

NEW KIDS ON THE BLOCK

Generation Z and the Changing Office
Workplace on the Chinese Mainland

April 2025 | Greater China Research

Better never settles



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EXECUTIVE SUMMARY



01 – EXECUTIVE SUMMARY

An Important Demographic

- The “new kids on the block”, or Generation Z, on the Chinese mainland are an increasingly important demographic in the region.
- They are digitally fluent; they desire flexibility, a work-life balance and have a strong focus on sustainability and social responsibility.
- Understanding these traits is crucial to curate the appropriate office workplace experience for this demographic.
- Through enhanced experience, this office workplace will not only be engaging and alluring to Generation Z talent but will also be that much more productive.

Needs Alignment Crucial

- Generation Z on the Chinese mainland look for collaboration, and a strong organisational culture.
- They seek office workplaces that promote wellbeing and inclusivity.
- To align with Generation Z's unique characteristics and their expectations in the modern work environment on the Chinese mainland, office workplaces in the region need to integrate technology and create spaces that foster connection, wellbeing, sustainability and productivity.

Gaps Present

- Our survey of corporate real estate (CRE) practitioners on the Chinese mainland and their perceptions on current and future office workplace optimisation for Generation Z in the region, revealed significant gaps between existing office working conditions and Generation Z expectations.
- The returned information and data underscores the urgency for organisations on the Chinese mainland to adapt their office workplaces and implement strategies that align with the evolving needs of the Generation Z demographic.

XSF – A Value-Add Tool

- Cushman & Wakefield's Experience per Square Foot (XSF) is a key metric for evaluating office workplace experience.
- In simple terms, XSF measures employee experience, wellbeing, and performance, while also defining the office workplace's role within the occupier's unique office workplace ecosystem.
- Lastly, office workplace strategy case studies that Cushman & Wakefield have worked on, on the Chinese mainland, clearly illustrate how XSF can be used to guide strategic decisions, improve employee wellbeing, enhance employee productivity, and ultimately optimise the office workplace for our clients in the region, including their Generation Z employee cohort.

02

INTRODUCTION



02 – INTRODUCTION

Our report analyses the evolving needs of the “new kids on the block”, Generation Z, on the Chinese mainland and their implications for the office workplace in the region.

Survey data included in our report reveals Chinese Generation Z’s priorities of flexibility, collaboration, and sustainability.

Additionally, our report emphasises the importance of optimising office spaces to attract and retain the Chinese Generation Z demographic, using Cushman & Wakefield’s Experience per Square Foot (XSF) metric as a key performance indicator.

Finally, four included case studies illustrate successful workplace strategies on the Chinese mainland, offering actionable insights for organisations seeking to create appealing and productive work environments for Generation Z in the same region.



03

DECODING THE NEW KIDS ON THE BLOCK



03 – DECODING THE NEW KIDS

Figure 1: Generations on the Chinese Mainland (2019)

Chinese Generation	Western Equivalent	Segment Size*
Post-00s: 15-25 Post-95s: 26-30	Generation Z	226.8 million 16.22% of the population
Post-90s: 31-35 Post-80s: 36-45	Millennials	326.6 million 23.22% of the population
Post-70s: 46-55 Post-60s: 56-65	Generation X + Baby Boomers	340.4 million 24.35% of the population

Note: Based on 2019 statistics of Chinese population distribution and size.

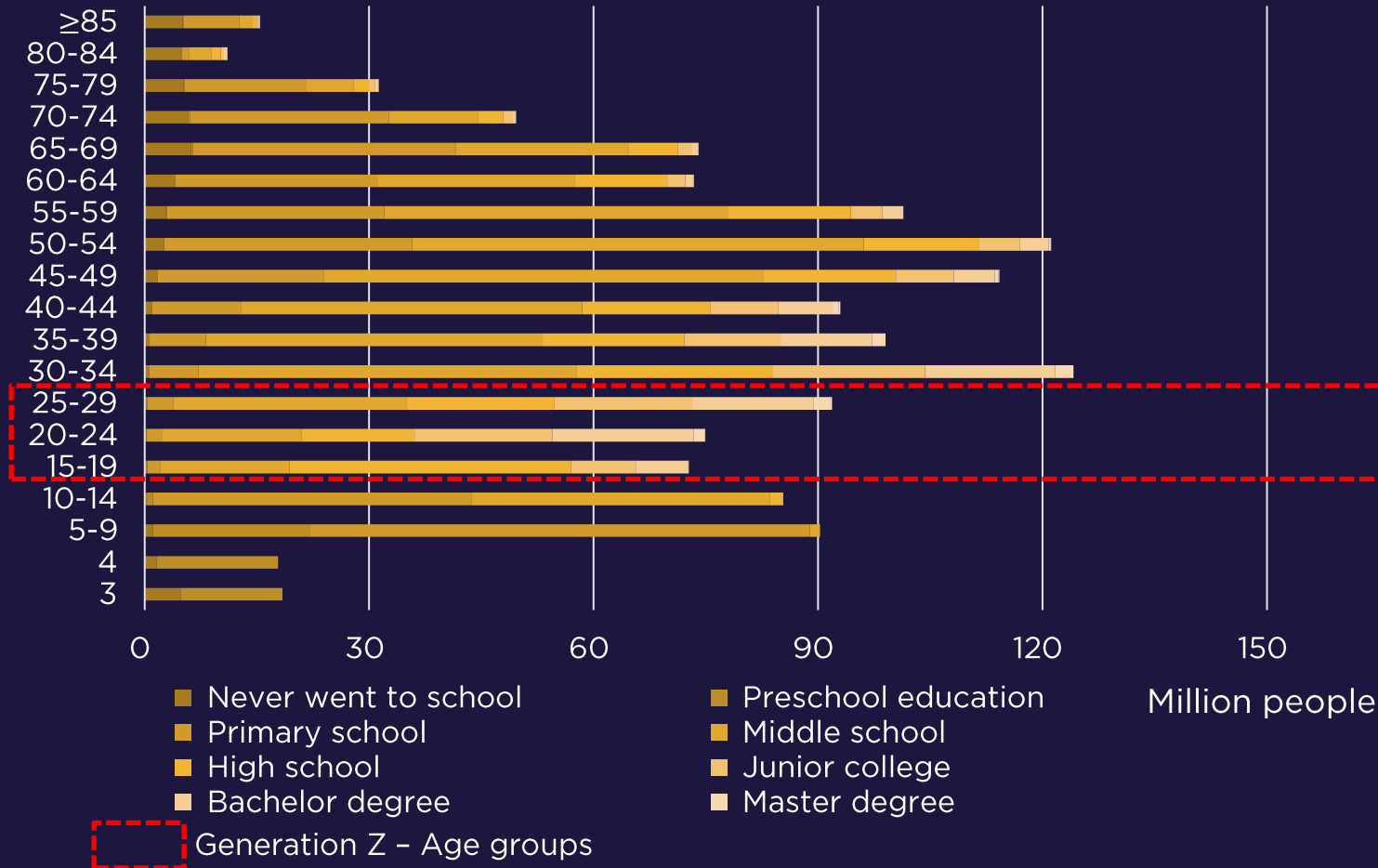
Source: Dragon Tail, Cushman & Wakefield Research

Gen Z: An influential demographic

- Numbering around 227 million people, and with around a 16% share of the total population, the “new kids on the block” on the Chinese mainland – or Generation Z – or those born post 1995 – represent a dynamic and influential demographic in the region (Figure 1).
- This generation has grown up amidst rapid economic development, rising prosperity and continued technological advancement.
- With Generation Z comes immense influence as they shape life perspectives, the consumer landscape and the economic trajectory.
- Their digital savvy nature and their evolving personal identity make them a force to be reckoned with.
- Businesses that fail to adapt to Generation Z’s preferences and values risk being left behind as their influence continues to grow.
- Understanding their characteristics, preferences, wants, and needs is crucial for anyone or any organisation, seeking to engage with this significant population segment...
- ...and this includes those organisations looking to attract and retain their youngest office-based employees.

03 – DECODING THE NEW KIDS

Figure 2: Generation Z on the Chinese mainland – Educational level (2020)



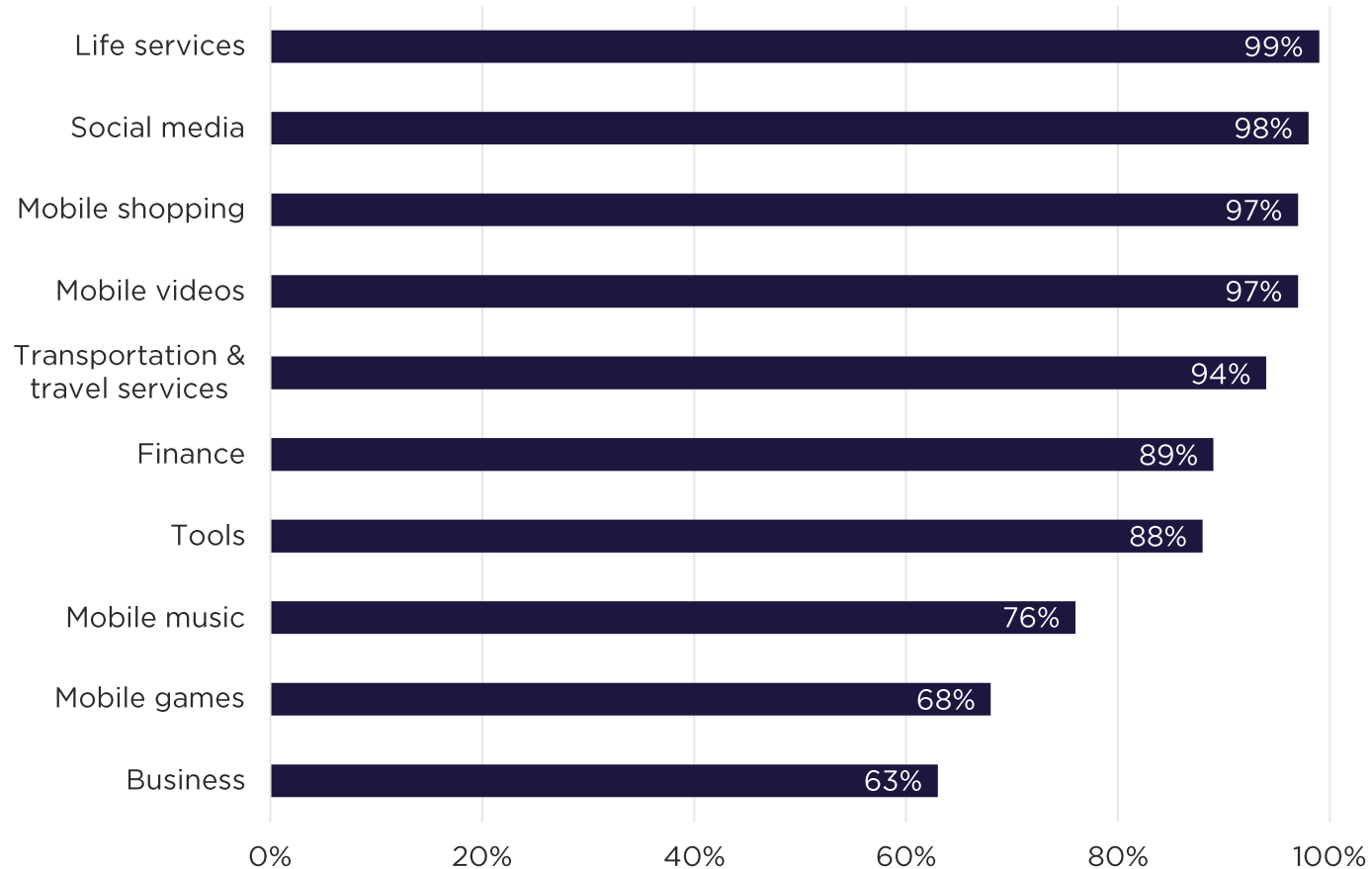
Source: China Population Census Yearbook 2020, Cushman & Wakefield Research

Gen Z Characteristics: A Blend of Tradition and Modernity

- Generation Z on the Chinese mainland are a unique cohort, having been shaped by economic growth, the one-child policy, and the rise of the Internet.
- They value humanistic values (e.g. diversity, equity, inclusion (DE&I), mental wellbeing, etc.) sustainability, and are more idealist than previous generations.
- Material wealth is no longer the sole measure of success; instead, Generation Z prioritise personal fulfilment and their status as human beings.
- This generation is uniquely positioned between traditional Chinese values and the rapidly evolving digital landscape.
- They are highly educated (17% have at least a bachelor degree), tech-savvy, globally aware, exhibit a strong sense of national pride and have a desire for individual expression (Figure 2).
- While family remains important, independence and self-reliance are also highly valued.
- Many are pragmatic and ambitious, driven by a desire for career success and financial security.
- The Chinese Generation Z cohort also demonstrate an awareness of social issues and a desire for meaningful work that aligns with their values.

