



CENTER CITY REPORTS

Return to Office Survey October 2020

NOVEMBER 2020

CENTER CITY DISTRICT,
CENTRAL PHILADELPHIA DEVELOPMENT CORPORATION

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In October, Central Philadelphia Development Corporation surveyed its members and Board members of the Center City District to determine what percent of their employees were currently working in the office downtown, the expected timetable for the majority to return, the most important factors that needed to be addressed to facilitate a return to the office, and the biggest advantages of a safe return.¹ A total of 38 firms responded, representing a variety of employment sectors, and with downtown employees ranging from five to 9,700. Collectively, respondents employed 15,436 in Center City at the start of 2020.

Most respondents indicated minimal office utilization currently, with 76% reporting 10% or fewer workers in the office full time. However, many plan to increase in-office staff by the end of 2020. By December 1, 42% of respondents expect up to 10% of their workforce to be at their desks; 32% expect between 11% and 25% of workers to be working downtown by that time. Another 8% expect 26% to 50% of their workers to return to the office by December, and 19% expect to see more than half of employees in the office.

Many office buildings have made adjustments to accommodate health and safety concerns, as have SEPTA and PATCO. When asked what additional factors need to be addressed to increase and accelerate the rate of return, 92% of employers cited the availability of a widely applied and successful **vaccine**. Next in importance were improvements to **public transit** (47%), including greater social distancing, cleaning protocols, and mask compliance; improved **public safety** in Center City and at transit stops (32%); improved

physical conditions and **protocols within the workspace** (18%), and improved physical conditions and protocols within **building lobbies and elevators** (16%).

Respondents noted multiple benefits from a return to the office. The most important were employee collaboration (89%) and face-to-face meetings with colleagues (82%). In descending order were then professional development (55%), socializing with colleagues (50%), face-to-face meetings with clients (47%), the ability to focus on work with fewer distractions (34%), access to files and materials (29%), access to technology (18%), and the availability of restaurants and retail nearby (16%).

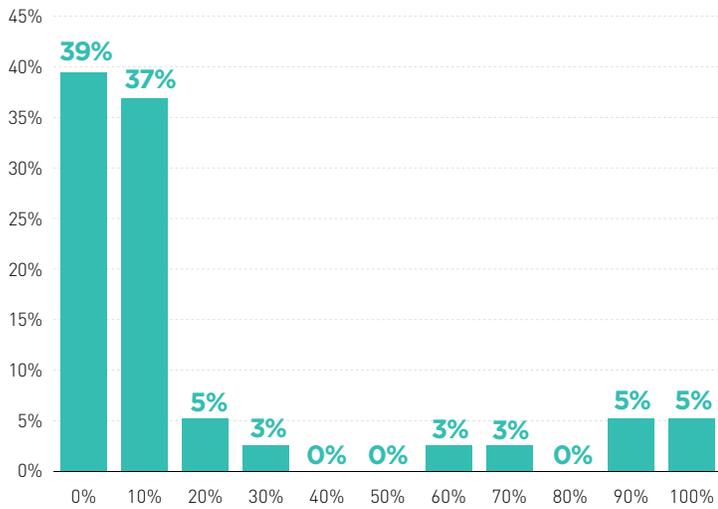
For those who have not returned to the office, 13% expect the majority of their workers to return by January of next year, 42% by spring, and 18% by summer. Some respondents are still waiting to set a date for majority of their employees to return.

The survey results suggested an initial shift away from public transportation toward increased automobile use as a means of getting to work: 47% of respondents reported that the automobile was their primary personal means of getting to work prior to the pandemic, while 34% primarily used public transit, 16% primarily walked to work, and 3% biked.² After the return to work, 63% expect that driving will be their primary means of commuting to the office, and 18% expect to use public transportation. The proportion of respondents who expect to walk or bike to work after returning to the downtown office was unchanged from the pre-pandemic number.

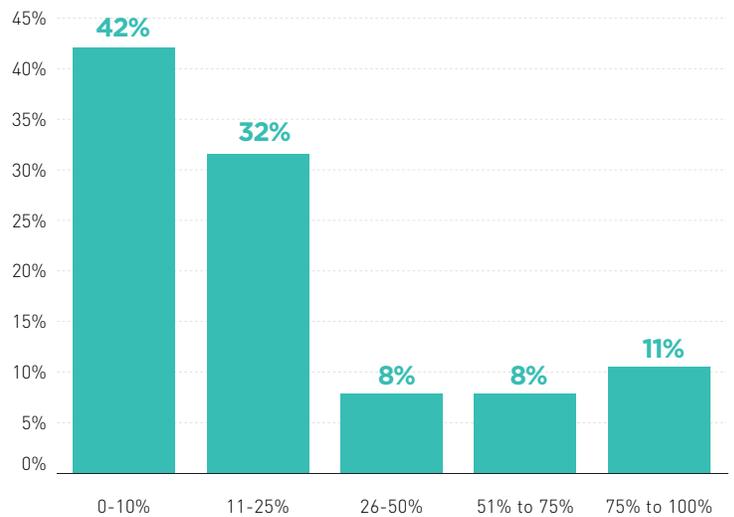
1: CPDC previously surveyed employers in June.

