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Return to the office and consumer behaviour by workers in downtown

Montréal

The “Return to office towers” series

Highlights – Friday, May 6, 2022

In collaboration with:

Leger

Québec 

 **The Chamber of Commerce
of Metropolitan Montreal**

Background (1/2)

As part of its **"I love working downtown"** program, the Chamber of Commerce of Metropolitan Montreal is launching initiatives to encourage workers to return downtown, make the area more attractive and showcase its distinctive character. These initiatives aim to draw more people downtown and preserve the vitality of this strategic area for the economy of Quebec and the city.

As one of these initiatives, the Chamber has launched a **series of "Return to office towers" surveys aimed at workers and employers in Greater Montréal**. These surveys, which reach hundreds of executives and employees each time, help to target issues related to the return of workers to in-person work, to identify actions to be taken and to gather the resources to finance the necessary actions and strategies. Although these goals remain the same, each survey addresses new themes as the health situation changes and companies reorganize their work on a hybrid basis.

Findings from previous editions of our "Return to office towers" surveys

The results of the **first edition of the survey** were revealed in June 2021, a few days before the mandatory telework requirement was lifted, at the end of the third wave. At that time, workers shared their views on returning to the office, telework, mobility issues and incentives to consider that would make in-person work more appealing.

The **second survey**, conducted in August 2021, showed strong support for implementing the vaccine passport in the workplace, the difficulties that teleworkers may face professionally and personally, and areas for improvement in their respective work environments. There was already enthusiasm for hybrid work arrangements: 47% of workers had begun their return to the office at that time, up from 28% in the previous survey. The majority of workers (51%) also said they would like to return to the office 2 or 3 days a week.

The **third survey**, conducted in November 2021 as the progressive return of public servants to in-person work began, made it possible to observe the pace of return of the workers: 61% of workers said they were back at the office, compared to 47% in August and 28% in June. The return also sparked renewed interest in in-person professional activities, since a very large majority of respondents were in favour of meeting with their customers and suppliers (74%), taking part in professional networking events (63%) and attending conferences (63%) in person.

Findings from the new survey

The new survey, conducted from March 15 to 28, took the pulse of the return and made it possible to assess worker satisfaction. The results confirm without a doubt that workers are still interested in reconnecting with their colleagues, their workspaces and the commercial, food and cultural services downtown.

As more and more employers share their return-to-work plans (72%), a large majority (68%) of workers go to their offices, either part time (42%) or full time (26%). Of these, nearly one third (31%) even plan to return 5 days a week.

Meanwhile, the enthusiasm for downtown social activities and restaurants is palpable: morning coffees (50%), restaurant lunches (73%), happy hour in restaurants and bars (45%) and shopping in all types of stores (46%) are some of the services workers plan to use when they go to the office. They also expect to spend up to \$106 per week on average.

Workers' mental health remains good on personal (90%) and professional (89%) fronts. The level of confidence in the health measures for public transit is stable (54%), but we note that 29% of workers still need to be convinced and reassured.

All the conditions are right to provide workers with an appealing and safe return to their work spaces and the commercial arteries of Greater Montréal and its downtown core.

OBJECTIVES

The Chamber of Commerce of Metropolitan Montreal (CCMM) tasked Leger with polling Greater Montréal's executives and employees to measure their attitudes, behaviour and comfort level in terms of returning to Montréal's offices and work spaces.

This report presents the **fourth edition** of the survey.

WHO?

A sample of **727 executives and employees** from companies whose place of work is located on the Island of Montréal, who are aged 18 and up and who are able to express themselves in French or English.

5% of them are owners/co-owners, 11% are presidents/VPs, 28% are directors/managers, 24% are professionals and 30% are salaried employees. 55% work downtown, 22% in western Montréal, 12% in eastern Montréal and 11% in the northern part of the Island of Montréal.

WHEN?

Data was collected between **March 15 and 28, 2022**.

CCMM emailed its members and Leger also questioned its panelists (n=427 and n=300 respectively).

NOTE TO READERS

The figures have been rounded. As a result, they may not add up to exactly 100%.

DIFFERENCES BETWEEN SURVEY EDITIONS

The results that present significant and relevant differences are highlighted in text boxes beside the overall results.

Data in **bold green** indicates a significantly higher proportion than that of the other respondents.

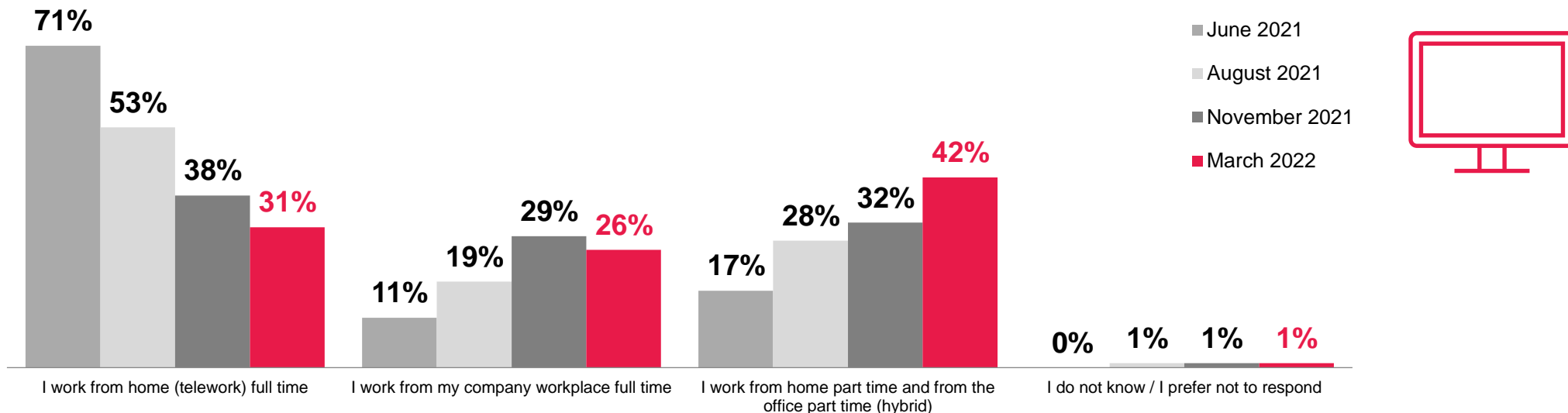
In contrasts, data in **bold red** indicates a significantly lower proportion than that of the other respondents.

Comparison of the 4 editions of the “Return to office towers” survey

Full-time telework is no longer the norm

Whenever possible and relevant, the results of this study have been compared with those from the third wave in **November 2021** (online survey conducted between October 26 and November 5, 2021 among 604 executives and employees of companies whose places of work are located on the Island of Montréal, who are aged 18 and up and who are able to express themselves in French or English). An upward arrow ↑ indicates a **significantly higher** proportion than in November 2021. A downward arrow ↓ indicates a **significantly lower** proportion than in November 2021. No arrow indicates that the proportions are statistically identical.

In the example above, the proportion of respondents who said they worked from home full time in **March 2022** is significantly **lower** than the result in **November 2021** (31%↓ compared to 38%). On the other hand, the proportion of respondents who said they worked from the office and from home (hybrid arrangement) in **March 2022** is significantly higher than the result in **November 2021** (42%↑ compared to 32%).



EMPLOYERS ARE CREATING IDEAL CONDITIONS TO MAKE IT EASIER FOR WORKERS TO RETURN TO THE OFFICE

Implementing the return-to-work plan

Just under half of executives (41%) have already implemented a plan, while 47% of executives are in the process of implementation or implementation is upcoming.

Three quarters of employees confirm that they have received a return-to-work plan (72%). In addition, three quarters of those who received a plan stated that it matched their expectations (73%).

Number of days at the office

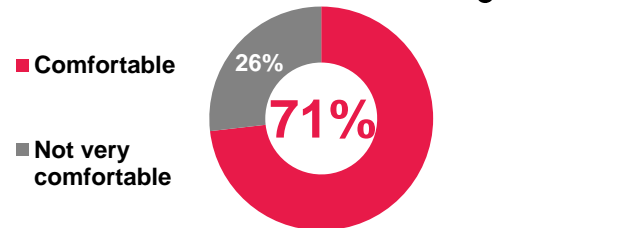
The majority of executives would like their employees to come to the office 2 or 3 days per week, although close to a third of executives prefer to leave the choice up to the employees (29%). We also noted a preference for going to the office midweek with Friday being the least popular day.

The government directives

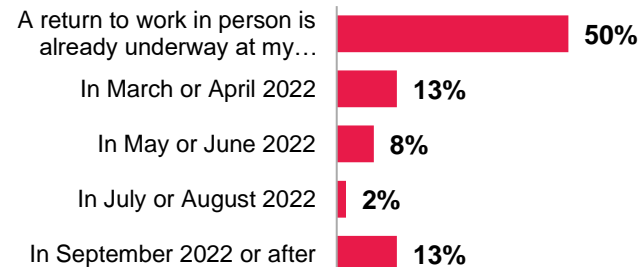
Over half of respondents find that the government directives for the return to the office are clear (61%), reassuring (59%) and effective (58%).

THE RETURN TO THE OFFICE

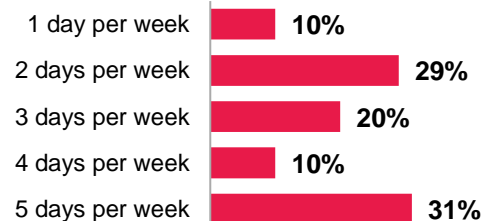
Comfortable with returning to work



Best time to return to work

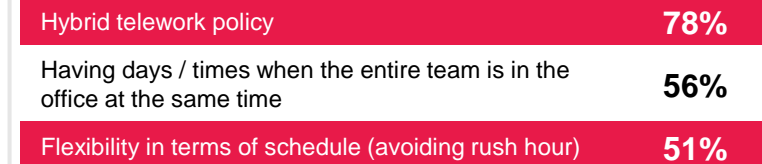


Expected number of days in the office for workers who have returned

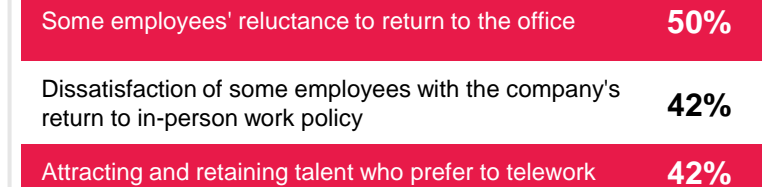


DETAILS OF THE RETURN

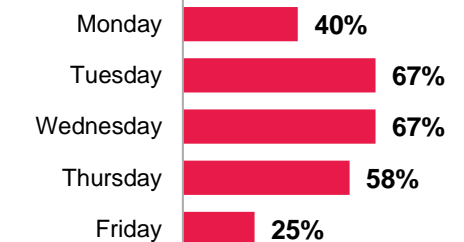
Elements for an easier return to the workplace



