

# VOICE OF THE EMPLOYEE

A SURVEY OF WHAT IS  
MOST IMPORTANT TO  
TENANT EMPLOYEES AS  
OFFICE BUILDINGS  
RE-OPEN POST COVID-19

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MAY 2020

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## INTRODUCTION

Companies around the globe are re-evaluating their need for physical office space as the world currently performs the biggest work from home experiment in history. COVID-19 abruptly forced hundreds of millions of employees to work from home starting in January 2020. The pandemic shut down the office environment across states and countries, with many markets still experiencing shelter-in-place situations well into May 2020. Some markets are slowly re-opening economies but have yet to return to a status with fully occupied office buildings. Other markets talk about office buildings not coming back to life until Q3 2020, Q4 2020 or even 2021. There is no right answer about timing. Governments must balance reopening the economy while protecting the health of their people. With many COVID-19 uncertainties remaining ahead, governments will do what they deem best for their respective markets, but it is going to be a complicated path ahead.

One thing is clear – information is king. Today, so much information is instantly available at our fingertips. And people expect more. People want more than real-time information about the number of COVID-19 positive cases in a state or city, the trend of hospitalizations and recoveries, or the status of vaccine progress. What matters more than ever before is the information that directly impacts people where they live and work.

With other aspects of re-opening the economy, guidelines and protocols are implemented and overtly communicated. States and cities must reach certain milestones and trends in positive COVID-19 cases, hospitalizations, etc. and places where people would come together [restaurants, hair salons, etc.] must follow strict health and cleanliness protocols.

However, people do not typically spend 8+ hours inside those other places. When people are inside their own homes for 8+ hours, they have greater control over the cleanliness and the people they allow inside. With office buildings, people are looking to the office building and their respective companies, to take on some of the ownership of keeping the space clean, monitoring the occupancy and other protocols.

Companies are taking it upon themselves to proactively implement protocols and procedures. Companies are going to the extent of conducting daily temperature checks, increasing cleaning schedules, and flexing office schedules. While office buildings are working with tenant companies to better understand and adapt for the protocols they are putting into place, employees expect office buildings to do their part as well.

We have heard what office buildings and real estate companies are contemplating post-pandemic. Among others, JLL, Transwestern and Cushman & Wakefield have released multi-stage re-opening guides for their property management teams, with significant focus on adhering to government mandates, cleaning and social distancing procedures within their building portfolios, and understanding individual tenant company “return to work” plans. We have also heard from the C-suite execs at major firms about what they will do. For example, Salesforce will begin reopening its regional offices in phases in May but will still allow

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employees the option to work from home through the end of 2020 even if their local office is open, whereas Google is reopening in June, with 10-15% of employees returning at first while many workers may not return until 2021 and all Twitter employees will work from home for the indefinite future.

But one thing is missing - the voice of the employee. We embarked on this survey to empower the voices of the analyst experiencing less interaction with co-workers, the parent-worker juggling full time parenting duties with virtual conference calls, and the manager trying to virtually manage their team. This report, the first comprehensive study of office tenant employees across the world, is based on 1,000+ survey respondents. It captures the reality of the office building employee in the so-called world of “flexible work from home,” centers on the employee experience, and describes what employees expect and require as they return to office buildings.

## EXECUTIVE SUMMARY

The majority of employees want to go back to work in their office buildings. Only 8% of people have changed their preference and now desire to work remotely for the indefinite future. At the same time, employees want to feel confident that their buildings are doing all that they can do to keep it safe and clean. Employees also want protocols and tools to help manage their own exposure. Touchless capabilities, awareness of building cleaning schedules, occupant health and indoor air quality, and building communications top the list. Technological tools are the way to do this as they can be used to promote social distancing, communicate pertinent information, and improve tenant comfort, productivity, and satisfaction.

Read on to dive into key insights from the survey.

## KEY FINDINGS

### Unexpected Changes to Employment Status

COVID-19 created a more sudden and drastic impact to the workforce than any other economic or natural disaster in modern history. Nearly 80% of office workers experienced a major change to their employment status.

- ❖ **Many employees are working remotely.** About 60% of employees who were previously working in an office building went to a remote work schedule.

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- ❖ **People's employment status has changed due to the pandemic.** 17% of employees have experienced reduced hours, are currently furloughed, or were laid off.

