Adaptive Spaces

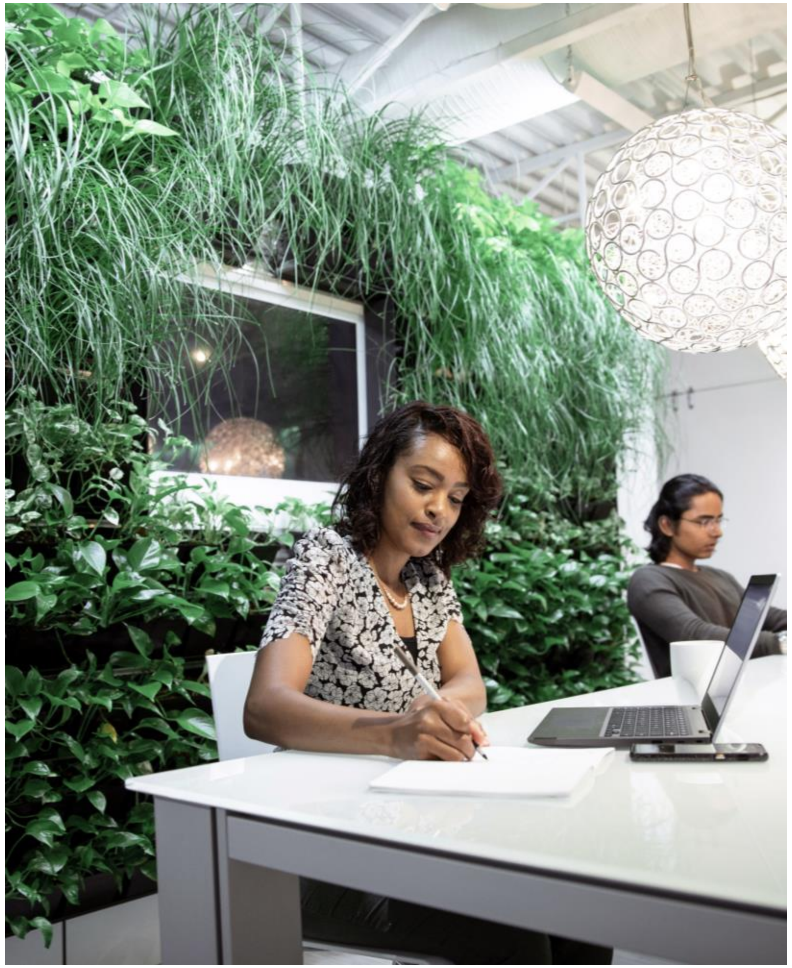
European Office Occupier Sentiment Survey 2024

REPORT

Shaping
the initiatives
of tomorrow

CBRE RESEARCH
JULY 2024

Introduction



Office occupiers face a complex agenda of related, and sometimes competing, priorities:

- Managing new and still evolving patterns of office attendance
- Implementing cost and efficiency improvements at a portfolio level
- Identifying the advantages and disadvantages of existing leases and key criteria for locational decisions
- Optimising the use of flex space
- Refining strategies for digital technology and sustainability

All of these require detailed assessment of priorities and trade-offs and, increasingly, rigorous governance and data. CBRE's European Office Occupier Sentiment Survey 2024 canvassed the views of over 120 companies on a range of topics including:

01	02	03	04
Return to the Office	Portfolio Optimisation	The Workplace of Tomorrow	Technology and Sustainability

Over the past year, efforts to bring employees back to the office have met with some success, and utilisation levels are rising. However, there is still a potential mismatch between the expectations of companies and those of employees as businesses look to increase attendance further.

Companies are looking to further reduce the size of their portfolios and are closely examining lease features and prioritising building quality. Accessibility, amenity, and sustainability are top-of-mind factors for location and building selection. As deadlines for net zero carbon commitments draw nearer, the focus on sustainability features in building decisions is intensifying.

Assessments of workplace effectiveness are hampered by limited measurement. And although specific technologies are being deployed to support workplace experience, coherent digital strategies are still rare. Despite positive steps forward, there is still a lot to be done.

Key Findings

01

Return to the Office and the Future

What level of office attendance are occupiers seeing, what are they aiming for, and how do they intend to get there?

Office attendance is rising

Over the past year, efforts to bring employees back to the office have met with some success. The proportion of companies reporting average building utilisation of 41-60% has risen to 47%, from 36% last year, to become the dominant position. This raises the proportion of companies with utilisation of 41-80% up to 61%, compared with less than half last year.

The proportion of companies reporting lower utilisation has fallen. Only a third of companies are reporting utilisation of 40% or below, compared with 48% last year.

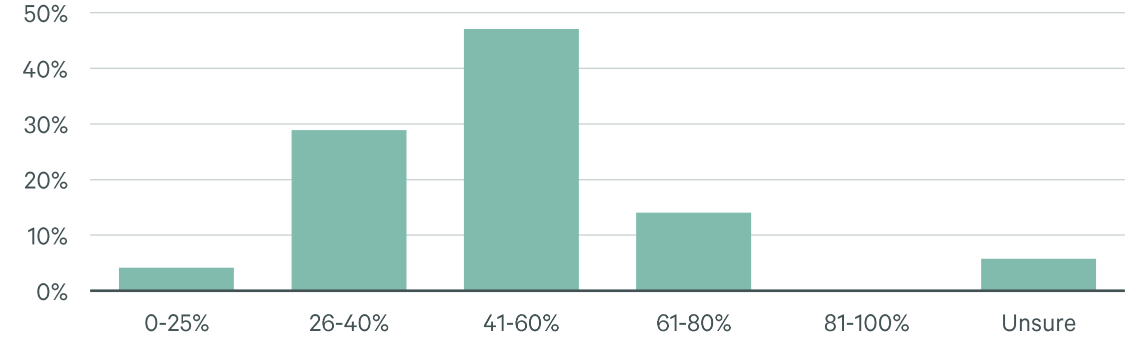
Large companies of 5,000 employees or more appear to be achieving more success, with nearly two-thirds reporting utilisation of 41% or higher. This is likely the result of both organic process and increased use of policy mandates (see page 8).

Solving for peak days

Average attendance is a useful metric, but peak utilisation can present different challenges. Three quarters of companies have peak day utilisation of 60% or more, including 26% who have peak days at levels that may constitute overcrowding (81-100%).

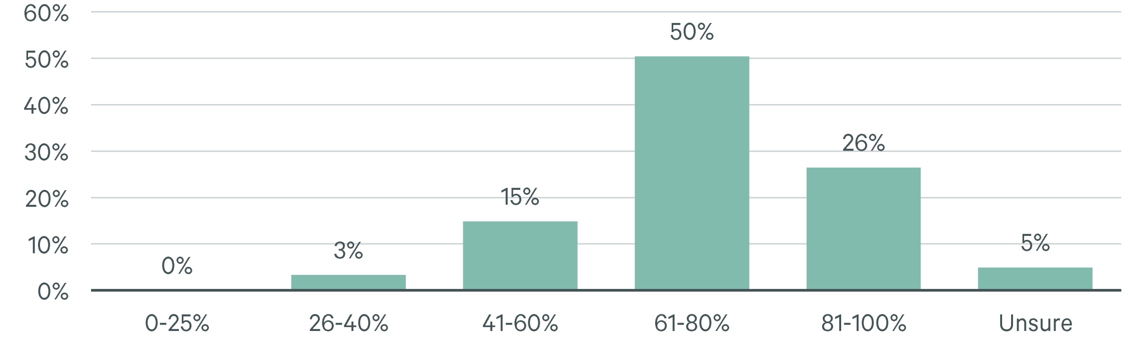
A more optimal pattern would see more companies (currently 50%) settling in the 61-80% range that is consistent with a sense of vibrancy. Many companies still need to try to modify the distribution of attendance.

FIGURE 1: Current average building utilisation rates



Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 2: Peak building utilisation rates



Source: CBRE Office Occupier Sentiment Survey 2024
Note: Due to rounding, the total may not equal 100%.

61% ▲

Report utilisation rates of 41-80%, up from the 48% who reported this level in 2023

33% ▼

Seeing utilisation of 0–40%, a decline from last year

76%

Have peak day utilisation of 61–100%

Companies and employees broadly agree, but with some differences

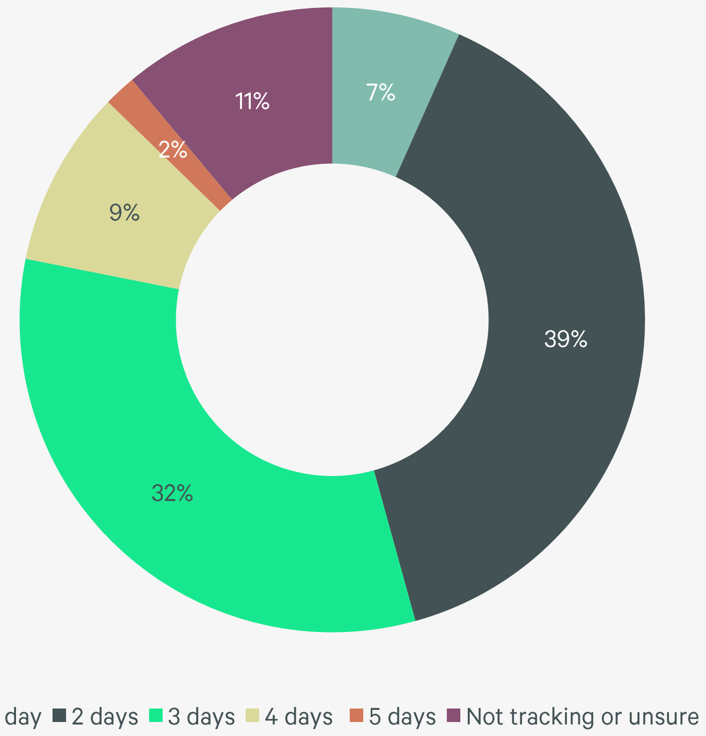
The proportion of employees going to the office three or more days a week has risen to 43%, from 37% in 2023. This indicates that some of the reported rise in utilisation is due to employees visiting the office more frequently, rather than just a result of smaller portfolios.

Most employees (71%) are in the office two or three days a week, with the larger element (39%) opting for two days. This represents slight underattendance compared to employers' stated preferences: nearly half of companies say they would like people to be in the office three days a week, with only 13% preferring two days.

This shortfall against expectations is one challenge in achieving optimum attendance. However, the reverse is true of the high attendance group who are in the office four-to-five days a week. This group is almost double (11%) the proportion companies say they want (6%). Aligning attendance distributions with employers' preferences is still a challenge for space planning.

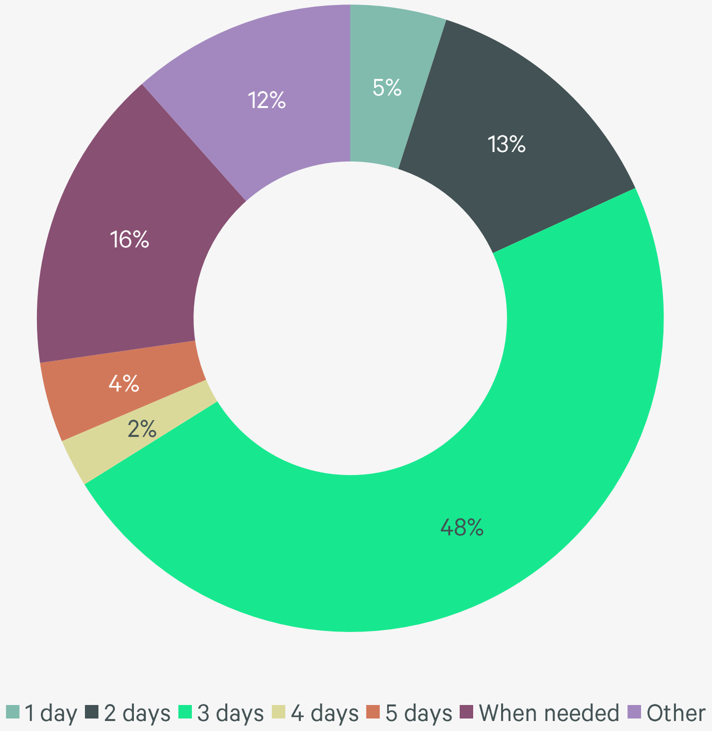
Smaller companies are achieving higher levels of attendance. Companies with fewer than 5,000 employees are seeing an increase in attendance of up to 18% for the four-to-five-day group. The effect is even more extreme for companies with fewer than 1,000 employees, 31% of which are seeing attendance levels of four-to-five days.

FIGURE 3: Current employee weekly office attendance levels



Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 4: Leadership aspirations for employee office attendance



Source: CBRE Office Occupier Sentiment Survey 2024

More companies view attendance as stable, but some still expect a further increase

What view do companies take of current patterns of attendance and their ability to influence them?

Nearly 60% of companies view the current return rates as a stable, steady-state position, marginally up on 2023 (56%). The proportion expecting to try to boost attendance further stands at 30%, down 10% from last year. Some companies have already devised and executed their return to office plans. Others may still be uncertain about the best ways to influence employees' decisions.

