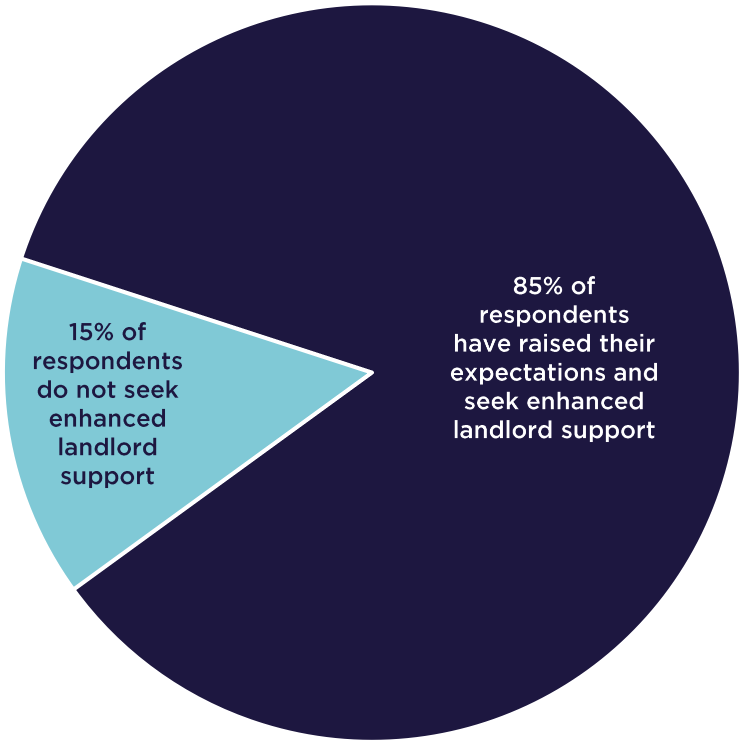
Weekly Office Occupancy Levels



ROLE OF THE OFFICE AND LANDLORDS

LANDLORDS HAVE AN OPPORTUNITY TO STEP UP AS THE OFFICE BECOMES A SERVICE

Rising Expectations and Willingness to Invest in Landlord-Provided Support



46%

prepared to pay higher service charge for more operational support

A CALL FOR NEW METRICS THAT MATTER

Executive Summary: What Occupiers Want Survey 2025

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COST STILL REIGNS, TALENT REMAINS KEY — BUT UNCERTAINTY IS DRIVING EVERYTHING

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CRE ORGANIZATION MODELS ARE EVOLVING— AND METRICS MUST CATCH UP

03

FLEXIBLE LOCATION STRATEGIES ARE THE NEW TALENT IMPERATIVE

04

DOWNSIZING HAS PEAKED - OCCUPIERS ARE STABILIZING

05

LANDLORDS MUST STEP UP AS OCCUPIERS EXPECT “OFFICE AS A SERVICE/EXPERIENCE”

How can we make cities in Greece more attractive to talent?

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ABOUT CUSHMAN & WAKEFIELD

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