Issues with a return to in-person work

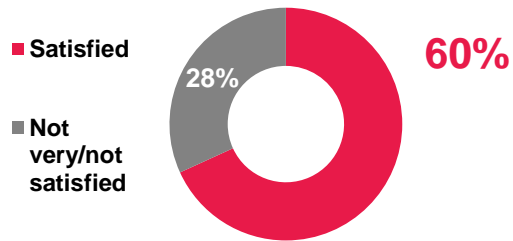


Best day to go to the office

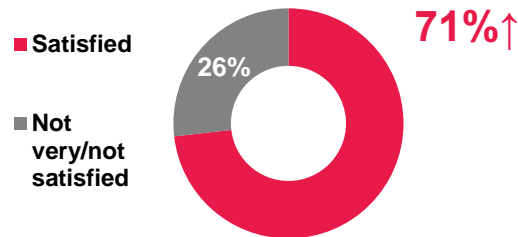


SATISFACTION AND APPEALING RETURN

SATISFACTION WITH THE EMPLOYEE EXPERIENCE OFFERED BY THE EMPLOYER TO ENSURE THAT THE RETURN IS APPEALING



SATISFACTION WITH THE COMMERCIAL, FOOD AND CULTURAL OFFER DOWNTOWN



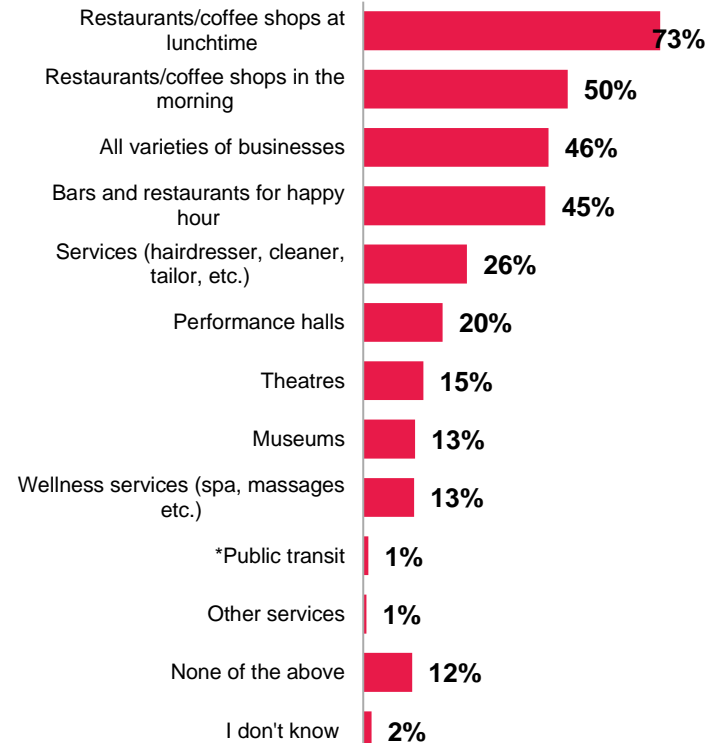
CONSUMPTION

Amount spent per week

Average

\$106

The downtown services that workers use



WORKERS WANT TO RECONNECT WITH EACH OTHER AND ARE SATISFIED WITH WHAT AWAITS THEM WHEN THEY RETURN TO THE OFFICE

While more than half of workers (71%) say they are comfortable with the idea of returning to the office, hybrid work arrangements (78%) that would allow them to be at the office at the same time as their colleagues (56%) and schedule flexibility (51%) are the factors that appeal to workers the most.

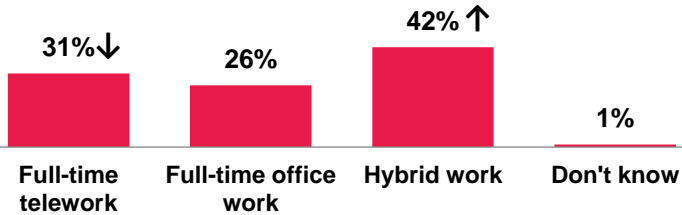
A majority of workers (60%) are satisfied with the plans drawn up by their employers to make the return to work appealing and safe.

A large number of them also express satisfaction with the commercial, food and cultural services that are offered downtown.

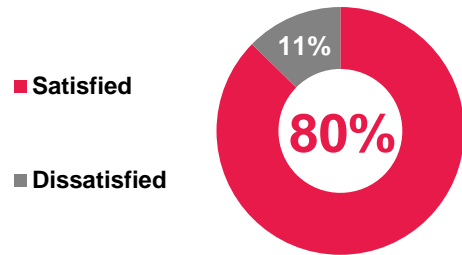
When asked where they will be most likely to go once they return to the office, restaurants on lunch break were the most popular (73%), followed by cafés in the morning (50%), all types of stores (46%) and bars for happy hour (45%).

Highlights | Other aspects of returning to the office

TELEWORK



Overall satisfaction with telework



Top 3 professional issues with telework

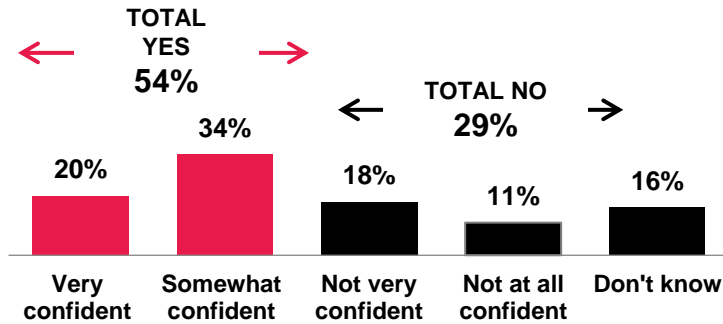
1. Loss of team spirit (34%)
2. Social isolation (32%)
3. Difficulty separating personal and professional life (25%)

Top 3 management issues with telework

1. Loss of team spirit (47%)
2. Loss of commitment among my employees (29%)
3. Lack of collaboration between my employees (24%)

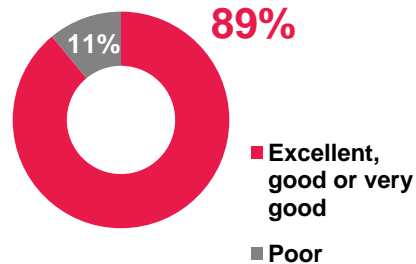
THE IMPACT OF THE PANDEMIC

Confidence in health measures for public transit

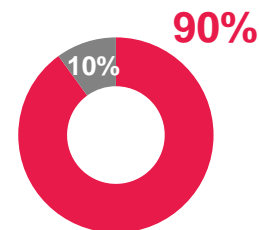


Workers' mental health

PROFESSIONAL



PERSONAL



WORKERS ARE SPENDING LESS AND LESS TIME WORKING FROM HOME BUT THEY STILL ENJOY IT TO THE SAME DEGREE

Although the trend has been on the decline over the course of the Chamber's surveys, close to a third of workers (31%) are still working from home full time.

All of the workers who were polled expressed their satisfaction with telework for reasons that our previous surveys have already revealed, including better work/life balance and less commuting time.

However, telework does come with its own set of challenges for both workers and managers, who state that the loss of team spirit is a major issue (34% and 47% respectively). For employers, loss of employee commitment (29%) and a lack of collaboration between them (24%) also complicate the management of telework.

Meanwhile, workers still rate their mental health as good both professionally (53%) and personally (54%).

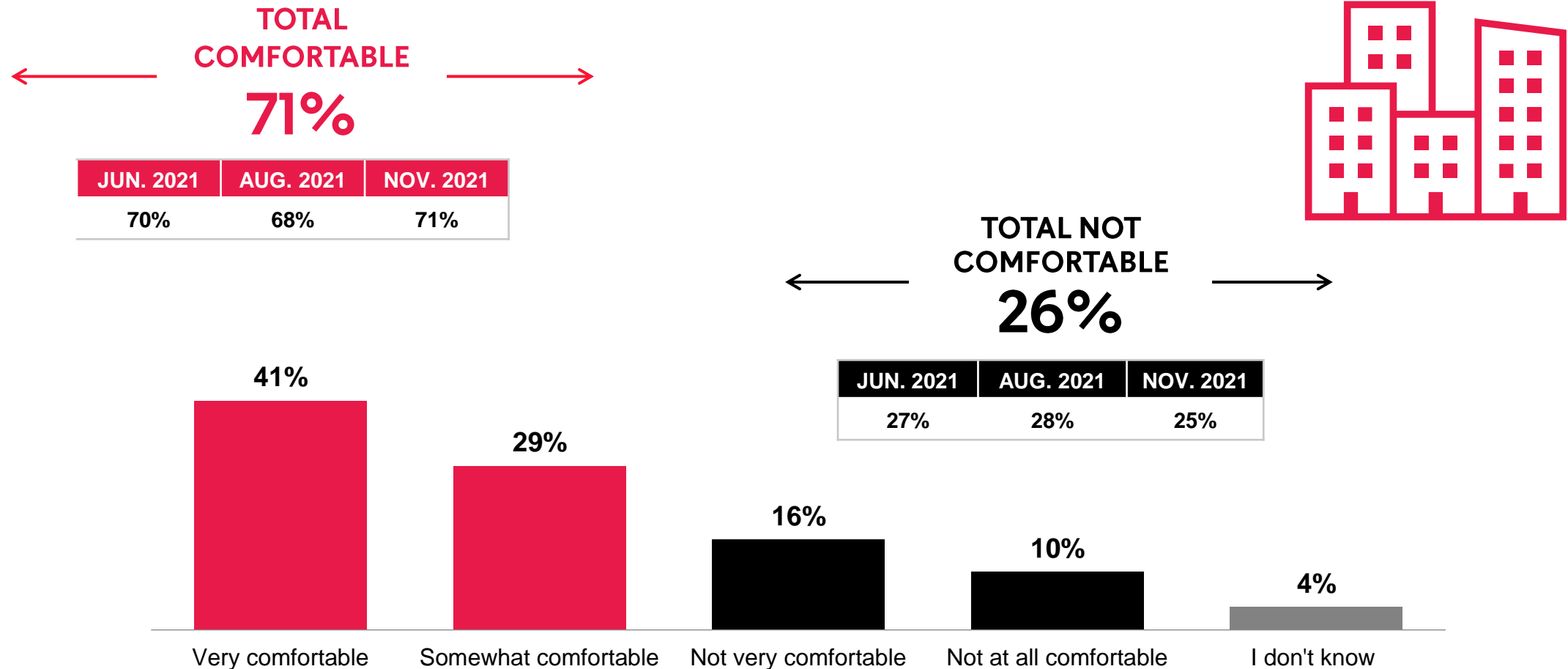
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The pace of the workers' return to work



