

Reopening Office Buildings: The Tenant Perspective

July 20th, 2020

An online, SurveyMonkey survey of Central Philadelphia Development Corporation members and CCD Board was conducted in the last two weeks to determine the expected timing of a return of workers to the office and to assess factors that respondents believe should be addressed to facilitate the return to work. Responses came from a total of 22 firms, who collectively employ 24,886 workers, representing a variety of sectors and with total employees ranging from 6 to 13,000.

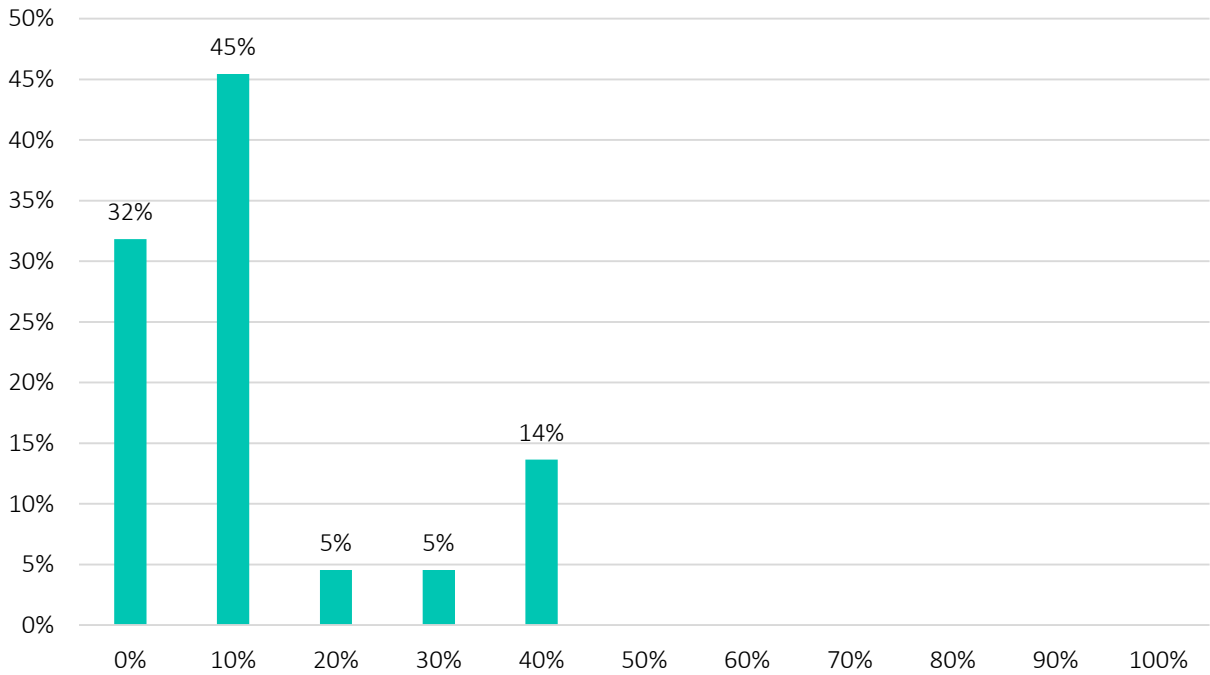
Most respondents indicated very low current office utilization, with 77% reporting 10% or fewer workers currently in the office full time. In contrast, 82% of respondents said that in 2019 no more than 10% of employees worked from home at least one day per week. Most respondents do not expect a rapid return to the office. Nearly all respondents expected 50% or fewer of their employees to be in the office full-time after Labor Day, while 68% expected that 30% or fewer of their staff will be in the office by then. Many expect that substantial remote work will continue into next year, with 55% saying that they expect that at least half of their employees may continue to work at home for at least one day per week in 2021.

Because many office buildings and tenants have already made safety and health adjustments, the survey asked what additional factors need to be addressed in order to promote a return to Philadelphia offices. The most commonly cited factor was the availability of a successful vaccine, cited by nearly all respondents, followed by improved physical conditions and protocols on public transit (50%). Other factors were: improved physical conditions and protocols within the workspace (14%), improved physical conditions and protocols within lobbies and elevators (14%), and a reduction in employees within the workspace (9%) – suggesting that many of these issues have already been addressed by employers and building managers.

