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Extensive survey on getting workers back to the downtown office towers “Back to the office towers” series

Highlights – September 2, 2021

In collaboration with:

Leger

Québec 

 CC
la Chambre de commerce
du Montréal métropolitain

Last spring the CCMM launched **“I love working downtown,”** a platform to relaunch Montréal’s downtown supported by the Ministère de l’Économie et de l’Innovation. The CCMM is using that platform to introduce initiatives that will encourage workers to return to their offices, make downtown more attractive and showcase its distinctive flavour. All of that is aimed at increasing consumer traffic and preserving the vitality of an area that is so strategic for Québec’s and the city’s economy.

Against that backdrop the CCMM conducted a **series of surveys under the title “Back to the office towers,” addressed to both workers and employers in Montréal.** The surveys helped us define the issues related to workers going back, determine what needs to be done, and gather the resources to fund the required actions and strategies.

The first survey, conducted between May 27 and June 7, contacted 1,779 executives and employees. They shared their views about going back to the office, working from home, mobility issues and incentives that would make a return to the office more attractive.

The results of the first survey, released in June, revealed that a majority of respondents (53%) were eager to go back to the office. However, 84% of respondents were satisfied with the teleworking experience and 77% said it gave them a better work/life balance. When they were asked about going back, the workers made quite a point about the importance of flexibility and a gradual return. For 75% of employees, a more flexible work schedule would be an effective incentive their employers could offer to entice them back to the office.

On June 30 the Legault government announced that mandatory teleworking was over and that workers would go back to work gradually starting in the fall. That led the CCMM to conduct **its second "Back to the office towers" survey** between August 2 and 12, to sound out preferences and perceptions about returning to the office, again for the purpose of helping employers make their decisions.

After the survey ended, some significant administrative decisions were handed down: the Government of Québec changed its mind and announced that the return would be postponed due to the surging Delta variant.

The Government also announced that it was introducing a **vaccination passport requirement** for some businesses and their customers, opening the door to its use by employers who want to bring their workers back. The CCMM will go on monitoring the situation and finding out what businesses think.

The second survey revealed that **people are already returning to their offices**. 47% of the respondents had started the process, compared to only 28% in our previous June survey. Among them, 19% were back full time and 28% part time.

While the pandemic-related uncertainties are still ongoing, **health and safety** are the major concerns. Close to three quarters of the respondents were worried about going back and working alongside unvaccinated people. The same percentage were in favour of a mandatory vaccination passport for entering the workplace.

This return that a majority of workers is hoping for will only work if everyone involved in the downtown core works together and if hybrid models can be introduced, combining flexibility, safety, progressivity and attractiveness.

OBJECTIVES

The **Chamber of Commerce of Metropolitan Montreal (CCMM)** mandated **Léger** to survey executives and employees in Greater Montréal as to their attitudes, behaviour and level of comfort of about going back to work in the offices when that is permitted.

This report presents the **second set of findings** of that survey.

A sample of **1,079 executives and employees** of businesses located on the Island of Montréal, aged 18 and older and able to answer in French or English.

WHO?

18% are presidents or vice presidents, 28% are directors or managers, 34% are professionals and 14% are other office employees. 60% work downtown, 17% on the West Island, 13% in Montréal's East End and 9% in Montréal North.

WHEN?

The responses were collected from **August 2 – 12, 2021**.

CCMM sent emails to its members and Léger also approached its panellists (n=778 and n=301 respectively).

NOTE TO READERS

Figures have been rounded up, so some totals may be slightly off 100%.

DIFFERENCES BETWEEN SURVEYS 1 AND 2

Where the results are significantly different and relevant they are shown in a separate text box beside the overall results.

Figures in **bold green** indicate a percentage significantly higher than that of the other respondents. Conversely, figures in **bold red** indicate a percentage significantly lower than that of the other respondents.

Comparison between surveys

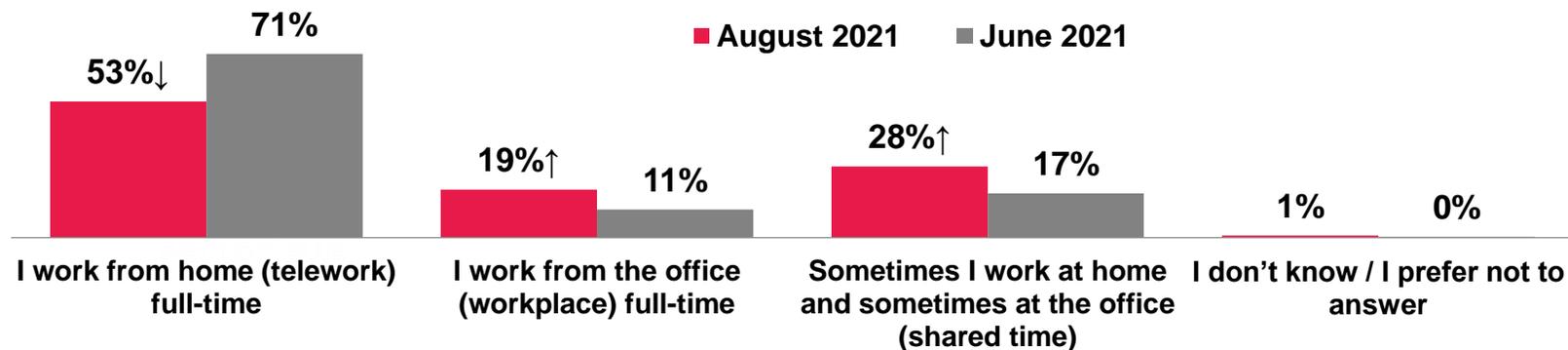
Where possible and relevant, the results of this study are compared with those of the first wave of **June 2021** (web survey conducted between May 25, and June 7, 2021, among **1,779 managers and employees of companies** whose workplace is located on the Island of Montreal, aged 18 and over and able to speak French or English).

An arrow pointing up ↑ indicates a **significantly higher** proportion than June 2021. An arrow pointing down ↓ indicates a **significantly lower** proportion than June 2021.

No arrow means that the proportions are statistically identical.

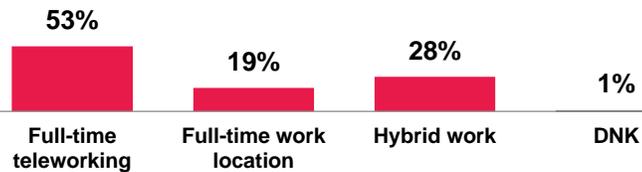
In the example below, the proportion of respondents who say they will be working from home full-time in **August 2021** is significantly lower than in **June 2021** (**53%** ↓ vs. **71%**).

On the other hand, the proportion of respondents who say they are working from the office full-time in **August 2021** is significantly higher than the result for **June 2021** (**19%** ↑ vs **11%**).

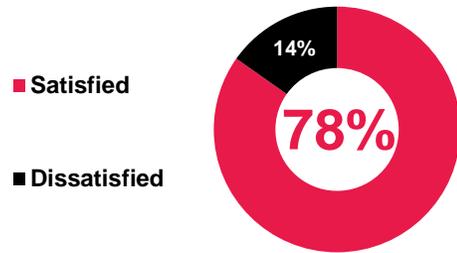


TELEWORKING ENVIRONMENT

CURRENT CONTEXT



OVERALL SATISFACTION WITH TELEWORKING



TOP 3 REASONS TO CONTINUE TELEWORKING

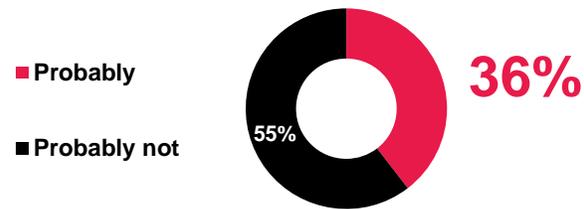
1. Significant time savings due to non-travel (32%)
2. Better work-life balance (29%)
3. More efficient from home (11%)