03 – DECODING THE NEW KIDS

Figure 3: Generation Z on the Chinese mainland – Penetration of mobile internet services by category (2022)



Note: Based on surveys conducted in January 2022.

Source: QuestMobile, Cushman & Wakefield Research

Gen Z Life Preferences: Digital Natives with Diverse Tastes

- Digital technology permeates many aspects of the lives of Generation Z on the Chinese mainland, with life services, social media, mobile shopping, and mobile videos being the top tech platforms used. (Figure 3).
- They are active users of WeChat, Douyin (TikTok's Chinese counterpart), and Weibo, relying on these platforms for communication, entertainment, and information consumption.
- In addition, Generation Z on the Chinese mainland are more likely to make spontaneous purchases, are comfortable with credit, and are willing to spend beyond their current budget.
- Their consumption habits are diverse, ranging from luxury goods and international brands to affordable domestic products.
- Beyond their consumer preferences, Generation Z on the Chinese mainland also have specific interests and hobbies.
- They show a strong interest in gourmet food, animation films, and e-sports, indicating a preference for entertainment.
- Experiences, particularly travel, are valued.

03 – DECODING THE NEW KIDS

Figure 4: Generation Z on the Chinese mainland
– Top hobbies (2024)

Hobbies	
1	Entertainment and Leisure (Music, TV Dramas, Films, Museums)
2	Sports (Fitness, Hiking, Camping, Fishing)
3	Keeping Pets (Cat, Dog, Exotic Animals)
4	Travel, Visiting Popular Stores, Outlets and Restaurants
5	New Skills Learning (Photography, Cooking)
6	Pan-Anime and Manga (Gaming, Animation)
7	Food and Candy Packaged Toys
8	Card Collecting and Trading

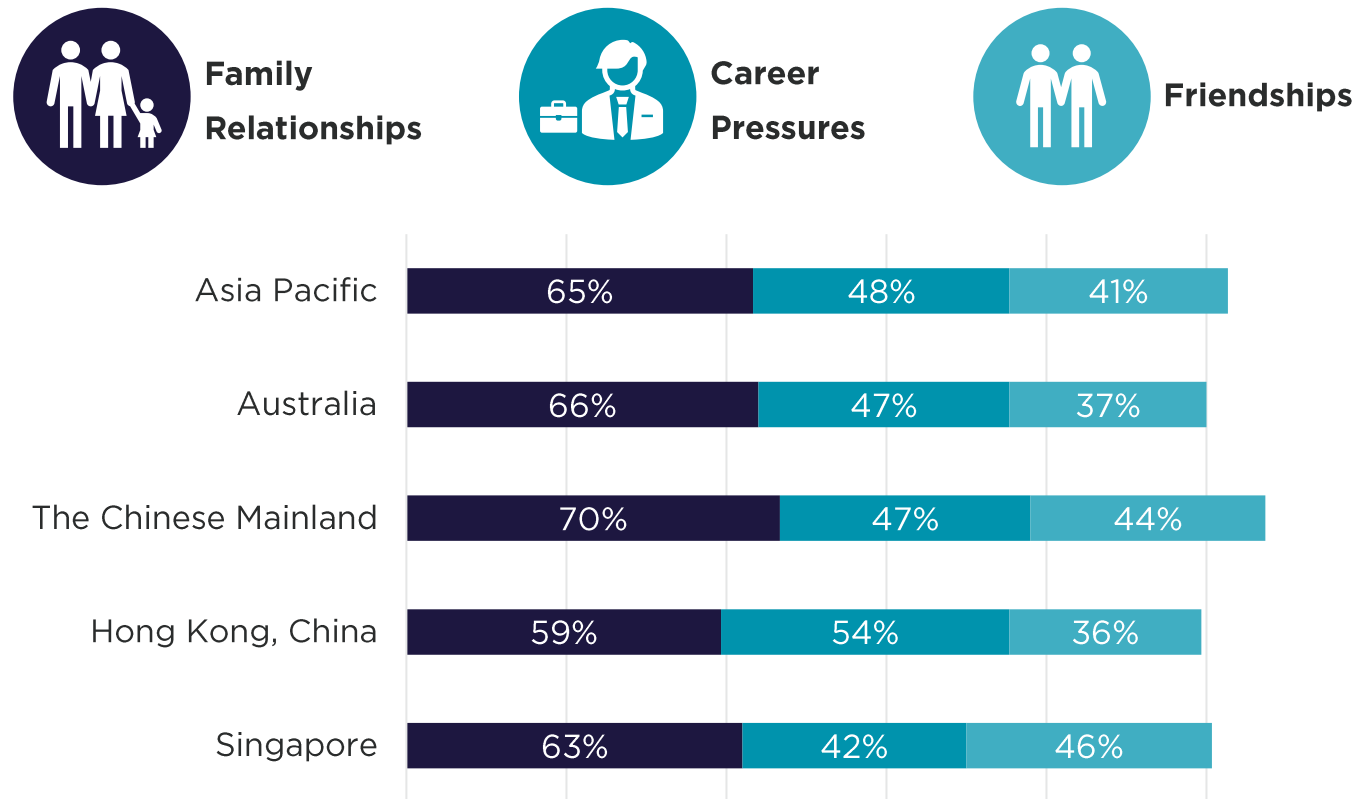
Source: Soul, Cushman & Wakefield Research

Gen Z Life Wants: Beyond Material Possessions

- While financial security remains a key aspiration, the wants of Generation Z on the Chinese mainland extend beyond material possessions to fulfilling experiences sprinkled throughout a typical day.
- Generation Z on the Chinese mainland value individuality and seek products and services that cater to their specific wants and preferences.
- This desire for uniqueness is driven by exposure to a vast and diverse range of products and services.
- In addition, Generation Z crave authenticity and transparency from brands and institutions – valuing companies that align with their values.
- They also show a growing interest in self-improvement, pursuing hobbies (such as entertainment, sports, pets and travel), creative activities, and personal development (Figure 4).
- Work-life balance is increasingly important for this generation, with many prioritising mental health and wellbeing.
- Lastly, they desire meaningful work, personal growth opportunities, and a sense of belonging within any part of society, including at work and within an organisation’s office workplace.

03 – DECODING THE NEW KIDS

Figure 5: Generation Z – The top three causes of stress across the Asia Pacific (2020)



Source: Lifeskills Institute, Cushman & Wakefield Research

Gen Z Life Needs: Support and Opportunities

- This generation needs access to quality education and career opportunities that align with their skills and aspirations.
- They need support in navigating the complexities of a rapidly changing society, including their career and the pressures which come with it (Figure 5).
- Generation Z also need a platform to voice their opinions and participate in shaping their future, both locally and globally.
- Open communication and understanding from older generations within the commercial organisation are also crucial for bridging the generational gap and fostering a harmonious office workplace.
- Understanding Generation Z on the Chinese mainland requires recognising the complex interplay between tradition and modernity, digital fluency and a desire for authenticity, material aspirations and a longing for purpose.
- By acknowledging these characteristics, preferences, wants, and needs, organisations can better engage with this influential generation and design, create, build and provide office workplaces on the Chinese mainland which are a more appealing to this generation.