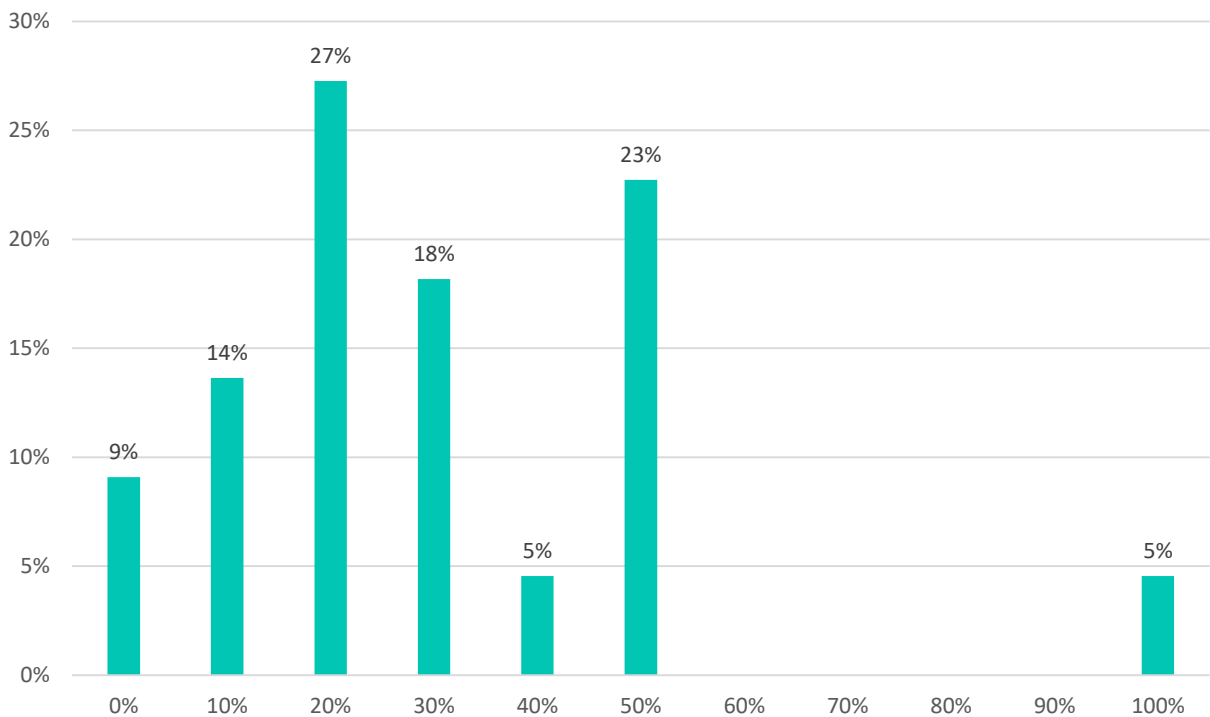
Some respondents expect their method of commuting to change after reopening. 36% personally used public transportation to get to work prior to the pandemic, while only 18% expect to do so after they return to the office. 36% indicated that they usually walked to work with 23% reported driving as their personal means of commuting prior to COVID-19. After reopening, there is little expected change among those who walk, but those who expect to drive increased to 36%.

Respondents cited multiple factors as motivations to return to the office. The most important were collaboration with colleagues (91%), face-to-face meetings with colleagues (77%), face-to-face meetings with clients (59%), socializing with colleagues (50%), professional development (45%), the ability to focus on work with fewer distractions (32%), access to technology (27%), access to files and materials (27%), and the availability of restaurants and retail nearby (27%).