2: It should be noted that respondents tended to be senior personnel within their organizations. From prior surveys, CPDC estimates that as many as 70% of all downtown office workers use transit to commute to work.

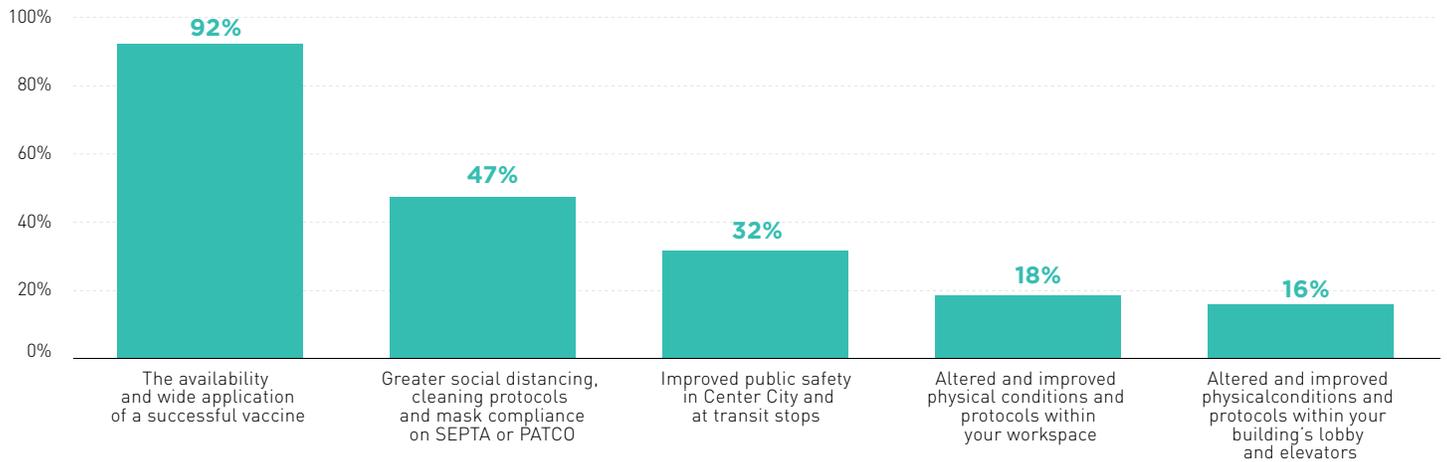
Q1. What percentage of your Philadelphia office staff is currently working in the office full-time?



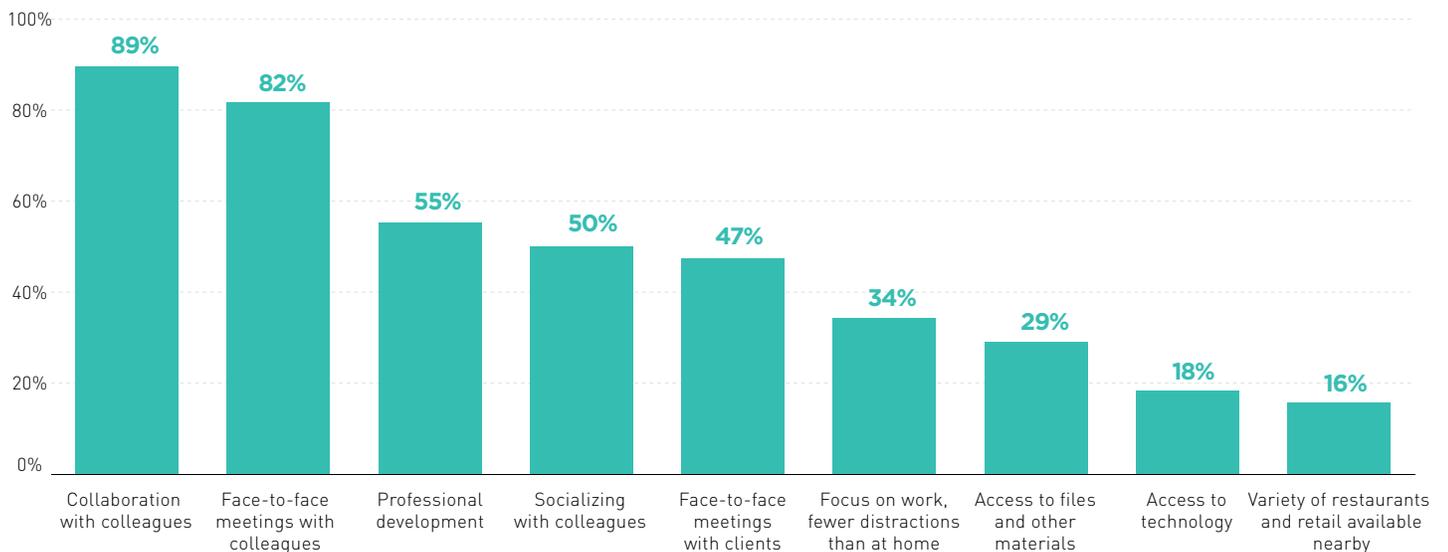
Q2. What percent of your Philadelphia office staff do you expect to be in the office part or full-time by December 1, 2020?