The fact that 30% of companies still have aspirations to increase office attendance may reflect the large gap between actual and desired two-day a week attendance.

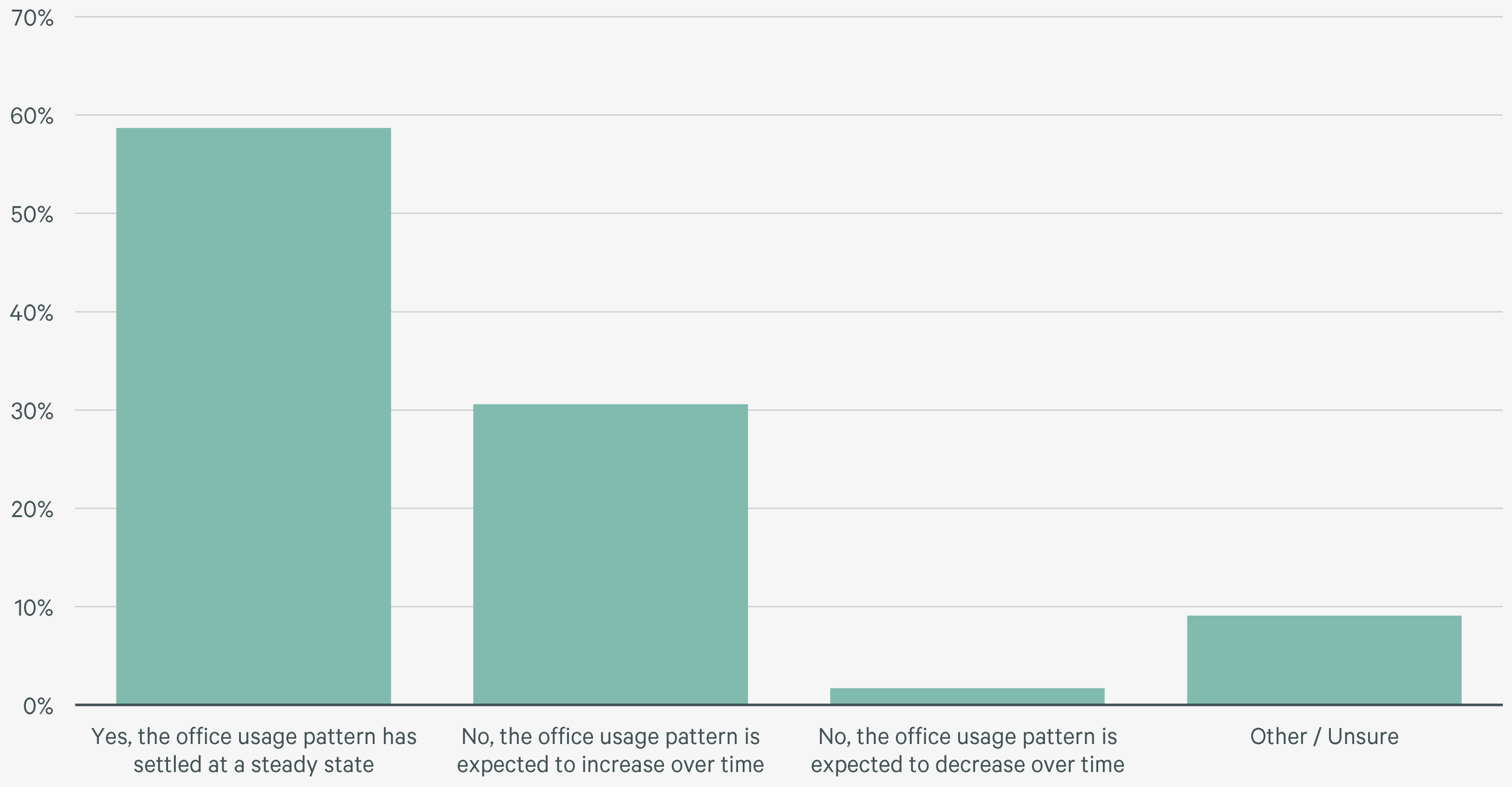
The group preferring two-days a week in the office likely represents those who most favour hybrid working, have family, or other caring commitments. Messaging around efforts to encourage them back to the office needs to be carefully designed.

What measures would be necessary to transition these remaining two-day attendees into the three-day group, and are companies willing to take those steps?

30%

Expect to take further steps to raise office attendance

FIGURE 5: Perceptions of scope to raise office attendance levels further



Source: CBRE Office Occupier Sentiment Survey 2024

Continuing shift towards tracking and enforcing attendance mandates

Office attendance policies are being used and enforced more widely, with scope for further movement in this direction. Over three quarters (76%) of companies have attendance policies in place, although only just over half of these say that policy is mandatory. A significant proportion (36%) have so far adopted policies that have a high degree of discretion.

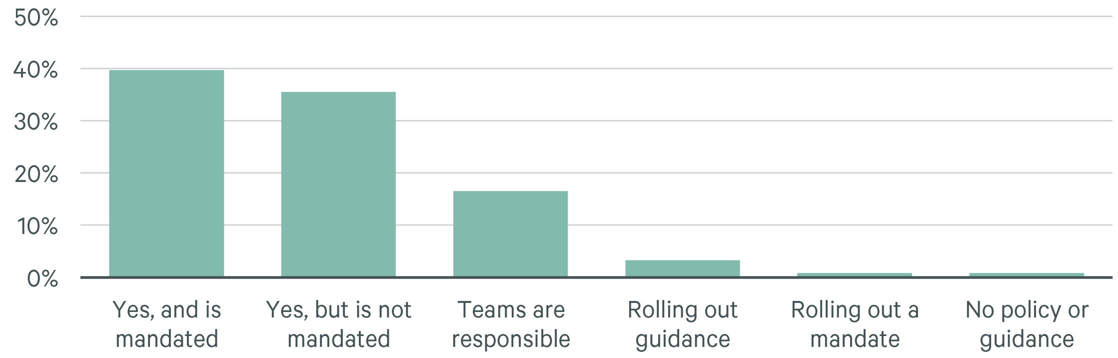
A further 17% allow individual teams to decide and communicate expectations around office attendance. While we expect some of these will shift to company-wide guidance, the approach to monitoring and enforcing mandates is still inconsistent.

Of those companies that have mandates, 83% are also measuring attendance, but only 25% are consistently enforcing the policy. While these figures indicate a significant movement towards tracking and enforcing office attendance (compared to 60% and 4% in 2023, respectively), there is scope for further tightening.

This is shown by the fact that only 13% of the companies with a mandate are now not making any attempts at measurement or enforcement, compared with 35% last year.

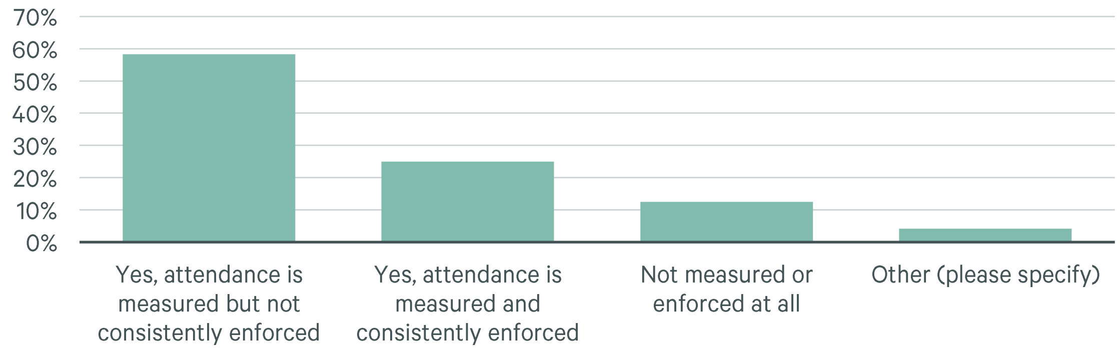
Overall, there has been a clear shift towards measuring and enforcing policy compliance – with further tightening likely.

FIGURE 6: Policy positions on office attendance



Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 7: Extent of measurement and enforcement of policy mandates



Source: CBRE Office Occupier Sentiment Survey 2024

83% ▲

Measuring compliance with mandates, up from 60% in 2023

25% ▲

Enforcing mandates, up from 4% in 2023

13% ▼

Mandating but not tracking attendance, down from 35% in 2023

02

Portfolio Optimisation

Solving for scale, location, and flexibility

Further portfolio consolidation to come

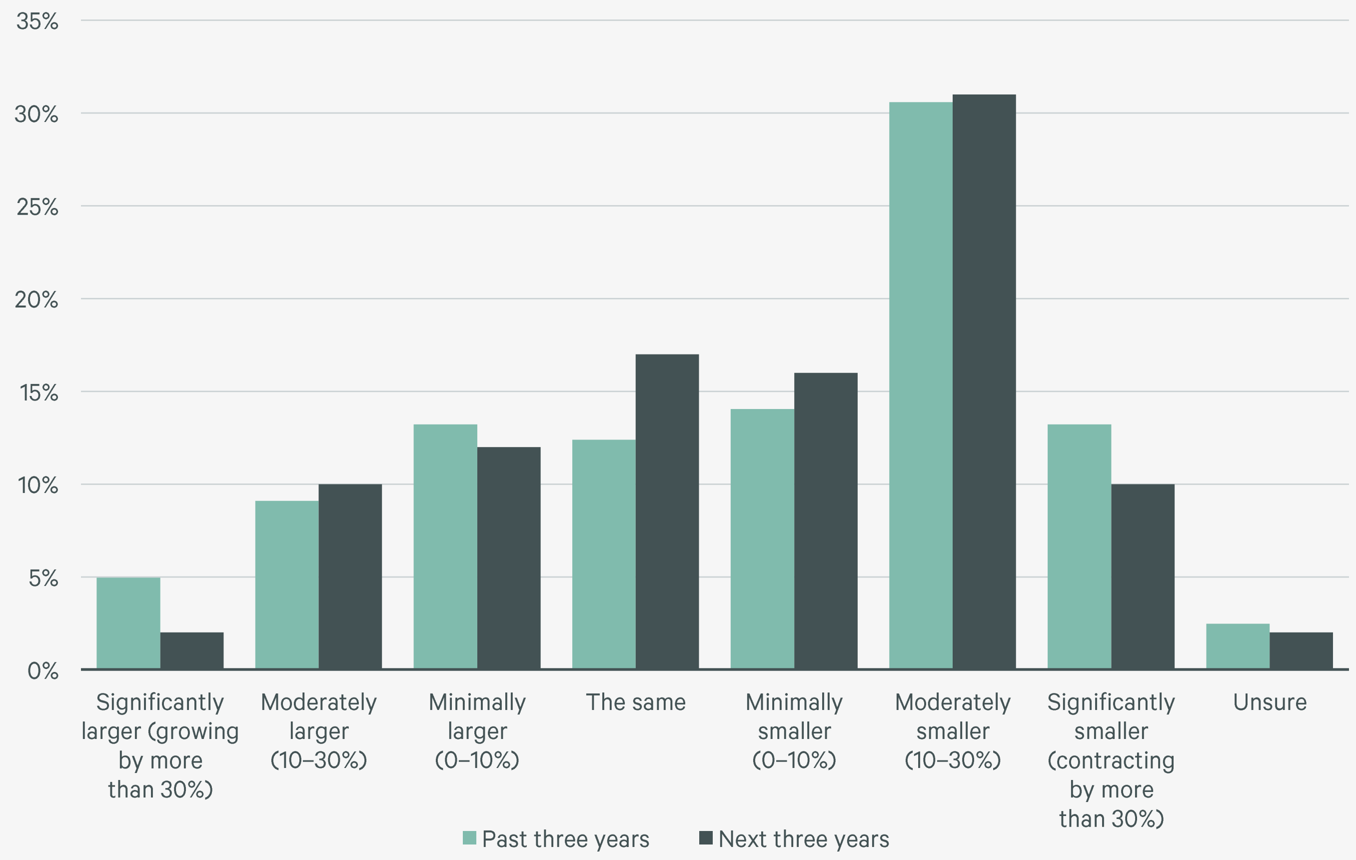
The main trend is towards further reduction in portfolio scale. Over half (57%) of companies expect to decrease their portfolio size over the next three years. With a similar proportion having contracted over the past three years, this is, for most, a continuation of an existing trend. There are size differences too: among companies of 5,000 employees or more, who are more likely to be carrying surplus space, 75% are expecting to reduce portfolio scale.

The most significant proportion (31%) are those planning moderate reductions in portfolio size. Compared to last year, the extremes have reduced, with a 3% decrease each in those expecting their portfolio to be significantly larger or significantly smaller.

The reasons for the intended reduction are diverse: most estimate that they will need less space due to hybrid working (47%), but cost reduction targets (19%), and the removal of long-standing inefficiencies in portfolios (23%), also feature.

Nearly a quarter of companies plan to expand. The overwhelming driver for this planned portfolio growth is expected business growth (74%). Keeping up with new workplace design standards (16%) and correcting for earlier over-contraction or unexpectedly high return to office (6%), are among the reasons given by others.