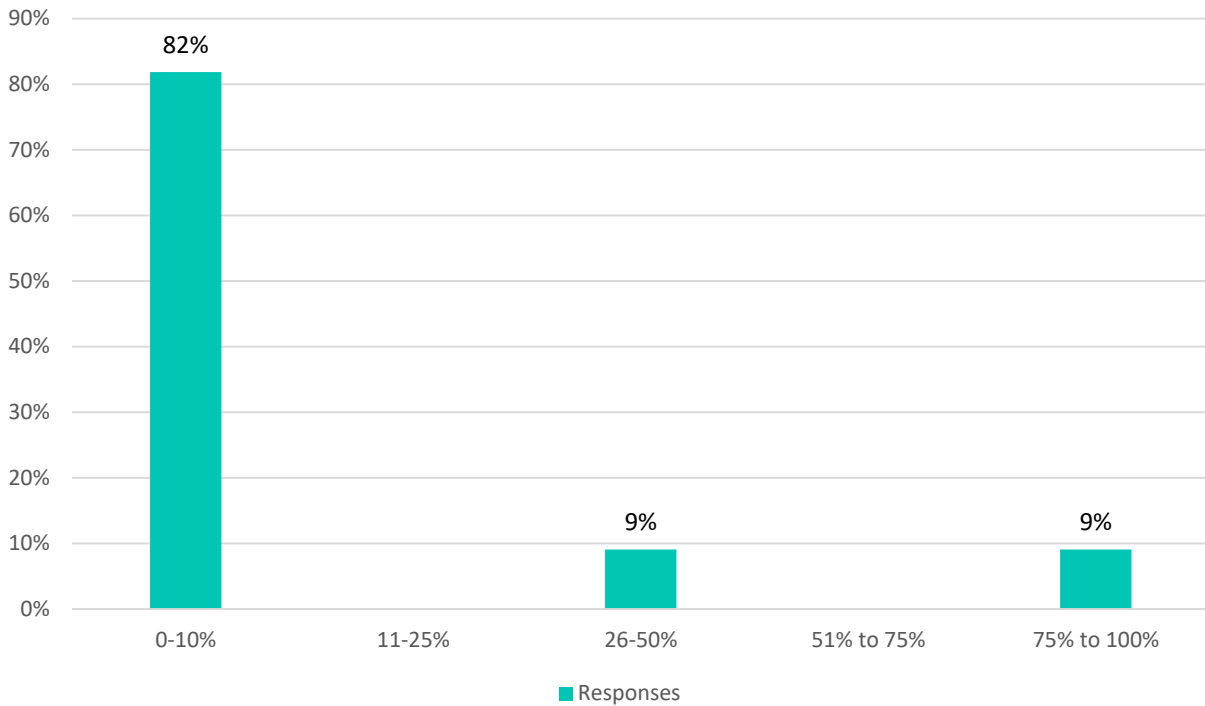
What percentage of your Philadelphia office staff is currently working in the office full-time?



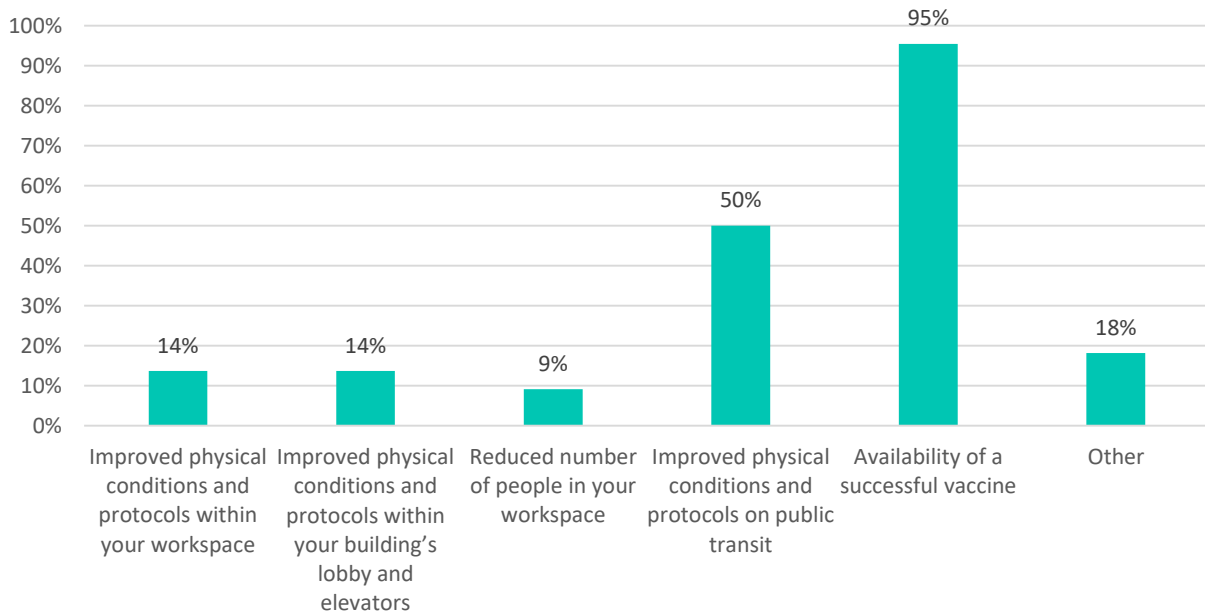
What percentage of your Philadelphia office staff do you expect to be in the office full-time after Labor Day?