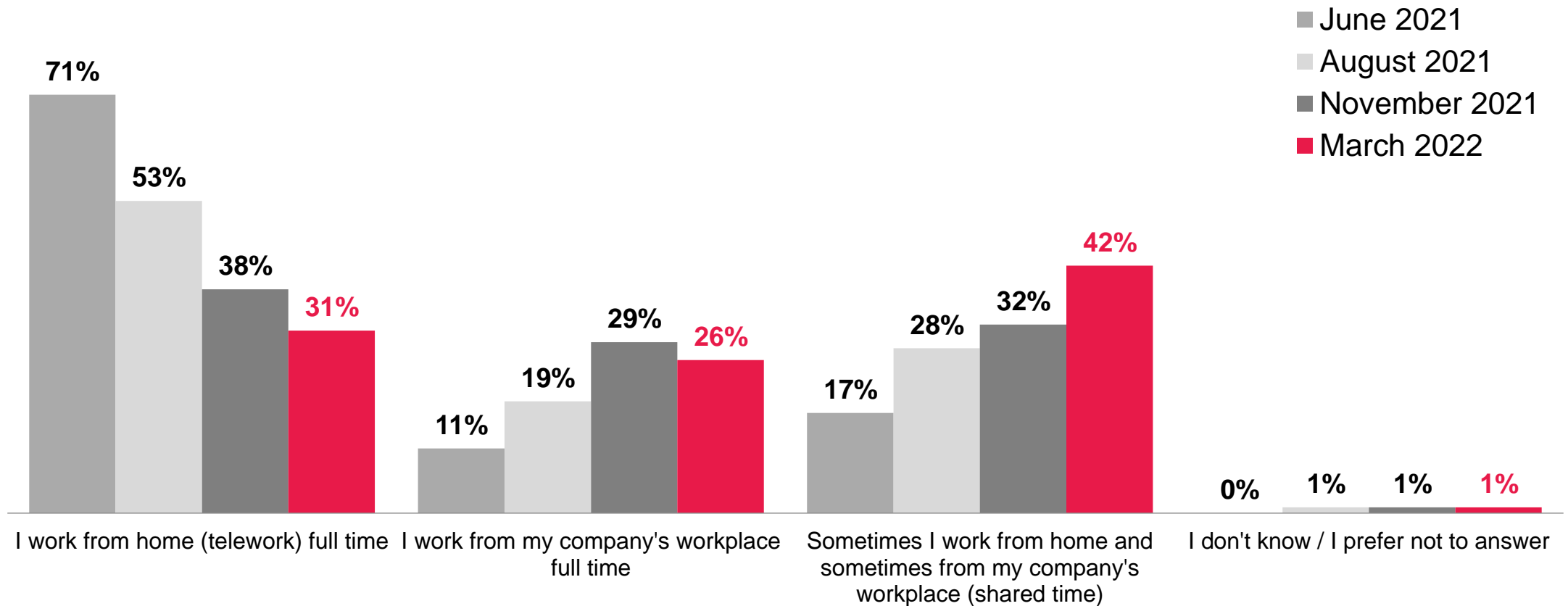
Workers are learning to live with the virus and are comfortable with return to the office



Q13. Some companies began to return to in-person work on February 28, while others haven't. As of today, do you feel comfortable progressively returning to work at the office/workplace?

Base: All respondents (n=727)

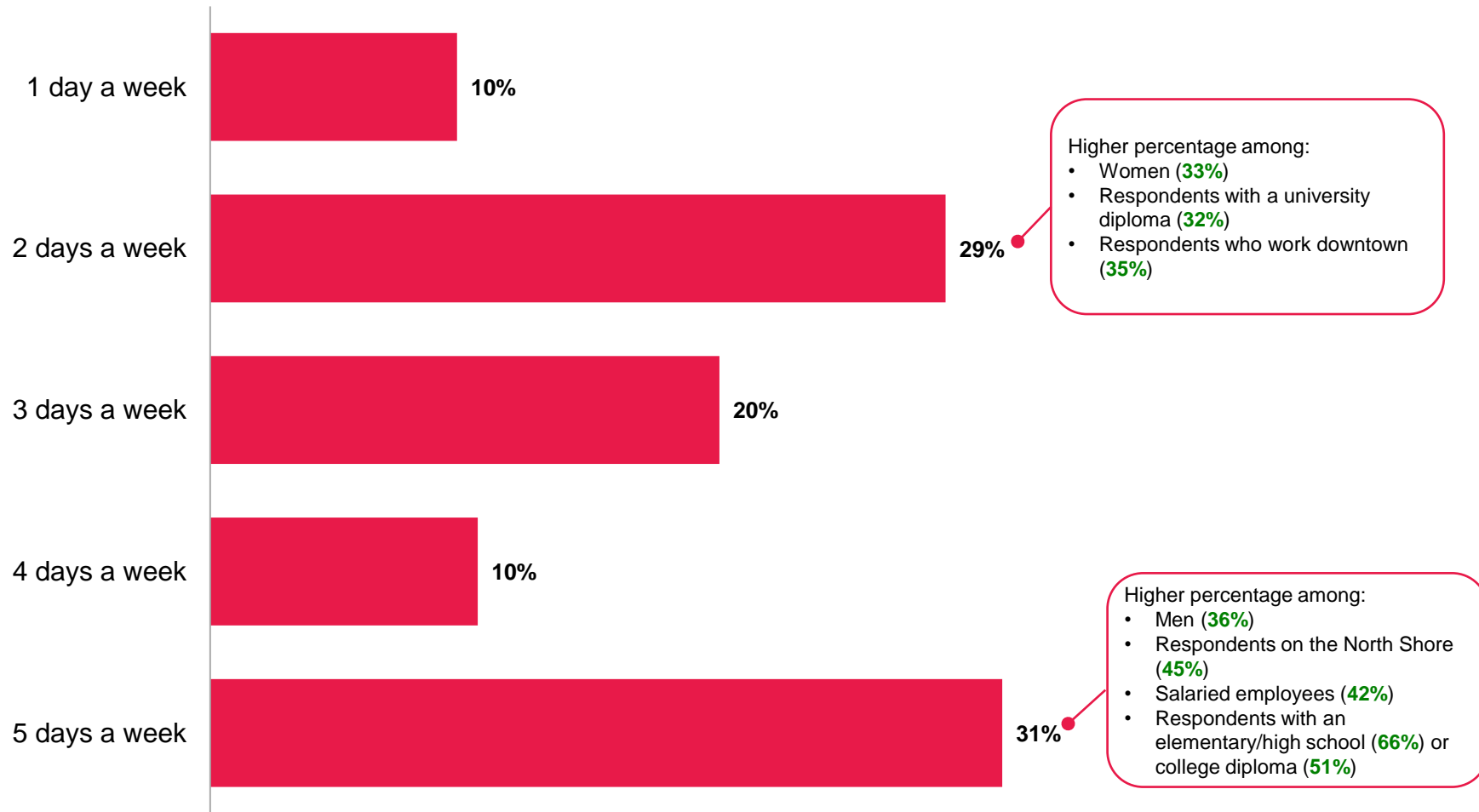
More and more workers are returning to the office



Q1. Which situation, among the following, best illustrates your current work environment?

Base: All respondents (n=727)

Close to a third of the workers who have returned plan to go to the office 5 days a week



Q402. In general, since you started going back to the office, how often do you go to the office or plan to go in the next few weeks?

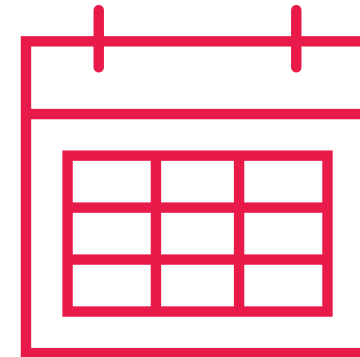
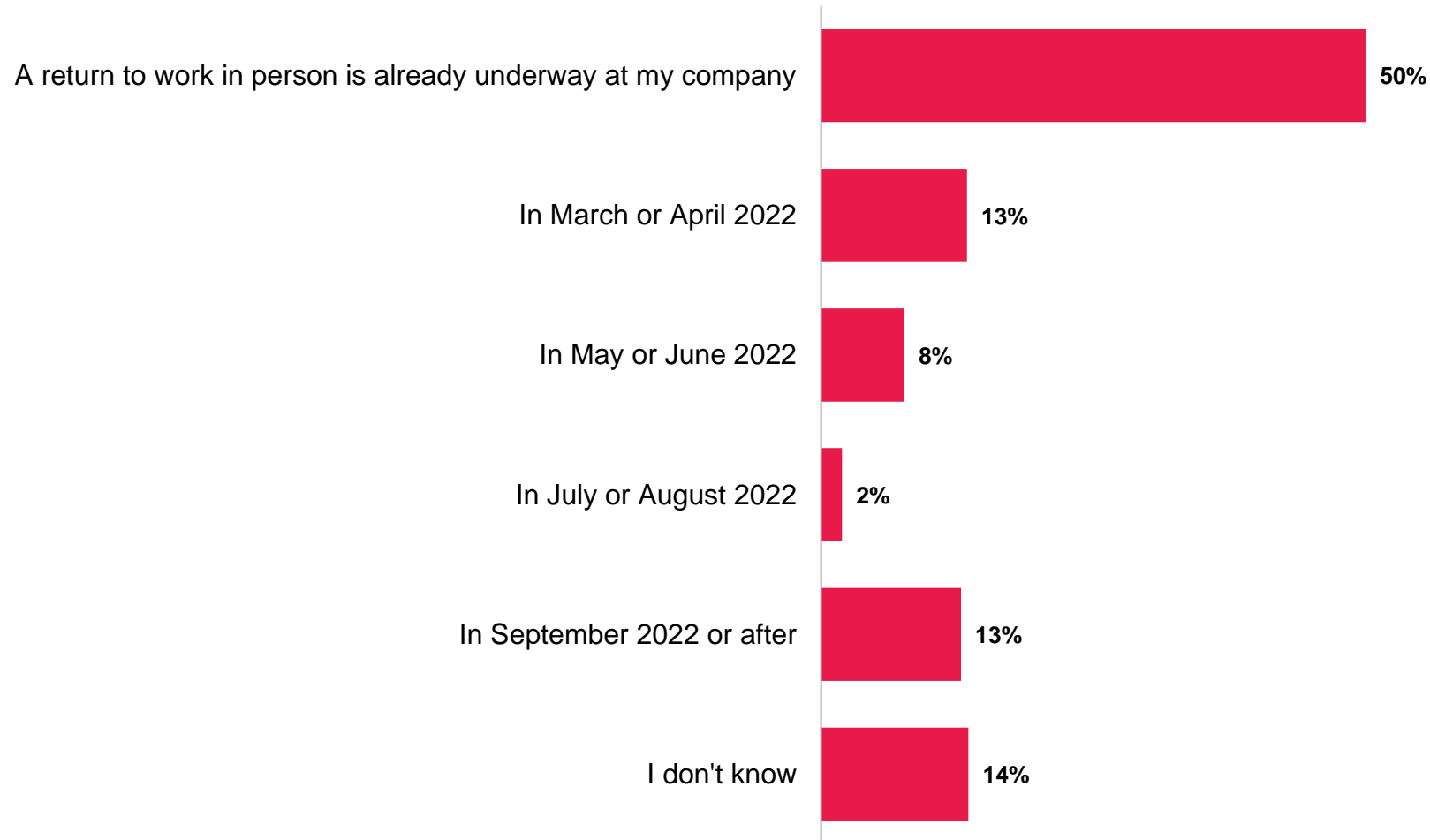
Base: Workers who are at the office full time or part time (n=496)

New question, no comparison possible.