TOP 3 PROFESSIONAL ISSUES IN TELEWORKING

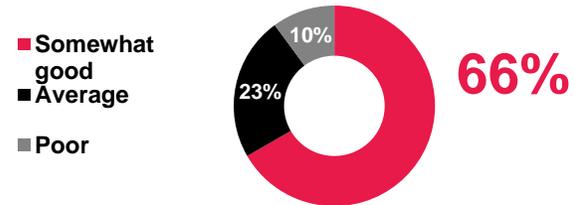
1. Loss of team spirit (43%)
2. Social isolation (39%)
3. Difficulty separating personal and professional life (32%)

IMPACT OF THE PANDEMIC

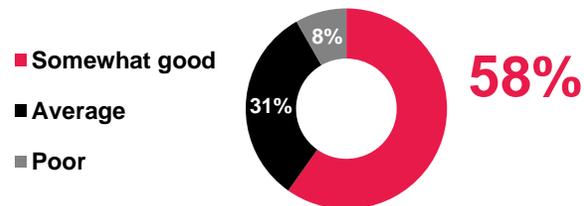
IMPACT OF TEAM SEPARATION ON WORK EFFICIENCY



MORALE AND MOTIVATION AT WORK AFTER MORE THAN A YEAR OF PANDEMIC



EMOTIONAL CLIMATE OF THE WORK TEAM AFTER MORE THAN A YEAR OF PANDEMIC



ALMOST HALF OF THE RESPONDENTS CONTINUE TO TELEWORK FULL-TIME AND THE MAJORITY ARE SATISFIED WITH THEIR TELEWORK EXPERIENCE

Just over one in two workers still say they telework full-time, a proportion that has declined since the last survey in favour of working in the office or workplace on a full-time or part-time basis.

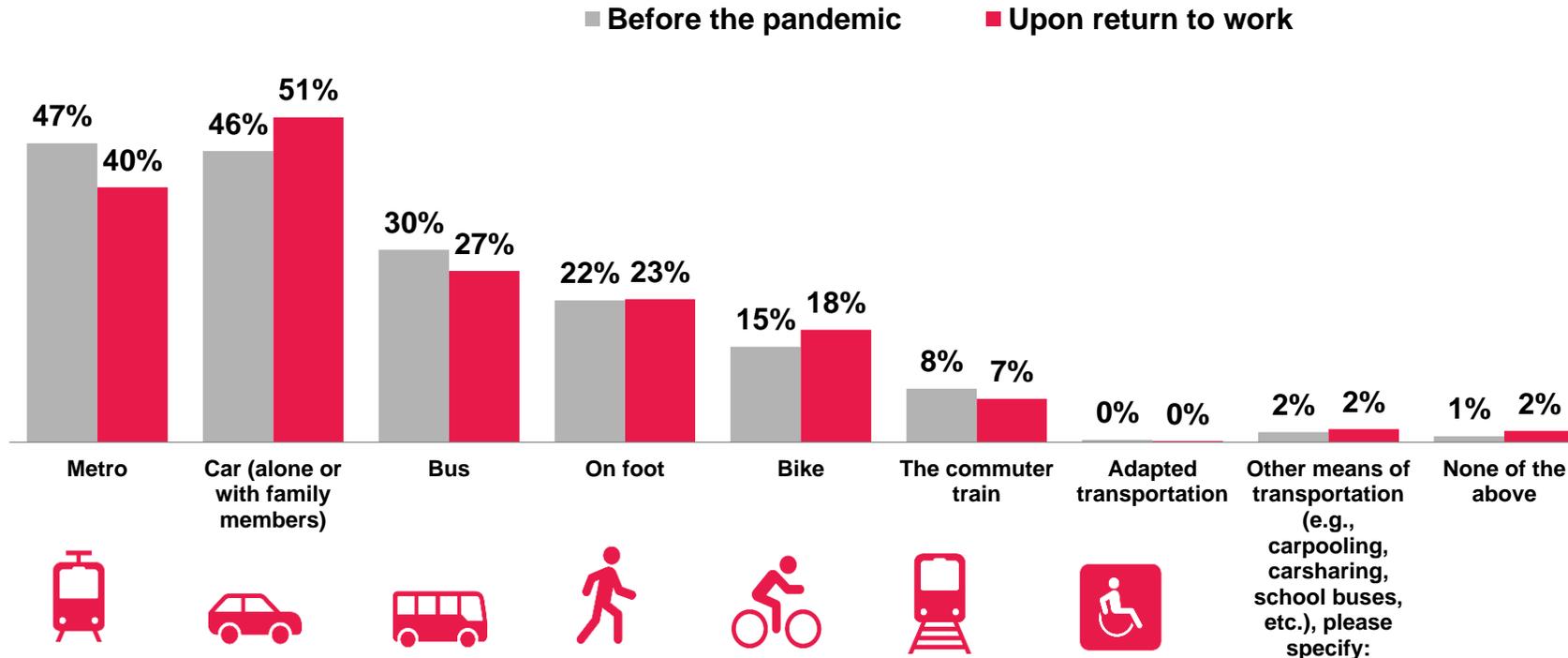
In general, most workers surveyed are satisfied with their telework experience after more than a year of the pandemic, although satisfaction is down from the June measurement.

The top three reasons why workers want to continue telecommuting are to save travel time, to have a better work-life balance, and to be more efficient at work. On the other hand, the main professional issues encountered in teleworking are the loss of team spirit, social isolation, and the difficulty of separating personal and professional life.

While one-third of respondents felt that team separation had an impact on work efficiency, most respondents were quite optimistic about work motivation and emotional climate after more than a year of the pandemic.

In addition, the feeling of being supported by colleagues, supervisors, and company management is down from the last survey.

Highlights | Transportation



WHILE RESPONDENTS SAID THAT THE SUBWAY WAS THEIR PRIMARY MODE OF TRANSPORTATION TO WORK PRIOR TO THE PANDEMIC, THE CAR WILL BECOME THE PREFERRED MODE OF TRANSPORTATION WHEN RETURNING TO WORK

It should also be noted that while the respondents stated that the Metro was their main mode of transportation to work before the pandemic, the car will be the preferred mode of transportation when they return to work. As in the June survey, public transit (metro, bus, and commuter train) will all see a slight decline in use after the pandemic in favour of other modes of transportation (car, bicycle, and walking in particular) according to workers.

It should be noted, however, that more than half of respondents say they are confident in the health measures in place on public transit but that this proportion is down from last June.

Q2A. Before the pandemic, what means of transportation did you use to get to your workplace?

Q2B. When you return to work in person, what means of transportation will you use to get to your workplace?

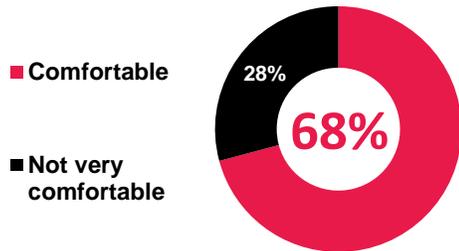
MULTIPLE ANSWERS: *Since respondents have the possibility to give up to four answers, the total may exceed 100%.

Base: All respondents (n=1,079)

Highlights | Back to work in the offices

RETURN TO THE OFFICE OR WORKPLACE

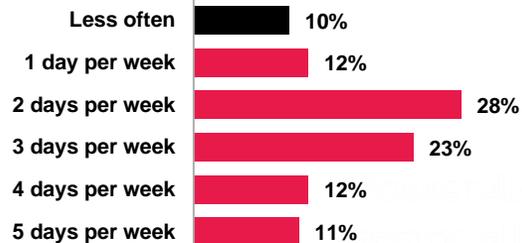
COMFORT WITH THE RETURN TO WORK



BEST TIME TO RETURN TO WORK



PREFERRED OPTION TO RETURN TO WORK



CONDITIONS AND INCENTIVES FOR RETURN

(among employees: n=512)

CONDITIONS FOR A SAFE RETURN



1. Limiting the number of employees in the workplace (50%)
2. The employer has a strong return-to-work plan that protects the health and safety of employees (48%)
3. Strict hygiene and cleaning protocol (43%)
4. The employer has the resources to take care of the health and well-being of employees (40%)
5. The employer informs employees of the level of risk in their office/workplace (32%)

INCENTIVES TO RETURN TO THE OFFICE



Being flexible with the schedule	72%
Making sure my entire team is present at the office at the same time	47%
Employer's contribution to transit fares	45%
More attractive office space	38%
Employer's contribution to lunch expenses	29%

ALTHOUGH THE MAJORITY FEEL COMFORTABLE RETURNING TO THE WORKPLACE, RESPONDENTS ARE NOT NECESSARILY IN A HURRY TO RETURN...