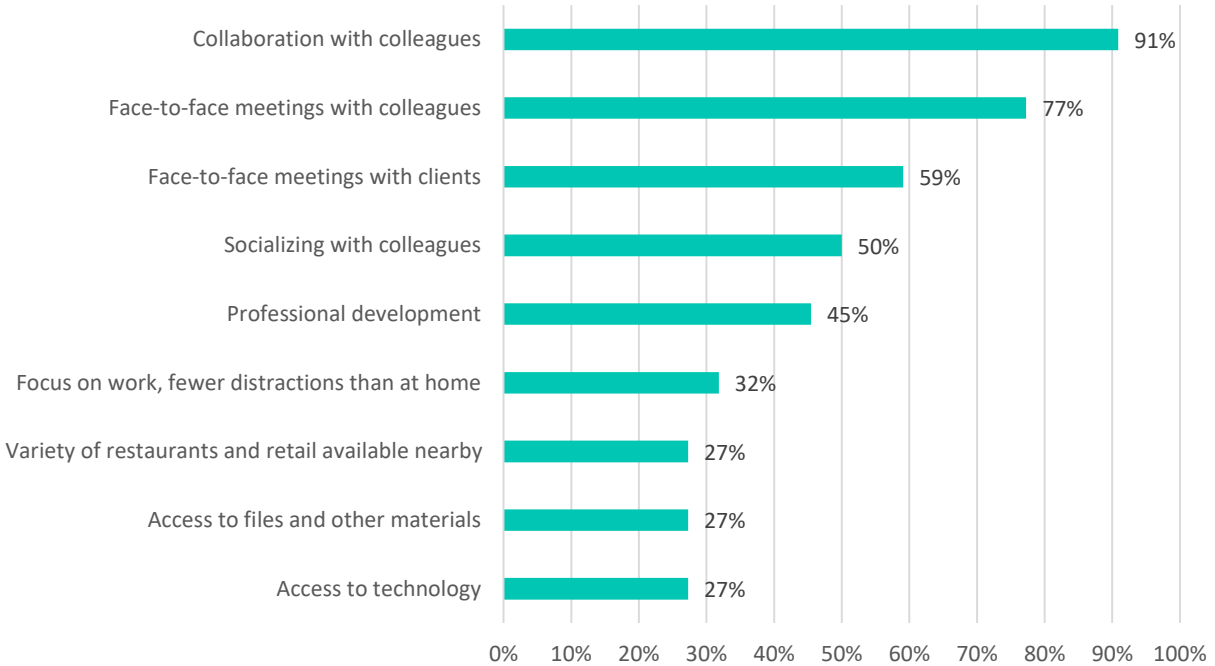
In 2019, what percent of your staff was routinely working from home at least one day per week?



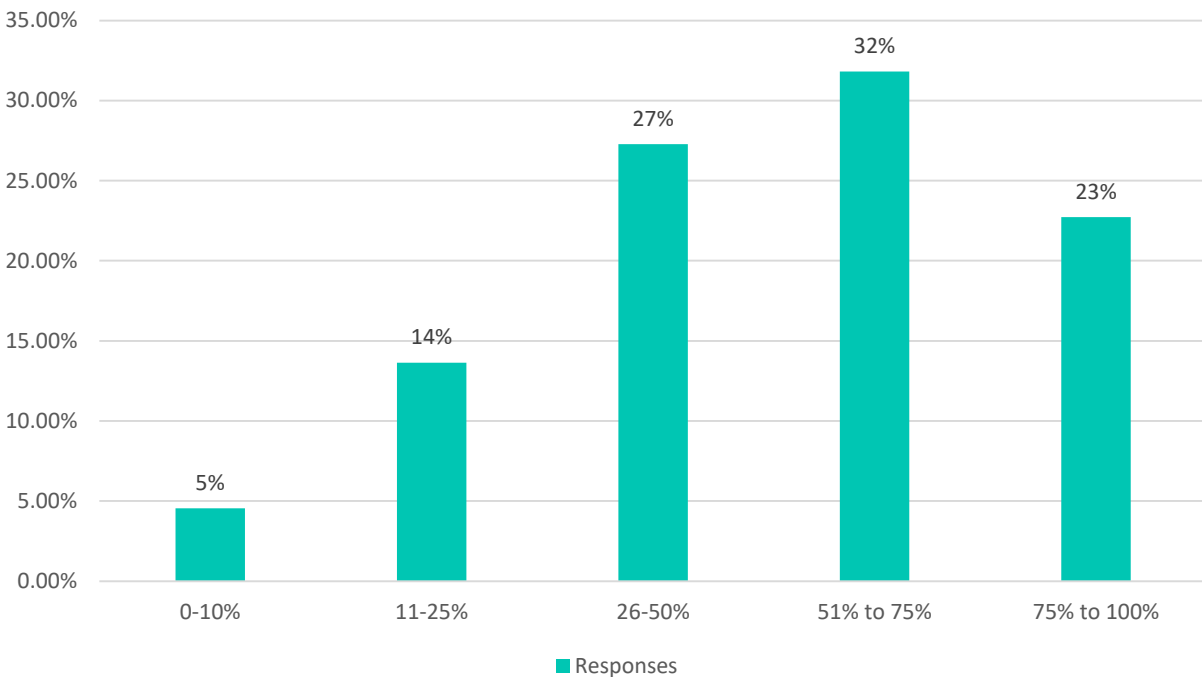
What in your judgment are the most important factors that have not yet been addressed, but need to be addressed in order for the majority of your peers to return to their Philadelphia offices? (Select all that apply)