## Working Remotely and the Desire to Return to the Office

For the last few months, employees have been adjusting to the many technological, social, and environmental differences of the “remote home office”. We asked employees what they liked and disliked most about working remotely as well as when and if they would be ready to return to the office. The results to the latter are very different than what we are hearing in the news – most employees want to return to their office building!

- ❖ **There are several aspects of working remote that employees like.** An overwhelming 82% of employees enjoy not having a commute. 56% like being able to spend more time with family. Increased productivity [31%], more autonomy [28%] and less management oversight [23%] round out the top 5 aspects employees like about working remotely.
- ❖ **At the same time, there are aspects of working remote that people do not like.** 45% of employees dislike the lack of scenery change. 40% say that the workday is less personal and less collaborative. Employees also express dislike for decreased productivity [30%], longer work hours [29%] and more meetings [28%].
- ❖ **Most employees want to return to the office building.** After working from home for several months, 65% of employees want to return to their office sooner rather than later. Of those, 44% of employees would like to return within the next 3 months, with another 12% wanting a flexible work from home schedule and 7% will when the government says its safe. Some employees want to wait until they receive a signal from external factors, such as, until the pandemic subsides [14%]. Only 19% of employees are in no rush to return to the office [11%] or would rather working from home indefinitely [8%].
- ❖ **When employees do return to office buildings, companies and buildings should not expect a return to the old ways.** Some employees have become accustomed to the benefits of no commutes, increased productivity and less management oversight. It will be critical for companies and office buildings to cater to the evolved needs and behaviors of their employees. To maintain tenant satisfaction and retention, office buildings should consider offering easy parking options to alleviate commuter frustrations, as well as amenities and technology tools to promote access, safety, collaboration, and productivity.

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## Employees have Requirements for Returning to Office Buildings

Even after governments re-open and companies invite employees to return to their offices, employees want changes that will make them feel comfortable and safe to return to their office buildings. Touchless capabilities, health, and safety protocols, more frequent or enhanced cleaning schedules, social distancing, and increased communications are among the top aspects.

- ❖ The biggest changes people want to see reflects their desire to control or limit their exposure to contract a virus. Technologies that enable touchless interactions topped the list, with over 60% of employees wanting to see touchless capabilities and motion activated bathroom amenities implemented at their office buildings. Additionally, requirements associated with wearing face masks in common or high-density areas [50%] and elevator occupancy [39%] were also high on the list. Health and cleanliness training programs [42%] were also among the top five things employees want their office buildings to implement.
- ❖ There is a difference between the requirements people want vs. what must have. Except for requirements to wear face masks in common or high-density areas [37%], all other changes were not deemed as “must haves” by most employees.
- ❖ This means that office buildings can be thoughtful in their approach to address tenant comfort and safety requirements. Rather than disregarding employee requirements, there may be an understanding by employees that not all changes can be immediately implemented. This reflects a huge opportunity for office buildings to implement as many of these changes as possible to set themselves apart as leaders in the market, have a greater chance of increasing tenant satisfaction during this time of uncertainty, and to do the right thing

## Personal and Community Health Information

We live in an information economy. But that does not mean we share health information widely, nor does it mean that people want to know.

- ❖ A majority of employees are comfortable sharing if they are sick. Over 50% of people are ready to share whether they are sick, whereas less than 20% of people are dead set against sharing this information.
- ❖ People are keen to know if someone else in their building is sick. Over 80% employees want to know SOME information about the health of the people in their building.
- ❖ However, people do not necessarily want a lot of information about others and this is key. Nearly 70% only want to know if someone is highly contagious or just that someone is taking a sick day. They do not require knowing who or where.
- ❖ People want consolidated, real-time information. Multi-tenant office buildings can take a leadership role in implementing technology to provide this service.



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People want that information to be collected and to be smartly used, but not overly shared. That means, they want procedures in place, technology to harness the information and they want the building to be able to inform/communicate pertinent information that would impact the broader populating in a timely manner.

## Information Awareness - Air Quality and Health + Wellness

The pandemic has caused a heightened focus on factors that increase risk for compromised health outcomes. Building cleanliness and air quality control is THE most important thing that office building employees care about.

- ❖ Nearly 80% of employees want to know the air quality in their office building and over 80% want cleaning schedule information. It is important to note that while people may not look at this information as frequently as they check the news, what they really want is the comfort in knowing that they can access it.
- ❖ Prior to pandemic, only 20% of people regularly thought about air quality and the overall health of other people in their office building on a regular basis. Now over 80% say they will think about these things moving forward.