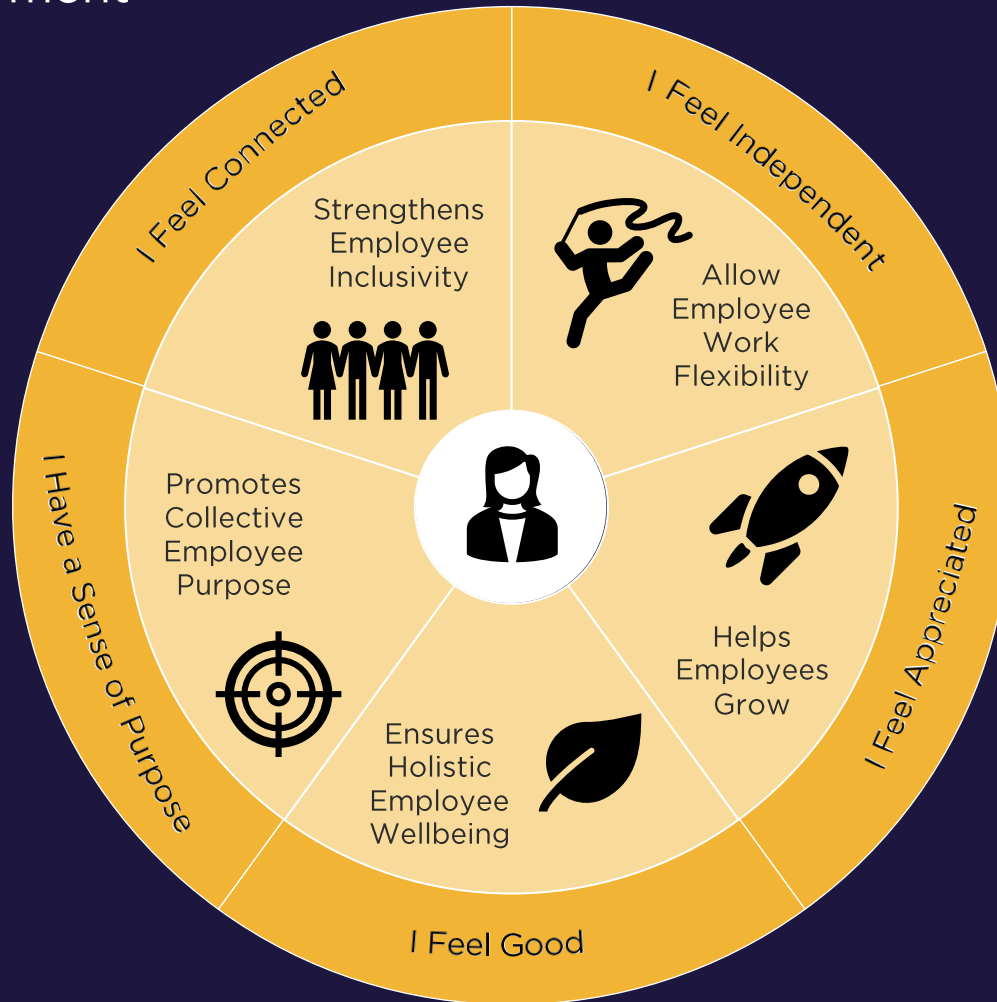
04

EMPLOYEE WANTS AND NEEDS



04 – EMPLOYEE WANTS AND NEEDS

Figure 6: Importance of organisation culture on employee development



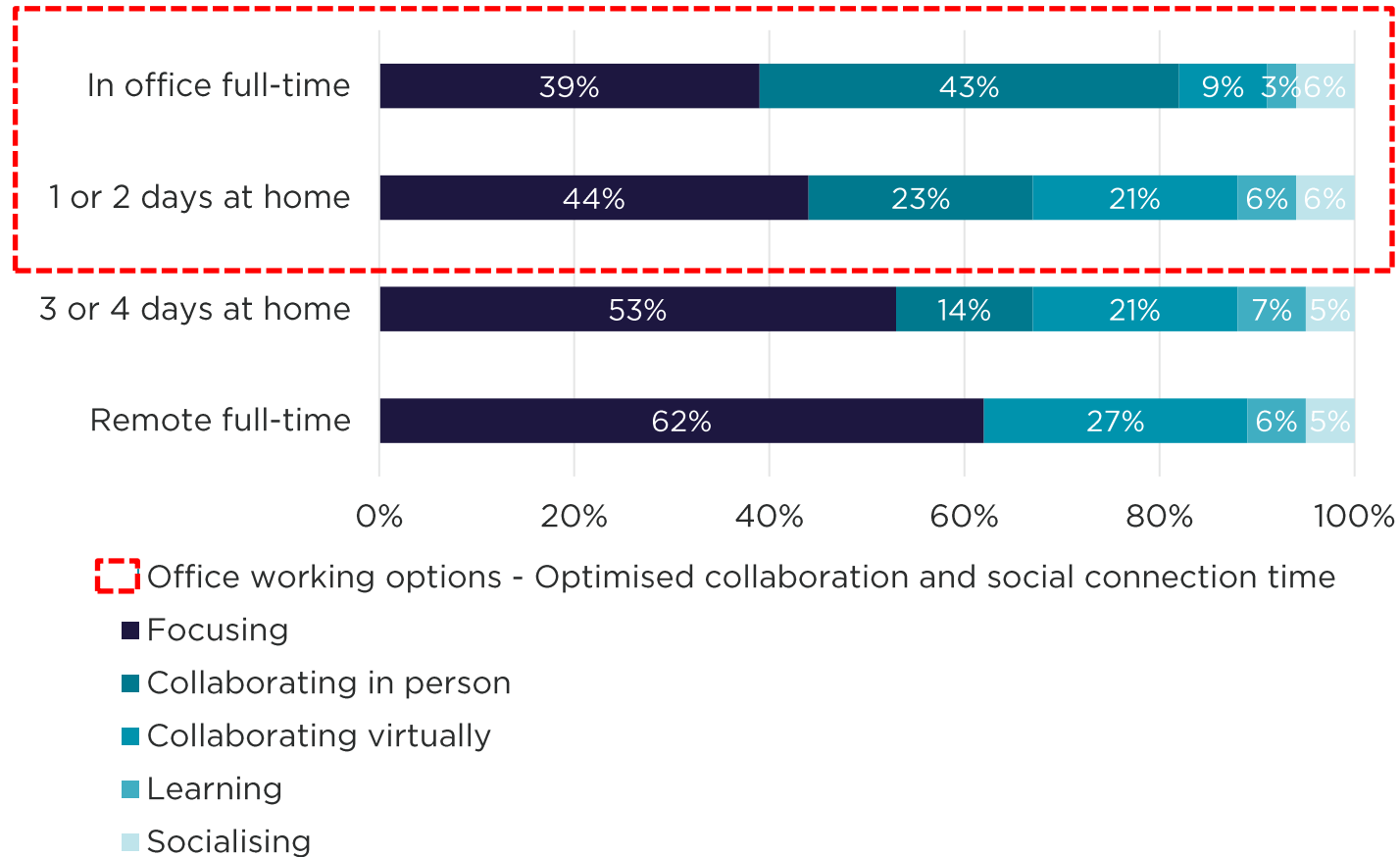
Source: Cushman & Wakefield Research

Company Culture: A Big Influence on Gen Z Employee Development

- Generation Z on the Chinese mainland value transparency, open communication, and a sense of community in the workplace.
- They are more likely to be attracted to organisations which have a strong purpose and that foster inclusivity, work flexibility, help employees grow, and promote employee wellbeing (including those that elevate a sense of belonging) (Figure 6).
- Generation Z on the Chinese mainland also want to work for organisations that have a positive impact on the world, and which are passionate about environmental and social issues.
- They value organisations which offer flexibility and autonomy in their work – they would like to be able to work from anywhere – be it in the office or remotely and set their own work hours.
- In addition, Generation Z on the Chinese mainland are looking for organisations that are transparent in their operations and that value DE&I.
- They also want to learn and grow in their careers and are looking for organisations that offer mentorship and development opportunities.

04 – EMPLOYEE WANTS AND NEEDS

Figure 7: Workdays and how in-office, hybrid office and remote employees generally spend their time (2023)



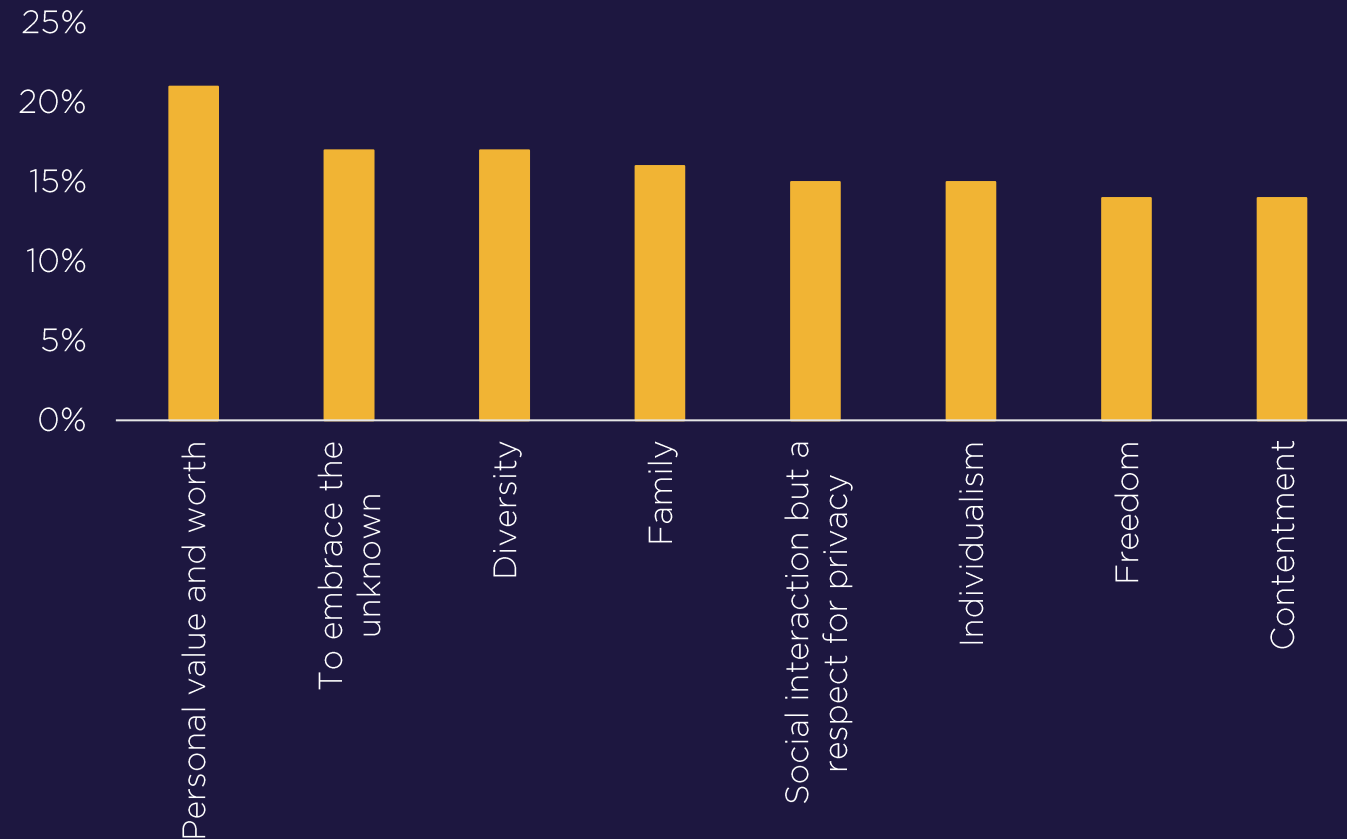
Source: Zippia, Cushman & Wakefield Research

Collaboration and Social Connection: Essential for Gen Z

- Generation Z on the Chinese mainland recognise the importance of collaboration and social interaction in the office workplace.
- While in the office, this generation wants to cooperate with colleagues, utilise company tools, and engage in social activities.
- This suggests that the ideal office space for Generation Z on the Chinese mainland is one that offers a choice of work location, and one that balances individual focus and privacy with opportunities for teamwork and social connection (Figure 7).
- Additionally, Generation Z on the Chinese mainland want to feel interested, inspired and excited when it comes to work, their office workplace and the office workplace's feel, setting, atmosphere and environment.
- They want to move away from any weariness and grind present in a "996" work culture and any organisation which has an office set up/working model which promotes interest, inspiration and/or excitement, will certainly be very attractive as a job choice for this generation.

04 – EMPLOYEE WANTS AND NEEDS

Figure 8: Generation Z on the Chinese mainland: Top life priorities (2023)



Note: Percentage of respondents who mentioned this priority

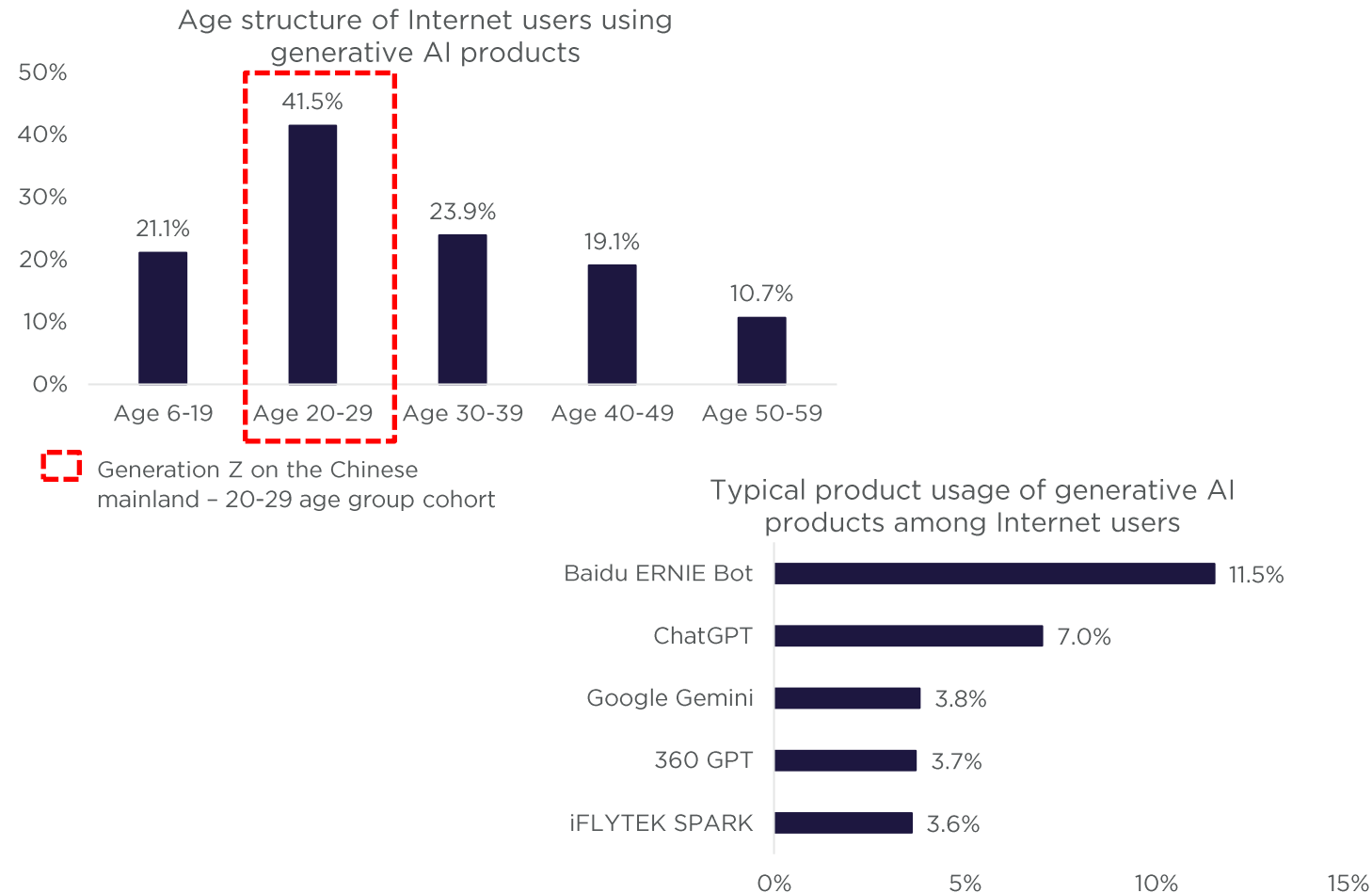
Source: Ping An Securities, Cushman & Wakefield Research

“Light Labour”: A Shift in Work Values for Gen Z

- A move away from the “996” work culture is also linked to the increasing popularity of “light labour” jobs among young Chinese professionals.
- This trend reflects a shift in work values where young people are prioritising personal value and worth over traditional notions of career success and social status (Figure 8).
- Many in the Generation Z cohort on the Chinese mainland are moving away from jobs that seem to be repetitive and are unrewarding, offering negligible opportunity for creativity or personal growth.
- Many in this same cohort are also increasingly seeking to express their individuality and pursue their own passions, rather than working for the collective good.
- Again, office space which can address these particular wants and needs through targeted design and operation, will be viewed favourably by Generation Z on the Chinese mainland as an interesting, and subsequently, attractive place to work.
- Of course, any change to office workplace design and operation will require alignment and agreement between business leaders, HR and CRE to redefine the process, policies and purpose of workplace.