More than 2 in 3 workers say they are comfortable with returning to work—a similar measure to the last study.

However, they are divided as to when they would like to return to the workplace, with a quarter wanting to return as early as September and just under a third preferring a return in 2022. However, 23% of respondents are already back in the office.

As in the June study, when returning to work, respondents' preferred options are 2 or 3 days a week at the workplace.

The five aspects and conditions that would most reassure workers for a safe return to the workplace are limiting the number of employees in the workplace, having a strong return-to-work plan, enforcing a strict hygiene and cleaning protocol, having resources to care for the health and well-being of employees, and informing employees of the level of risk in their workplace.

...AND THEY WILL NEED FLEXIBILITY.

To encourage them to return to the workplace, employees would most like their managers to be flexible on scheduling. To a lesser extent, they would also like employers to ensure full team days, contribute financially to transportation, ensure more attractive offices, and contribute to lunch costs.

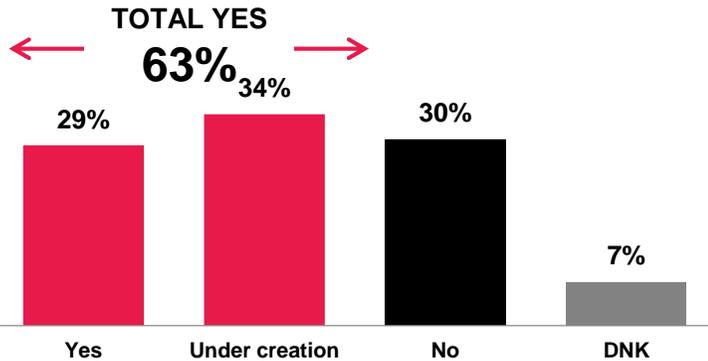
It is also worth noting that 2 out of 5 employees may leave their employer if they are not flexible about their working hours. One third of workers might also leave if the proposed return plan does not suit their telework/in-person preferences.

Highlights | Back to work in the offices

RETURN-TO-WORK PLAN

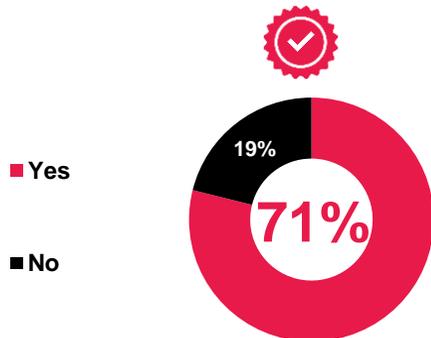
PROVISION OF A RETURN-TO-WORK PLAN BY THE EMPLOYER

(among employees: n=512)



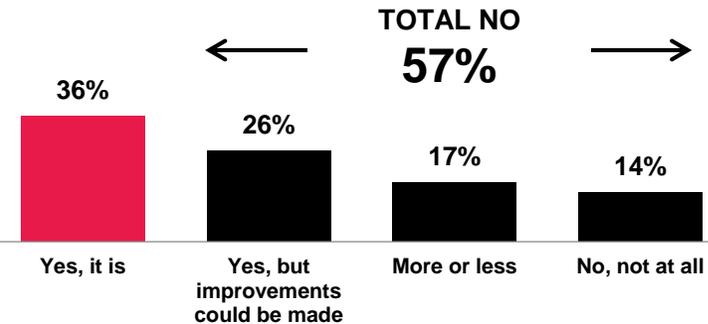
ADEQUACY OF THE RETURN-TO-WORK PLAN IN MEETING SAFETY EXPECTATIONS

(among respondents who were given a return plan: n=320)



IDEAL OFFICE AND WORK ENVIRONMENT

OFFICE ADAPTED TO THE NEEDS OF THE EMPLOYEES



AREAS FOR IMPROVEMENT IN THE OFFICE

(among respondents who say their offices are inadequate: n=613)

1. Better air quality (52%)
2. Contactless doors (42%)
3. More distance between offices (39%)

IDEAL POST-PANDEMIC WORK ENVIRONMENT

My home	27%
One closed office per person	20%
An open area with cubicles and partitions	15%

MORE AND MORE EMPLOYERS ARE COMMUNICATING THEIR RETURN TO WORK PLANS, WHICH IN MOST CASES MEET EMPLOYEES' EXPECTATIONS

Nearly two in three employees say a return-to-work plan has been or is being provided by their employer, a significantly higher proportion than in June 2021.

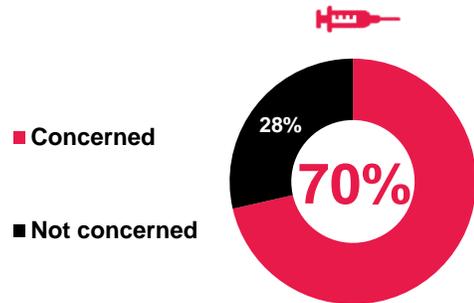
Of those respondents who have been provided with a return-to-work plan, the majority say that the plan meets their expectations of their employer's responsibility to ensure the safe return of employees to the office.

However, when asked if their current offices are suitable for their needs, only one-third of respondents said they were. The main areas for improvement or for addition in the offices of those who are not entirely satisfied are air quality, the addition of contactless doors, and the distance between offices.

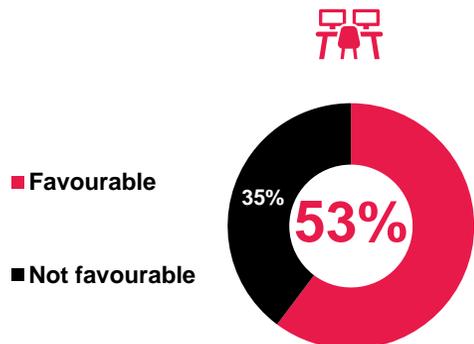
If asked to choose their ideal post-pandemic work environment, just over a quarter of workers would choose their home, while one in five would prefer one closed office per person. To a lesser extent, an open area with cubicles and partitions (15%), shared workspaces (11%), an open area without cubicles and partitions (9%), or an enclosed office for a few people (7%) would also be ideal work environments for post-pandemic respondents.

WORKING WITH UNVACCINATED PEOPLE

CONCERNS ABOUT WITH RETURNING TO WORK WITH UNVACCINATED PEOPLE

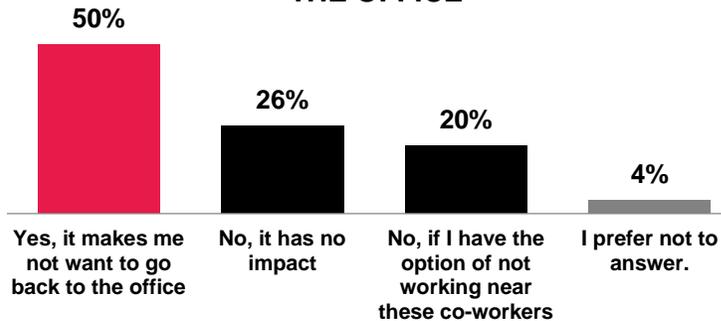


DESIGNATION OF A WORKSPACE FOR THOSE WHO ARE DOUBLE VACCINATED

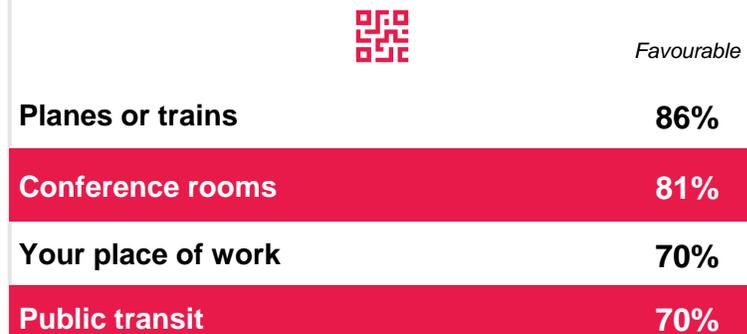


RETURN TO THE OFFICE AND PROOF OF VACCINATION

IMPACT OF HAVING UNVACCINATED COLLEAGUES ON THE DESIRE TO RETURN TO THE OFFICE



PROOF OF MANDATORY VACCINATION FOR ACCESS TO SERVICES OR PLACES



STRONG CONCERN ABOUT RETURNING TO WORK WITH UNVACCINATED PEOPLE

Seven in ten workers say they are somewhat or very concerned about returning to work with unvaccinated people, a proportion that increases among workers aged 50 or older and among business executives.