## Safety, Security and Building Communications

Employees can control the safety and security of their homes. They have security systems, Nests, heck even doorbells provide a sense of security. They also know what surrounds their house in the neighborhood, as well as, when events and public maintenance events are happening. With returning to office buildings, safety and access to information are a top priority.

- ❖ Employees want to feel safe and informed when returning to their office buildings. Building safety and security protocols ranked the second most important to employees. Employees want to feel informed, as building communications and access to building information ranked third most important.

## Reduce Exposure with Self-Service and Touchless Capability Technologies

The less physical contact and the fewer touchpoints, the better. Employees rank self-service technologies and touchless capabilities, such as mobile keycards as the next most important features of an office building.

- ❖ Employees are becoming accustomed to a new way of working – which is having the tools to doing everything themselves. Currently, they do not need to worry about carrying a work badge or submitting a service request to increase

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the AC in their office or asking their office manager to reserve a conference room for an upcoming client presentation. Self-service and touchless capability technologies will help provide a frictionless office experience so they can easily get into their office buildings, productively get their work done and go home.

- ❖ **Plus, these types of technologies are a win-win for building operators and owners.** Technology solutions that connect tenants, management teams and building systems, empower buildings to operate more efficiently and operators to better understand building occupancy and utilization of spaces.

## The Importance of Air, Light and Space

While physical amenities, right now, are not as important as information communication and technologies that provide touchless capabilities, employees want amenities that will provide respite from crowded, enclosed spaces and promote health and wellness. Amenities that provide fresh air, natural light and space are among the most important to employees.

- ❖ **62% of employees want open air spaces.** Shelter-in-place has given people a heightened sense of appreciation for stepping outside and breathing fresh air.
- ❖ **Indoor amenities that foster well-being are also important.** Natural lighting [39%], live plants [31%], access to take the stairs from floor to floor [30%] and break lounges [28%] were also important to employees.
- ❖ **Space over crowds.** Large activity spaces which are more likely to accommodate or attract crowds are less important.

## Employees Desire to FEEL Informed, They Expect their Buildings to BE Informed

- ❖ **Two things are happening today.** First, people can access information about the number of COVID-19 cases in their county, the health resources available to them and the safety protocols being put in place by their local economy. Second, people can access all this information, plus news, weather, etc. within seconds on their mobile phones. This does not mean that people are currently searching for this information every hour or even every day. Rather, employees have the comfort that someone is capturing this data, the information does exist and that they can access it when they want. For office buildings, people want to feel a sense of security that their buildings have information and that they have the tools to communicate pertinent updates.

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## Conclusion | Technology is the Bridge

More than ever before, building operators and owners need to be ready with technologies that enable them to be more informed and in control of their buildings.

- ❖ Ready to exceed the expectations of the returning workforce by offering touchless capabilities and self-service tools.
- ❖ Ready to ease tenant concerns by communicating building safety and health protocols
- ❖ Ready to act quickly and communicate urgent updates
- ❖ Ready to be transparent about building cleanliness and air quality control



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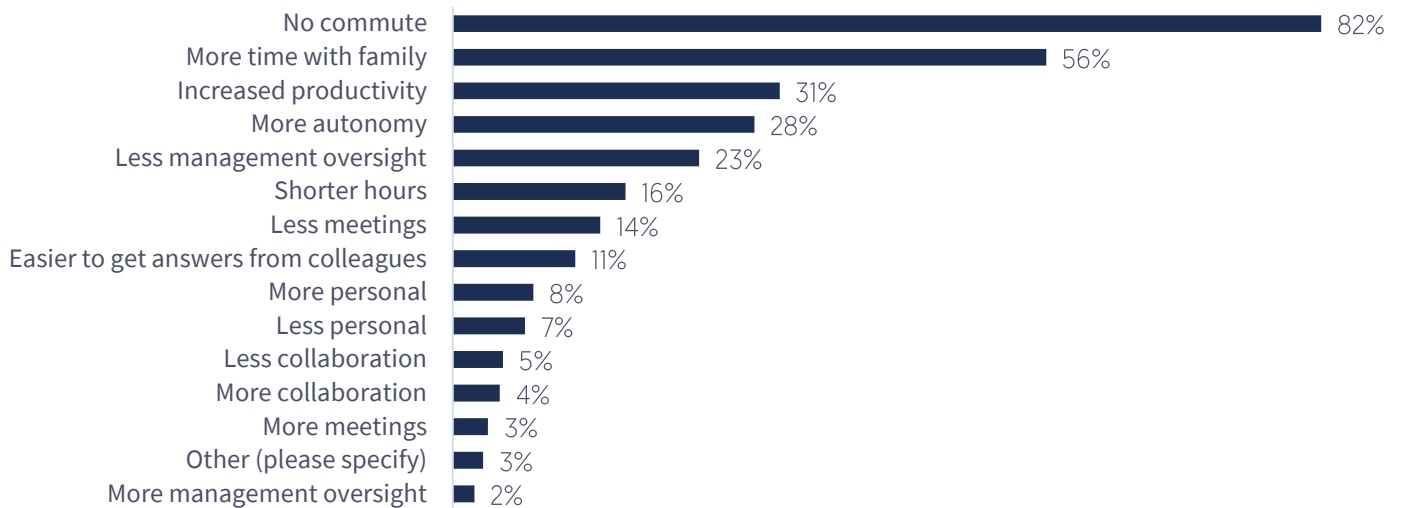
## Methodology