04 – EMPLOYEE WANTS AND NEEDS

Figure 9: Generation Z on the Chinese mainland and the use of artificial intelligence (AI) technology (2024)



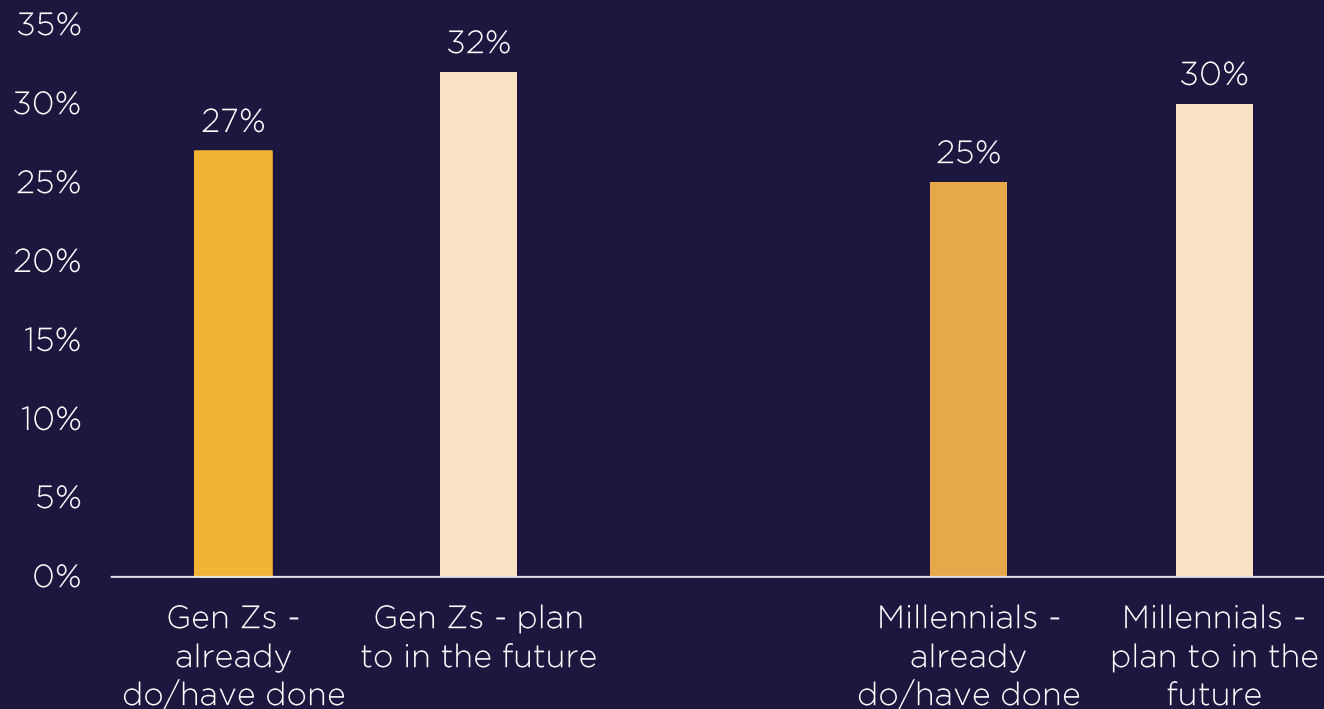
Source: CNNIC, Cushman & Wakefield Research

Gen Z and Technology: Generative AI Now Widely Used

- Generation Z on the Chinese mainland are highly active online, spending significant time on various apps that facilitate the watching videos, social networking, online shopping and travelling.
- Popular platforms include WeChat, Douyin, Bilibili, Taobao, Didi, Ele.me and Meituan.
- Generation Z on the Chinese mainland have also witnessed the rise of the latest developing technology; namely artificial intelligence or AI.
- As one can see in the charts in Figure 9, with a user rate of over 41%, the 20-29 age group cohort in the Generation Z age bracket, are greatest adopters and users of AI technology on the Chinese mainland.
- Popular generative AI platforms used by Generation Z on the Chinese mainland include, Ernie Bot, and ChatGPT...and from this year...DeepSeek.
- In the office workplace, generative AI is now used by Generation Z on the Chinese mainland to help them to work more efficiently and creatively, and for repetitive task automation.
- Ahead, this generation's comfort and skills with AI will be highly valued in the employment area and in the office workplace on the Chinese mainland.

04 – EMPLOYEE WANTS AND NEEDS

Figure 10: Generation Z on the Chinese mainland – Comparison with Millennials in the region in terms of a sustainability background check on a prospective organisation they hope to join (2024)



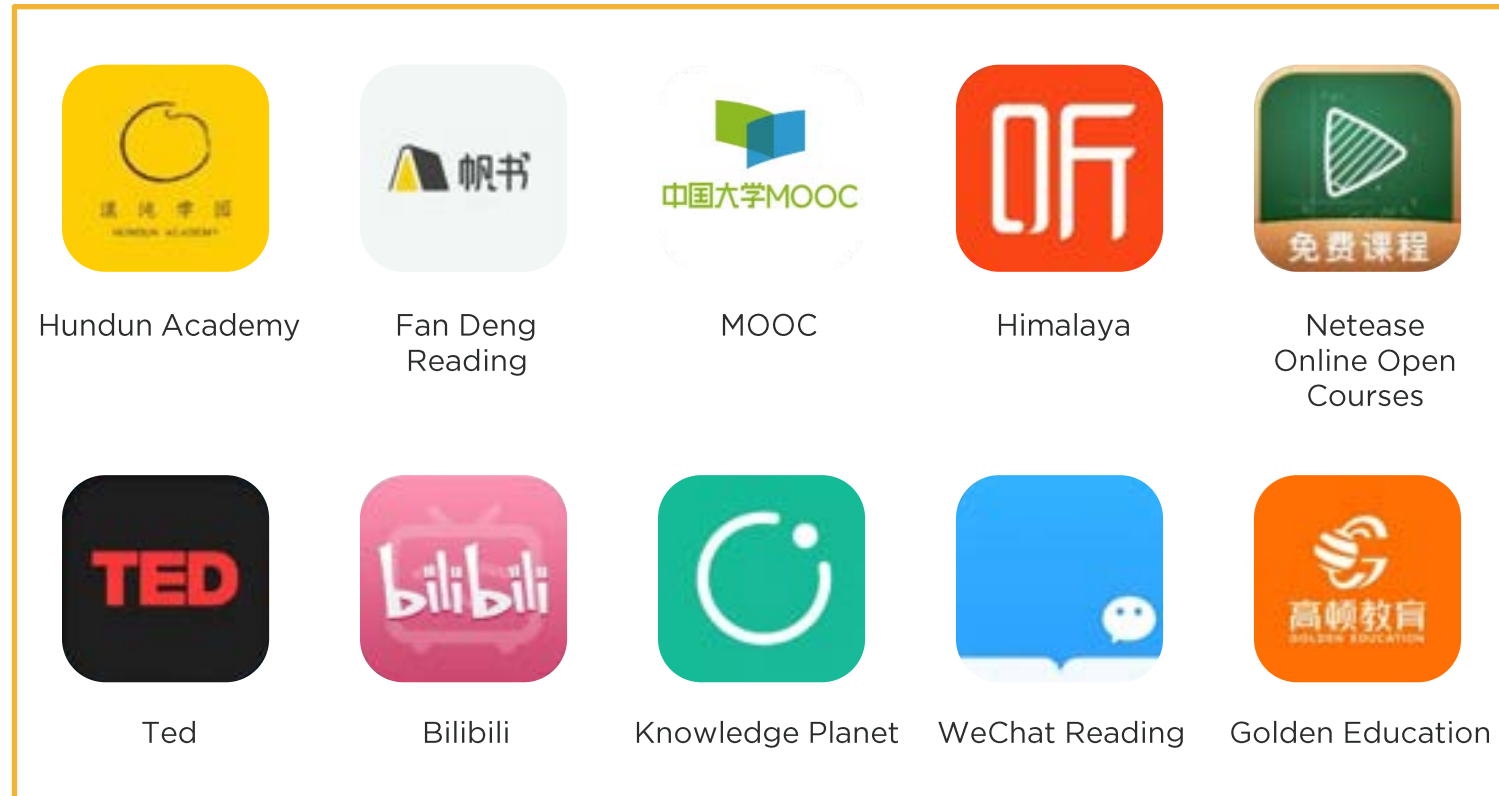
Source: Deloitte, Cushman & Wakefield Research

Gen Z and Sustainability: A Top Priority

- Sustainability is increasingly important to Generation Z on the Chinese mainland due to their heightened environmental consciousness and desire for a work environment that aligns with their values.
- Generation Z on the Chinese mainland has grown up with a keen grasp of climate change and its impact as well as the COVID-19 pandemic, making them more environmentally conscious than previous generations.
- This generation in the region is more likely to prioritise organisations that demonstrate a genuine commitment to sustainability and align their products and services with Generation Z's values.
- This prioritisation is underlined in Figure 10 which shows Generation Z globally, including those on the Chinese mainland, are more likely than Millennials to join a sustainability-minded organisation than one that is not.
- Thus, organisations on the Chinese mainland that demonstrate a commitment to sustainability and social responsibility and demonstrate this commitment through the incorporation of sustainability elements and features that are built into their office workplace offering will be appealing to potential top Generation Z employee talent.

04 – EMPLOYEE WANTS AND NEEDS

Figure 11: Selected popular work-related learning and development apps for workers on the Chinese mainland



Source: Cushman & Wakefield Research

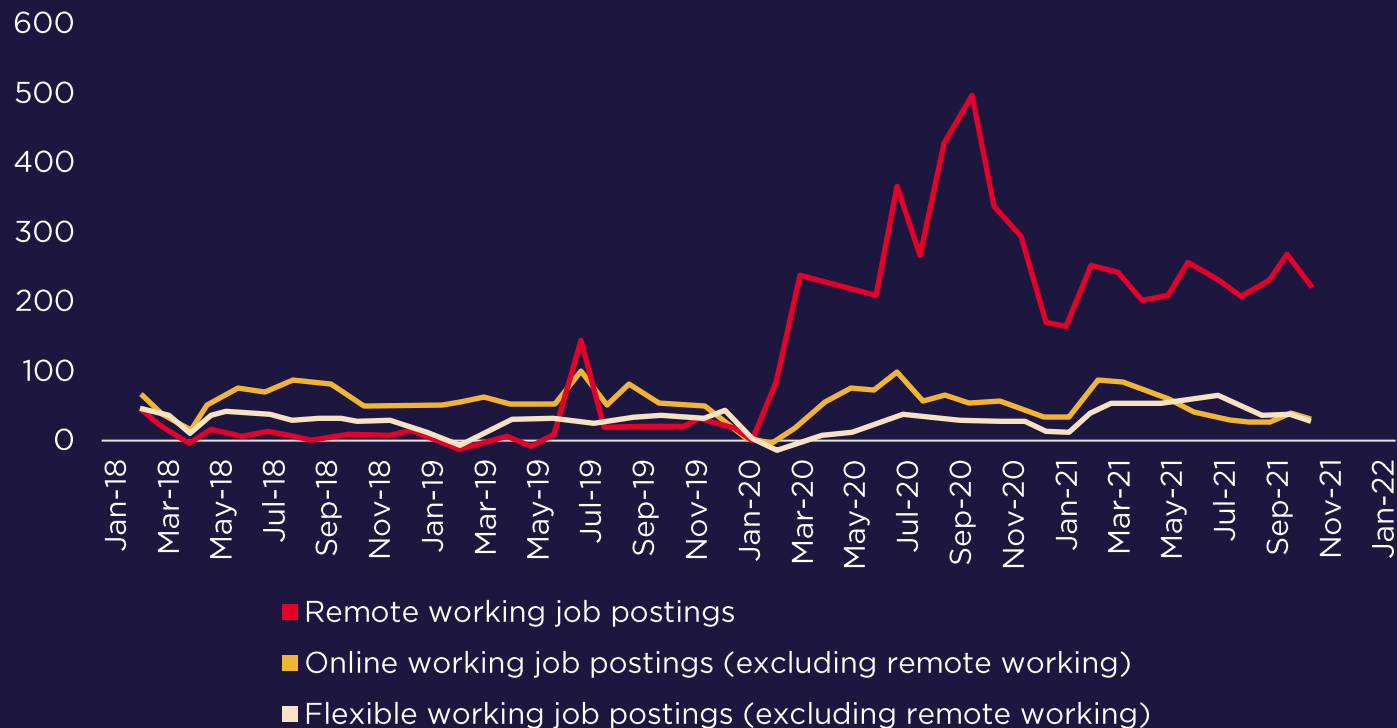
Employee Learning and Development: Valued by Gen Z