On the other hand, if the employer decides to designate a workplace for those who are double vaccinated which is separate from those who have not received two doses of a vaccine, just over half of respondents would support this, while one-third would oppose it.

Having unvaccinated co-workers appears to have a mixed impact on respondents, with nearly half of workers saying it would cause them to not return to the office, while the other half said it had no impact on their return to the office. It should be noted, however, that of this latter group, slightly less than half would return to their place of work provided there was an opportunity to avoid working in close proximity to unvaccinated co-workers.

Finally, most workers support proof of vaccination for access to various services or locations. Specifically, a large majority of respondents support proof of vaccination for access to planes, trains, and conference rooms, while seven out of ten respondents would support proof of vaccination for access to their workplace and public transit.

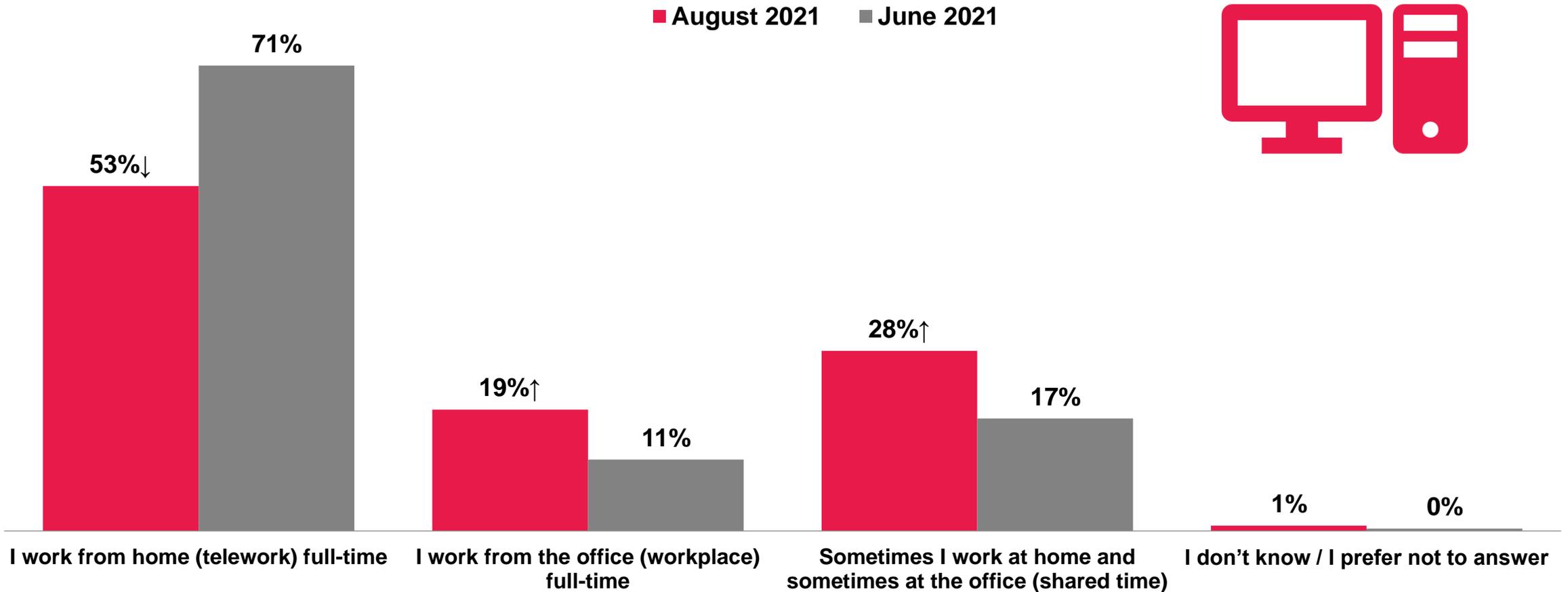
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Back to work from the workers' perspective



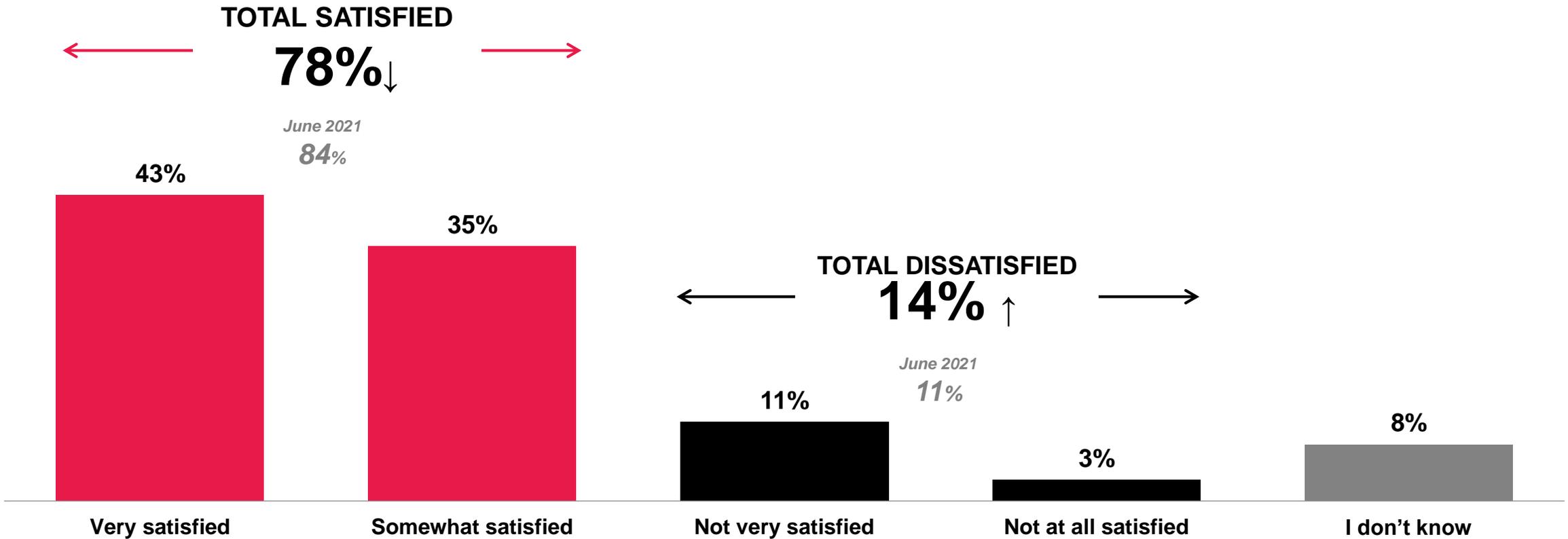
What the workers are doing right now



Q1. What is the situation, among the following, that best illustrates your current work environment?