FIGURE 8: Size trajectory of corporate real estate portfolios



Source: CBRE Office Occupier Sentiment Survey 2024

Renewing what works, relocating for upgrade, and shedding the surplus

The aim of portfolio consolidation is driving a forensic focus on lease features – and opportunities to break, exit, or regear – but also with a strong focus on asset quality. As leases expire or break clauses become exercisable, occupiers are using the lease structures available to them to consolidate their portfolios and relocate to better quality space.

Over 50% of companies are focusing on exiting rather than renewing at lease expiry or are renegotiating terms. This is not an indiscriminate process: nearly 60% are likely to renew existing leases where they remain fit for purpose.

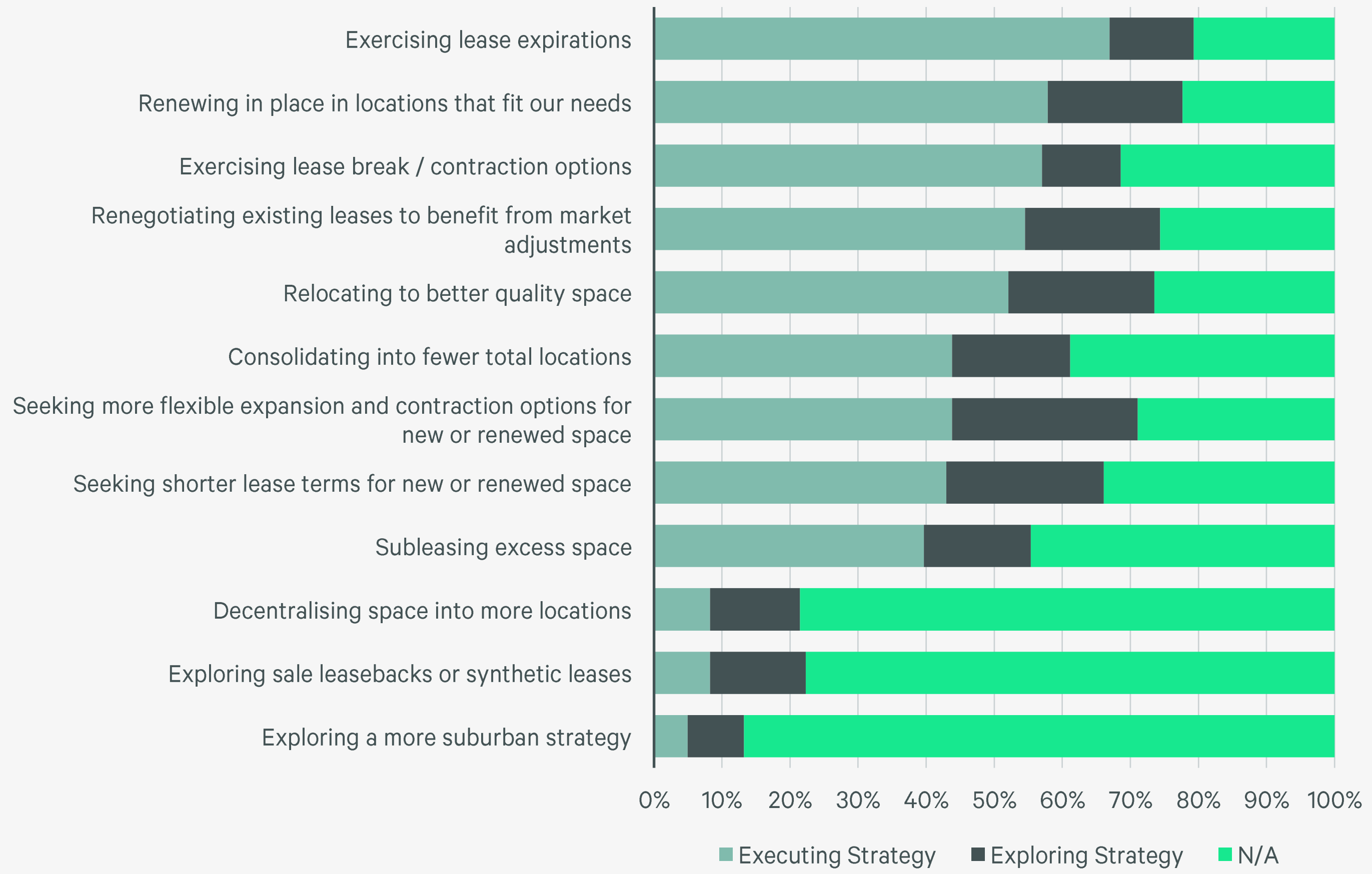
For those companies renewing existing leases, there is no single dominant reason but rather a spread of responses covering several issues:

- Willingness of landlords to renegotiate terms and offer more flexibility
- Continued suitability of existing buildings or locations
- The capital cost of moving

At the same time, for some occupiers, there are other motives that are powerful enough to overcome these "inertia" factors, and to favour relocation. Over half (52%) are relocating some functions to better quality space (up from 45% last year) and here the driving forces, other than cost, are:

- Desire to improve user experience in a smaller volume of space
- Need to offer better amenities and services to employees
- Alignment with sustainability goals

FIGURE 9: Strategies for working towards anticipated portfolio footprint



Source: CBRE Office Occupier Sentiment Survey 2024

Access and refreshment are top-of-mind

For companies looking to relocate, accessibility and amenity are strong decision drivers. Public transport access, in particular, continues to rise in importance, highlighted as a locational factor by 44% of companies in 2022, 80% in 2023, and 89% this year.

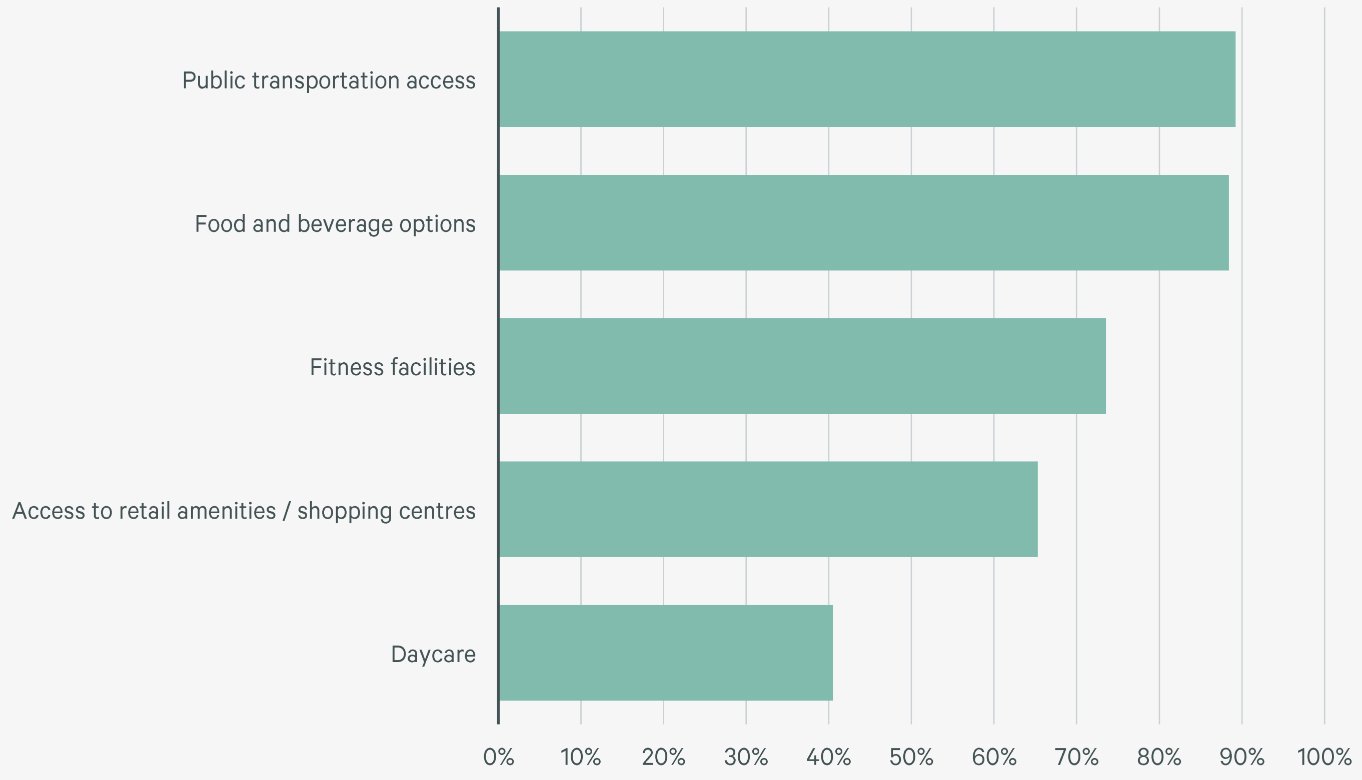
This reflects the journey that companies and employees have been on from low post-pandemic office attendance and loose or optional mandates, to the higher utilisation rates and more demanding mandates we are starting to see now. Having an office in an area that is easy for employees to reach, and provides a positive user experience, remains an extremely high priority. It is increasingly being viewed as a counterweight to any perception of coercion in attendance mandates.

Nearby food and beverage outlets – restaurants and cafes - are not far behind (88%), with fitness facilities and retail opportunities also featuring. All this points towards a growing emphasis on highly accessible – and hence mostly central – locations with a high level of urban amenity. Companies' micro-location decisions are increasingly responding to the wishes of their workforce.

89%

Highlight public transport access as a key location driver

FIGURE 10: Favoured locational factors



Source: CBRE Office Occupier Sentiment Survey 2024

Sustainability is the key consideration

Satisfying for locational demands is one thing, but what about the building itself?

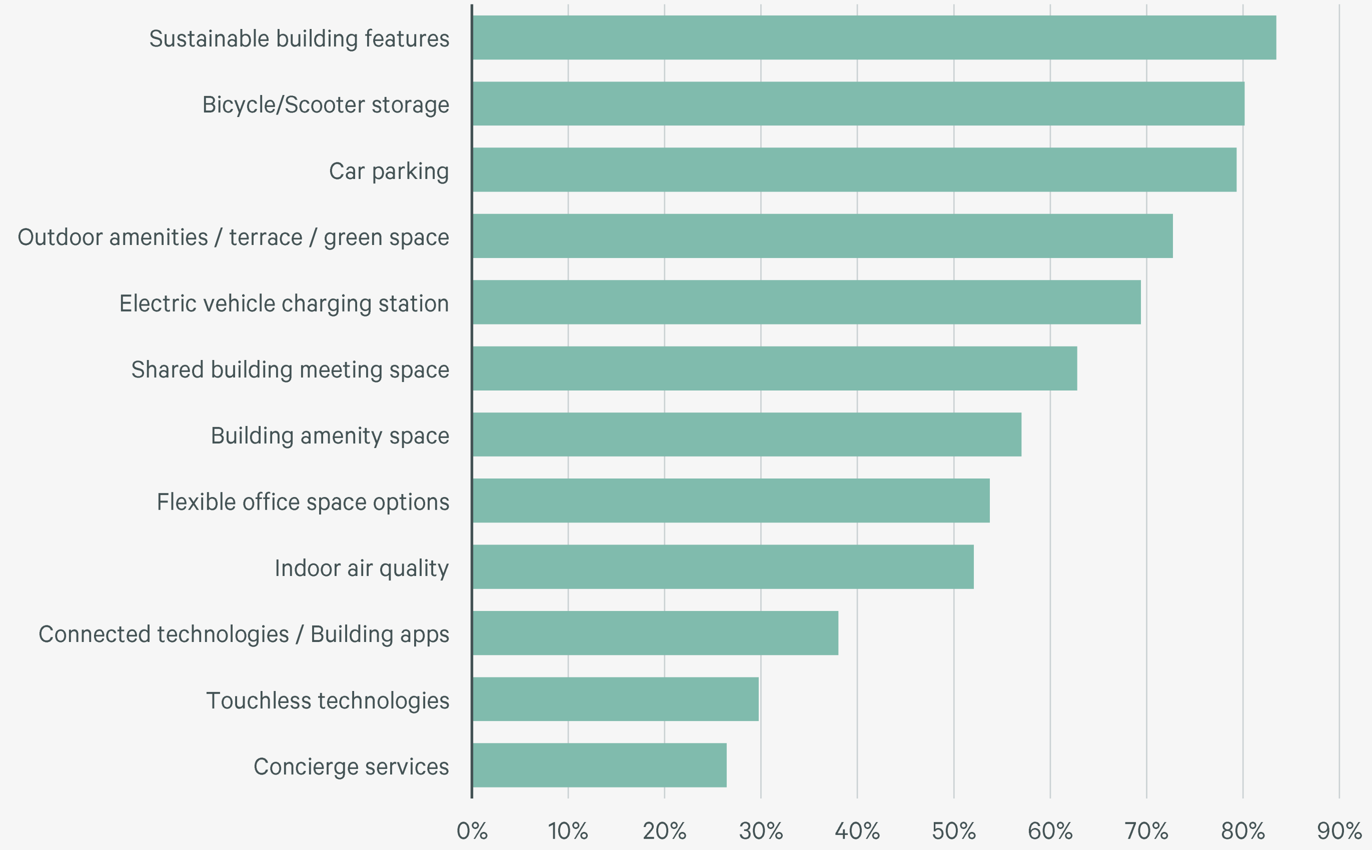
As net zero goals draw closer, occupiers are focusing heavily on the kind of real estate they will need to meet those targets. Sustainable features are the most sought-after aspect of an office for occupiers. Other elements that contribute to reducing the friction of travel also feature strongly, such as bicycle/scooter storage (80%), EV charging points (69%), and car parking spaces (79%) provided in the office building.