- Among the Generation Z cohort on the Chinese mainland, there is a strong already-instilled emphasis on academic achievement and career development and the acquisition of new skills and knowledge is crucial for achieving their career goals.
- Additionally, given a highly competitive job market and rapidly developing tech, Generation Z on the Chinese mainland are constantly looking to differentiate themselves from the rest of the competition through learning and development.
- One way to distinguish themselves is to utilise even more technology and undertake on-the-job learning via free/optional online learning courses – with selected popular online learning and development course apps used by Generation Z on the Chinese mainland seen in Figure 11.
- Following on from this, Generation Z on the Chinese mainland are more likely to stay with organisations that offer clear paths for advancement through learning and development.
- Organisations on the Chinese mainland which invest in both hard and soft skills learning and hold an employee growth mindset close to their heart, will be favoured by Generation Z in the region.

04 – EMPLOYEE WANTS AND NEEDS

Figure 12: Remote/Online/Flexible working job posting index on the Chinese mainland (Jan 2018-Jan 2022)

Jan 2020 = 100



Note: Education and training related jobs have been excluded.

Source: Zhaopin, National School of Development, Cushman & Wakefield Research

Work Flexibility and the Hybrid Office: Evolving for Gen Z

- When it comes to the office workplace, Generation Z on the Chinese mainland are by and large looking for more than just a desk in their office space.
- They value open, less crowded, and less distracting work environments that prioritise collaboration, social purpose, resting, focus, and utilising organisation office work tools.
- This shift in expectations comes after working from home during the COVID-19 pandemic, which highlighted some of the drawbacks of traditional office layouts and the growing desire for flexibility.
- During this period many organisations on the Chinese mainland were forced to adopt a remote working mode, as exemplified by the remote-working job posting index for the Chinese mainland which peaked at close to 500 in September 2020 (Figure 12).
- Given this experience, post COVID-19, while there have been many organisations which have requested that their employees return to the office, there are still a number of organisations on the Chinese mainland which have continued to operate a flexible hybrid office working model and don't expect to change this modus operandi anytime soon.

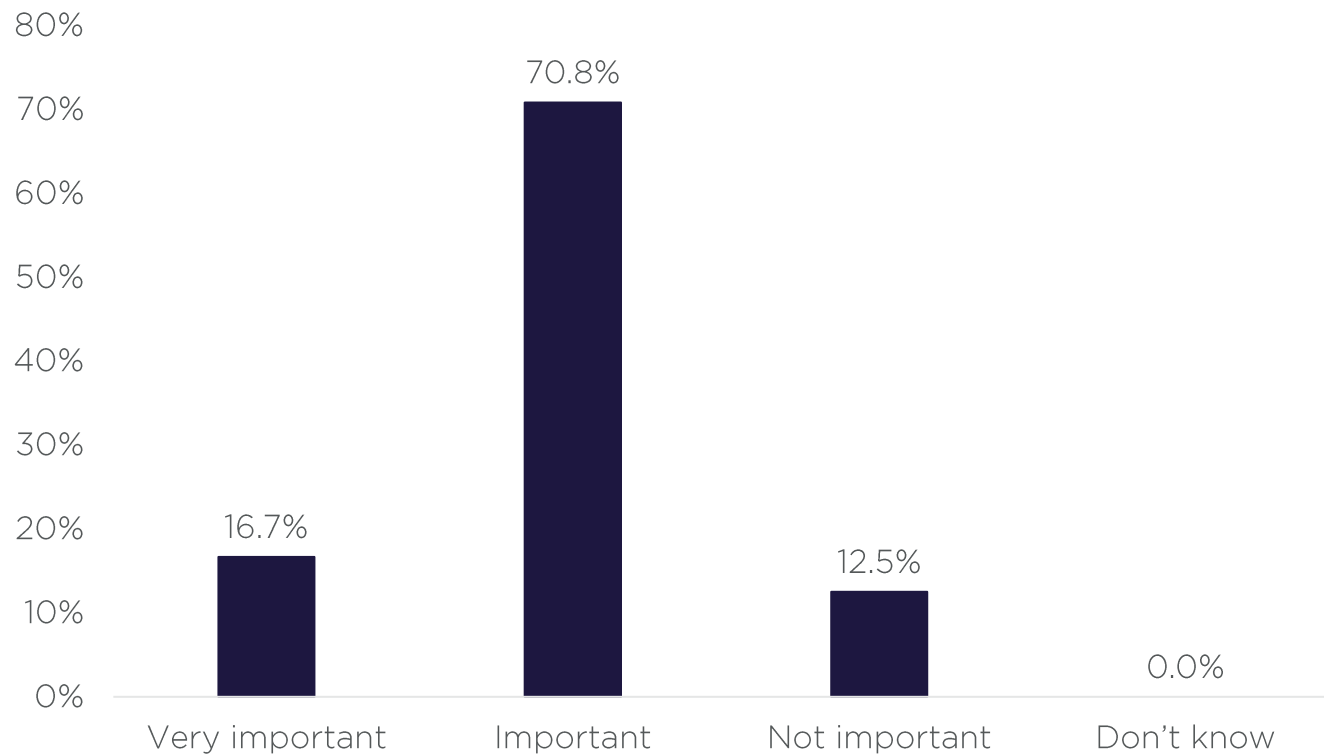
05

OUR OFFICE WORKPLACE SURVEY RESULTS



05 – WORKPLACE SURVEY RESULTS

Figure 13. Question 1. What importance does your organisation place on your workplace offering on the Chinese mainland in terms of Generation Z talent attraction and retention? (Please choose one answer.)



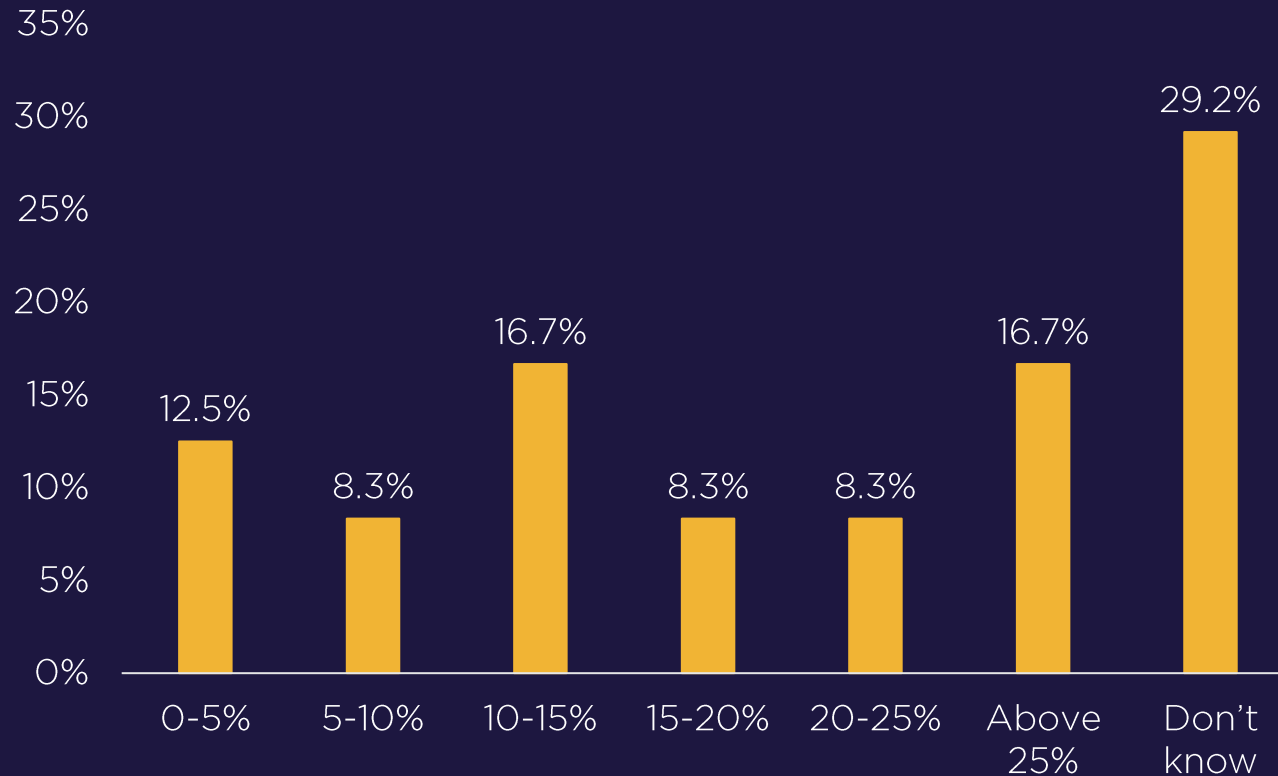
Source: Cushman & Wakefield Research

The Workplace Offering: Critical to Gen Z Attraction and Retention

- At the beginning of 2025, we conducted a survey of corporate real estate (CRE) practitioners on the Chinese mainland to find out their thoughts on Generation Z and the office workplace in the region.
- With a returned result figure of over 87%, our CRE practitioner survey respondents working on the Chinese mainland fully understand that their workplace offering is either important or very important vis-à-vis Generation Z talent attraction and retention (Figure 13).
- As mentioned in Section 4 of this report, Generation Z on the Chinese mainland value, collaboration and socialisation, DE&I transparency, work flexibility and a balanced work-life balance, a purpose to their work, access to the latest technology and enhanced sustainability.
- Any organisation in the region which offers an office workplace that is appealing to Generation Z on the Chinese mainland, will thrive.
- This means offering an office workplace which has a design and layout, the latest incorporated technology and a suitable operation strategy that caters to the above-listed criteria.

05 – WORKPLACE SURVEY RESULTS

Figure 14. Question 2. What proportion of your organisation's current office-based workforce on the Chinese mainland fall within the Generation Z age group? (Please choose one answer.)