Base: All respondents (n=1,079)

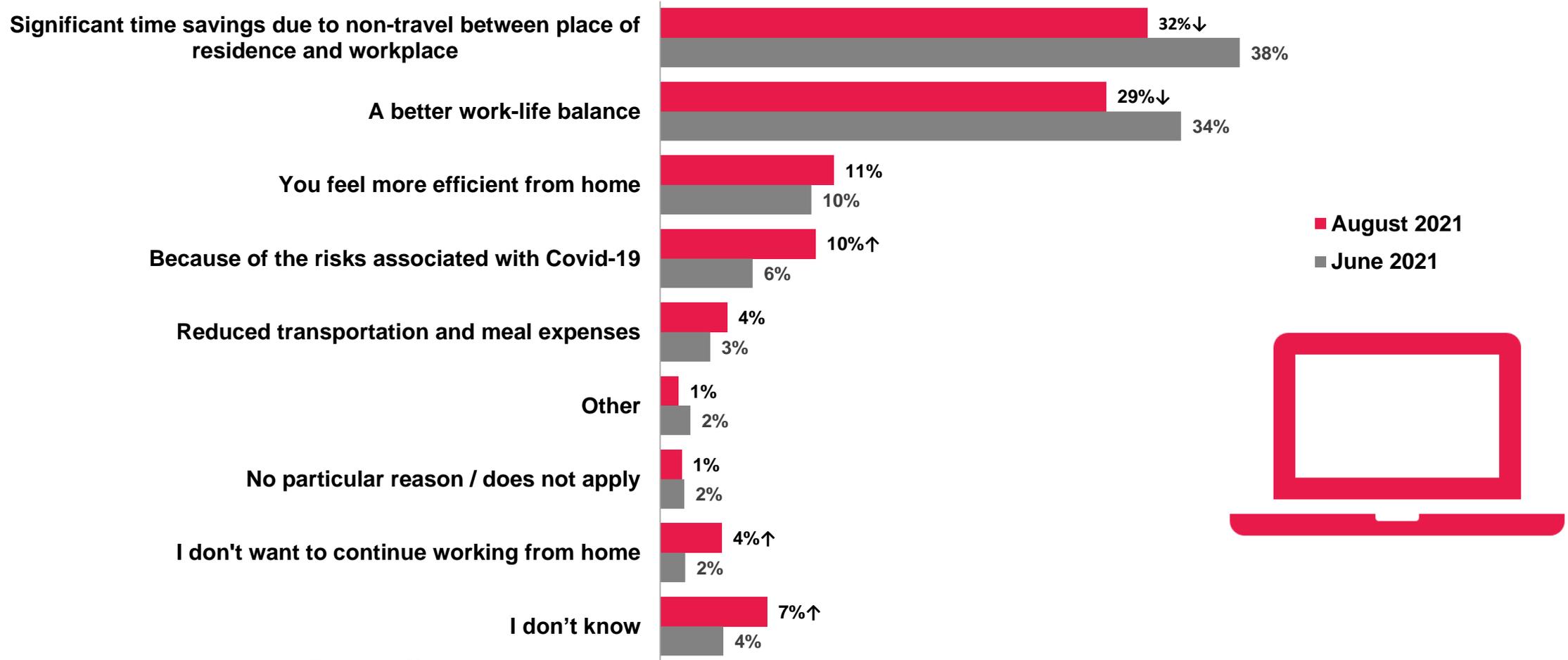
Most people appreciate teleworking



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

Base: All respondents (n=1,079)

Teleworking saves transportation time and provides a better work/life balance....

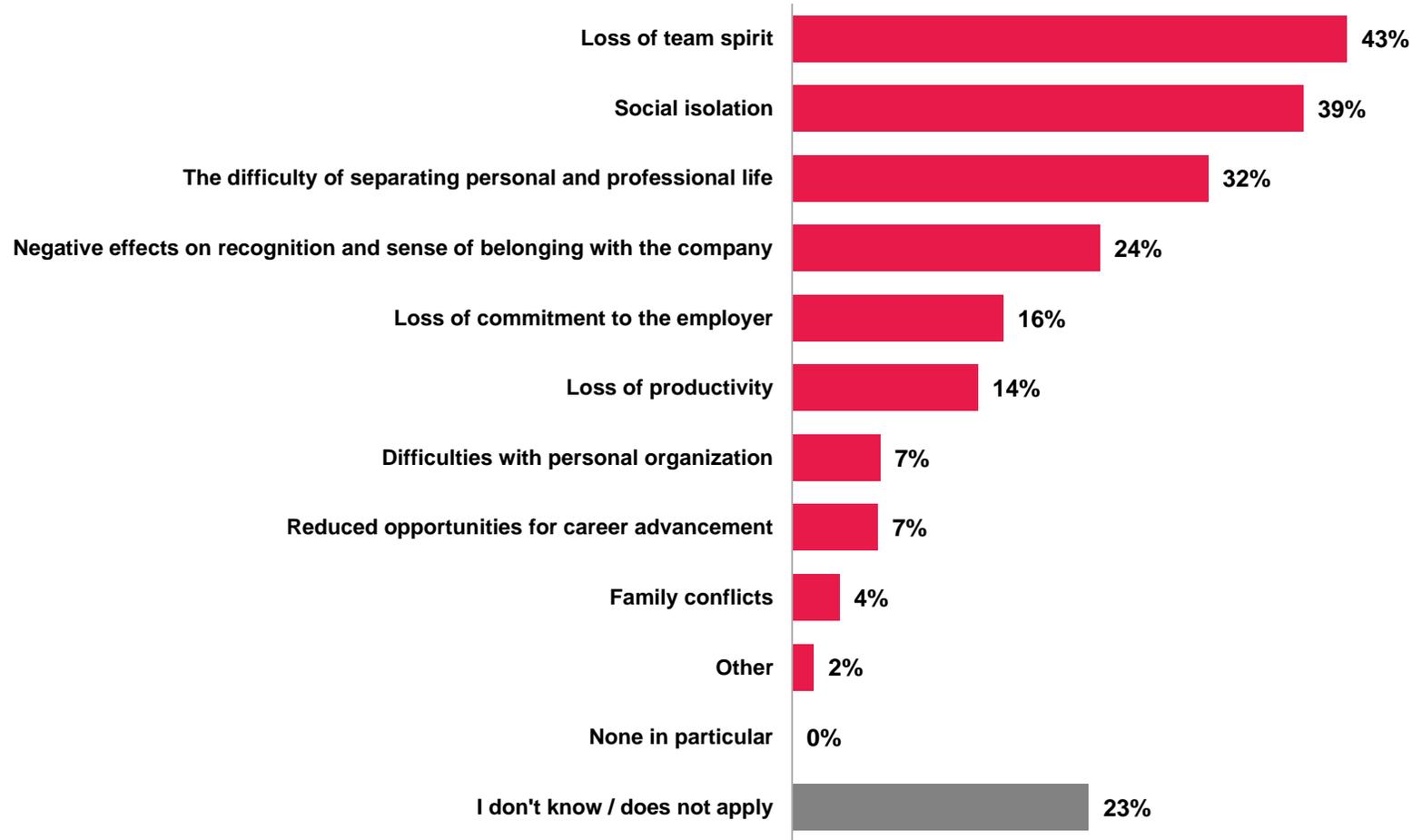


Q16. Which of the following choices best describes why you would prefer continuing to work from home (full-time/part-time)?

Base: All respondents (n=1,079)

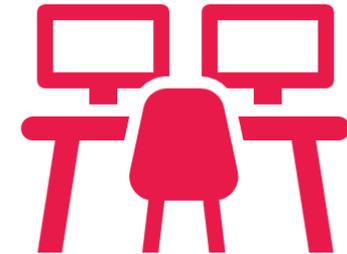
*Other spontaneous mentions by respondents

... but it also leads to social isolation and a loss of team spirit



HIGHER PROPORTION FOR:

- Managers (52%)
- Downtown workers (46%)



