



OFFICE UTILIZATION SURVEY RESULTS

An Analysis of Raleigh-Durham's Office
Real Estate Usage Trends

Better never settles




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INTRODUCTION

Cushman & Wakefield (C&W) sought to explore how Raleigh-Durham firms are adapting their office utilization strategies in response to recent shifts in workplace dynamics. While some businesses find that employees are just as productive working remotely—avoiding office distractions and long commutes—others emphasize the importance of in-person work for fostering innovation and maintaining a strong company culture. Many employers fall somewhere in between and take a hybrid approach, offering flexibility based on individual needs. Having a deeper understanding into these strategies will help provide valuable insights into current trends and practices in Raleigh-Durham’s office market.

To achieve this understanding, C&W developed and distributed a 22-question office utilization survey to clients and contacts throughout Raleigh-Durham. The survey gathered responses from more than 50 companies ranging in size from five to more than 500 employees across ten different industries.

KEY FINDINGS

54%

of respondents stated their company has an in-person office mandate. Of that, nearly **68%** indicated the mandate **did not result in turnover.**

55%

of companies surveyed require **three or more days in the office.**

Companies in the **construction, healthcare, and nonprofit sectors** had the **highest share of mandates.**

40%

of companies do not require specific days of the week employees must be in-person. Of the **60%** that do require specific days, **Tuesdays, Wednesdays, and Thursdays** are the most mandated.

OVERVIEW



To achieve an understanding of the return-to-office landscape on a company level, C&W developed a 22-question office utilization survey and engaged the partnership of a variety of companies throughout the metro.

Responses were collected from more than 50 companies ranging from five to 500+ employees, spanning across 10 broad industries.

Q Does your company have an in-person office mandate in place?

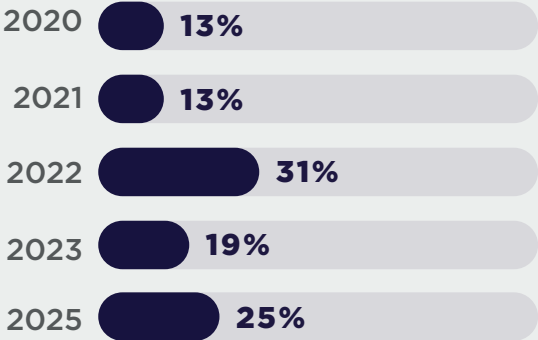
✓ YES
54%

In-person mandates are **catching on**. Of the 50+ companies surveyed, a majority reported their companies have a mandate in place.

✗ NO
46%

Q What year was the mandate announced?

Mandates are also becoming more pronounced. **75% of mandates were announced during the last three years**, while only 12.5% were announced in 2021 and only 12.5% in 2020.



YES OFFICE MANDATE

C&W’s office utilization survey collected **more detailed information about the companies with in-person mandates in place**, such as subsequent turnover, mandated days of the week, and number of days mandated per week.

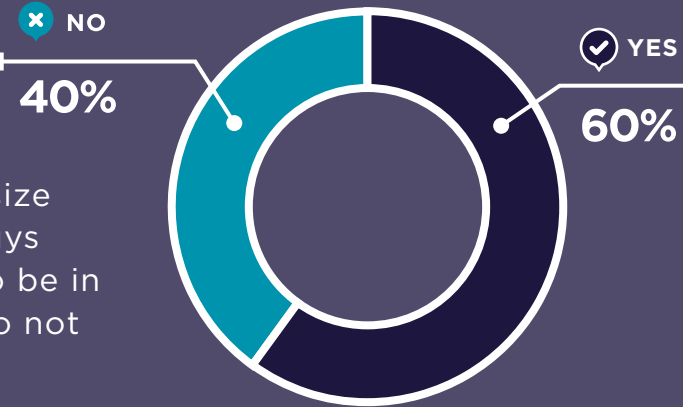
Has the mandate resulted in turnover?



Of the companies with in-person mandates, **65% stated that the mandates did not result in turnover**, and 35% were unknown. No companies reported that mandates resulted in turnover.

Are there specific days each week that an employee must attend?

Though the majority of companies have mandates in place, most companies—across all industries and size ranges—are flexible on days employees are required to be in the office. While **40.0%** do not specify days, **60.0%** do.



Which days are required?