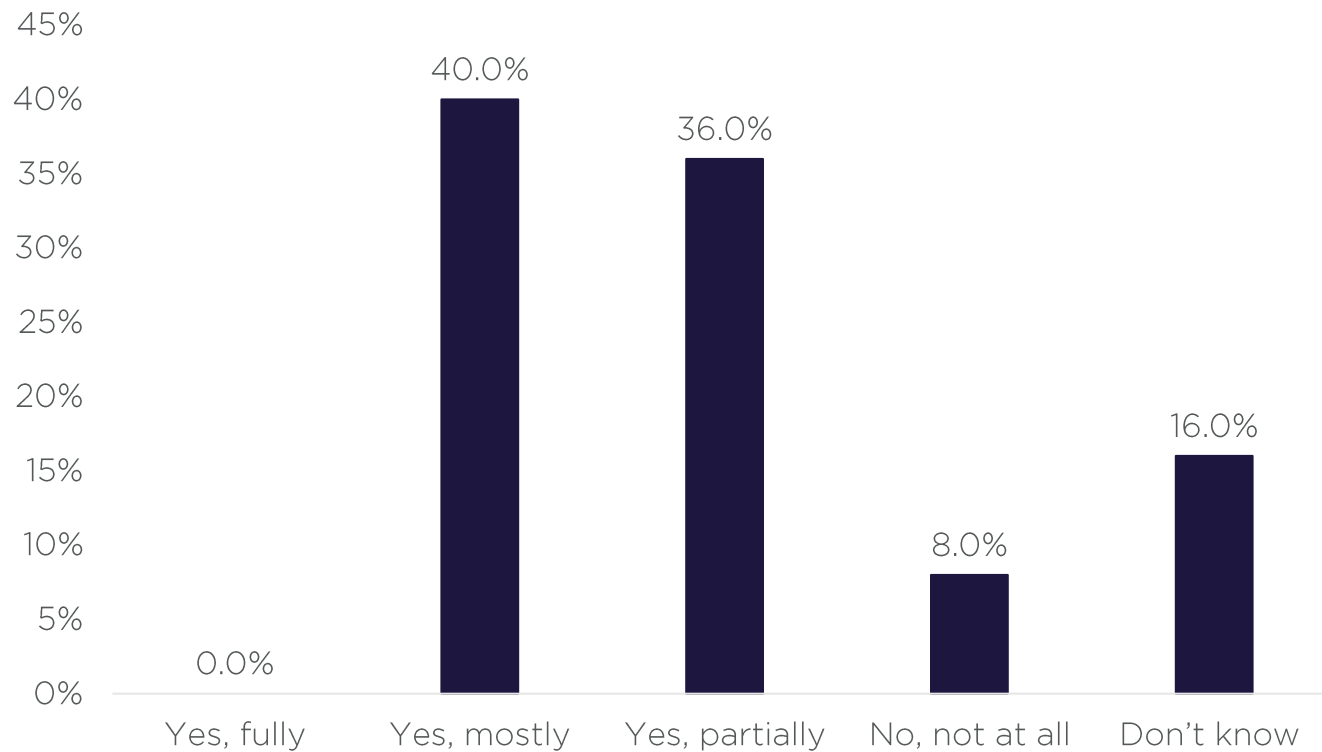
Source: Cushman & Wakefield Research

The Gen Z Workforce: Our Survey Proportion

- When considering our CRE practitioner respondents and their current office-based workforce on the Chinese mainland, interestingly 25% of our survey respondents said Generation Z consisted of 20% and above of their office-based workforce (Figure 14).
- When we breakdown our survey numbers between the responses received from domestically headquartered organisations and internationally headquartered organisations, at 57%, we can see that the office-based workforce proportion over 20% was higher for domestic headquartered organisations.
- The upshot today, is that the Generation Z cohort now forms a significant component of the office-based workforce on the Chinese mainland – another reason for the importance of the office workplace for talent attraction and retention within this demographic in this region.
- As the office-based Generation Z employee cohort grows in number and significance on the Chinese mainland, so CRE practitioners will have to deepen their office workplace change management and office workplace strategy on this generation to ensure the office workplace is fully optimised for the future.

05 – WORKPLACE SURVEY RESULTS

Figure 15. Question 3. Do you feel your organisation's current office workplace on the Chinese mainland is optimised for Generation Z? (Please choose one answer.)



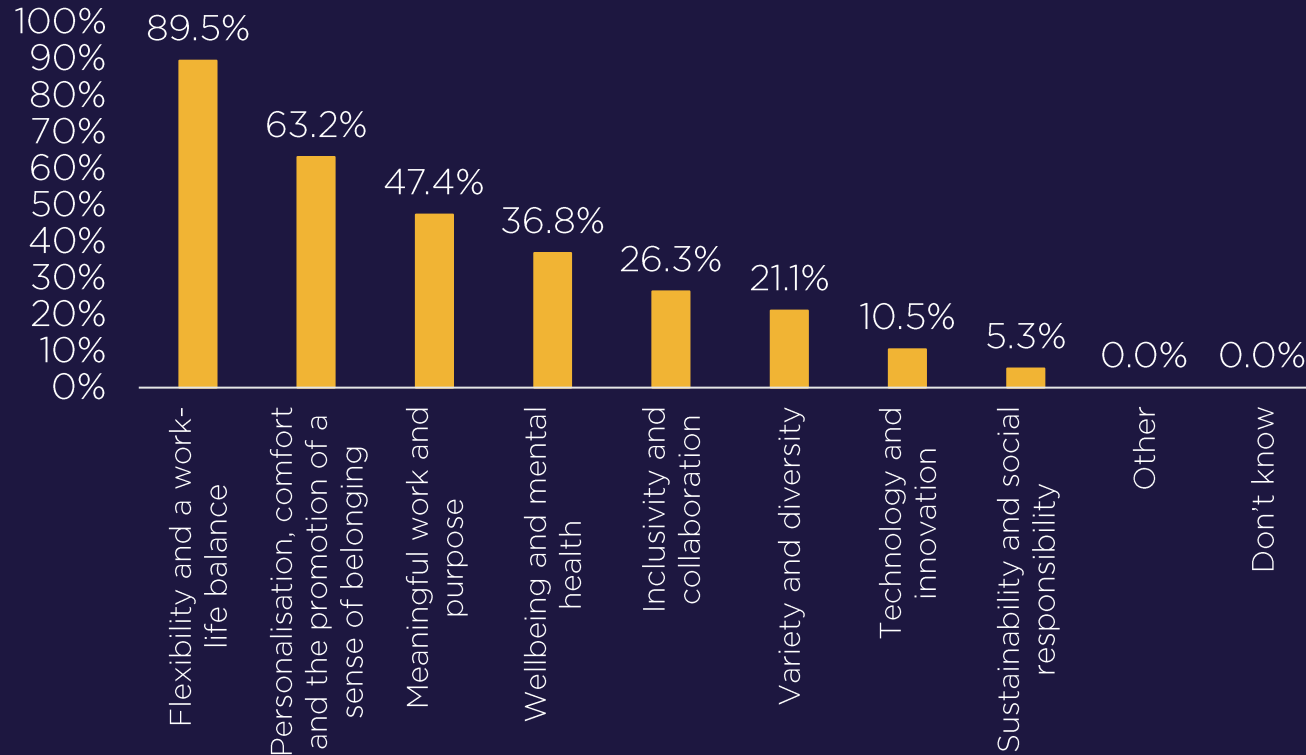
Source: Cushman & Wakefield Research

The Current Office Workplace: Mostly Optimised for Gen Z

- Understanding the importance of certain optimised office workplace measures and conditions is one thing.
- However, the actual implementation and operation of any optimised office workplace measures and conditions is often another thing altogether.
- In our survey, the vast majority of our CRE practitioner respondents said their office workplace offering is important to Generation Z talent attraction and retention on the Chinese mainland.
- However, the same CRE respondents suggest that in practice, the situation is a little different.
- According to our survey, in practice, only just over 40% of our survey CRE practitioner respondents said their office workplace on the Chinese mainland is mostly optimised for their Generation Z employees, and none said that their office workplace in the region is fully optimised (Figure 15).
- These results suggest that there is still a gap to fill regarding actual practice and potential full office workplace optimisation on the Chinese mainland which caters to the wants and needs of Generation Z in the region.

05 – WORKPLACE SURVEY RESULTS

Figure 16. Question 4. If, you chose A, B or C for Question 3, looking at the priorities that Generation Z generally value, which priorities do you feel your organisation's office workplace on the Chinese mainland caters to best? (Please choose three answers.)



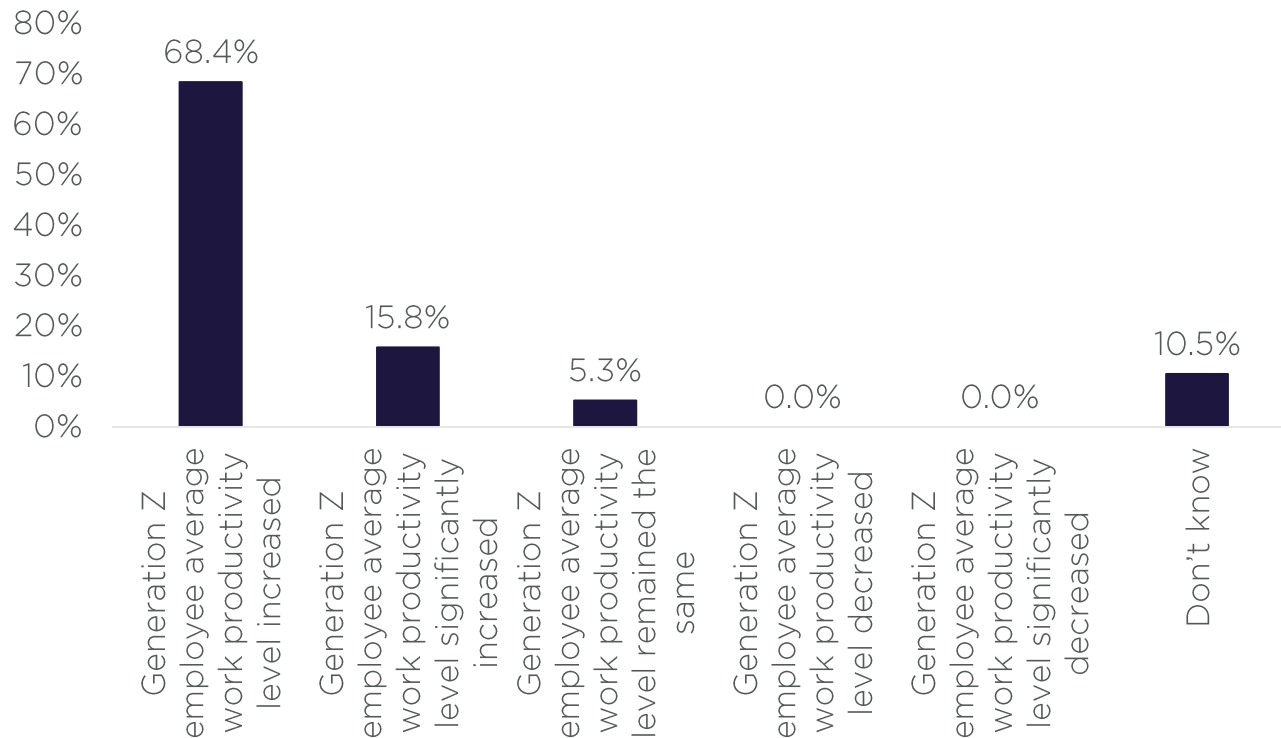
Source: Cushman & Wakefield Research

Flexibility, Personalisation and Meaningful Work: Gen Z Top Three

- According to our survey and Figure 16, "Flexibility and a work-life balance", "Personalisation, comfort and the promotion of a sense of belonging" and "Meaningful work and purpose" are the top three priorities cited by CRE practitioner respondents that are best catered to by their organisation's office workplace on the Chinese mainland.
- With Generation Z in mind, these priorities are important to attract and retain this talent group.
- However, more work needs to be done by CRE teams and businesses to ensure office workplaces on the Chinese mainland continue to be attractive to Generation Z.
- Of note is a step-up in "Sustainability and social responsibility", and "Technology and innovation".
- Generation Z on the Chinese mainland expect their workplaces to be equipped with the latest technology and this could involve investing in tools for work-related, virtual collaboration, etc.
- This employee cohort is increasingly concerned about sustainability and as such, office workplaces on the Chinese mainland could include more energy-efficient tech, more implementation of recycling programmes, and more promotion of sustainable transport options.

05 – WORKPLACE SURVEY RESULTS

Figure 17. Question 5. If you chose A, B, or C for Question 3, what is your view on your organisation's Generation Z employee average work productivity level post office workplace optimisation? (Please choose one answer.)