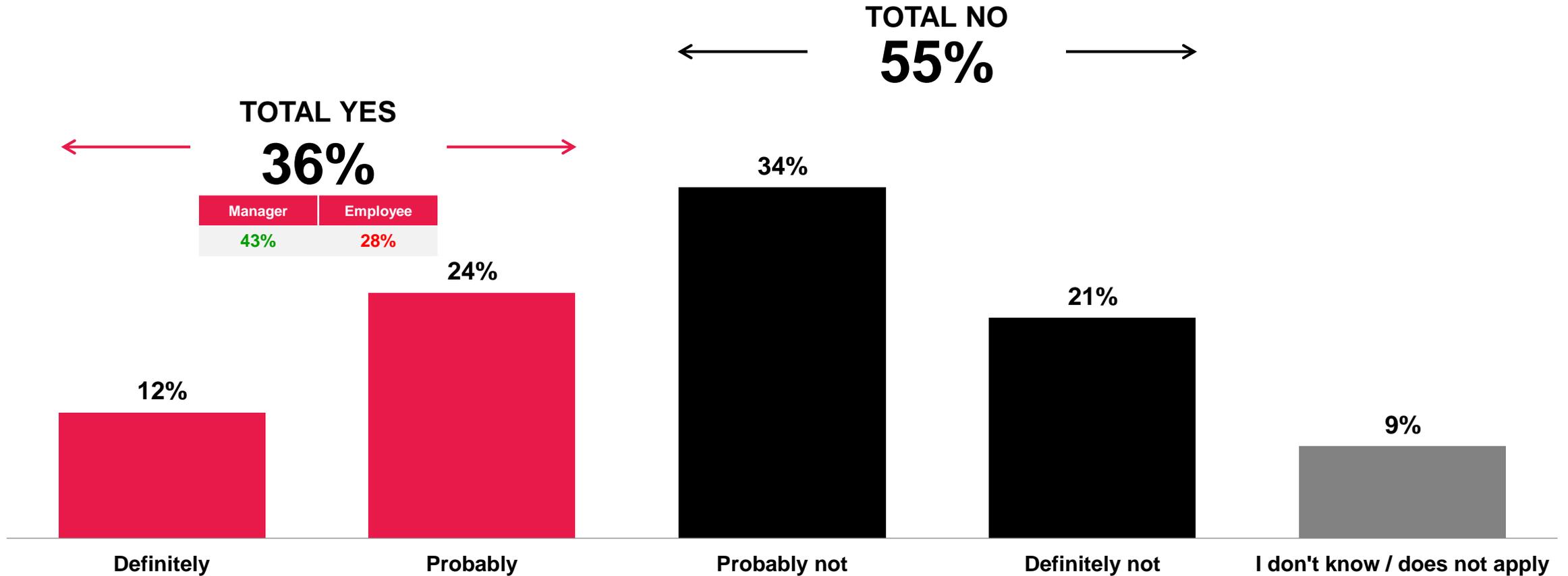
Q201 What are the professional issues you currently face with teleworking?*

MULTIPLE ANSWERS *Since respondents have the possibility to give up to four answers, the total may exceed 100%.

Base: All respondents (n=1,079)

*New question in August 2021 No comparison possible with June 2021.

One third of workers feel less inclined to work when only part of their team is in the office, with the rest at a distance



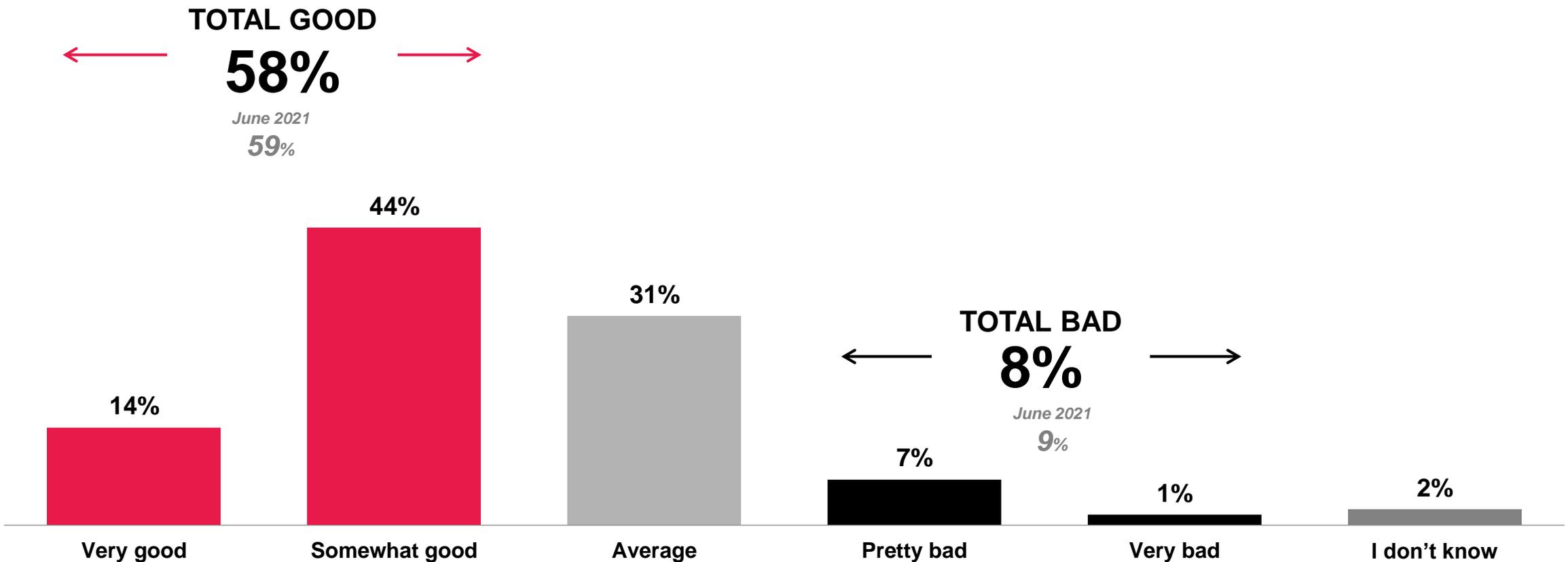
Q202 Could having one part of your team in the office while another works remotely have an impact on your work efficiency?*

Base: All respondents (n=1,079)

*New question in August 2021 No comparison possible with June 2021.



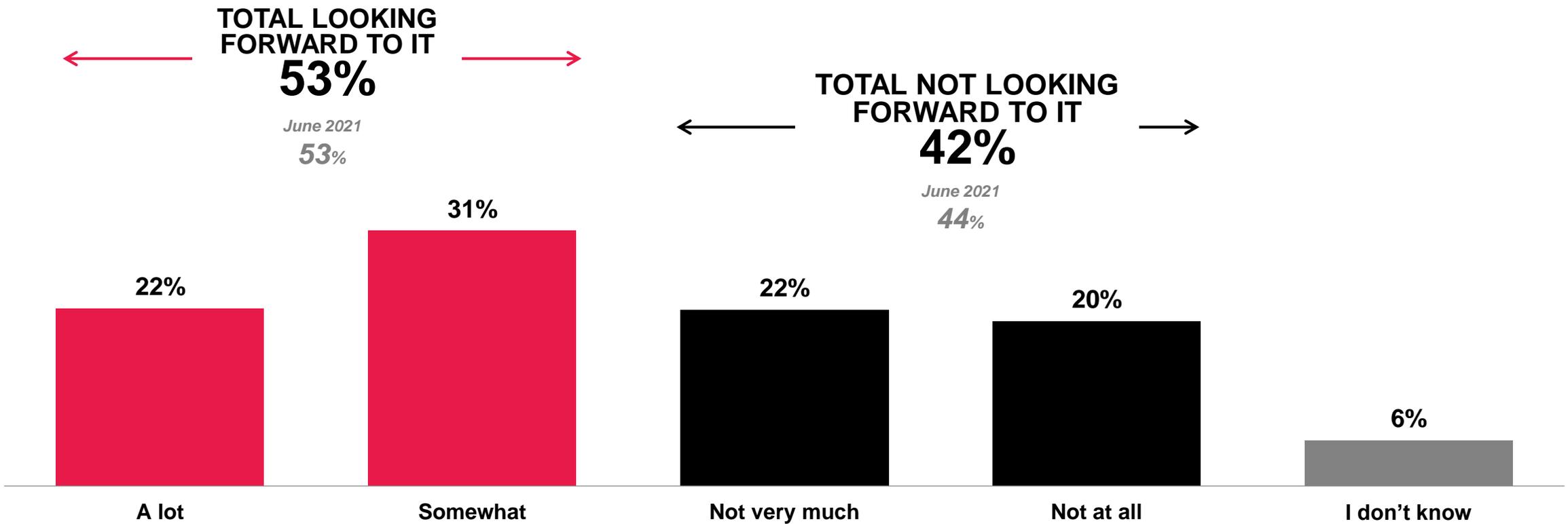
Team spirit is still good after over a year of the pandemic



Q9. After more than a year of pandemic, how would you describe the emotional climate of your work team?