An element of flexibility is also highly desirable. 54% want flexible offices in their building, and even more (63%) would like access to shared meeting spaces. This supports the trend towards flex and traditional office space co-locating in the same building, each boosting the level of demand for the other. Touchless technology and concierge services are viewed as marginal by most.

83%

Focusing on sustainable building features

FIGURE 11: Favoured building features



Source: CBRE Office Occupier Sentiment Survey 2024

Occupiers plan for more flexibility

Companies continue to push for more flexibility in their office portfolios. What are the elements of companies' growing need for flexibility?

Over a third (36%) say they have no flex in their portfolios now, but only 18% plan expect to be in this position in two years' time. And the proportion with less than 10% in flex space falls from 70% today to just over 40% over the same timeframe.

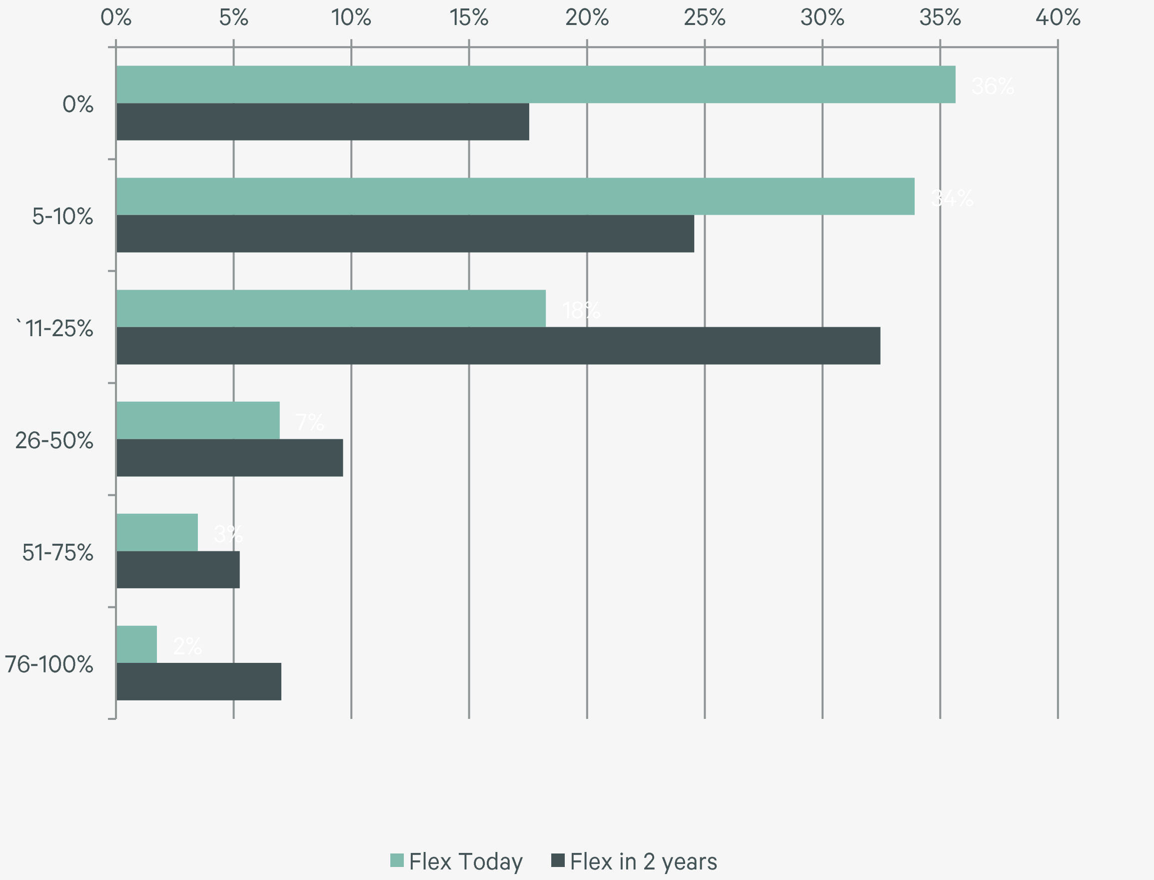
There are progressive increases projected in those that have a moderate level of flex space (between 11-50% of their portfolio). Currently this accounts for 25% of companies, but likely to rise to around 42% in two years' time.

Only 5% of companies currently have the majority (>50%) of their portfolio in flex, but this is expected to more than double to 12% within two years.

Whether this translates into transactions depends largely on the provision of the right supply in the right locations.

Not only is there a clear upswing in the amount of flex space occupiers plan to use, their reasons for doing so are also widening to cover both strategic and tactical motives. Reducing capital expenditure (46%), solving uncertain demand (32%), and providing space for temporarily displaced teams (30%) are the major reasons.

FIGURE 12: Flexible office space allocations, current and two years' time



Source: CBRE Office Occupier Sentiment Survey 2024
Note: Due to rounding, the total may not equal 100%.

43% ▼

0–10% flex in two years, down from 70% today

42% ▲

11-50% or more in flex in two years. Up from 25% today

12% ▲

>50% flex in two years, up from 5% today

03

The Workplace of Tomorrow

Is the workplace fit for purpose, and if not, what needs to be done?

Towards a purposeful workplace

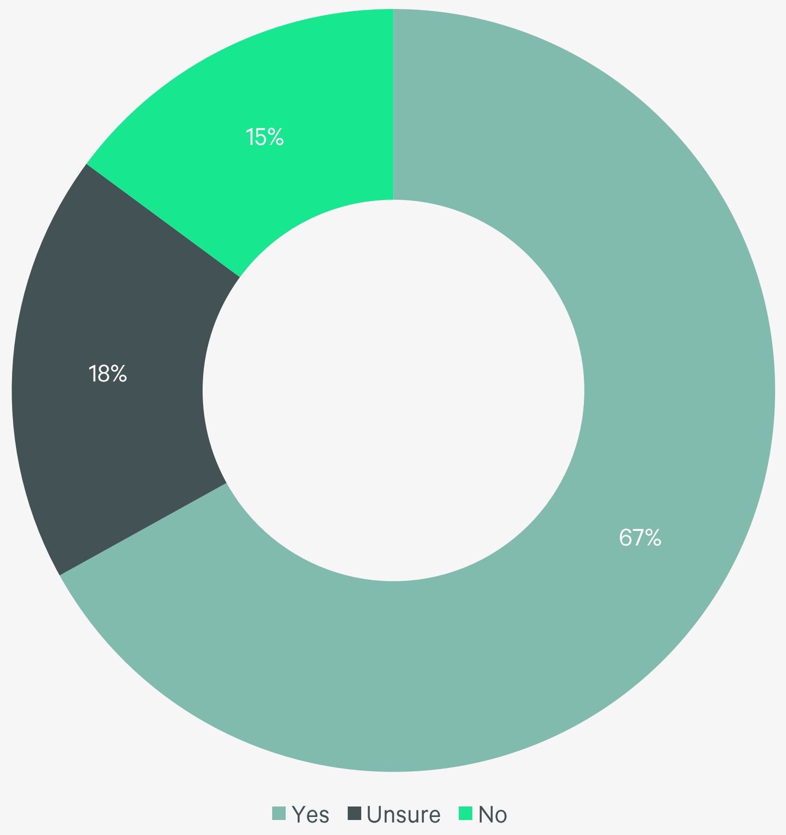
As companies continue to shape and adapt to new working arrangements, the purpose and adequacy of the workplace is in sharper focus. What does it need to satisfy in terms of amenity, user experience, company culture, and other objectives? Increasingly, an effective workplace is not just one that is well used by employees, but one that helps to convey to stakeholders the culture and values of a company.

Two-thirds of companies think that their workplace is effective in fulfilling its purpose, and only 15% actively think that it is not. The perception of effectiveness is slightly lower (61%) among the largest occupiers – those with 10,000 employees or more – reflecting the fact that these companies typically occupy multi-building portfolios of varying age and quality. It is notably higher (76%) among companies with under 1,000 employees.

One challenge, particularly for larger companies, is understanding the components of effectiveness, and being able to assess whether their workplaces are fulfilling them. Optimising the effectiveness of a workplace or portfolio involves delivering on pre-defined priorities – which might include flexibility, technology, employee and customer appeal, as well as more traditional metrics such as running costs, utilisation, and operational efficiency.

But although most companies assess their workplaces to be effective, it looks as though this is a more general impression than something based on clear evidence.

FIGURE 13: Perceptions of workplace effectiveness



Source: CBRE Office Occupier Sentiment Survey 2024

Measurement or presumption?

Only 46% of companies are measuring the effectiveness of their workplaces and 40% are not. So, the evidence base for assessing workplace effectiveness is more limited than it might appear, and many organisations are still taking an impressionistic approach to the issue.

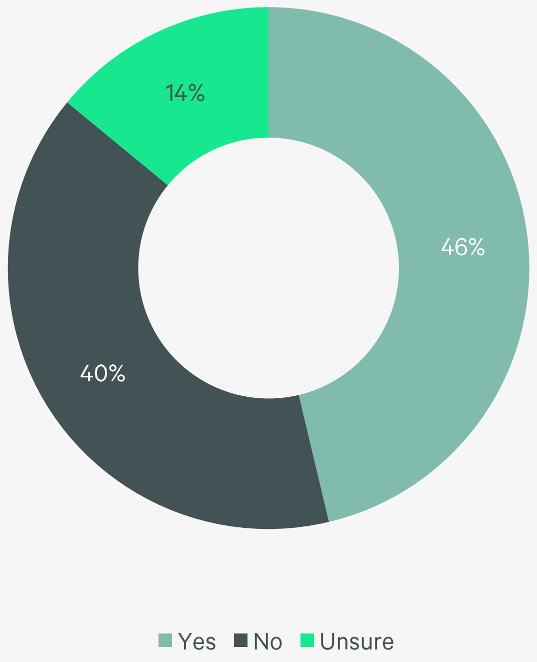
More encouragingly, of companies that are in mainly poorer quality or mixed quality buildings, a far higher proportion (60%) are measuring workplace effectiveness – perhaps recognising that workplace quality is key to achieving a growing range of strategic aims.

Of those companies that are measuring workplace effectiveness, space utilisation – the proportion of available office capacity that is being used – is by some distance the preferred method (89%). Employee engagement scores rank second at 66%. Other methods such as retention and attrition, and external review score below 40%.

Measuring space utilisation usually relies on swipe card tracking. This allows for a basic assessment of usage, but is often too crude to capture detail, much less gauge effectiveness. There are benefits in shifting towards a more sophisticated approach – for instance, capturing floor-by-floor patterns, use of different work environments, and individual desk usage – as a basis for decisions on layout, design, and user satisfaction.

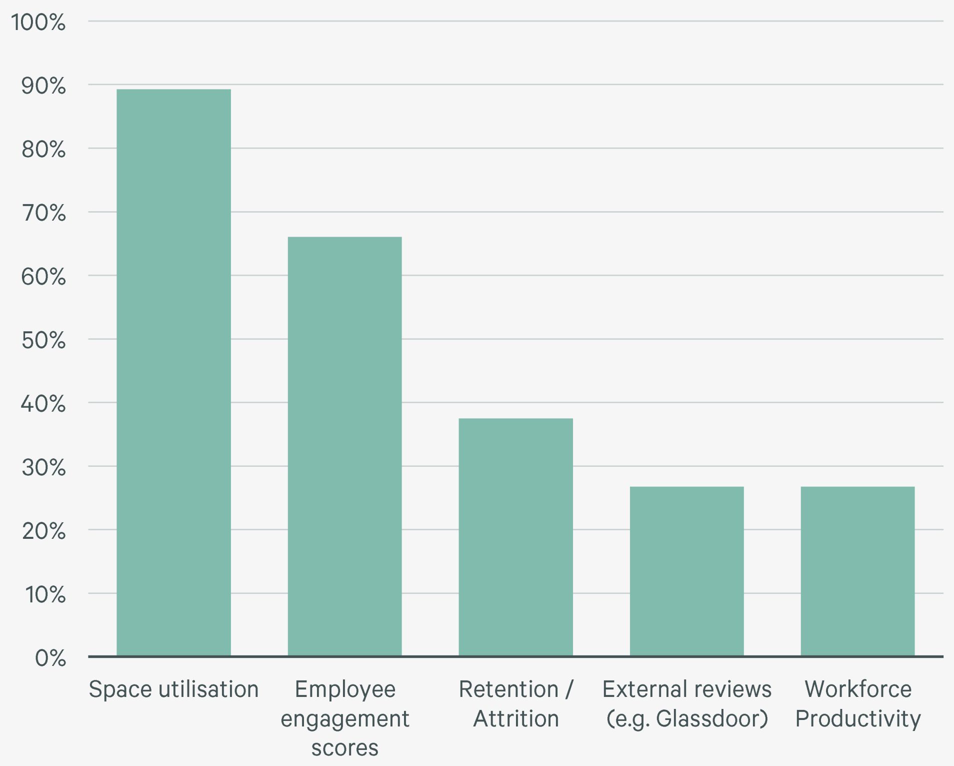
Benchmarking assets against defined criteria - such as amenity, flexibility, and digital capability – is increasingly possible through diagnostic tools and provides a clearer framework for setting a baseline and driving improvements.