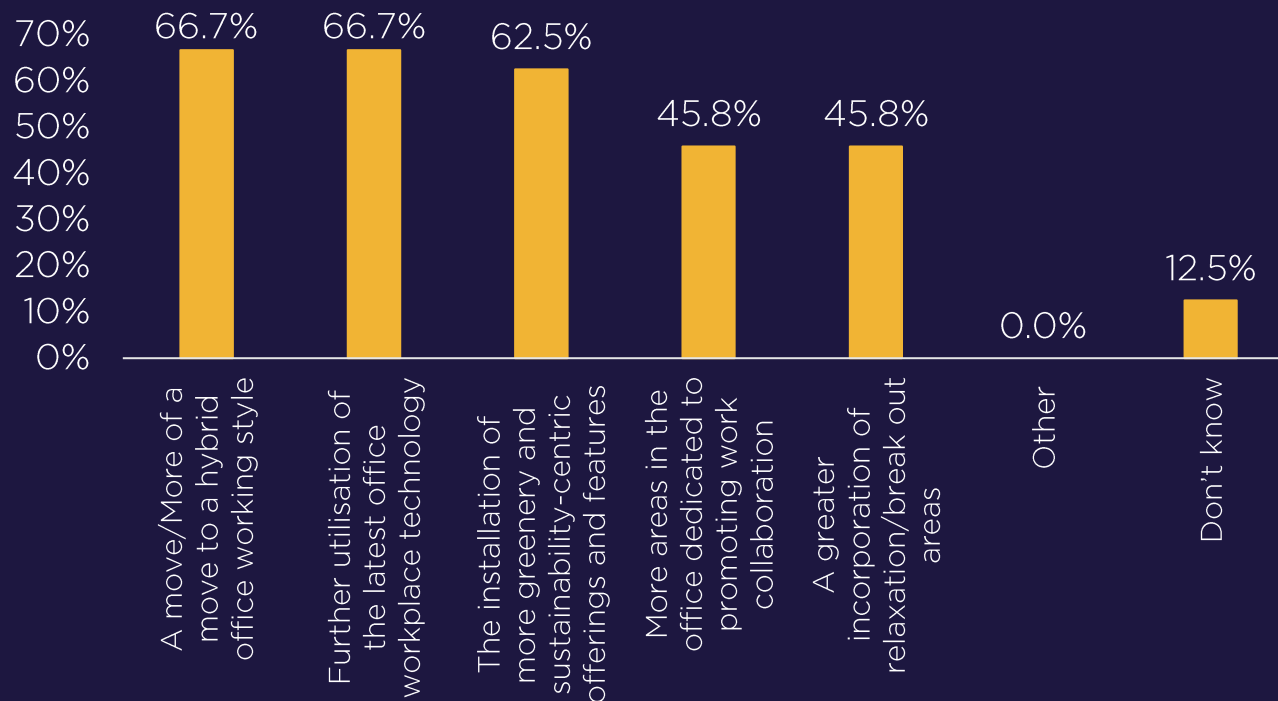
Source: Cushman & Wakefield Research

Office Workplace Optimisation: Improves Gen Z Work Productivity

- Our survey and Figure 17 show that a majority of CRE practitioner respondents on the Chinese mainland (84.2%) reported that their Generation Z employees' average work productivity level significantly increased or increased after office workplace optimisation.
- A smaller percentage (15.8%) reported a significant increase, while a very small percentage (5.3%) reported no change at all.
- This is a solid endorsement in terms of the value that best-practice office workplace optimisation can bring to employee productivity levels and some ways to optimise include:
 - **Ergonomic design** – Which reduces discomfort and fatigue – boosting focus.
 - **Collaborative spaces** – Which fosters teamwork and idea generation.
 - **Natural light and greenery** – Which improves mood and concentration.
 - **Tech-enabled workspaces** – Which simplifies work.
 - **A comfortable, functional environment** – Which maximises efficiency, leading to higher output and improved employee wellbeing.

05 – WORKPLACE SURVEY RESULTS

Figure 18. Question 6. Looking to the future, what changes will your organisation look to make to ensure your office workplace on the Chinese mainland is appealing/even more appealing to your organisation's Generation Z employees? (Please choose three answers.)



Source: Cushman & Wakefield Research

The Hybrid Office and Advancing Tech: Future Changes for Gen Z

- Looking at our survey results and Figure 18, the majority of CRE practitioner respondents on the Chinese mainland plan to make further changes to their office workplaces to appeal to Generation Z.
- "A move/More of a move to a hybrid office working style" was the most popular choice.
- Other popular changes include "More areas in the office dedicated to promoting work collaboration" and "The installation of more greenery and sustainability-centric offerings and features".
- Moving forward, a successful hybrid workplace strategy that appeals to Generation Z on the Chinese mainland requires a clear definition of the model utilised (structured or flexible), a redefined office focused on collaboration, robust technology for seamless communication, and clear policies.
- Organisations on the Chinese mainland will need to prioritise employee wellbeing with regular check-ins to foster a strong sense of community.
- Lastly, any move towards hybrid office working will need to align with organisation management culture and any strategy adjustment will need to be continually conducted based on feedback and performance data for optimal results.

06

**EXPERIENCE
PER SQUARE
FOOT**



06 – EXPERIENCE PER SQUARE FOOT™

An investment prioritisation tool



Today, it feels like there are more questions than answers about the future of the office workplace. For CRE and their business stakeholders situated on the Chinese mainland, the conversation extends further to Generation Z.

Two things are certain: one, the office has a critical role to play in both employee and organisation competitive advantage; two, now more than ever data-driven insights are imperative for leaders navigating the flexible and ever-changing nature of work...and this is where Cushman & Wakefield's workplace strategy tool Experience per Square Foot comes into play.

Experience per Square Foot™ (XSF) is an investment prioritisation tool driven by the voice-of-employee.

Whether you occupy office space to provide your employees a great place to work or own and develop office space to offer to organisations, XSF provides precise, actionable, and data-driven clarity into what brings people to the office, provides them with a great experience, and enables them to do their best work as a healthy, engaged, productive and happy part of the workforce.

- Measures the employee office workplace experience.
- Uncovers experience drivers and their performance.
- Identifies investment areas that will have the biggest impact.
- Ensures alignment of resources with organisational goals.

KEY INSIGHTS SINCE 2017

Key
Stats

210K

Survey respondents

12M

Datapoints

100+

Countries across the
Globe

185

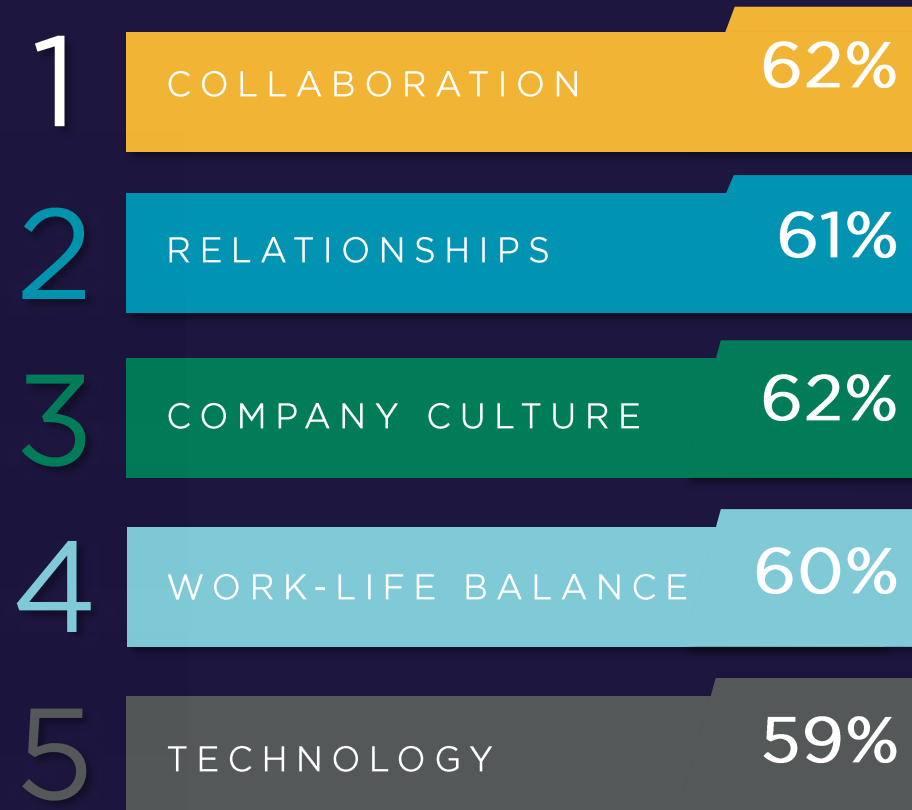
Organisations
participated in XSF

50%

Participation rate
since the pandemic

06 – EXPERIENCE PER SQUARE FOOT™

Figure 19. Percentage of employees who believe their office supports its top 5 purposes



Only about 60% of respondents believe their current office supports its top purposes

Source: Cushman & Wakefield Experience per SF Feb 2025



XSF: Communal space set to grow

- As evolution of work shifts towards a blend of office, home, and alternate spaces, the role of the office workplace has transformed too.
- Rather than serving as the one place where we once completed all our tasks, employees have highlighted the importance of the office workplace as a hub for fostering community and connection.
- As reported by employees, the main purposes of the office include facilitating collaboration, nurturing relationships, and promoting social interactions.
- According to XSF research and Figure 19, just over half of employees believe the office effectively supports its top three objectives.
- Our findings show there is a misalignment between the traditional office and its new purpose.
- As the Generation Z cohort of talent on the Chinese mainland share the same sentiment around the purpose of offices in future, communal and collaboration spaces will be a key area to redesign in offices to address the current misalignment
- With the targeted level of communal office space nearly doubling globally, compared to pre-pandemic levels (40-50% vs. 20-30%), into the future, we expect the area of optimised communal office space on the Chinese mainland to continue to grow as well.

07

OFFICE WORKPLACE OPTIMISATION



07 – WORKPLACE OPTIMISATION

Figure 20. The intentional workplace: Designed to support four core experiences



The best workplace strategies enable a great experience by providing various work settings, tools and service people can select throughout the day.

Source: *Reworking the Workplace*, RIBA Publishing 2023, Cushman & Wakefield Research

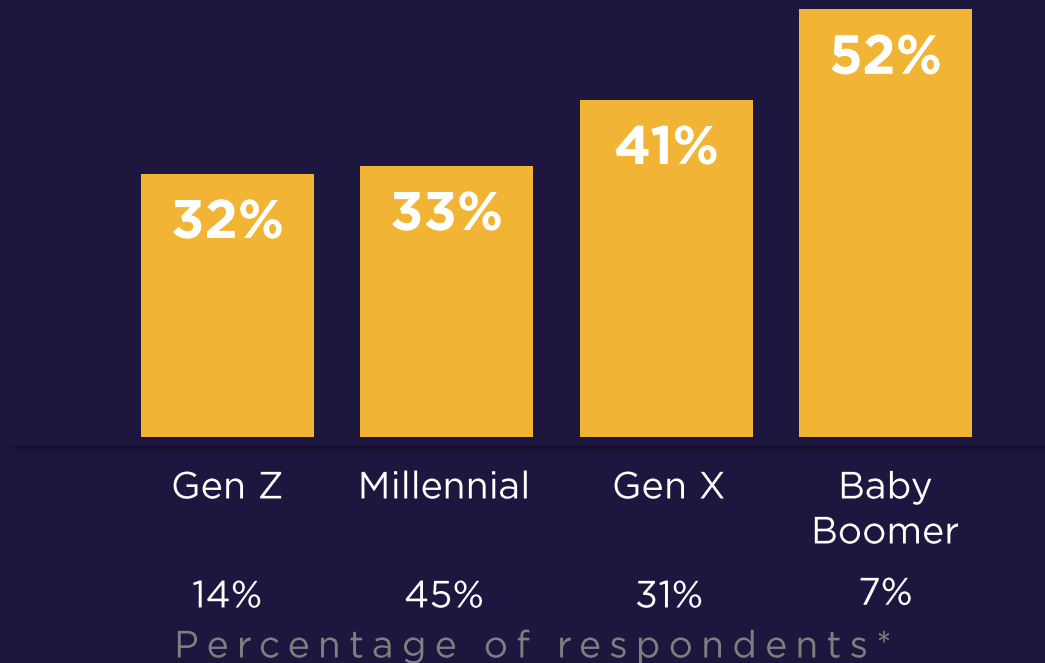
The Office Workplace of Tomorrow: Work and Community

- In the office workplace of tomorrow on the Chinese mainland, work and community will be inextricably linked and this will be appealing to Generation Z in the region.
- Work will continue to be a fundamental driver of the place and the city in which the office workplace is located.
- Place will have a key role in human connection, community and positive social impact, which will continue to reinforce the appeal of the physical office amongst Generation Z on the Chinese mainland.
- As such, office space will need to be intentionally designed to curate the right experiences for employees. This entails a fresh emphasis on aligning experiential objectives with workplace resources and strategic investments.
- On the left are the four core experience elements that can be configured and combined in various ways to support different activities and tasks.
- Most importantly, change management will be an integral tool to guide employees in their workplace transformation, harnessing the full benefits of an activity-based workplace.