Base: All respondents (n=1,079)

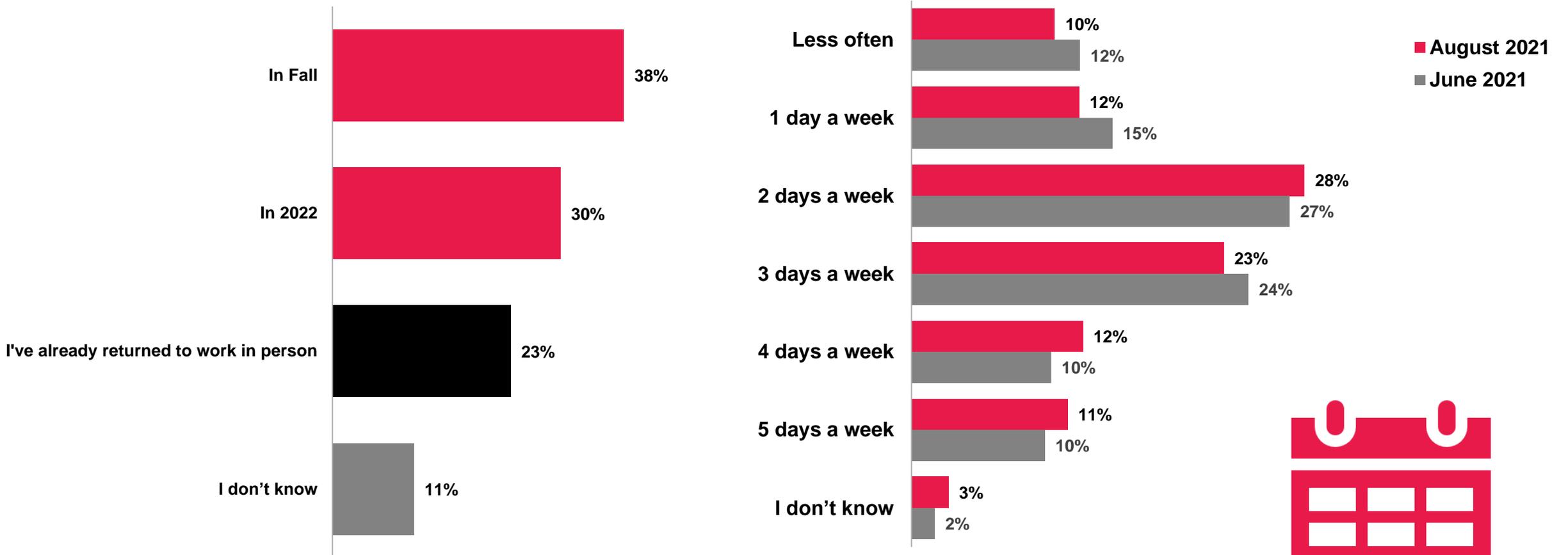
A majority of workers are eager to go back to work



Q11. Are you looking forward to returning to work at the office/workplace?

Base: All respondents (n=1,079)

Starting in the fall, people will go back 2 or 3 days a week



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

Base: All respondents (n=1,079)

*Several choices were removed in August 2021. For this reason, no comparison is possible with June 2021.

Q15. What would be your preferred option when you are allowed to return to work at the office/workplace? Would you like to go back...

Base: All respondents (n=1,079)

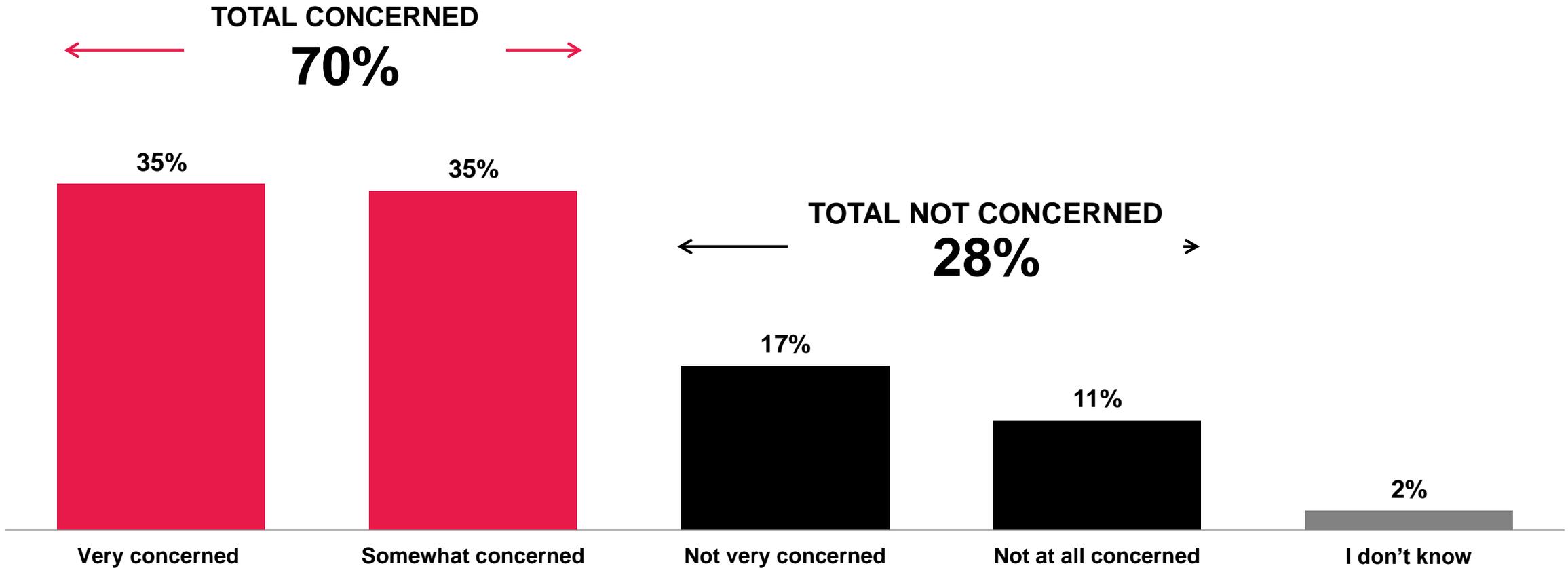
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What the workers think about vaccination in the workplace



Most workers are worried about the idea of working alongside unvaccinated people



Q206 How concerned are you about returning to work at the office with unvaccinated people? *

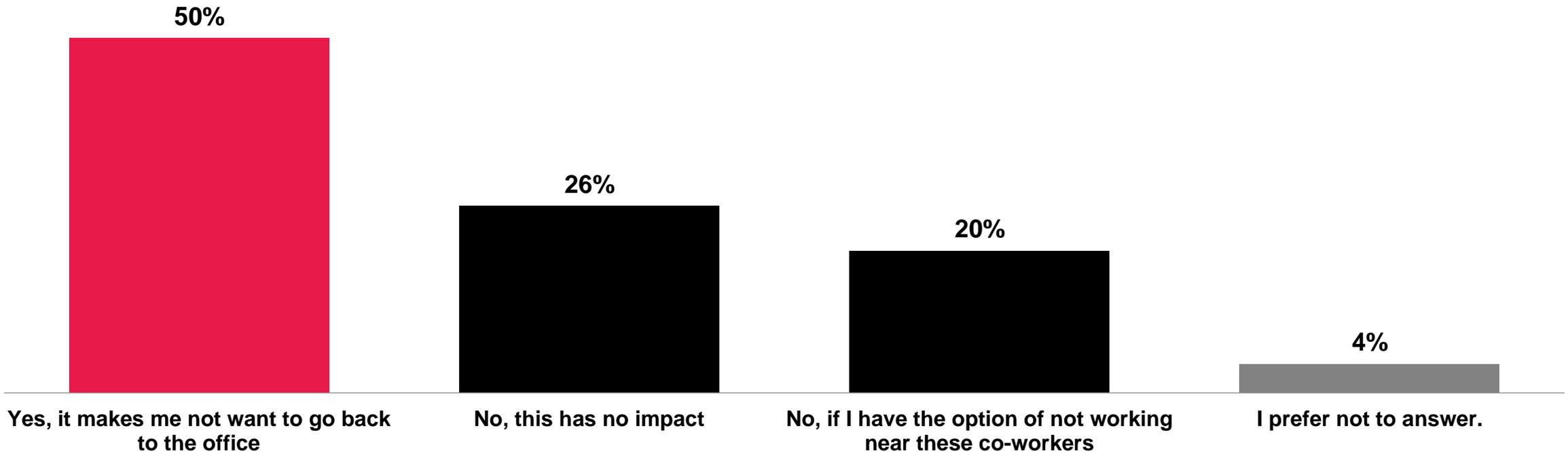
Base: All respondents (n=1,079)

*New question in 2021. No comparison possible with June 2021.