FIGURE 14: Proportion measuring workplace effectiveness



Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 15: Methods for measuring workplace effectiveness



Source: CBRE Office Occupier Sentiment Survey 2024

How can workplace technologies help?

Defining and measuring the effectiveness of workplaces is a pre-condition for optimising portfolios and providing peak user experience – and technology has a growing role to play.

The most popular technologies being deployed or considered to support utilisation and collaboration are:

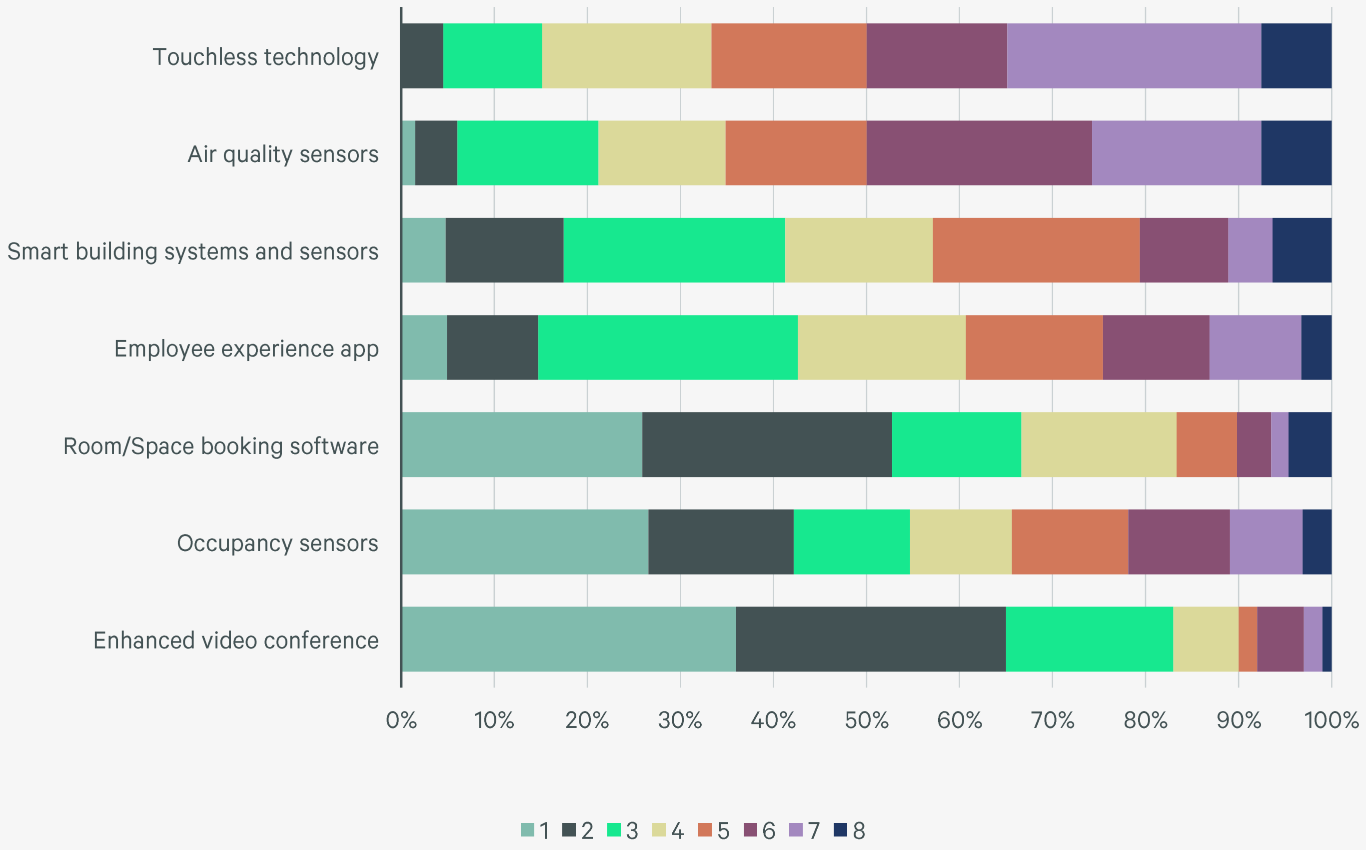
- Enhanced video conferencing
- Software for room and space booking
- Occupancy sensors

Although ranked as slightly less important, employee experience apps and smart building systems and sensors also feature. This indicates that companies are strongly focused on supporting and improving employee experience in multiple ways. As health concerns have receded, air quality sensors and touchless tech have become less important.

The three main aims underlying these choices are:

- A strong focus on enabling and streamlining new working patterns, or at least ensuring that technology is not an inhibitor of effective remote working
- Tracking office attendance and utilisation in greater detail
- Enabling frictionless use of, and switching between, different working environments – including meeting rooms

FIGURE 16: Adoption of workplace technologies (Ranked 1 (most important) – 8 (least important))



Source: CBRE Office Occupier Sentiment Survey 2024

Managing space sharing

As well as assessing workplace utilisation and effectiveness, companies are also focusing on the tactical aims of:

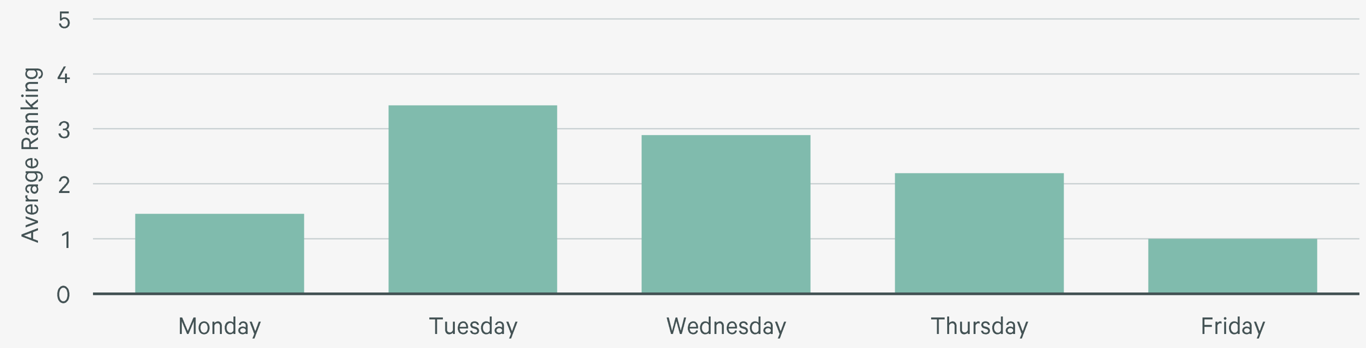
- Managing capacity
- Accommodating and/or altering daily fluctuations in office attendance
- Refining the way in which space is distributed and shared among in-office employees

Midweek peaks in office attendance are typical, mostly on Tuesdays, although Monday attendance has been rising, leaving Fridays as the only lower-utilisation outlier.

Occupiers say that they have sufficient capacity to accommodate peak day attendance: over 90% report that they have enough capacity to cater for peak attendance in most of their buildings. On the face of it, capacity is not a priority issue now and would be even less pressing if efforts to spread attendance more evenly are successful.

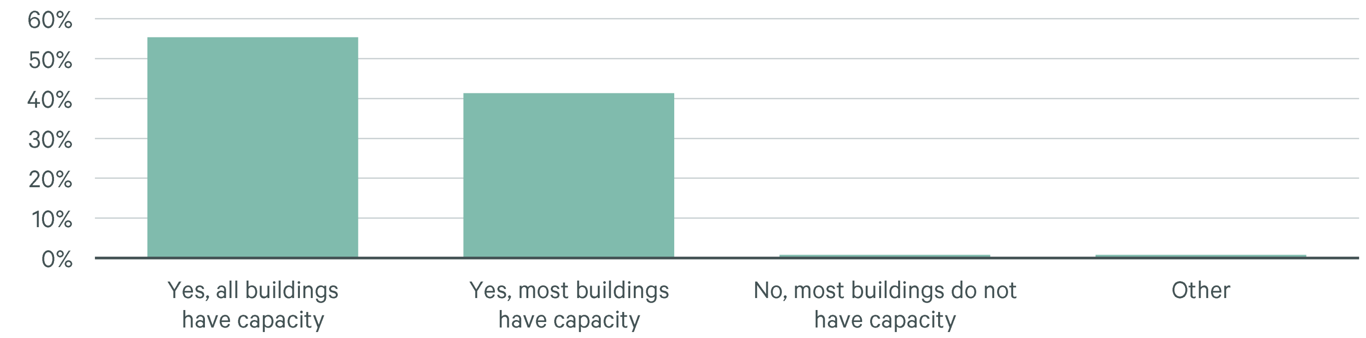
At the same time, over a quarter of companies are reporting peak-day utilisation of over 80%, and nearly a third are expecting utilisation to rise further from current levels (see Section 1). With office vibrancy most likely to be achieved at around two-thirds utilisation, there is overcrowding on peak days for some companies, which would be exacerbated by driving attendance higher.

FIGURE 17: Distribution of days with highest consistent utilisation



Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 18: Ability to accommodate peak days comfortably



Source: CBRE Office Occupier Sentiment Survey 2024
Note: Due to rounding, the total may not equal 100%.

Higher desk-sharing ratios becoming the norm

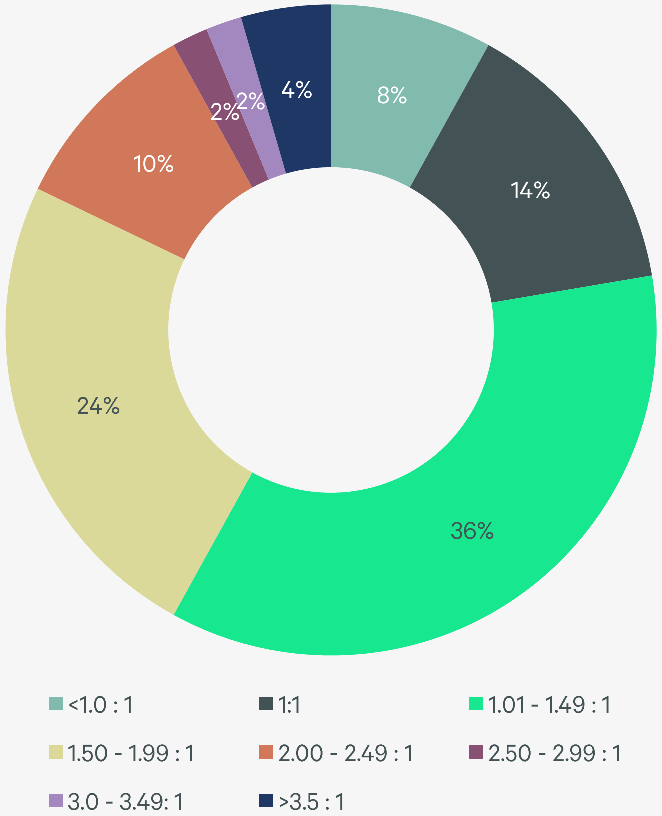
Planning and managing desk capacity and access arrangements is critical – both to mitigate overcrowding risks and to offer employees the scope to use space in a way that best suits their preferences.

Desk allocations and desk sharing patterns are a key part of this. Currently, just under 60% of companies are working to people-to-desk ratios of less than 1.5:1, and only around 40% offer higher ratios than this.

With some intending to raise attendance levels, this will need to shift towards higher sharing ratios in the future. Survey respondents estimate that, in two years' time, desk-sharing ratios of less than 1.5:1 will be typical for only 37% of companies, and higher ratios for about 62% – effectively a reversal of the current picture.

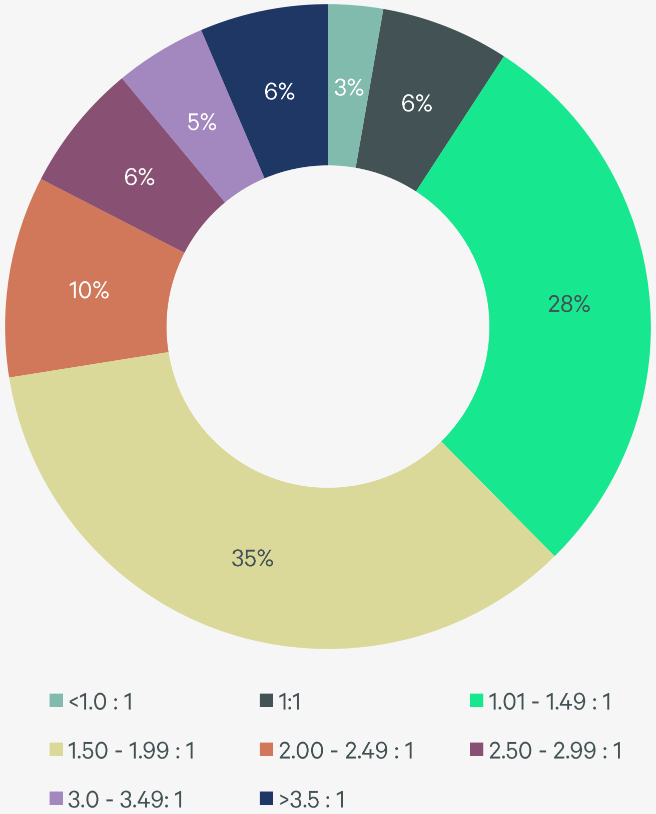
With pressure to reduce overall portfolio size, but also to raise the provision of lower density environments such as event space and collaboration space, higher desk-sharing ratios look set to persist.