The purpose of this study was to better understand what matters most to employees as they look at returning to their office buildings post COVID-19. This study presents the results of a survey we conducted in May 2020. The survey asked employees about their employment status, what they liked and disliked about working remotely, how soon they would feel comfortable returning to work in their office building and what is most important to them when returning to an office building work environment. 1,387 people responded to the survey of which 1,028 employees work in office buildings. The participants are representative across ages, genders, industries, employee roles and regional US geographies, with 92% of participants representing the United States.

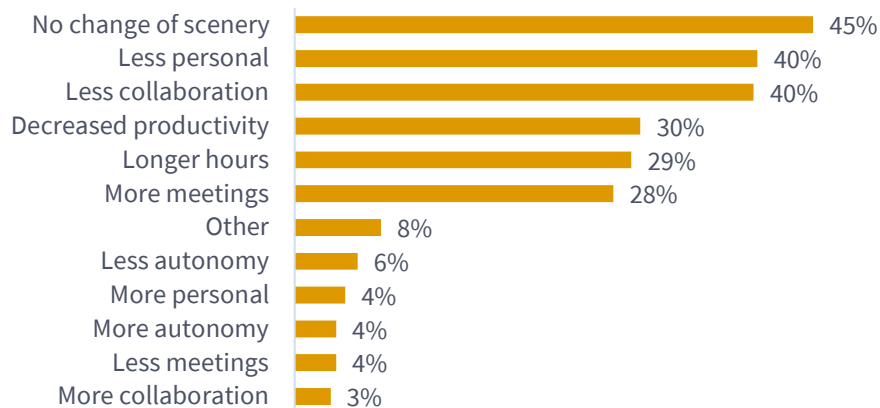
## Appendix

### Summary of Employee Survey Questions and Responses

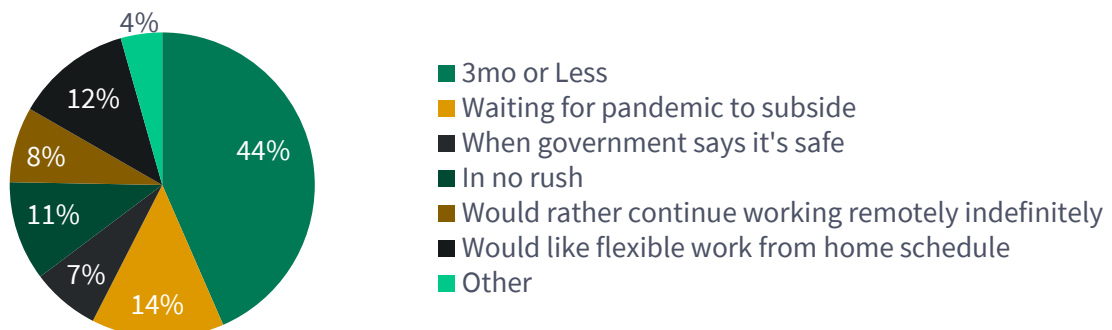
❖ What do you LIKE about working remotely? Select all that apply