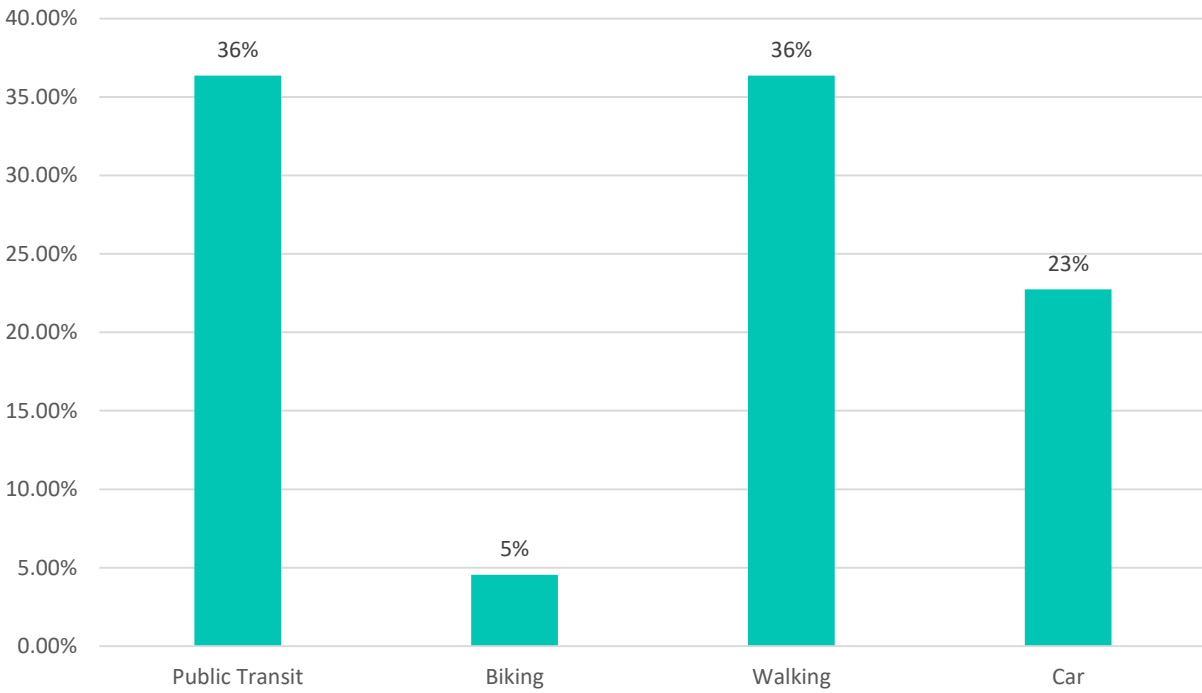
What are the most important reason(s) for you and your coworkers to return to work in your Philadelphia office? (Select all that apply)



In 2021, what percent of your staff do you anticipate may work from home at least one day per week?



Before COVID-19, what was your primary mode of transportation for your personal commute to work?



When you return to the office, what do you anticipate will be your primary mode of transportation for your personal commute to work?