07 – WORKPLACE OPTIMISATION

Figure 21. Everyone has low wellbeing score, with Generation Z hit hardest

% High Wellbeing by Generation
(Q1 2023 – Q4 2024)



Source: C&W Experience Per Square Foot™ survey results from Q1 2023 – Q4 2024. Gen Z (n=1,896), Millennials (n=6,532), Gen X (n=4,175), and Baby Boomers (n=880).

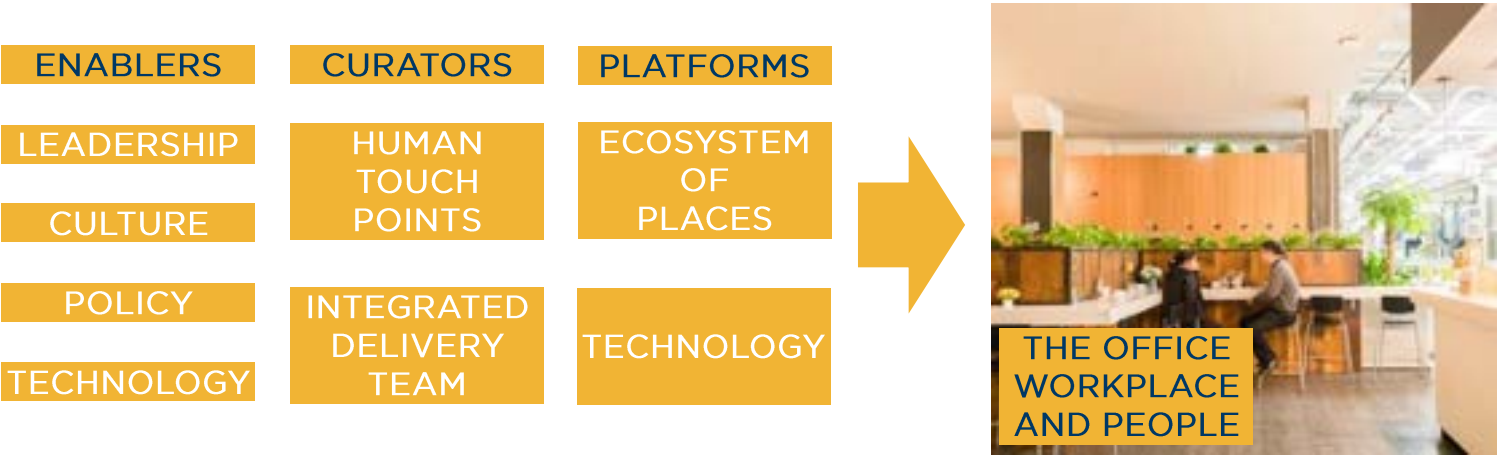
High Wellbeing includes survey respondents who reported “Very Good” or “Excellent” wellbeing. *Percentages are portions of respondents answering both the generation and wellbeing questions; the remaining 3% are of the Traditionalist or “other” generations

The Office Workplace of Tomorrow: Wellbeing

- Employee wellbeing enhancement will also be key to office workplace optimisation on the Chinese mainland.
- Globally, wellbeing levels have experienced a drop since 2019 and have yet to recover.
- While all generations struggle, it is Generation Z that struggles the most.
- Wellbeing is tied to employee performance and workers with high wellbeing are **4x more likely** to do their best work compared to peers with low wellbeing.
- Therefore, organisations have an incentive to prioritise employee wellbeing, within and outside of the office.
- The top three drivers of wellbeing for Generation Z can be ranked in the following order:
 - 1) **Renewed**: Feeling energised throughout the workday day.
 - 2) **Inspired**: Feeling inspired at work.
 - 3) **Cultural Connection**: Feeling connected to company culture.
- Ahead, to support Generation Z employee wellbeing on the Chinese mainland, office workplaces in the region will need to update their space programmes such that they enthuse a sense of work-life balance.

07 – WORKPLACE OPTIMISATION

Figure 22. A framework to operationalise hybrid working



Source: Cushman & Wakefield Research

The Office Workplace of Tomorrow: Hybrid Working and Delivery

- Hybrid working is also an important office-workplace-of-tomorrow-optimisation aspect which organisations on the Chinese mainland need to consider in relation to their Generation Z employees.
- Hybrid working is a complex workplace transformation that requires an ecosystem of various workstreams to collaborate for a sustainable outcome.
- Figure 22 depicts this ecosystem where the interactions between enablers, curators and platform will result in the ideal workplace of tomorrow for employees and Generation Z.
- CRE leaders also have to deliberate the degree of remote working within the hybrid model. Will it be:
 1. Working revolving around the office.
 2. Truly distributed working.
 3. Remote-first working.
- Whatever hybrid working system is adopted and implemented, the crucial recommendation would be to engage and collect voices of customers (VOCs) – particularly if you are future proofing your work environment for the future generations to come.

07 – WORKPLACE OPTIMISATION

Cushman & Wakefield office workplace advisory case studies on the Chinese mainland

Workplace Strategy Advisory: On the Chinese Mainland

- A solid change management and/or office workplace strategy is essential for any optimised office workplace of tomorrow, as it enables organisations on the Chinese mainland to define a bespoke solution, the aim of which is to create an office workplace that is in line with the business, people's needs (including Generation Z on the Chinese mainland) and the corporate culture.
- These are vital for decisions on future corporate spaces regarding location, sizing and space types.
- With the right strategy, Cushman & Wakefield can respond to questions regarding the floorspace to let, the types of spaces that should be established in the new offices, the optimum balance between in-person and remote working, how these changes will affect employees (including Generation Z employees on the Chinese mainland) and how to manage this, as well as the main differences between an organisation's way of working and the trends in its sector.
- With office workplace optimisation in mind, Cushman & Wakefield's Office Workplace Strategy Team on the Chinese mainland has worked on many advisory assignments, including four realised projects for the following clients – one major global life sciences firm, one major Asian bank, one major global FMCG firm, and one major global tech firm.

Major Life Science Firm, Shanghai



Major FMCG Firm, Shanghai



Major Asian Bank, Shanghai



Major Tech Firm, Shenzhen



07 – WORKPLACE OPTIMISATION

CASE STUDY 1: A MAJOR LIFE SCIENCES FIRM, SHANGHAI

Workplace Strategy, Change Management and Post Occupancy Evaluation – A Major International Life Sciences Firm



Advisory: Cushman & Wakefield's Workplace Strategy Team

Background

- Our client engaged Cushman & Wakefield's Workplace Strategy team to create a tailored flexible office space strategy and implementation plan for its headquarters office on the Chinese mainland.
- Total HC: ~1,500.

What We Did

- We conducted a workplace strategy evaluation to summarise the findings from office user engagement and data analysis, which outlined the vision, user requirements, and aspirations for our client's future China headquarters office workplace in Shanghai.
- We provided a change management advisory service to help our client's China headquarter office staff to smoothly transition to their future workplace.
- We conducted a post office occupancy evaluation study to summarise headquarter office workplace user feedback and methods for further workplace strategy improvement.

The Results

- In this case, our client successfully transitioned to an optimised, agile office workplace where users can move freely around the office, utilising spaces that best suit their objectives – a great outcome for their staff, including their Generation Z employee cohort.

07 – WORKPLACE OPTIMISATION

CASE STUDY 2: A MAJOR BANK, SHANGHAI

Workplace Strategy, Change Management and Post Occupancy Evaluation – A Major Asian Bank



Advisory: Cushman & Wakefield's Workplace Strategy Team and Cushman & Wakefield's Project Management Team

Background

- This office workplace strategy project required a consolidation of two sites with a phased construction and multiple moves.
- This office workplace strategy project required a move from a fixed-desk environment to an activity-based working environment.
- Total HC: ~950.

What We Did

- We integrated data-driven research with comprehensive user feedback to produce a reasonable and creative office workplace strategy.
- We garnered insight into the users' real office workplace needs and we worked closely with the project team to realise effective solutions.
- To ensure success, the overall project required us to provide comprehensive communications and have constant engagement with the project team to ensure one and all were on the same page at every single stage of the project.

The Results

- Finally, our client was able to realise the migration of their employees (including their Generation Z employees) to an optimised, dynamic, activity-based workstyle which was in alignment with the recommended office workplace strategy business model.

07 – WORKPLACE OPTIMISATION

CASE STUDY 3: A MAJOR FMCG FIRM, SHANGHAI

Workplace Strategy and Change Management – A Major international FMCG Firm



Advisory: Cushman & Wakefield's Workplace Strategy Team and Cushman & Wakefield's Transaction Team

Background

- Our client's future office workplace needed to accommodate a large headcount growth.
- The office workplace user experience needed to be improved.
- Our client's business culture needed to be further promoted via the final office workplace design and layout.
- Total HC: 3,000+.

What We Did

- We provided office workplace demand data and analysis to optimise the office workplace planning.
- At every stage of the project, we customised the services and deliverables we provided based on our client's specific needs.

The Results

- We provided our client with a clear and simple office workplace plan and strategy recommendation which was able to secure immediate senior management buy-in.
- Eventually, our client was able to realise an optimised desk sharing plan that meets the needs of all key stakeholders, including their valued Generation Z personnel.

07 – WORKPLACE OPTIMISATION

CASE STUDY 4: A MAJOR TECH FIRM, SHENZHEN

Workplace Strategy and Change Management – A Major International Tech Firm



Advisory: Cushman & Wakefield's Workplace Strategy Team

Background

- Our client's future office workplace needed to adopt a global guideline.
- Our client needed to shift from a traditional office workplace to agile working with unassigned seating.
- Total HC: ~800.

What We Did

- We captured the local office landscape assessment, leadership and employee input and applied these findings appropriately against our client's global office workplace guideline.
- We structured workshops, leadership updates and other activities to keep our client's employees engaged through the process.

The Results

- We helped our client adopt activity-based working practices in the new office space.
- The new office features various space types, including a social and collaboration area.
- The latest technology is now accessible throughout the space, which all bodes well for our client's Generation Z employees.

08

KEY TAKEAWAYS



08 – KEY TAKEAWAYS

GEN Z ON THE CHINESE MAINLAND

- **Gen Z Priorities:** Flexibility, collaboration, technology and sustainability are paramount for Generation Z when it comes to appealing office workplaces on the Chinese mainland.
- **Technology Integration:** Technology plays and will continue to play a key role in creating engaging and productive workspaces for Generation Z on the Chinese mainland.
- **Hybrid Work Models:** Flexible and hybrid work models are increasingly important for attracting and retaining Generation Z employees on the Chinese mainland, but any change will depend on organisation management culture.
- **Experience per Square Foot (XSF):** Cushman & Wakefield's XSF is a crucial metric for measuring the effectiveness of workplace optimisation strategies.
- **Workplace Optimisation:** Organisations on the Chinese mainland must adapt office spaces to link in people, purpose and place to meet the needs of Generation Z in the region and to attract and retain talent.

08 – KEY TAKEAWAYS

PEOPLE, PURPOSE AND PLACE PRIORITIES FOR THE FUTURE





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About Cushman & Wakefield

Cushman & Wakefield (NYSE: CWK) is a leading global commercial real estate services firm for property owners and occupiers with approximately 52,000 employees in nearly 400 offices and 60 countries. In Greater China, a network of 23 offices serves local markets across the region. In 2024, the firm reported revenue of \$9.4 billion across its core services of Valuation, Consulting, Project & Development Services, Capital Markets, Project & Occupier Services, Industrial & Logistics, Retail, and others. Built around the belief that Better never settles, the firm receives numerous industry and business accolades for its award-winning culture. For additional information, visit www.cushmanwakefield.com.

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