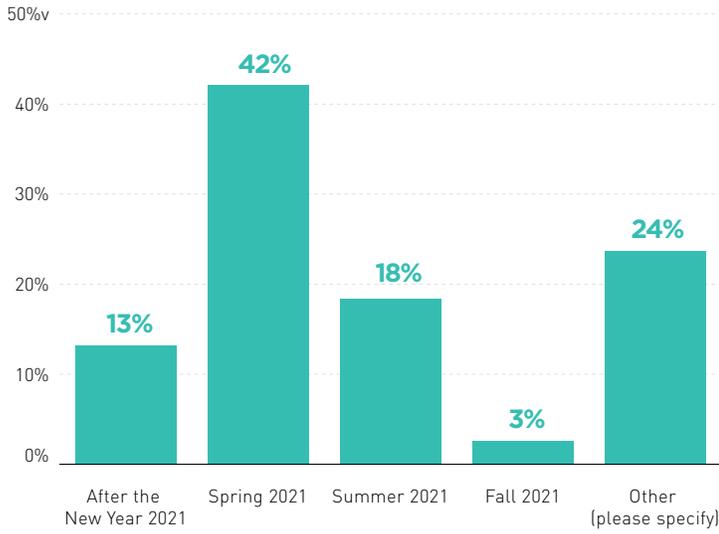
Q3. What in your judgment are the most important factors that have not yet been addressed, but need to be addressed in order for the majority of your peers to return to their Philadelphia offices? (Select all that apply)



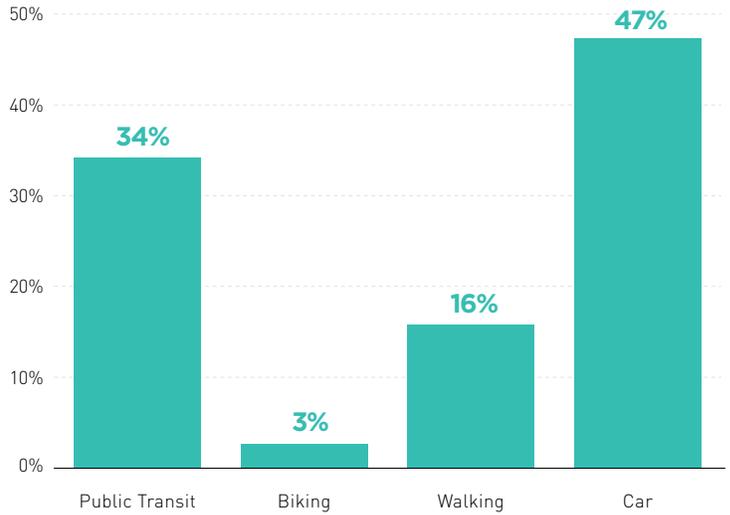
Q4. What are the most important reason(s) for you and your coworkers to return to work in your Philadelphia office? (Select all that apply)



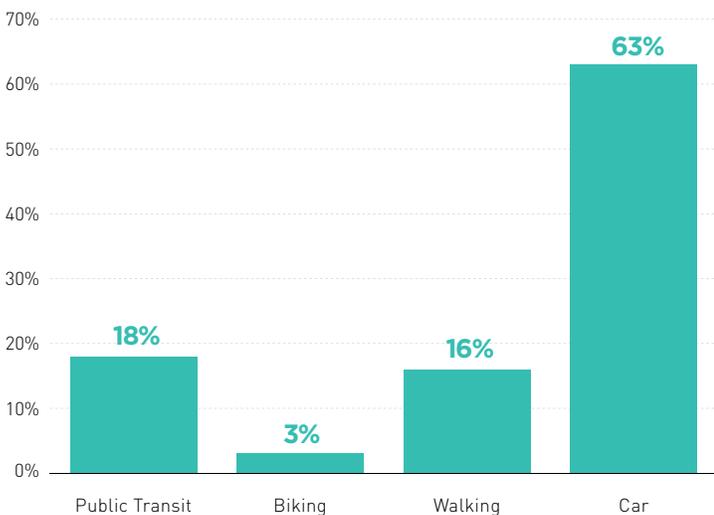
Q5. What is your current estimate as to the date when the majority of your employees will routinely be in the office?



Q6. Before COVID-19, what was your primary mode of transportation for your personal commute to work?



Q7. When you return to the office, what do you anticipate will be your primary mode of transportation for your personal commute to work?



While many firms have returned employees to the office, most do not expect to have a majority of their workers back at their desks before spring or early summer, 2021 after the widespread availability of a vaccine.