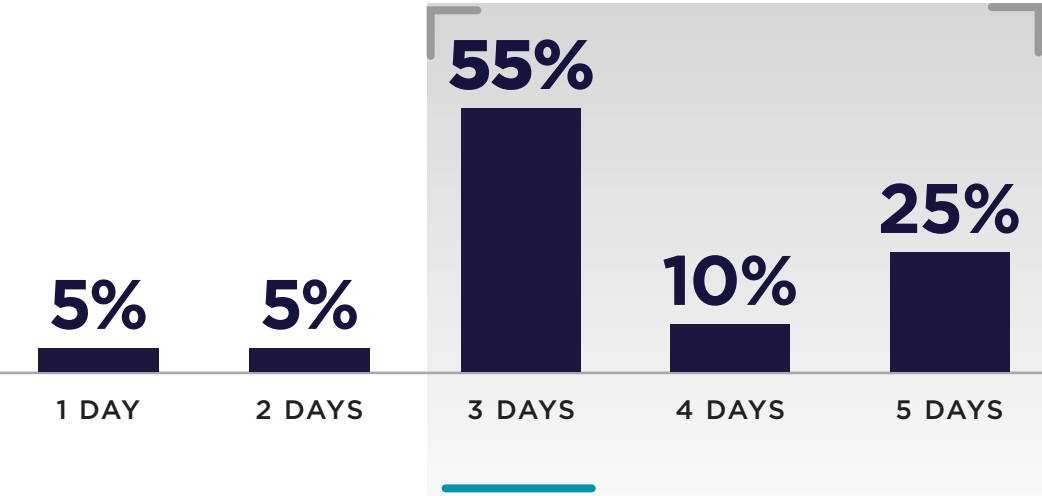


Of the companies that do specify days, **Tuesdays, Wednesdays, and Thursdays are the most mandated day** while Monday and Friday are the least mandated.



What is the minimum number of days a week an employee must come into the office?

While most companies *do not* require specific days of the week in the office, a vast majority require a **set number of days in the office**.

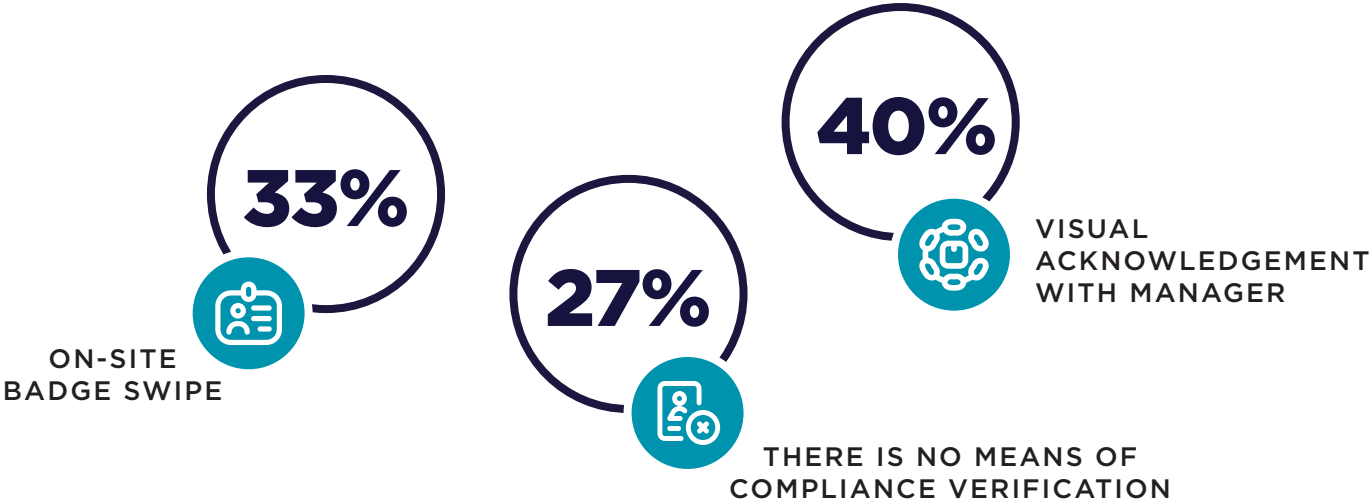


At least **90%** of respondents state their companies require at least **three days in person**.



How does Company Management know if employees are in compliance with mandates?

C&W surveyed how companies know if employees are following mandates.