FIGURE 19: Desk ratios, people per desk, current



Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 20: Desk ratios, people per desk, two years' time



Source: CBRE Office Occupier Sentiment Survey 2024
Note: Due to rounding, the total may not equal 100%.

Organising for change

Companies need to introduce several different mechanisms to support their ambitions for portfolios and workplaces. Some are organisational, some physical, and some relate to the use of data for strategic decision-making.

The most prominent is cross-functional partnering among CRE, HR, IT, and others (53%). This is lower than it was last year (68%), and other organisational changes, such as refining budget processes (21%), and setting up programme management groups (21%), are still not common.

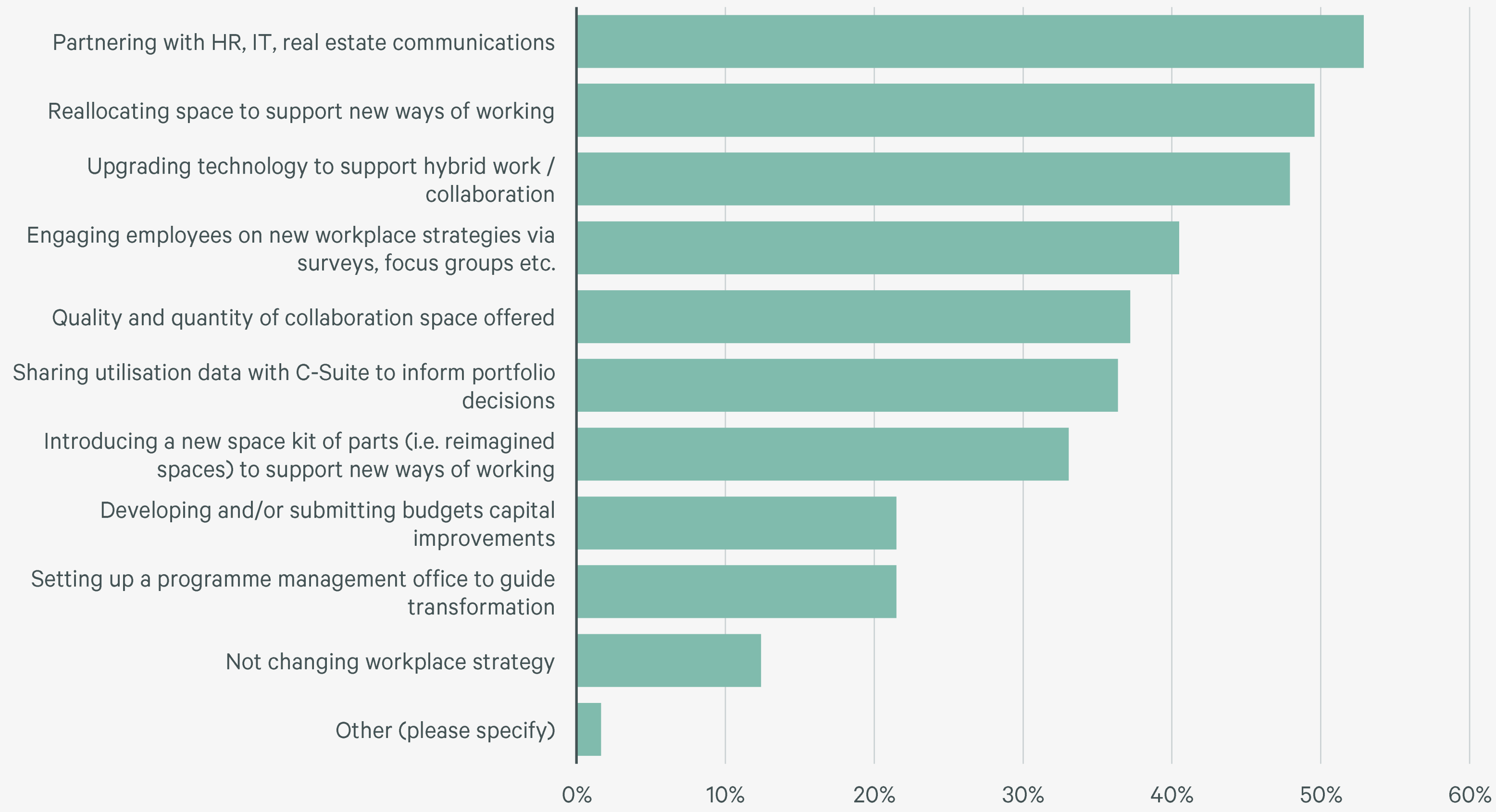
Reallocating space to support new ways of working (50%) and prioritising the quality and amount of collaboration space (37%) are the main physical design initiatives. Nearly half are upgrading technology to support mixed working patterns.

Although utilisation is rising, only 36% are sharing that data with the C-Suite to inform portfolio decisions. More positively, 40% are using staff surveys and focus groups to generate supporting evidence for new workplace strategies.

In summary, companies are:

- Reallocating space to enhance collaboration opportunities when employees are in the office
- Upgrading their technology and working preferences evidence so that on-site and off-site teams can work seamlessly together

FIGURE 21: Mechanisms for activating the workplace



Source: CBRE Office Occupier Sentiment Survey 2024

04

Technology and Sustainability

A view ahead

Digital strategies: an emerging need

While the need to support workplace experience via specific technologies is well recognised, coherent digital strategies still lag.

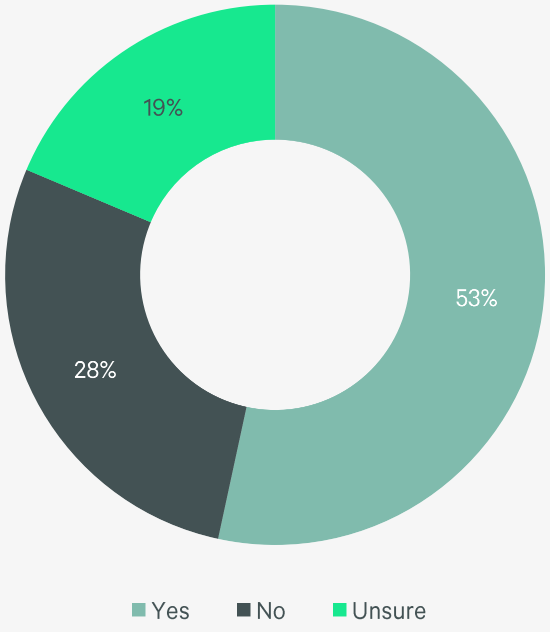
The use of digital technology in CRE is mostly immature, with 61% of companies using foundational technologies or early-stage digital processes. There is a more technologically advanced group of companies representing around 30% of occupiers who are using anything from live building data to cutting-edge technologies.

Many seem to be content with their organisation's trajectory of technological adoption, with 50% saying the amount they spend on real estate technology will not change in the next year. Only 28% are planning to increase their spending in this area across the next twelve months.

28%

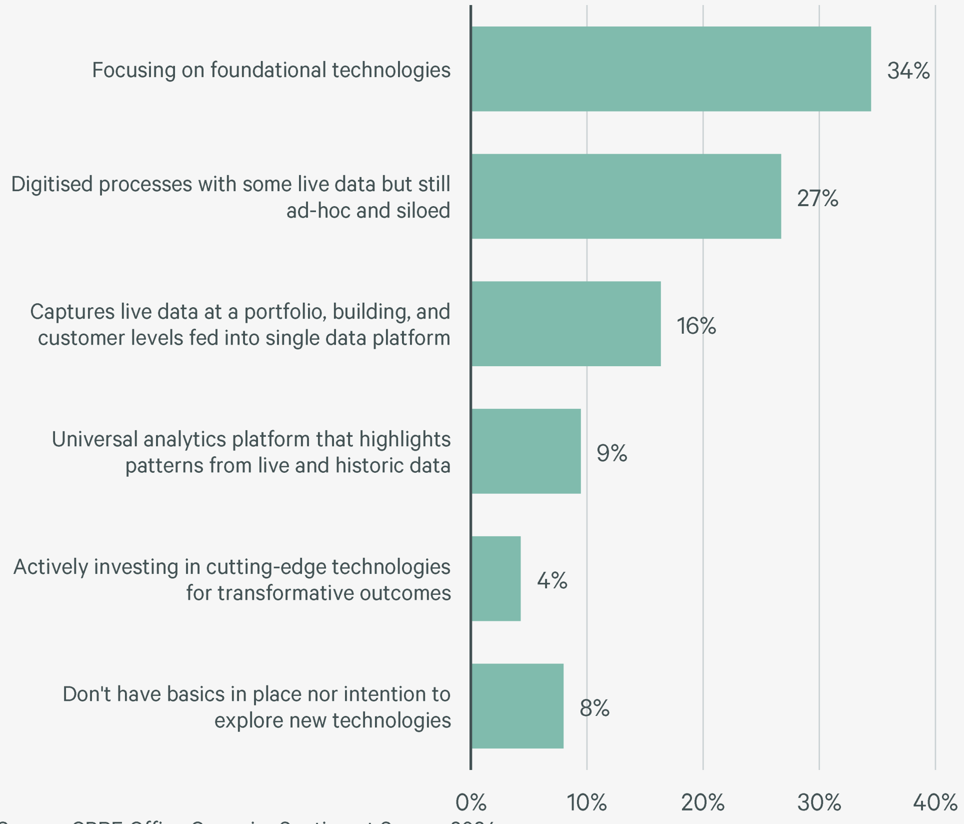
Have no digital strategy and roadmap

FIGURE 22: Existence of digital strategy and roadmap



Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 23: Levels of digital sophistication in corporate real estate services functions



Source: CBRE Office Occupier Sentiment Survey 2024
Note: Due to rounding, the total may not equal 100%.

AI already playing a part in real estate operations

Similarly, the use of Artificial Intelligence (AI) as a means of improving process efficiency in real estate is still in its infancy. Only a third of companies are deploying AI in their real estate processes, and of these, only 20% regard it as transformational. Over half are not yet using AI in their CRE processes.

This 20% is only a small group in absolute terms at this point, but it is certainly significant that some occupiers consider that their business operations have already been enhanced by AI.

Among occupiers using AI, most are applying it to occupancy management or building and workplace operations, with a smaller group using AI to achieve sustainability and portfolio optimisation goals.