The majority of companies began the return to in-person work on April 1.

The others planned to follow suit in the coming weeks.



Q14. When would you feel most comfortable progressively returning to work in person?*

Base: All respondents (n=727)

*Response choices were modified. For this reason, no comparison is possible.

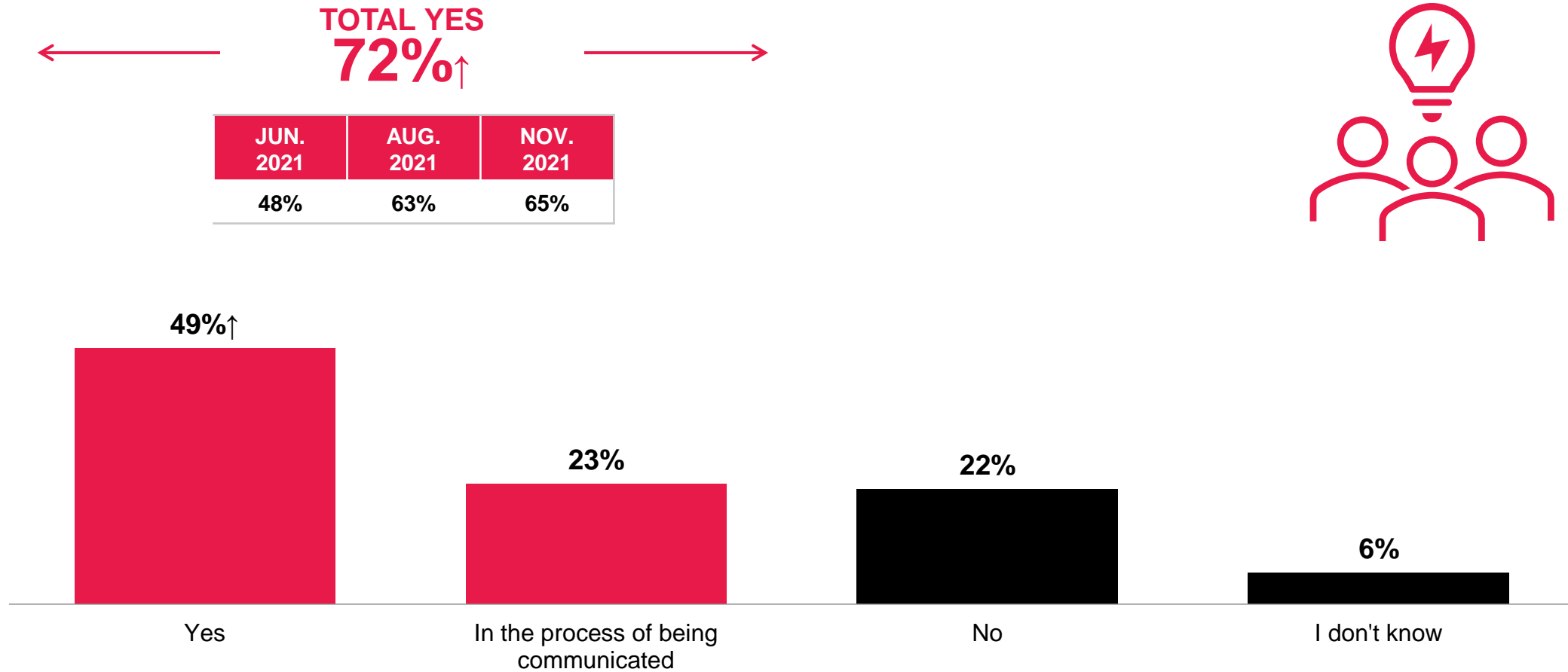
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**Employers are
making it easier
for their
employees to
return to the
office**

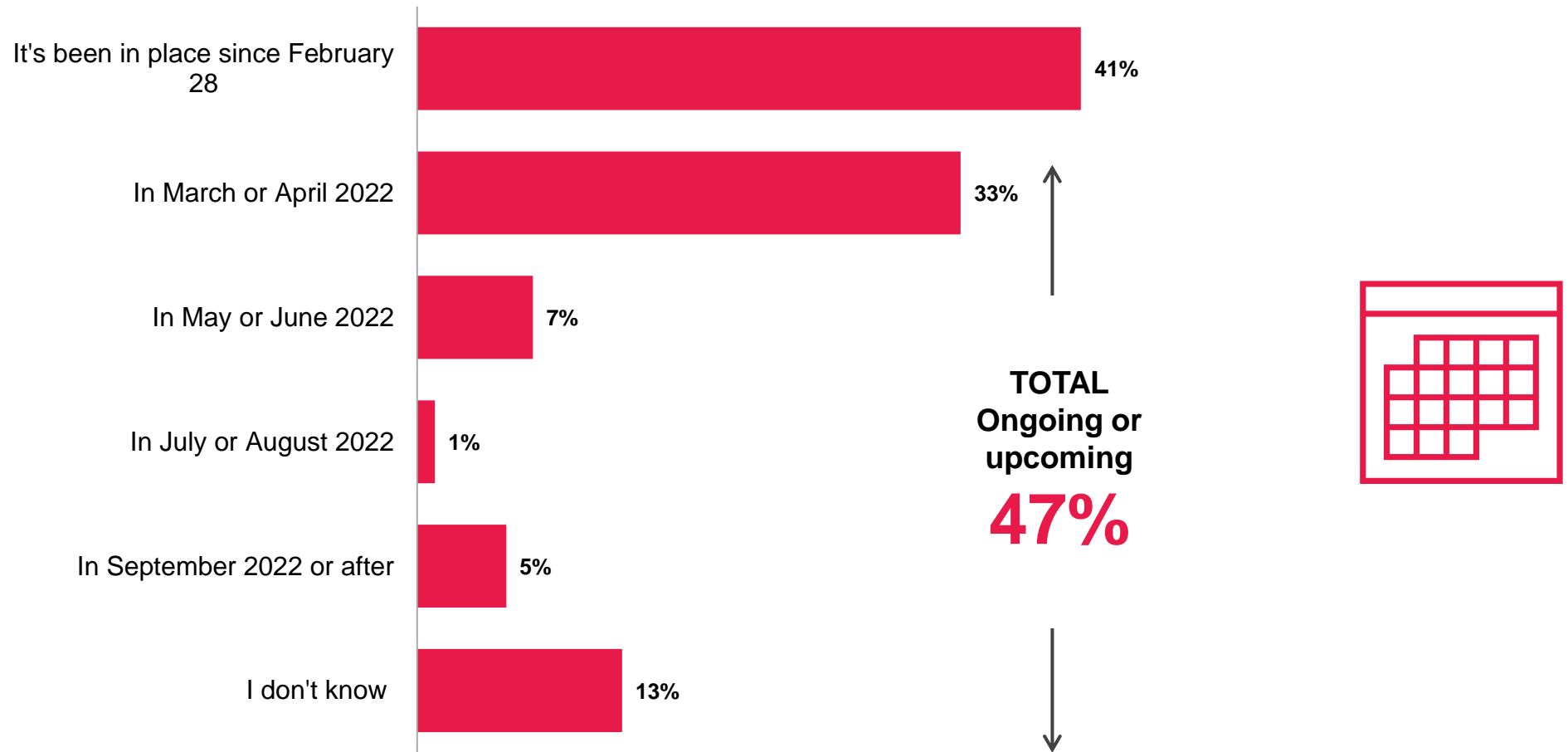


More and more employers are sharing their return-to-work plans



Q21. Has a return-to-work plan been provided by your employer?
Base: Employees (n=360)

The return-to-work plans have already been implemented or are being implemented in most companies.

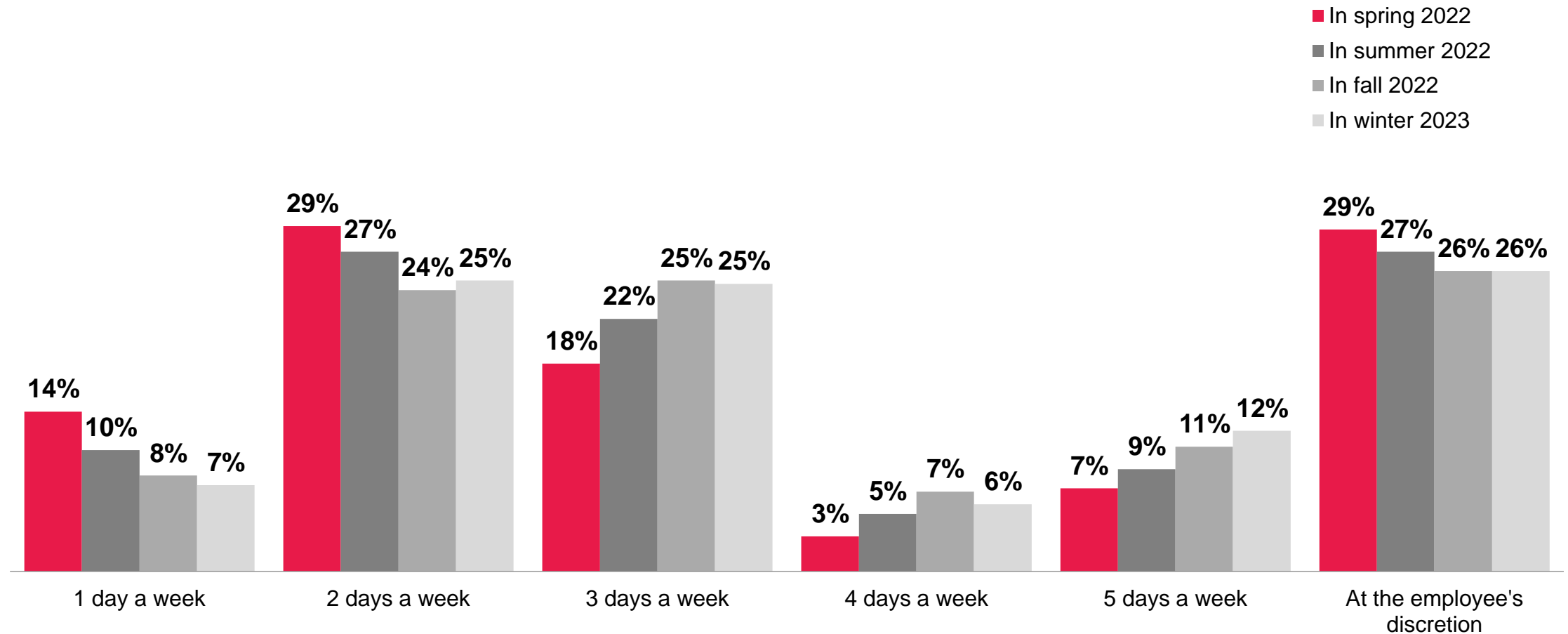


Q501. Considering that the mandatory telework directive has just been lifted, when do you expect to implement your plan for returning to the office?