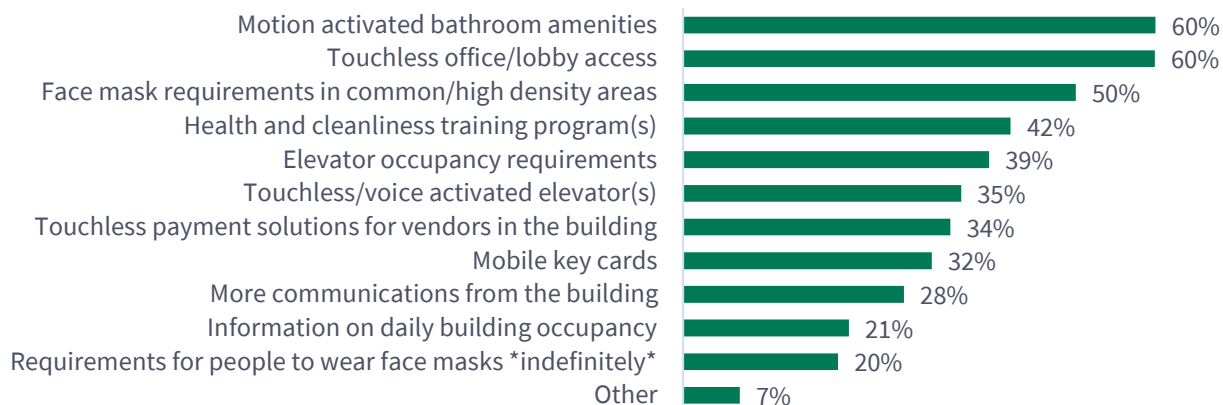
❖ What do you DISLIKE about working remotely? Select all that apply



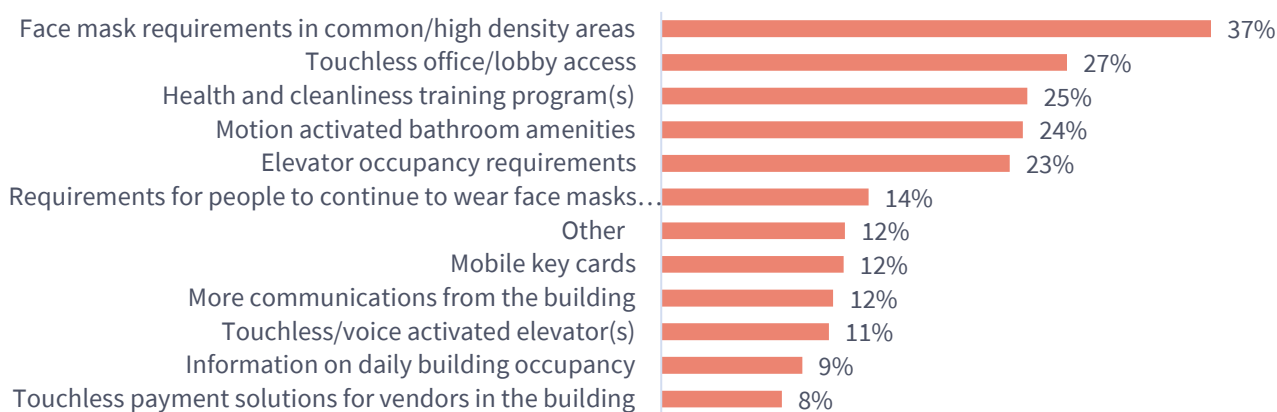
❖ How soon would you feel comfortable returning to your office building?



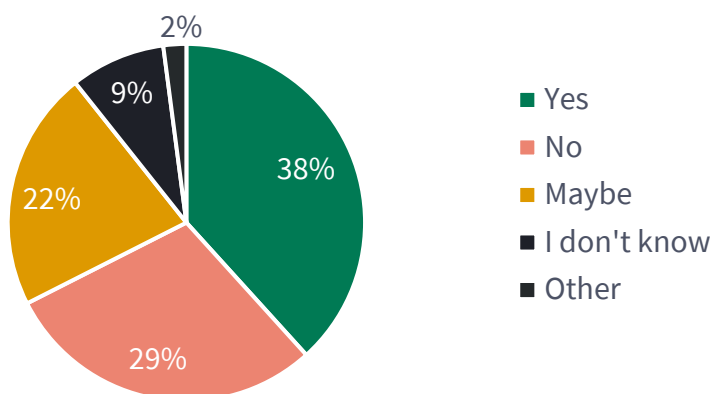
- ❖ Which of the below would you LIKE to see implemented at your office building?  
Select all that apply.