FIGURE 24: Extent of AI usage

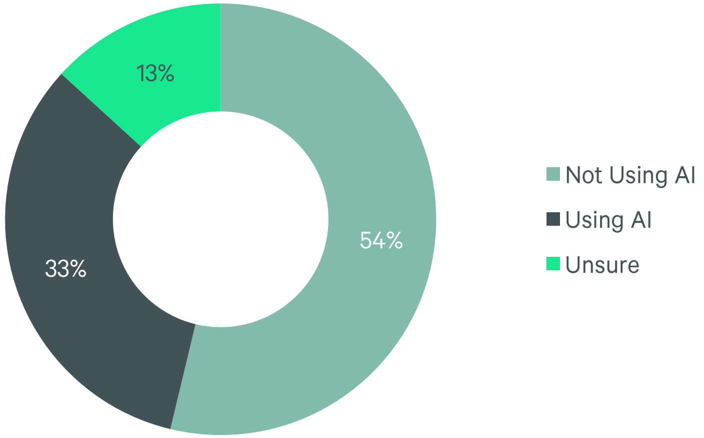
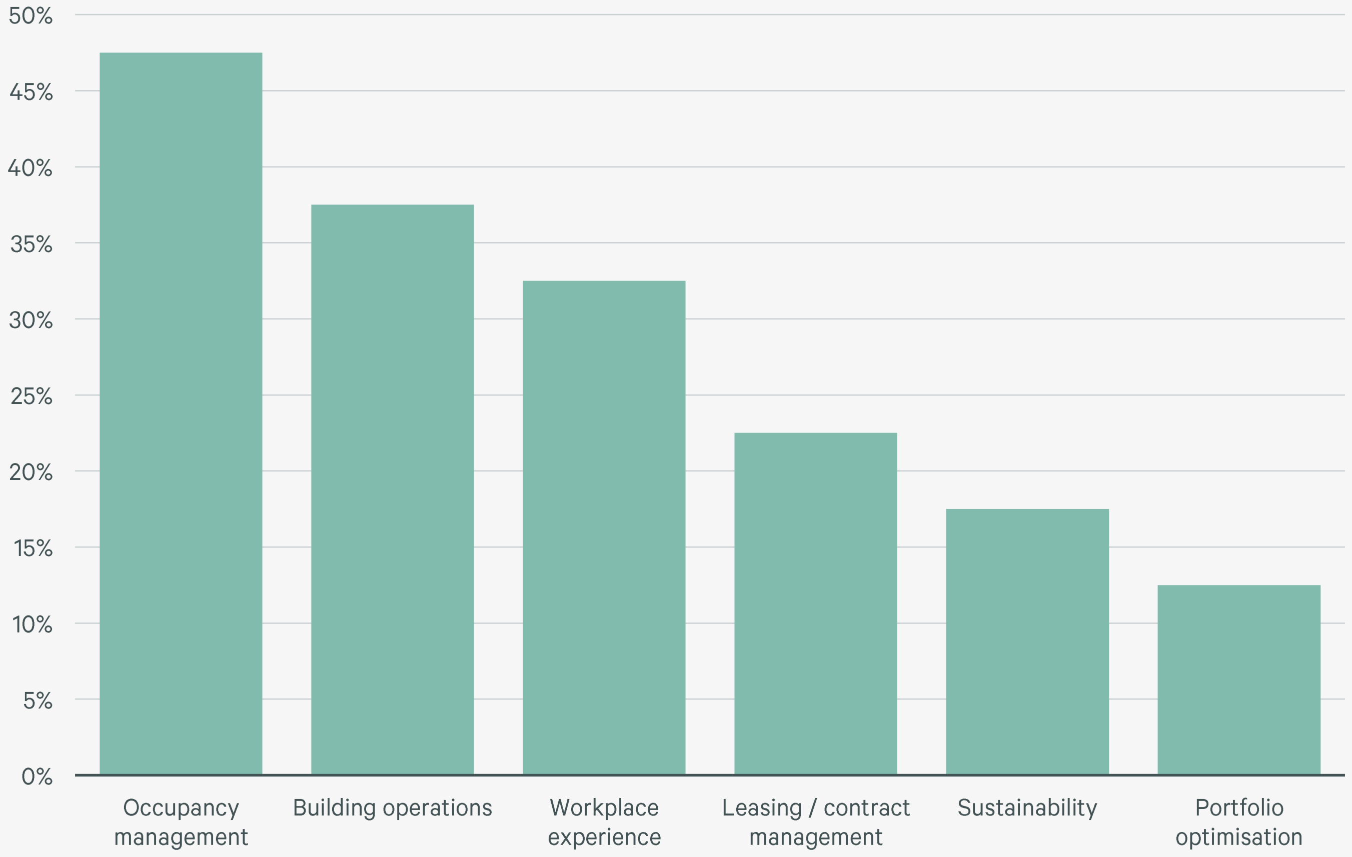


FIGURE 25: Areas of use of AI in CRE processes



Source: CBRE Office Occupier Sentiment Survey 2024

Sustainability: net zero timeframes drawing nearer

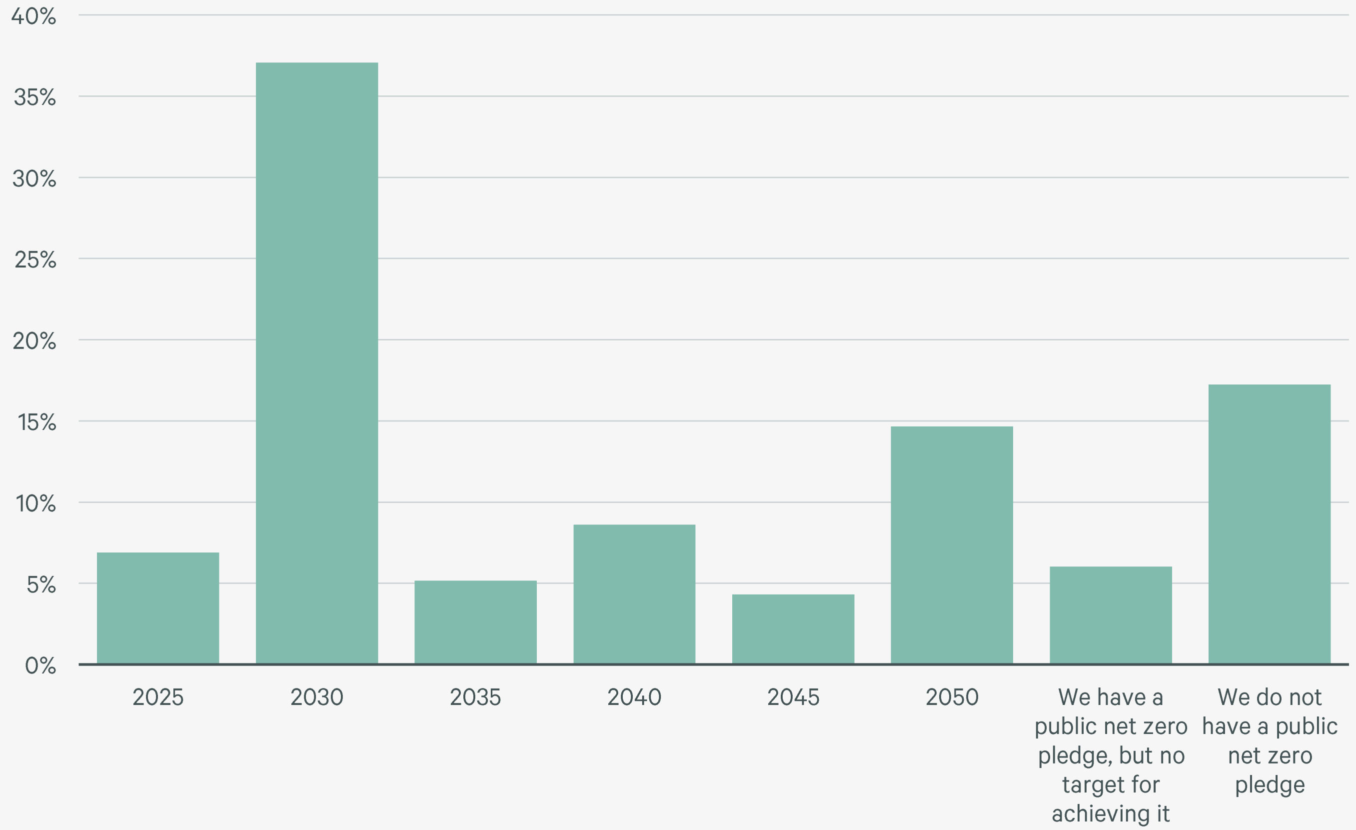
Turning to the influence of sustainability on real estate decision-making, a large majority of companies (83%) have publicly-stated net zero pledges, and most have a timeframe attached to this. Nearly half (44%) have net zero targets that they aim to achieve by 2030. It will be interesting to see how these firms achieve this and identify efficient paths to reaching these goals. They may also potentially serve as guides for others who follow.

A group of occupiers (38%) have no net zero target, an undated target, or a 2050 target. This represents a large group to have deferred action beyond the timeframe of most of their peers. With the framework for information reporting and disclosure tightening across Europe, early formulation of strategy and understanding of relevant policy instruments is advisable.

83%

Have publicly-stated net zero pledges

FIGURE 26: Distribution of timings for net zero pledges



Source: CBRE Office Occupier Sentiment Survey 2024

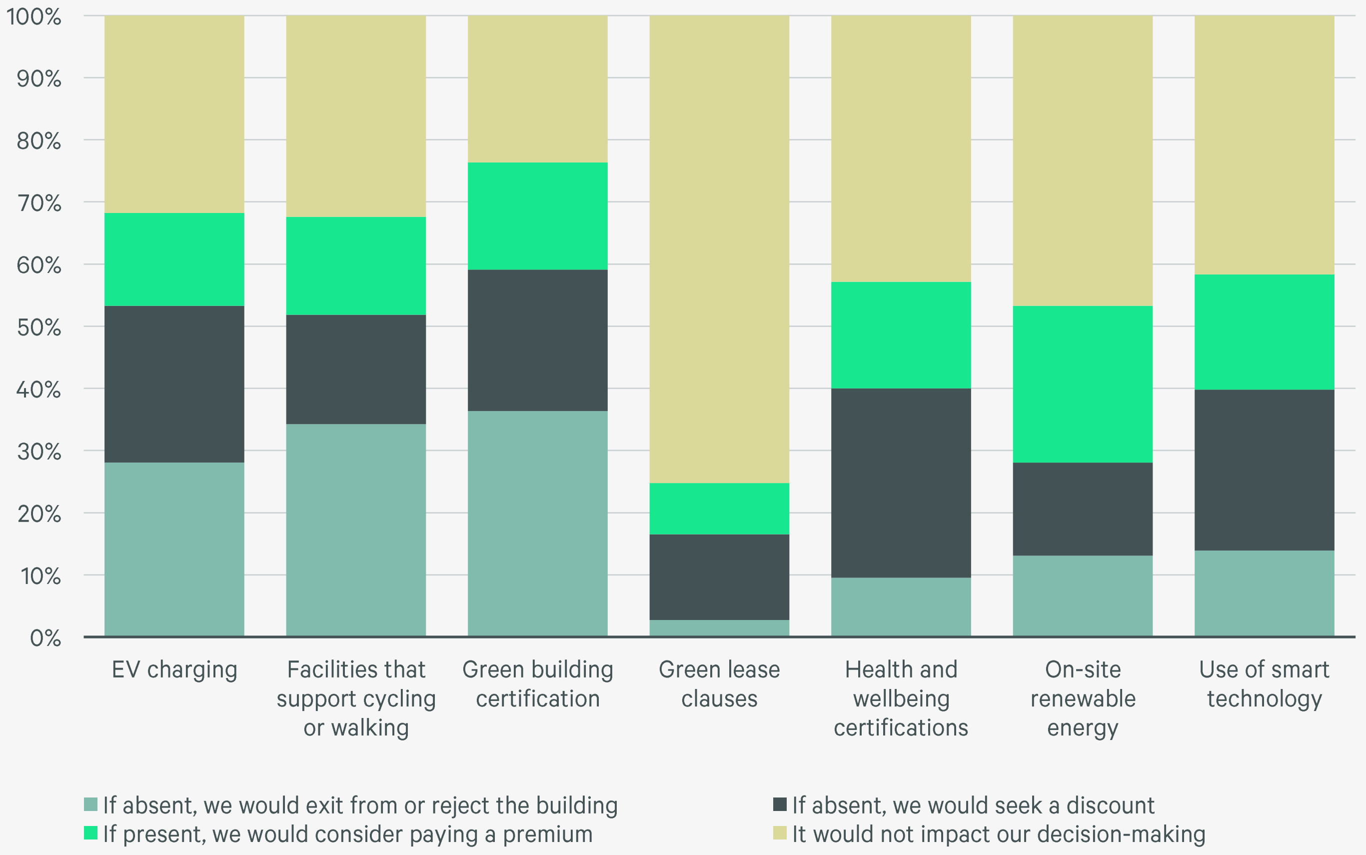
Sustainability affecting specific decision areas

The imminent approach of net zero target dates is focusing minds on practical solutions to improving real estate sustainability. Around a third of occupiers say that they would exit or reject a building that does not have a green building certificate, EV charging, or facilities that support cycling or walking.

Company strategy is also aligning with net zero dates, with over 40% of companies saying they include climate risk and net zero alignment in their location decisions. There is likely to be a high degree of overlap between this group and the 44% of occupiers with net zero dates of 2030 or earlier.

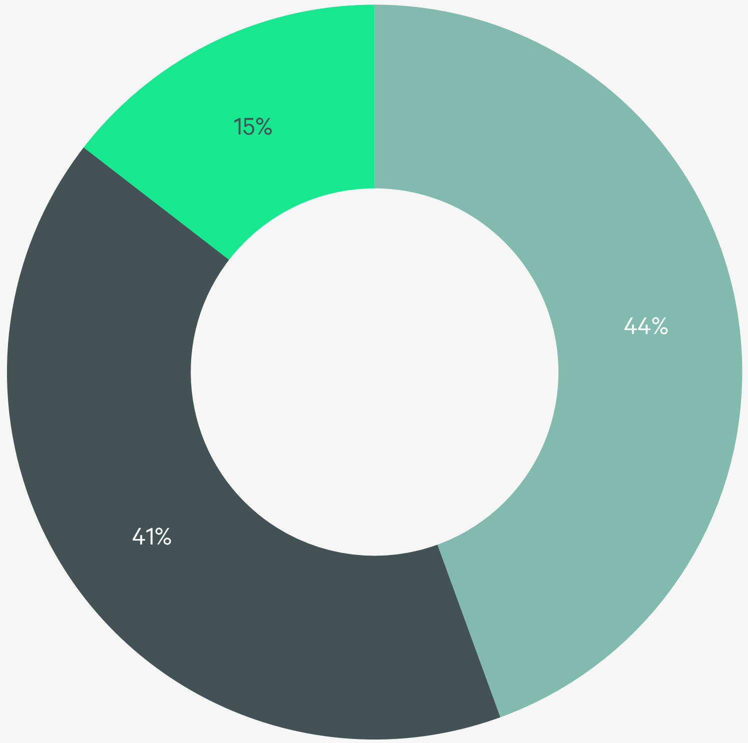
Achieving these targets will require occupiers and landlords to work together, something that occupiers recognise in their priorities for what they would like to see in green leases. The most popular clauses in green leases centre on data sharing between landlord and tenant and building level enablement of renewables and recycling.