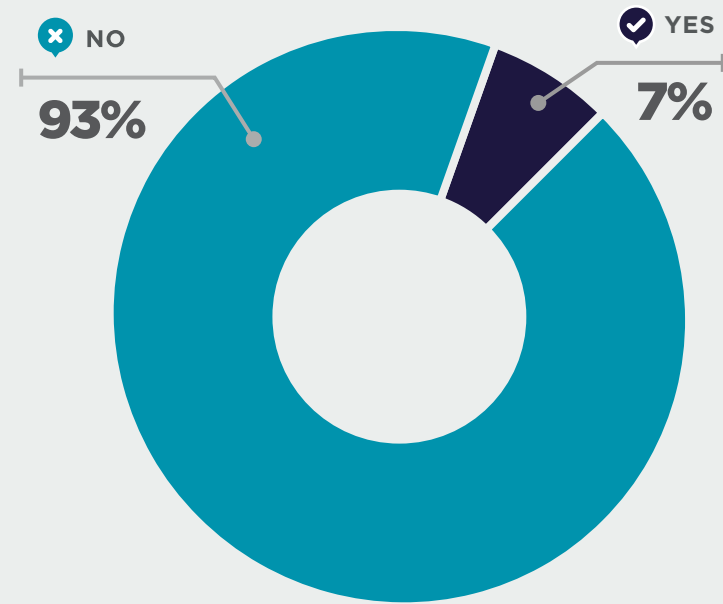


Of the respondents, the majority, **40%**, stated they know employees are compliant with mandates through visual acknowledgement with manager.

As in-person mandates become more prevalent, some companies are finding ways to encourage people to return to the office.

Does your company offer incentives to come back to work?

While **93.3% of companies do not provide incentives for employees to return to the office**, the companies that do offer them believe that free food and parking are effective ways to entice people back.



Of the companies that reported incentives, the **most common** included:

- Breakfast**
- Lunch**
- Snacks**

Does the mandate apply to all employees or are certain jobs/functions exempt?



Some exemptions include:

- | | | |
|---|--|------------------------------------|
| Attorneys | Previously Remote Employees | Sales |
| Anyone who lives over 50 miles 1 hour away | Project Managers, non-lab-based roles | Certain Supervisor Approval |

☒ NO OFFICE MANDATE

The survey included additional questions for companies that **do not have in-person mandates in place.**

Q *Do employees have an option to come into the office?*



Q *Can employees work anywhere in the U.S.?*

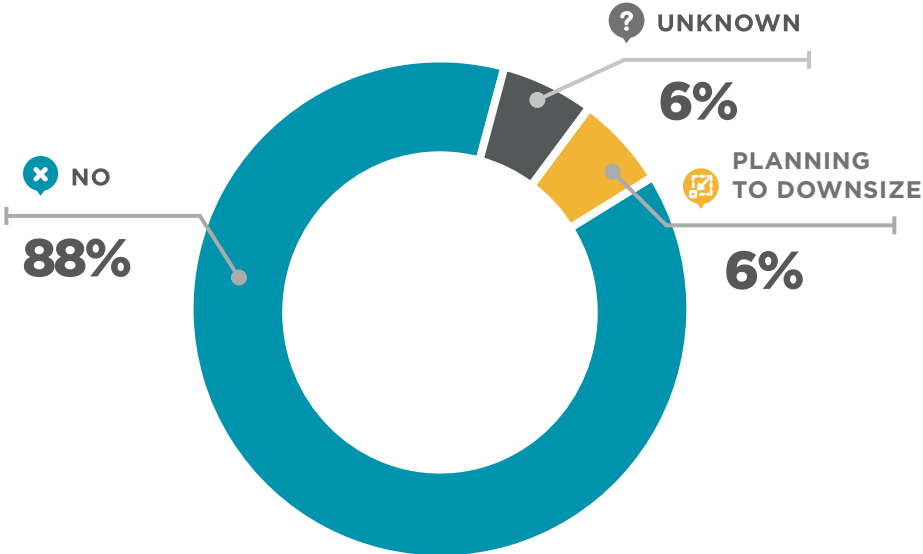


More than half of companies without a mandate allow employees to **work anywhere** within the United States.