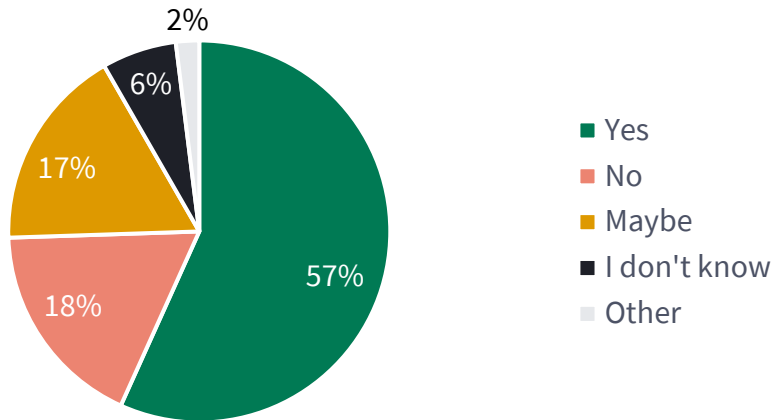
- ❖ Which of the below HAVE TO BE implemented before you feel comfortable returning to your office building? Select all that apply.



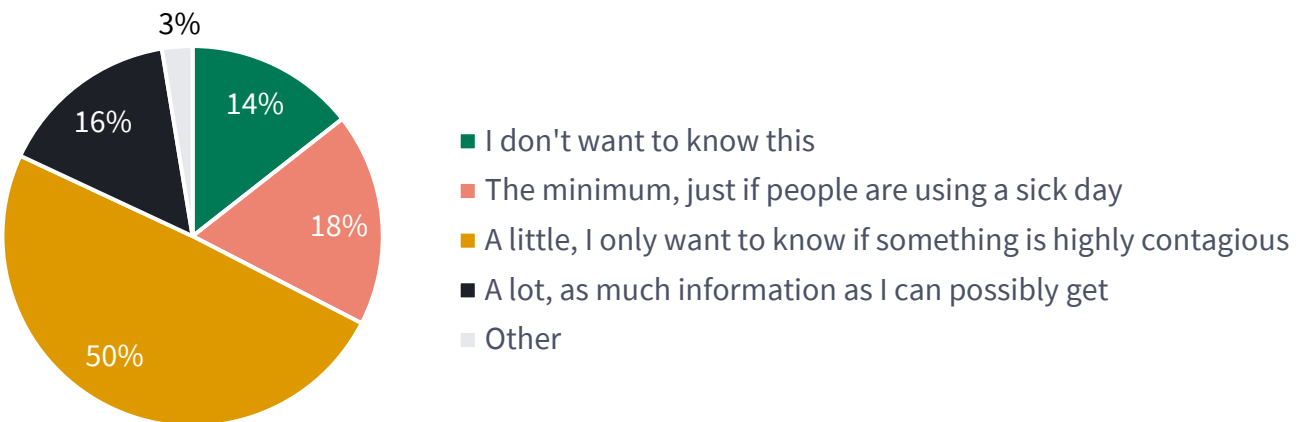
- ❖ If the information were available, would you like to know the number of people who are using a sick day across your entire office building?



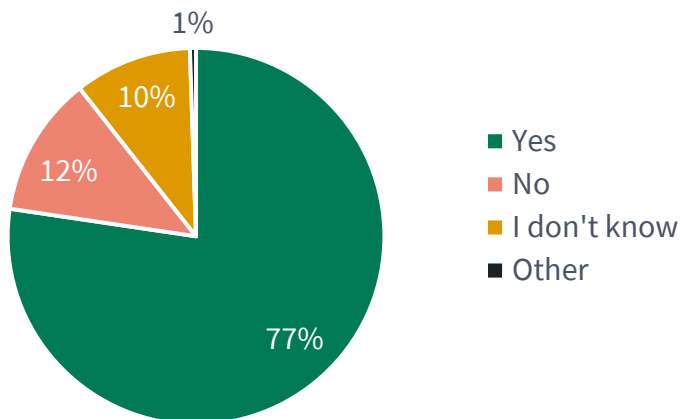
- ❖ Without identifying you, would you be OK if your employer reported you were sick to the building owner?