Base: Respondents who are managers (n=367)

New question, no comparison possible.

Employers expect their employees to return in the spring for two days a week or according to their choice.

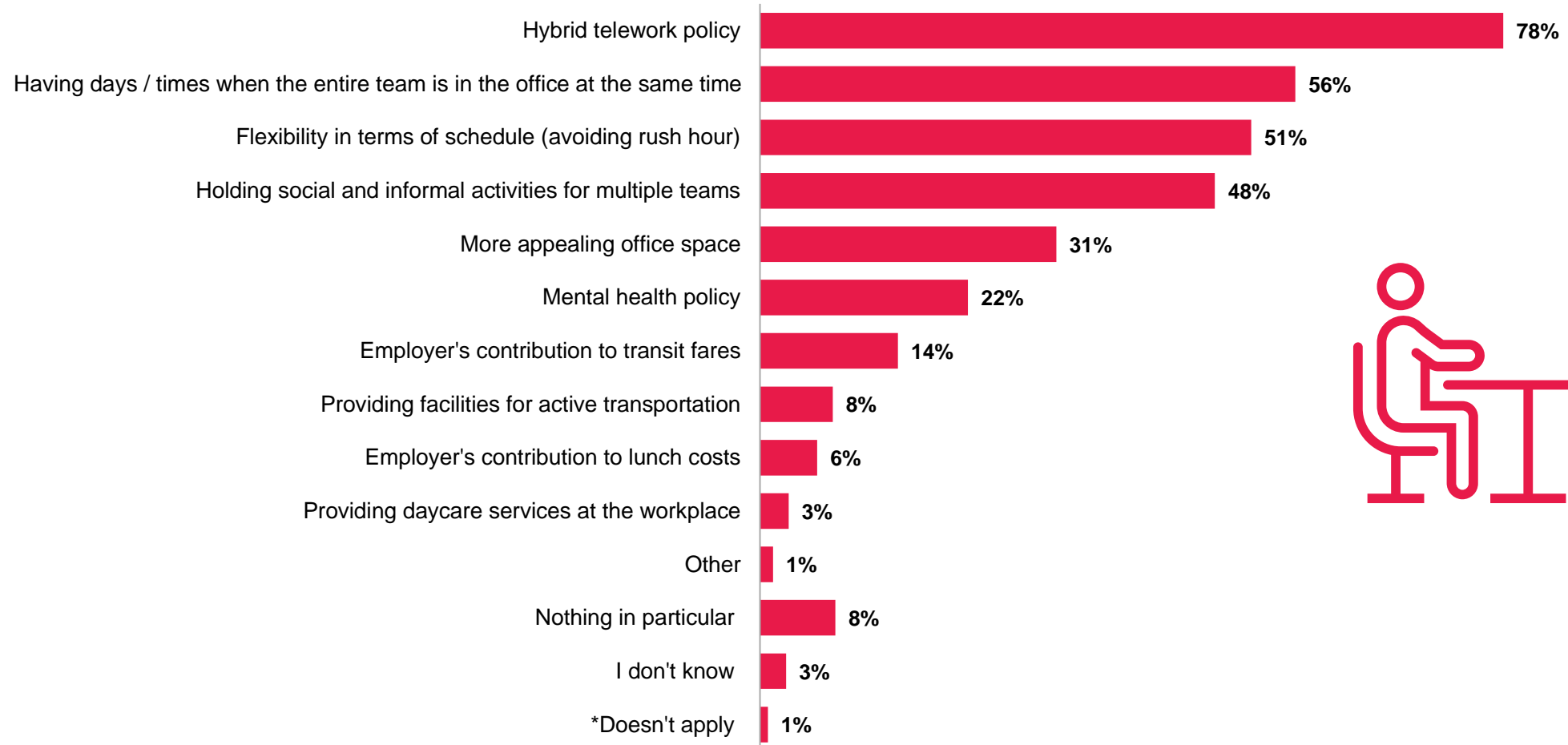


Q502. In general, how often will you ask your employees to be at the office?

Base: Respondents who are managers (n=367)

New question, no comparison possible.

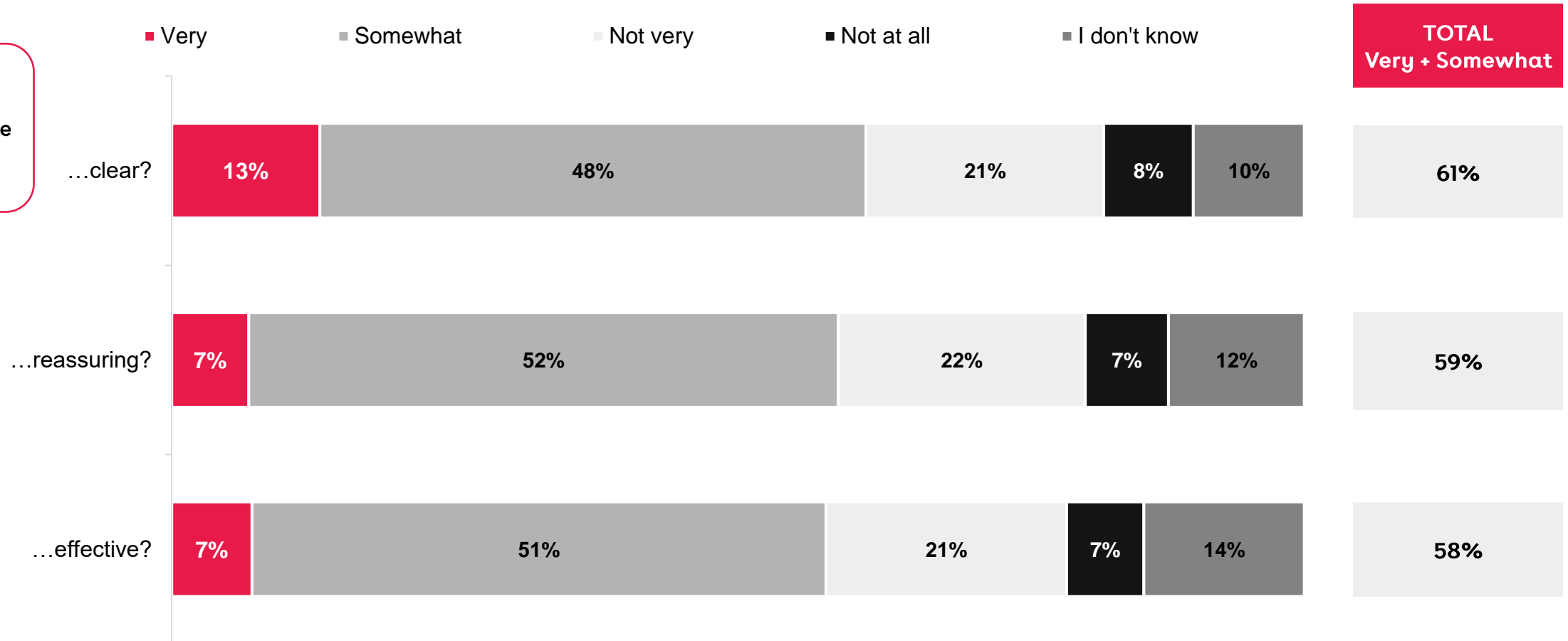
The ideal way to make it easier for employees to return is to promote a hybrid work policy that centres around teamwork and schedule flexibility.



Q503. Which of the following elements do you plan to implement to make it easier for employees to return to the workplace?
 Base: Respondents who are managers (n=367)
 Multiple answers: Since respondents are able to give multiple answers, the total may exceed 100%.
 New question, no comparison possible. *Spontaneous answers provided in "other"

The government directives for the return to the office are clear, reassuring and effective

Are the government directives for the return to the office...



Q505. In a context where you, as an employer, must once again prepare for your employees' return to the office, to what extent are the government's return-to-work guidelines...

Base: Respondents who are managers (n=367)

New question, no comparison possible.