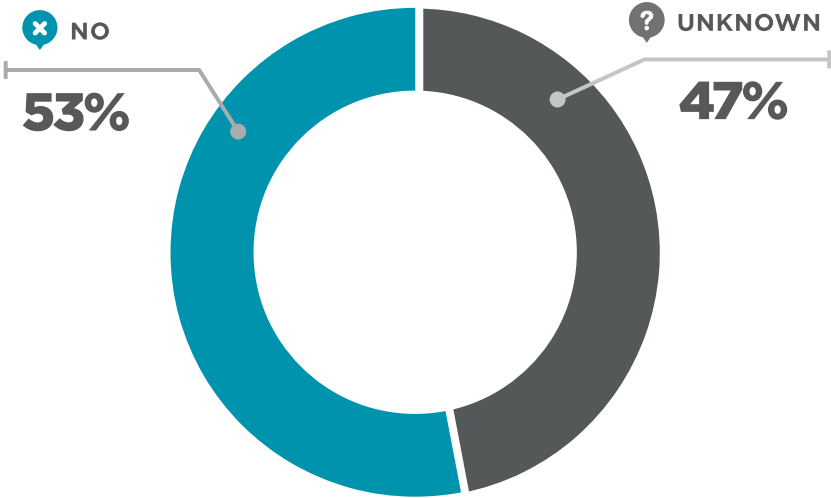




Is leadership considering closing the physical office location to become a fully remote work environment with no local office?



Is leadership planning a mandate in the future?

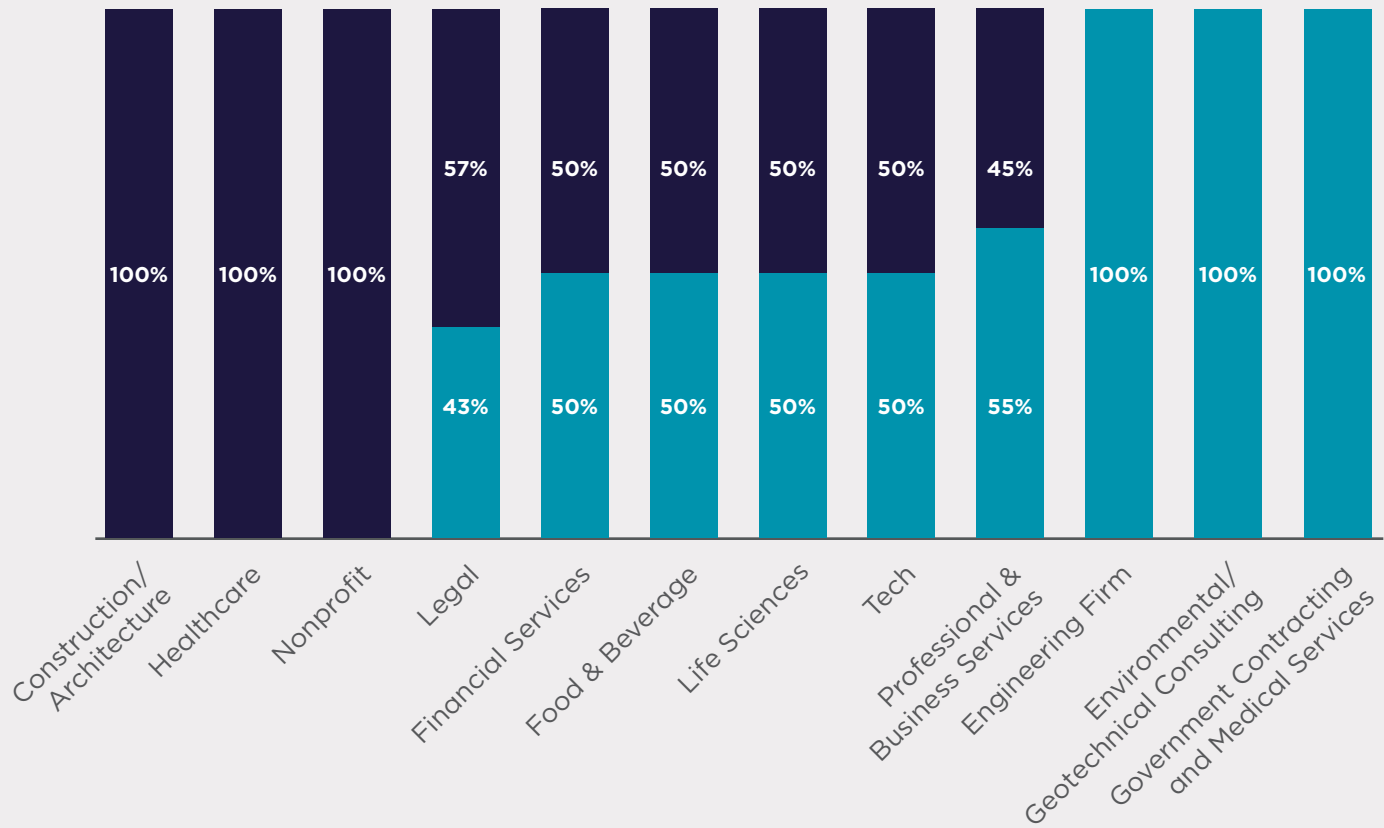


At the end of the survey, respondents were given the opportunity to provide any additional information about their company’s post-COVID in-person policies. Of the **46%** of companies who responded “no,” **35%** of companies indicated in the comments they have soft in-person guidelines in place.