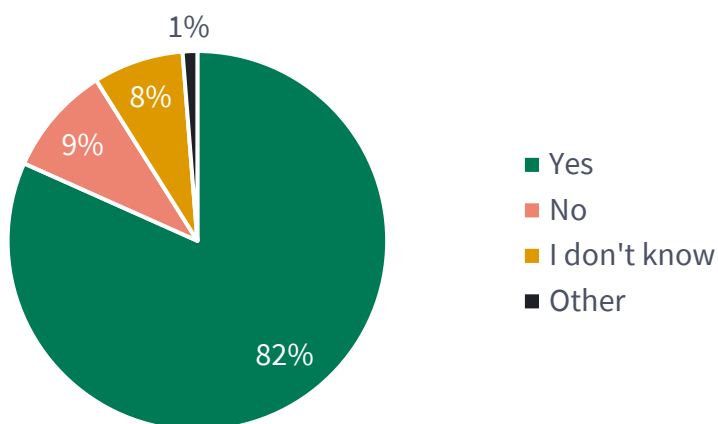
- ❖ Without identifying you, would you be OK if your employer reported you were sick to the building owner?



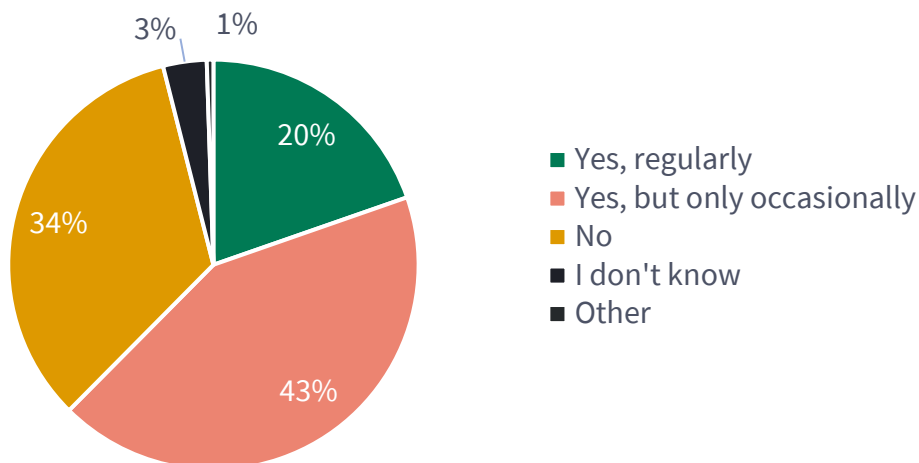
- ❖ Would you like to know the air quality insight the building you are working in?



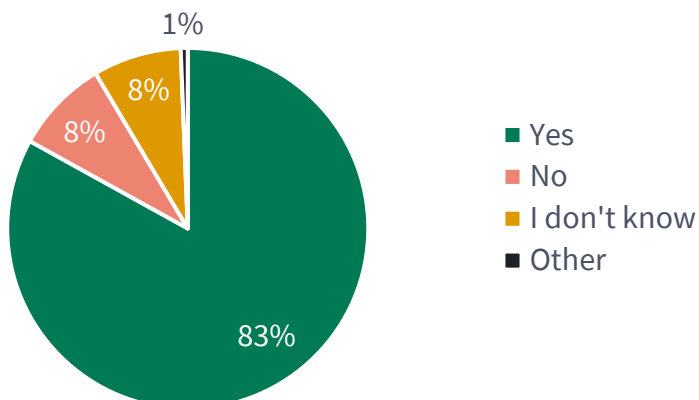
- ❖ Would you like to have access to information on how recently/frequently areas in your office building are cleaned?