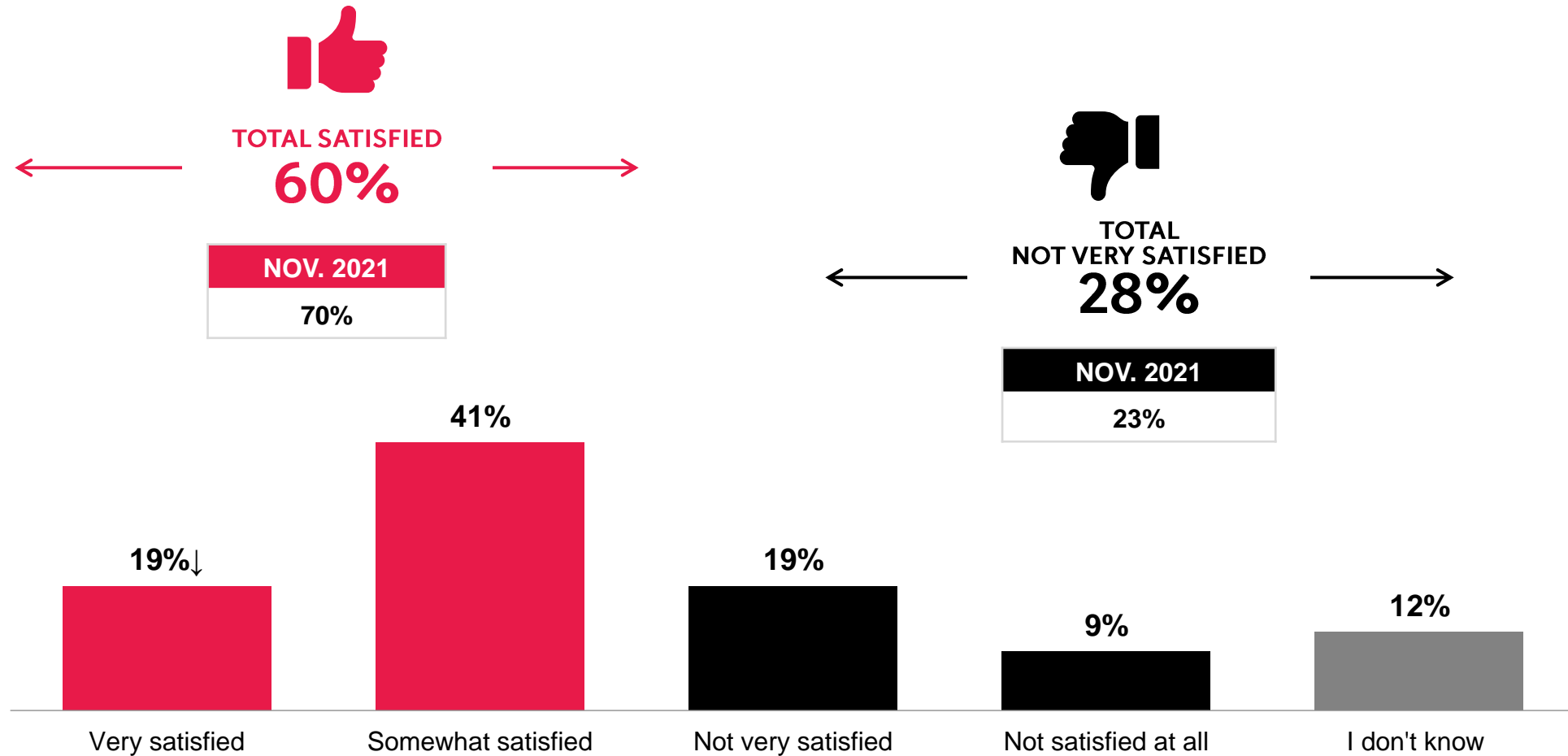
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Worker satisfaction with the return



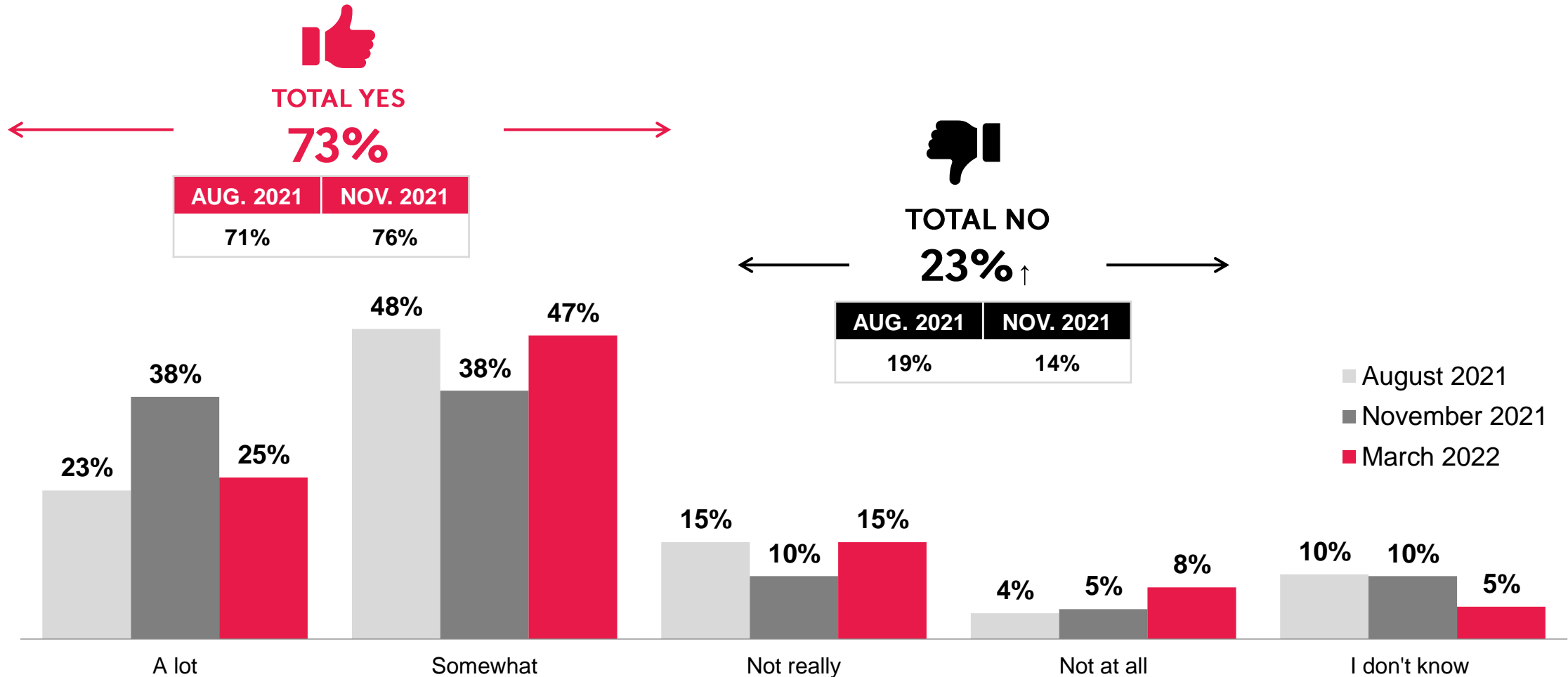
The workers are satisfied with the experience their employer is offering them in the office



Q11B: As your return to the office is already underway, how satisfied are you with the employee experience offered by your employer to ensure that the return is appealing?

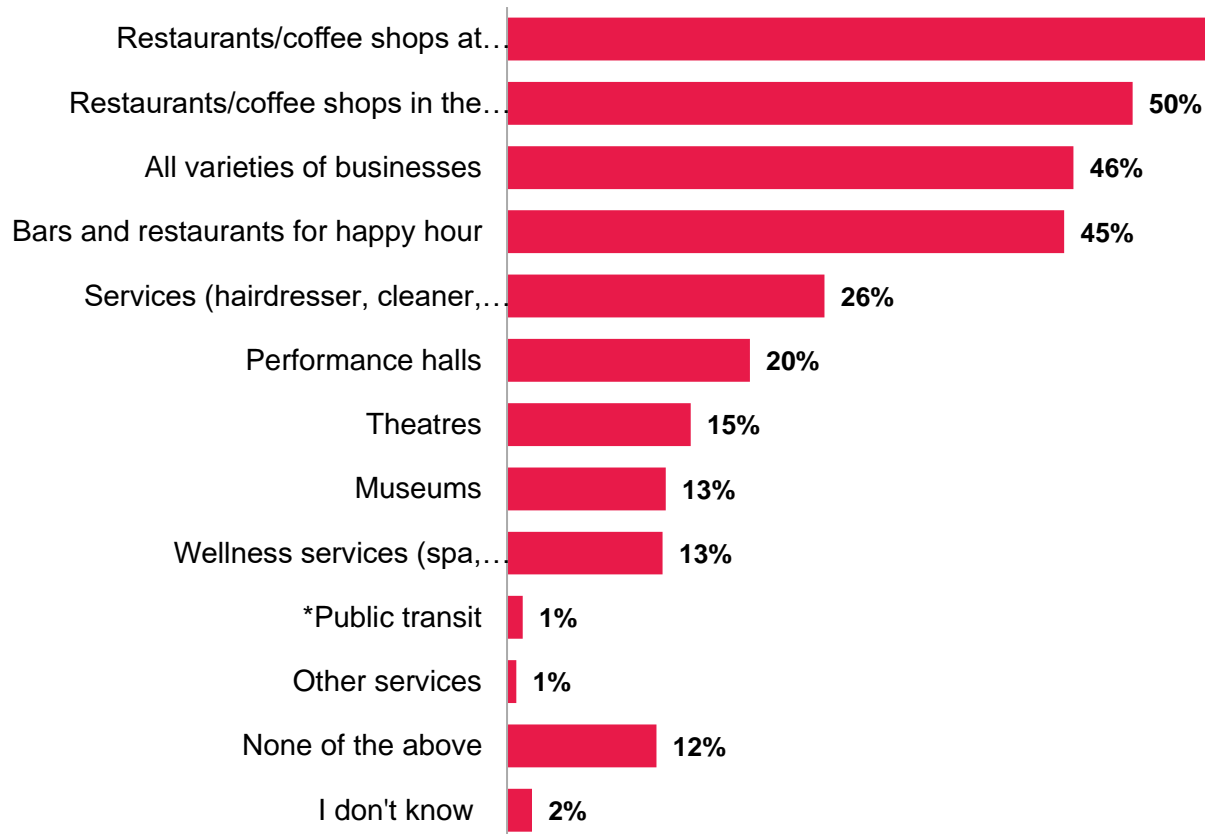
Base: Employees whose return to the office is already underway (n=230)

The workers who are aware of their employer's return to work plan are satisfied



Q21B. Does the return-to-work plan meet your expectations in terms of your employer's responsibility to make sure the employees' return to the office is safe?
Base: Employees who say a return-to-work plan has been or is being provided (n=259)

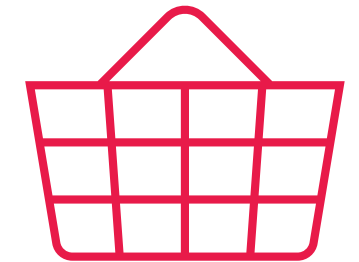
On average, workers expect to spend up to \$106 per week downtown



Total spent per week

n= 344

\$50 or less	34%
\$51–\$100	20%
More than \$100	21%
I don't know	24%
Average	\$106



- Higher percentage among:**
- Men (**\$120**)
 - Age 50 and up (**\$126**)
 - Residents of the Island of Montréal (**\$117**)
 - Executives (**\$124**)
 - Respondents with university degrees (**\$109**)

Q404. Since you started going back to the office or when you do go back, what services did or will you use?*

Base: Downtown workers (n=400)