FIGURE 27: Impact of specific sustainability features on building decisions



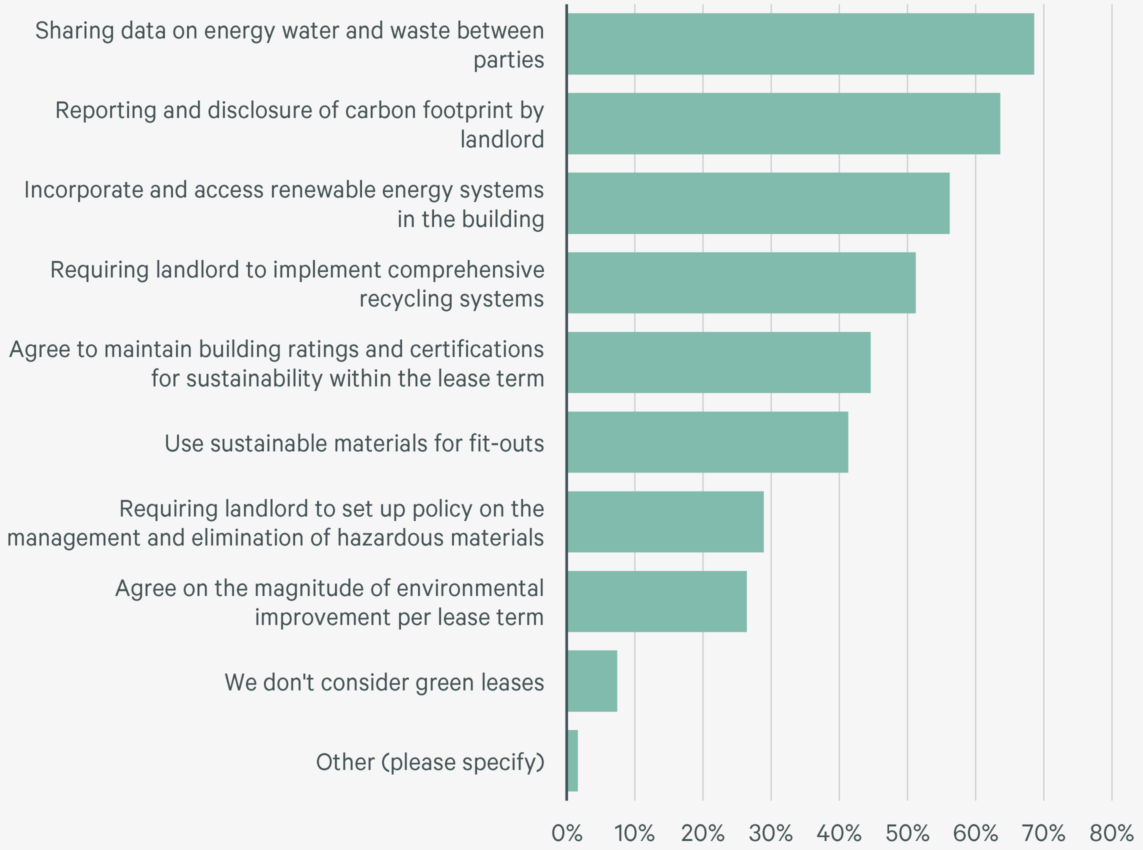
Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 28: Making location decisions based on a location's vulnerability to climate change and/or its shift toward a low-carbon climate friendly future



Source: CBRE Office Occupier Sentiment Survey 2024

FIGURE 29: Preferred features in green leases



Source: CBRE Office Occupier Sentiment Survey 2024

05

Key Recommendations

Key recommendations

01

HYBRID WORKING AND THE OFFICE: ALIGNMENT REMAINS KEY

Office utilisation is rising and looks set to rise further as natural momentum and more widespread use of mandates have an effect. At the same time, employee and leadership preferences are not always identical, and over-attendance on peak days remains a challenge. Alignment of expectations, messaging, and measurement is key.

02

RECOGNISE THE TRADE-OFFS IN PORTFOLIO OPTIMISATION

Cost may be the main driving factor behind intentions to reduce portfolio size, but other core aims such as quality, experience and flexibility are also prominent. Focus on the opportunities presented by existing leases, the sustainability and amenity features of new buildings, and a more strategic role for flex space.

03

PROMOTE THE PURPOSEFUL WORKPLACE

Identify and measure workplace effectiveness by pre-defined criteria and support these aims through investment in technology. Revisit space allocations and sharing arrangements, where necessary, to support collaboration and address peak level overcrowding.

04

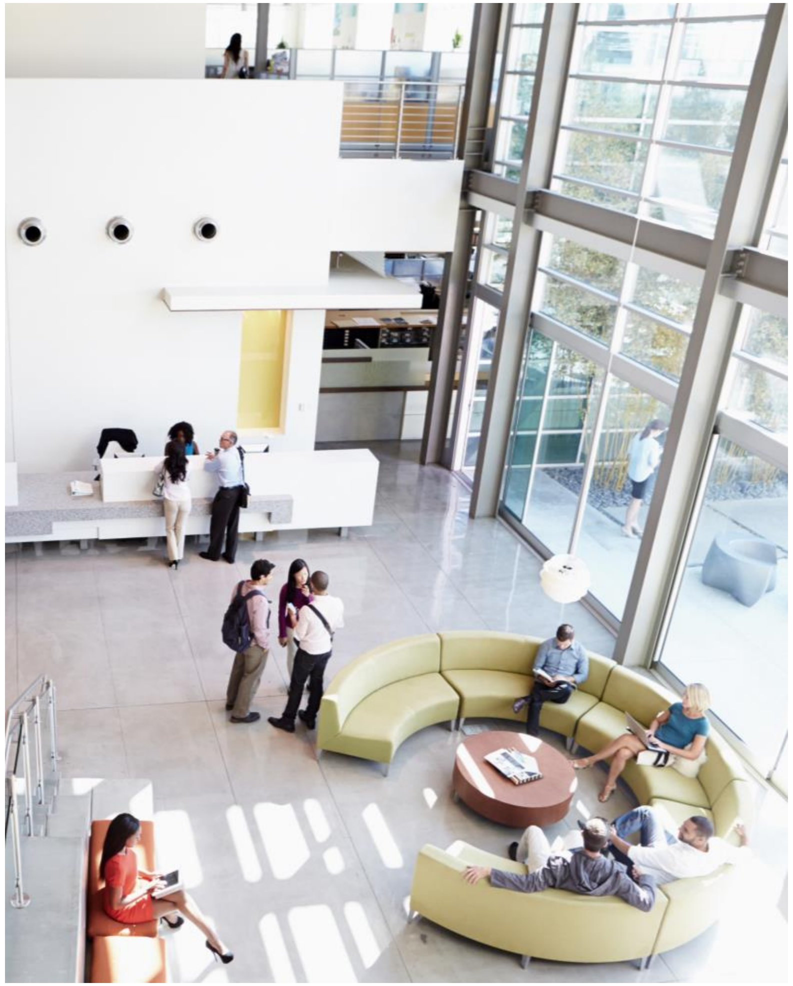
DEVISE AND REFINE DIGITAL STRATEGIES

Coherent digital strategies still fall behind the use of individual technologies for specific aims. Structured data integration and acceleration towards predictive analytics platforms can streamline and enhance corporate real estate decision-making.

05

APPLY SUSTAINABILITY TARGETS TO FULL RANGE OF REAL ESTATE DECISIONS

The approach of net zero commitment dates is sharpening occupiers' focus on sustainability issues, but with application to a limited number of decision areas so far. Look to broaden the focus to include health and wellbeing, energy sourcing, and to expand data sharing with landlords.



About the survey
Total responses: 121

FIGURE 30: Percentage of respondents by sector

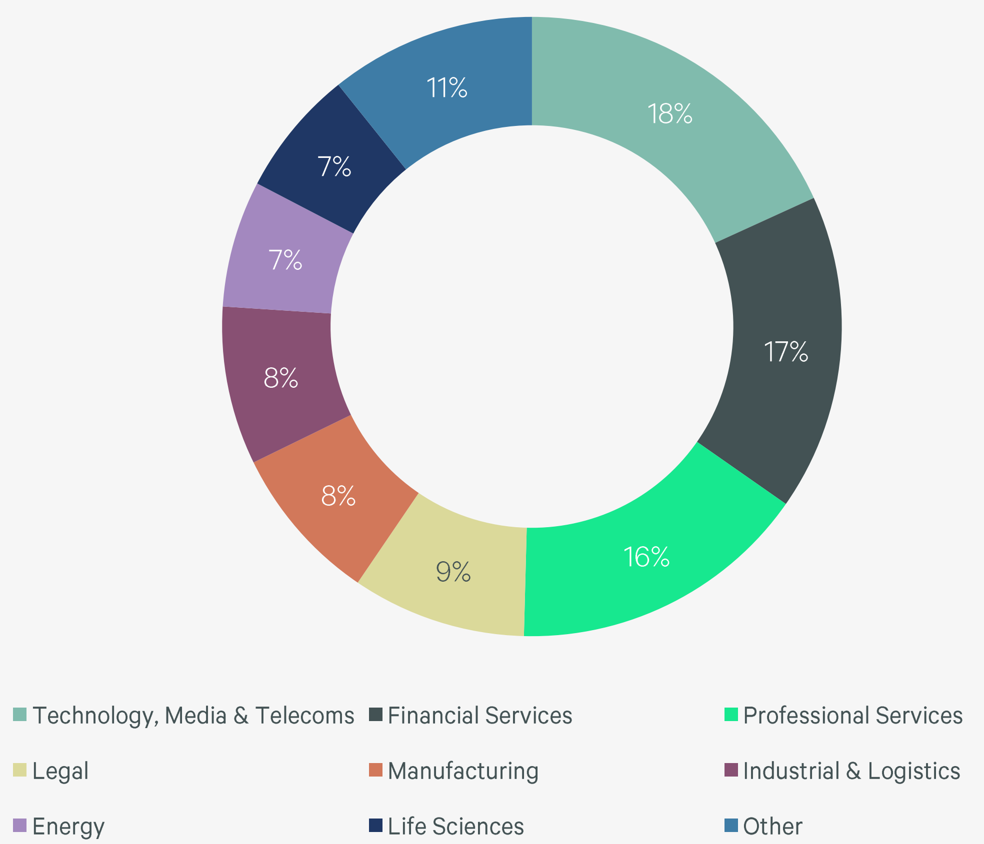
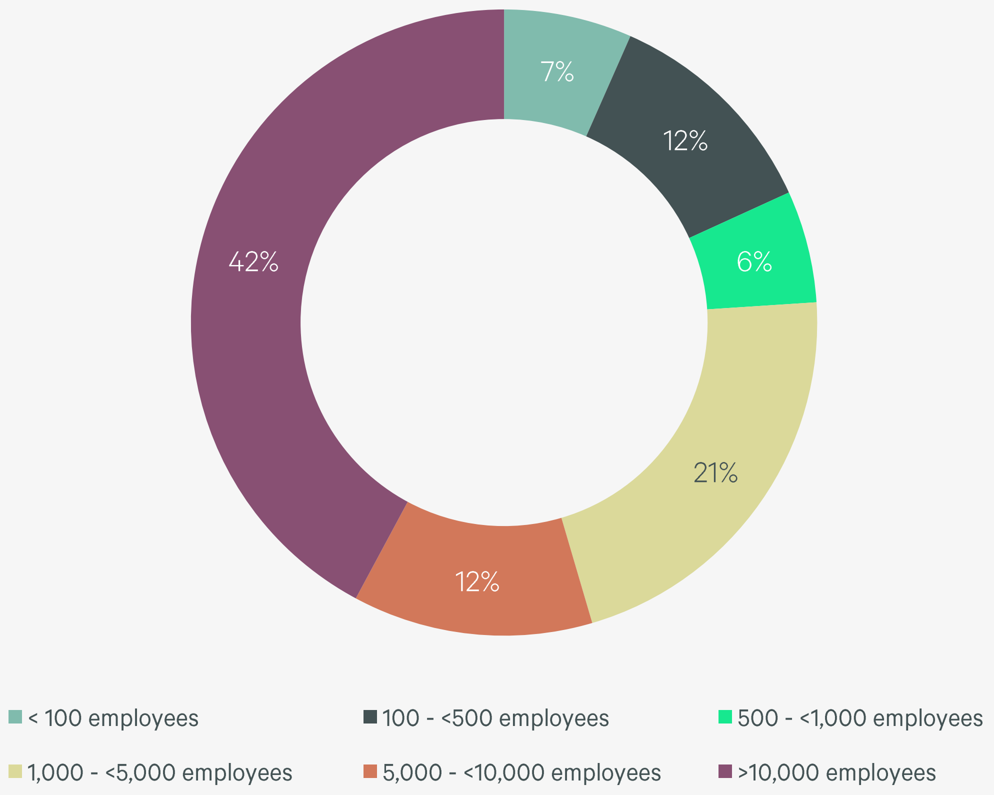


FIGURE 31: Percentage of respondents by size



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