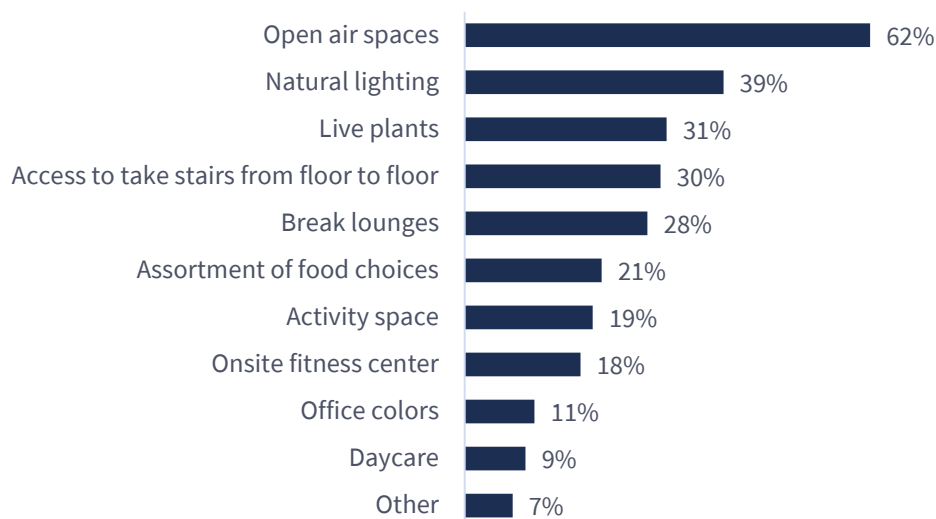
- ❖ BEFORE the pandemic, did you think about the overall health of other people and air quality in your office building?



- ❖ AFTER the pandemic, do you think you will think about the overall health of other people and air quality in your office building?



- ❖ When you go back to your office building what amenities will be important to you? Select all that apply.



- ❖ Please rank what is most important to you as someone who works in an office building. [1 = most important, 9 = least important]

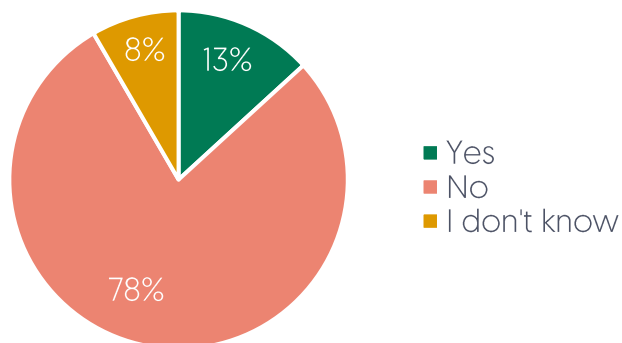
<b>1</b>	<b>BUILDING CLEANLINESS AND AIR QUALITY</b> such as frequency of cleaning, touchless entry ways/elevators and air quality control
<b>2</b>	<b>BUILDING SAFETY AND SECURITY</b> such as security check-in, building access turnstiles and emergency protocols
<b>3</b>	<b>COMMUNICATION AND INFORMATION</b> about the building, nearby amenities, events, and emergency notifications
<b>4</b>	<b>SELF-SERVICE TECHNOLOGIES</b> such as visitor management, service requests, parking registration, amenity reservations, food ordering and the ability to improve comfort by adjusting temperature
<b>5</b>	<b>MOBILE ACCESS</b> to the building via a smartphone app i.e. entering the building with your mobile device
<b>6</b>	<b>PHYSICAL AMENITY</b> options such as on-site gym, restaurants, and bars
<b>7</b>	<b>OVERALL AESTHETIC</b> such as look and feel of the lobby
<b>8</b>	<b>ADDITIONAL SERVICES</b> such as dry-cleaning, onsite wellness classes, dog walking, etc.
<b>9</b>	<b>COMMUNITY ENGAGEMENT</b> such as networking events and tenant parties



- ❖ Which of the below would you use a SMARTPHONE APP for if it was provided by your office building? Select all that apply.

<b>68%</b>	<b>COMMUNICATION</b> of emergency notifications
<b>60%</b>	<b>INFORMATION</b> about the building
<b>49%</b>	<b>COMMUNICATION</b> of building notices, such as construction and holiday hours
<b>47%</b>	<b>MOBILE ACCESS TO THE BUILDING</b> via a smartphone app
<b>45%</b>	<b>INFORMATION</b> about on-site and nearby amenities
<b>45%</b>	<b>COMMUNICATION</b> of events and promotions
<b>38%</b>	<b>SELF-SERVICE</b> food ordering
<b>37%</b>	<b>SELF-SERVICE</b> ability to improve comfort by adjusting temperature
<b>36%</b>	<b>SELF-SERVICE</b> visitor management
<b>36%</b>	<b>SELF-SERVICE</b> service requests
<b>31%</b>	<b>SELF-SERVICE</b> parking registration
<b>3%</b>	<b>OTHER</b>

- ❖ Does your building currently offer a smartphone app?



- ❖ If your building offered a smartphone app, would you use it?