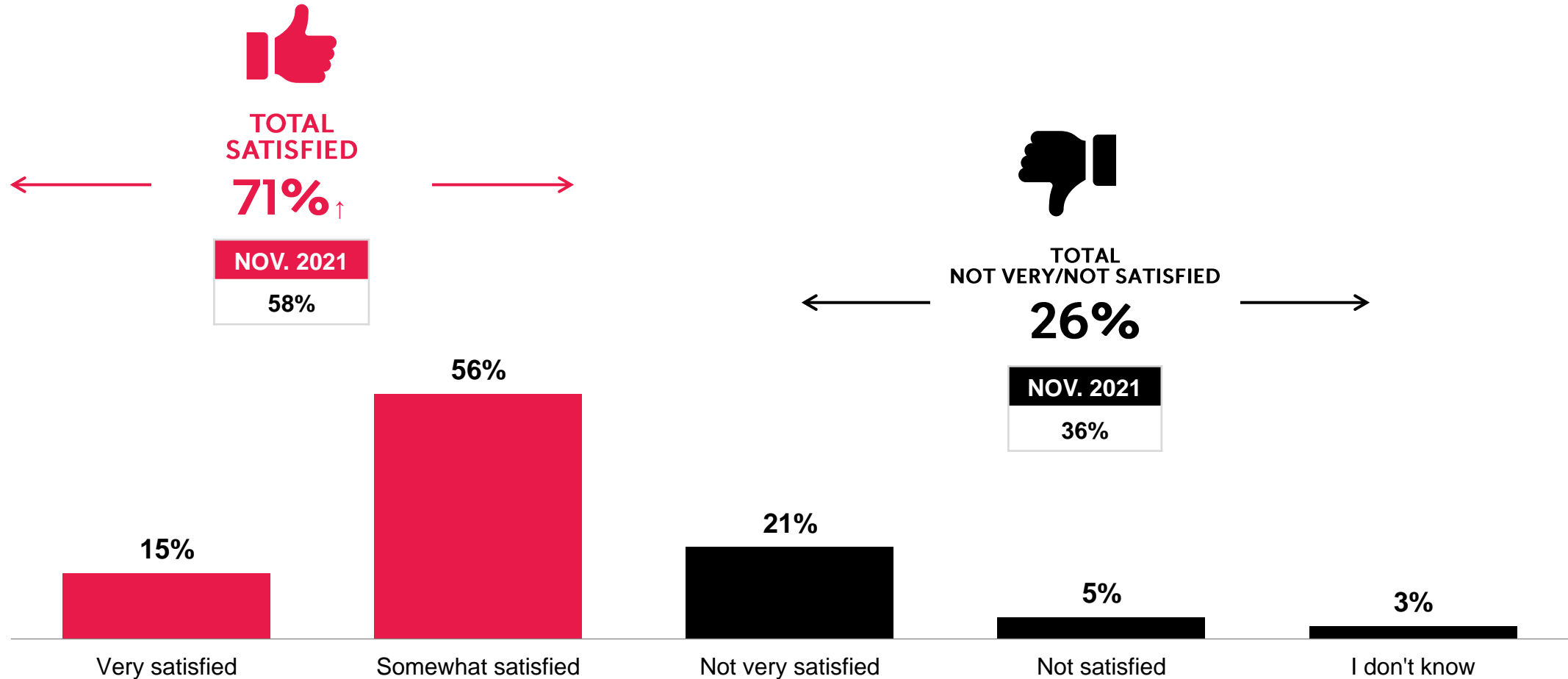
Q404B. Thinking of all the services you have used or plan to use, how much do you anticipate spending per week?*

Base: Workers who plan to use services downtown (n=344)

**New question, no comparison possible. Multiple answers: Since respondents are able to give multiple answers, the total may exceed 100%.

*Spontaneous answers provided in "other"

Satisfaction with the commercial, food and cultural services downtown is rising



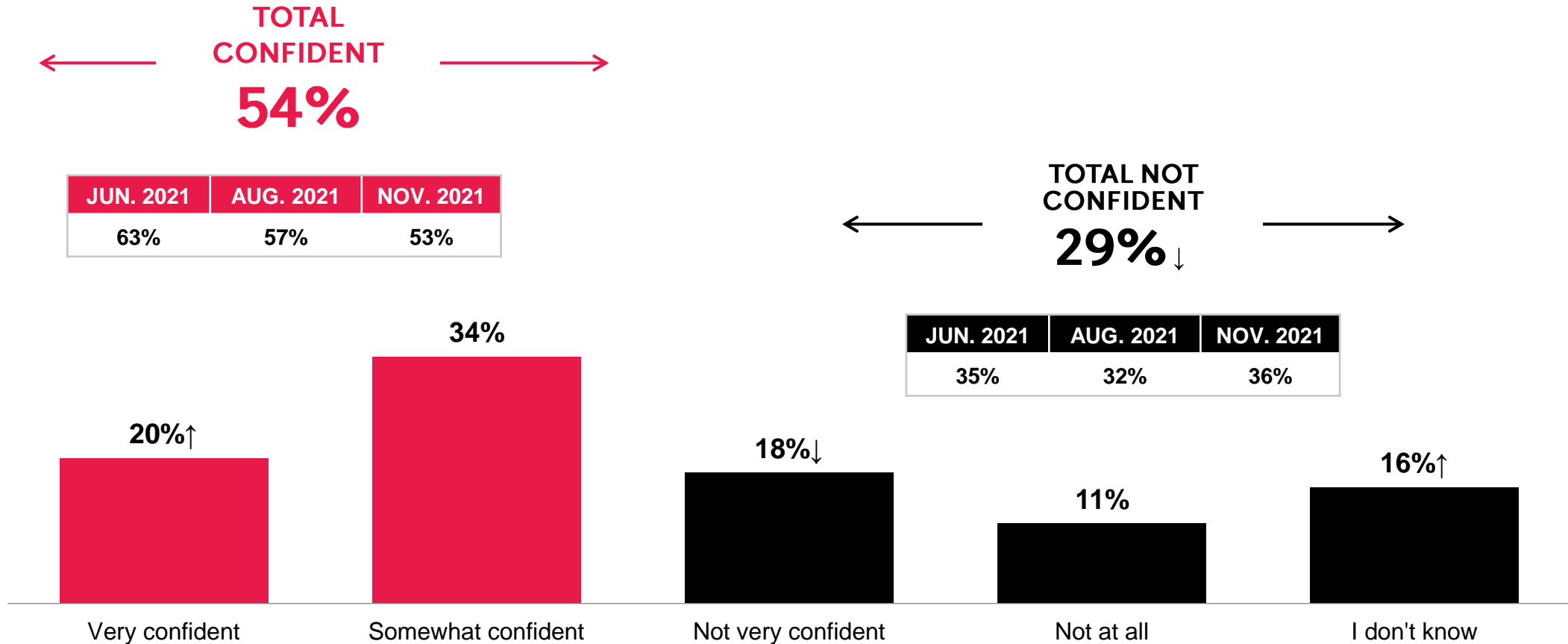
Q11A: As your return to the office is already underway, how satisfied are you with the downtown area's commercial, food, and cultural offer right now?
Base: Respondents who have already started to return to the office and who work downtown (n=260)

A large majority of workers rate their mental health as good both personally and professionally



Q301: After more than two years of the pandemic, how would you rate your mental health?
 Base: All respondents (n=727)

More than half of workers have confidence in the health measures implemented on public transit, but 29% still need to be convinced



Q3. To what extent are you confident in the sanitation measures in place on public transit so as to resume taking public transit when you return to your workplace?*

Base: All respondents (n=727)

*Modification of the question in August 2021. In June 2021, the question was: "How confident are you that public transit (metro, bus, train) will be safe in the coming months?"

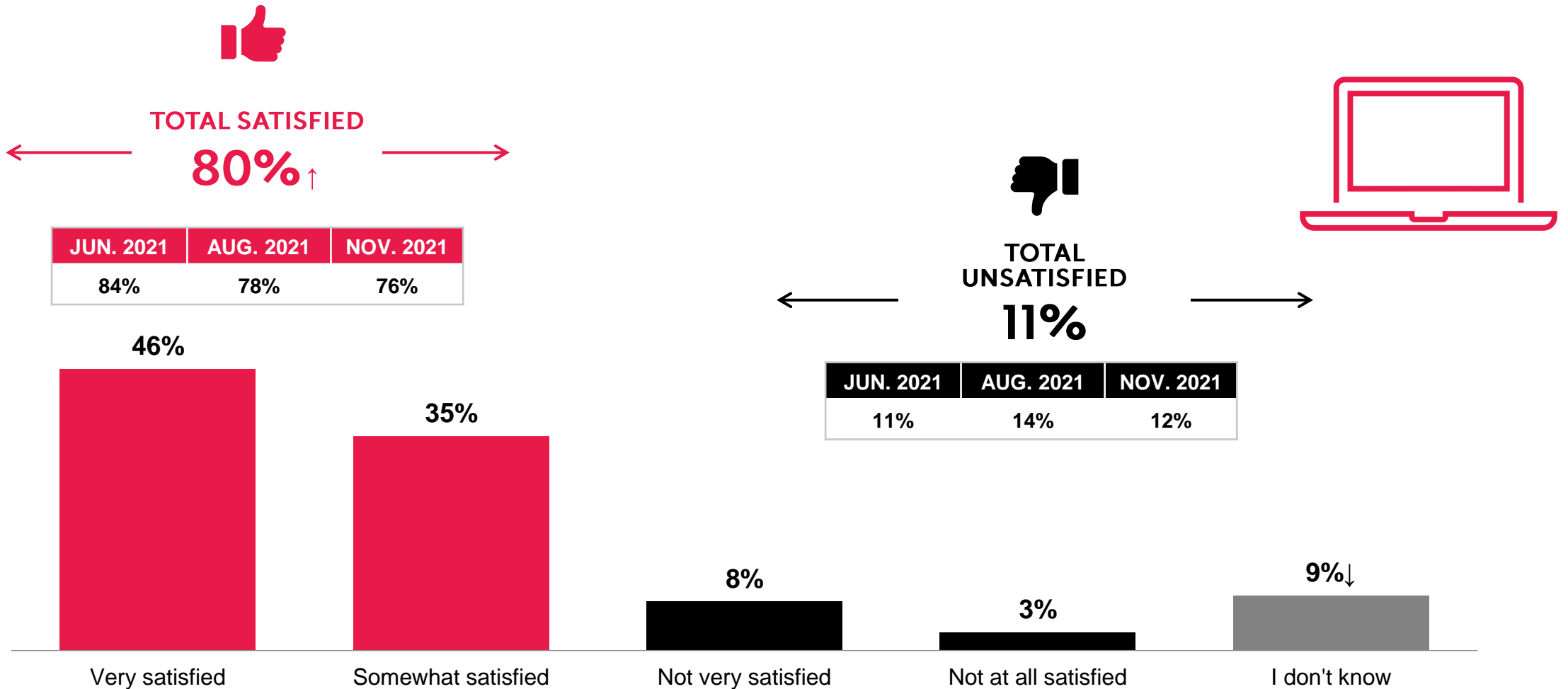
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The challenges of hybrid work



Enjoyment of telework is stable



Q5. How satisfied are you with your telework experience in general?