OFFICE RESPONDENT COMPOSITION

C&W collected responses from ten broad industries. **Of the industries involved, the construction/architecture, healthcare, and nonprofit sectors had the highest share of companies with mandates.**

MANDATES BY INDUSTRY



✓ YES ✗ NO

MANDATE BY NUMBER OF EMPLOYEES*

Respondents were asked to disclose the number of employees within their Raleigh-Durham operation. **Large companies are more likely to have in-person work mandates.**



While many of the small companies reported they did not have an in-person mandate in place, **44.4%** explained in the comments that they never had the option of working remotely or they have in-person “guidelines” in place.

Companies with **300+** employees reported the *highest share of mandates* versus no mandates.

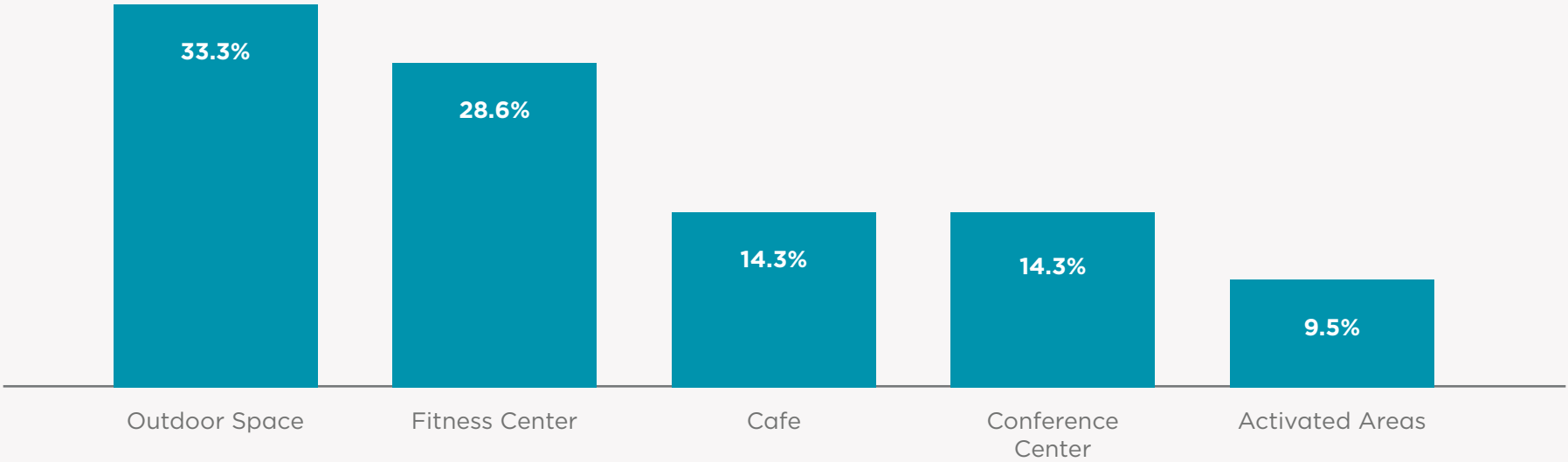
* Number of employees in Raleigh-Durham location

✓ YES ✗ NO

C&W asked companies which amenities their buildings offer.
Outdoor space was the *most popular amenity* followed by fitness centers/showers.

Q

What amenities does your building offer?



CONCLUSION

Proprietary data collection indicates that office utilization has been increasing in Raleigh-Durham over the last four years. In-person mandates are becoming the norm and, as a result, Raleigh-Durham will likely see the continued moderate uptick in office use in the coming years. Still, companies are choosing to provide their employees with flexibility, particularly around the days of the week they come into the office. This structural shift in company policy will continue the need for company rightsizing and reevaluation of their existing footprints.

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About Cushman & Wakefield

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