Base: All respondents (n=727)

Loss of team spirit remains the greatest challenge in relation to telework for executives



Q401: What management issues do you currently face with telework?

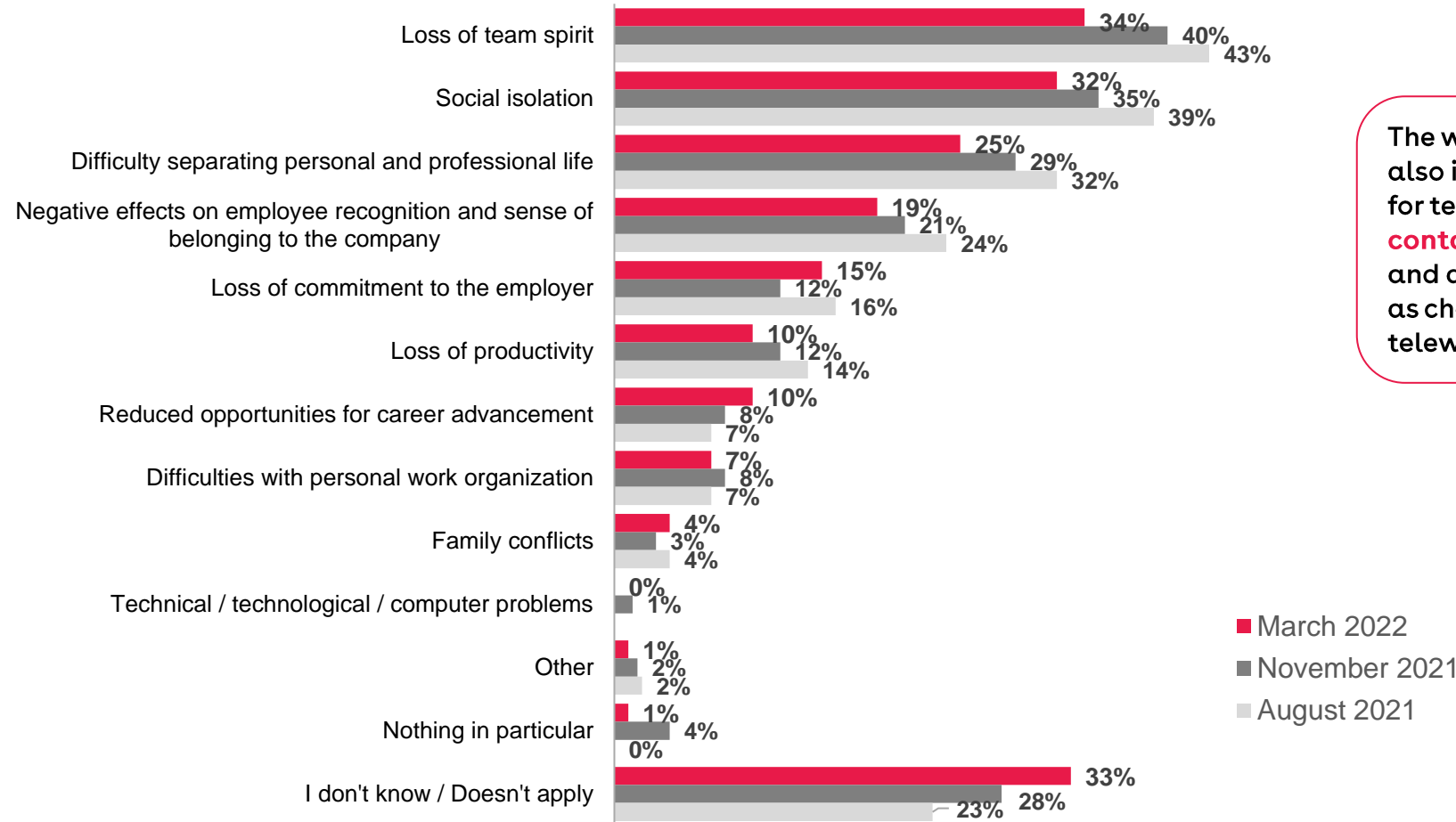
Multiple answers: Since respondents are able to give multiple answers, the total may exceed 100%.

*New question, no comparison possible.

**Spontaneous answers provided in "other"

Base: Respondents who are managers (n=367)

Like executives, workers are negatively affected by the loss of team spirit during telework – Social isolation is also a major issue



The workers who were polled also identified **unsuitable space for telework, a lack of direct contact, a heavier workload and a lack of available support** as challenges related to telework.*

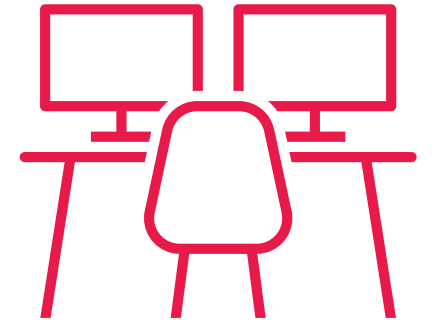
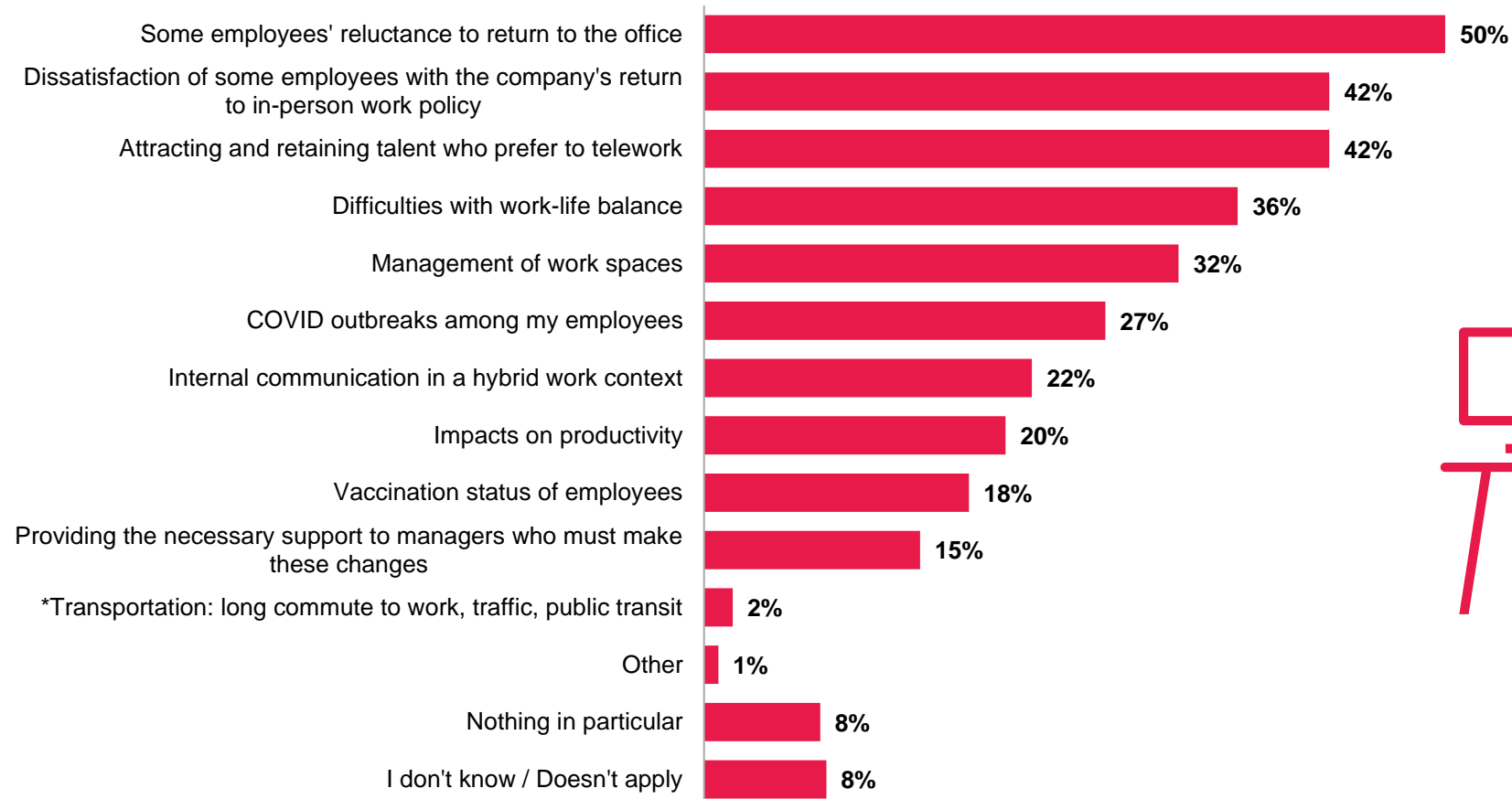
Q201. What professional issues do you currently face with telework?

Multiple answers: Since respondents are able to give multiple answers, the total may exceed 100%.

*Spontaneous answers provided in "other"

Base: Respondents who are employees (n=360)

The challenges to be overcome during the return to in-person work



Q504. What issues do you anticipate with a return to in-person work?

Base: All respondents (n=727)

Multiple answers: Since respondents are able to give multiple answers, the total may exceed 100%.

New question, no comparison possible. *Spontaneous answers provided in "other"

Conclusion

THE RETURN IS CONFIRMED

More and more workers have begun their return to the office, some full time and some part time.

A SATISFACTORY RETURN

Workers have reiterated their satisfaction with the return-to-work plans created by their employers and the food, commercial and cultural services offered in downtown Montréal.

A FRIENDLY RETURN

Workers are enthusiastic about the idea of reconnecting with their work colleagues and consuming downtown, whether that means returning to the office at the same time as the rest of the team, going to have a morning coffee, eating lunch in a restaurant, networking in a bar in the evening or shopping after working hours.

SOME WORKERS NEED REASSURANCE

29% of workers are still unconvinced about the health measures implemented on public transit. A broad effort needs to be made to reassure workers and all users to ensure a safe return to the office.

NEXT STEPS

In the coming months, the Chamber of Commerce of Metropolitan Montreal will continue providing employers and workers with resources and tools by means of various events and publications to support their return to the office towers.

On April 22, the Chamber launched its [Espaces et cie](#) platform, a free solution for listing and finding office space in downtown Montréal.

Go to [our website](#) for more details about all of our tools and the rest of our initiatives, and stay tuned!



Check out the platform

ESPACES 
ET CIE



**Create your free profile and rent or
sublease your office space easily, right
now!**



**The Chamber of Commerce of Metropolitan
Montreal team is ready to support you
throughout the process.**