1 out of 2 workers is hesitant about going back to work alongside unvaccinated coworkers

HIGHER PROPORTION FOR:

- 50 years of age or older (55%)
- Respondents whose offices are not fully adapted to the needs of employees (56%).

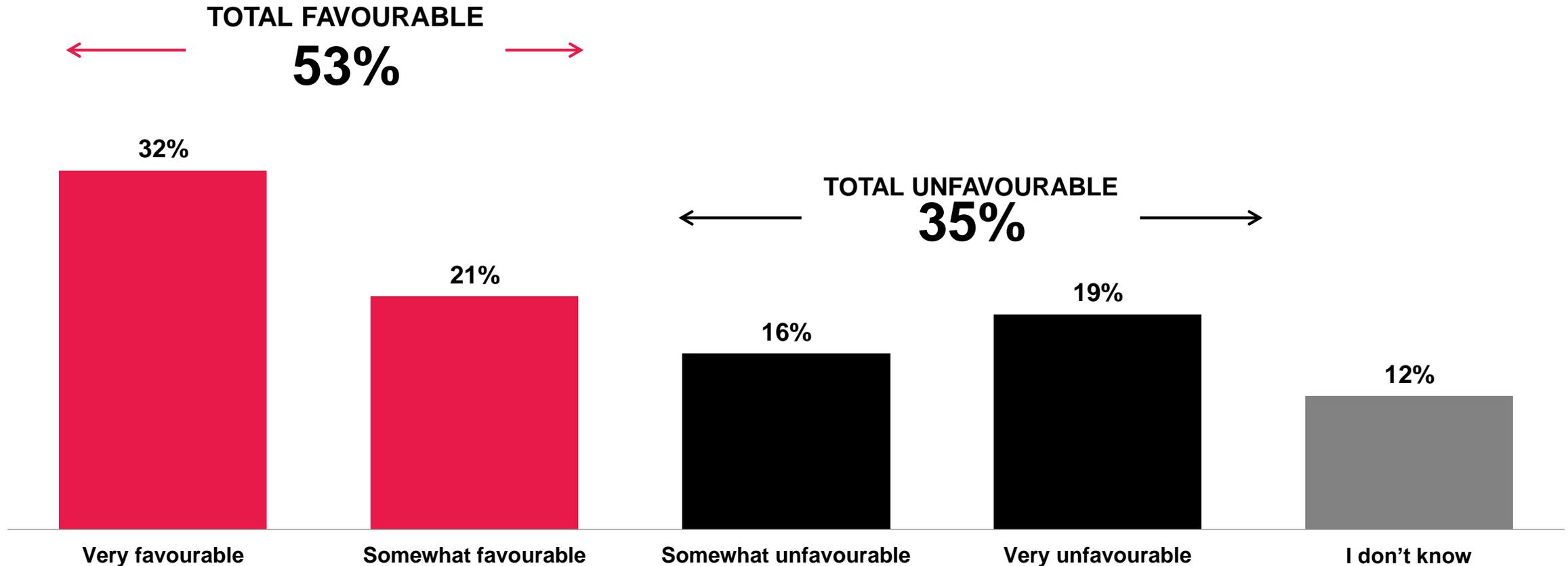


Q207 Can having unvaccinated co-workers negatively impact your desire to return to the office?

Base: All respondents (n=1,079)

*New question in 2021. No comparison possible with June 2021.

A majority of workers are favourable to designating a reserved work area for people who have received both doses



Q207B. To what extent would you be favorable to your employer designating a workspace reserved for people who have received two doses of a vaccine, separate from a workplace reserved for people who have not received two doses of a vaccine?*

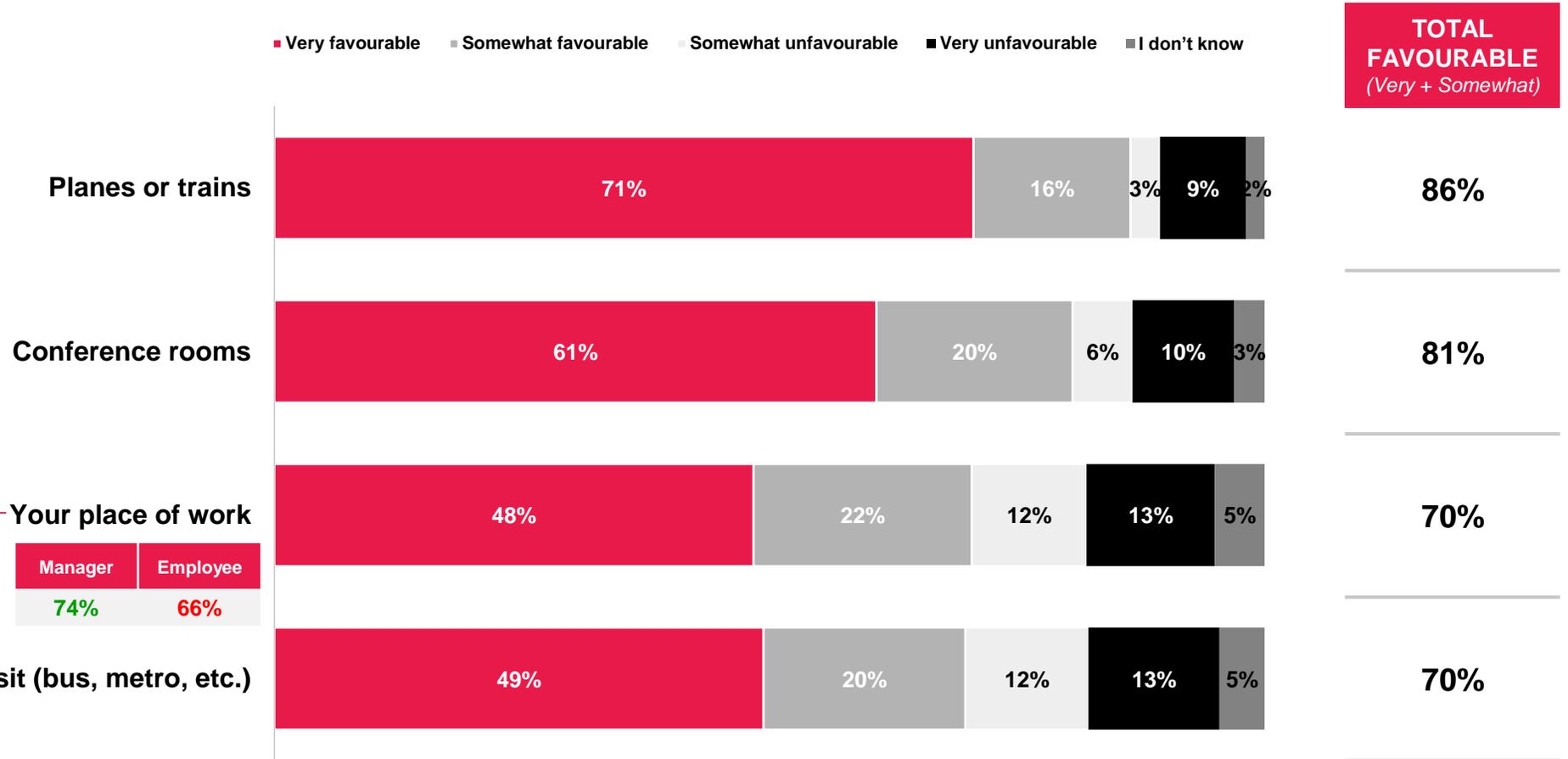
Base: All respondents (n=1,079)

*New question in 2021. No comparison possible with June 2021.

Workers are generally favourable to having to show proof of vaccination at work

HIGHER PROPORTION OF "TOTAL FAVOURABLE" AMONG:

- 50 years of age or older (80%)
- Managers (74%)
- Respondents who are concerned about returning to the office with unvaccinated people (85%)



Q208 To what extent would you be favorable to mandatory proof of vaccination in order to have access to the various following services or locations?*

Base: All respondents (n=1,079)

*New question in August 2021 No comparison possible with June 2021.

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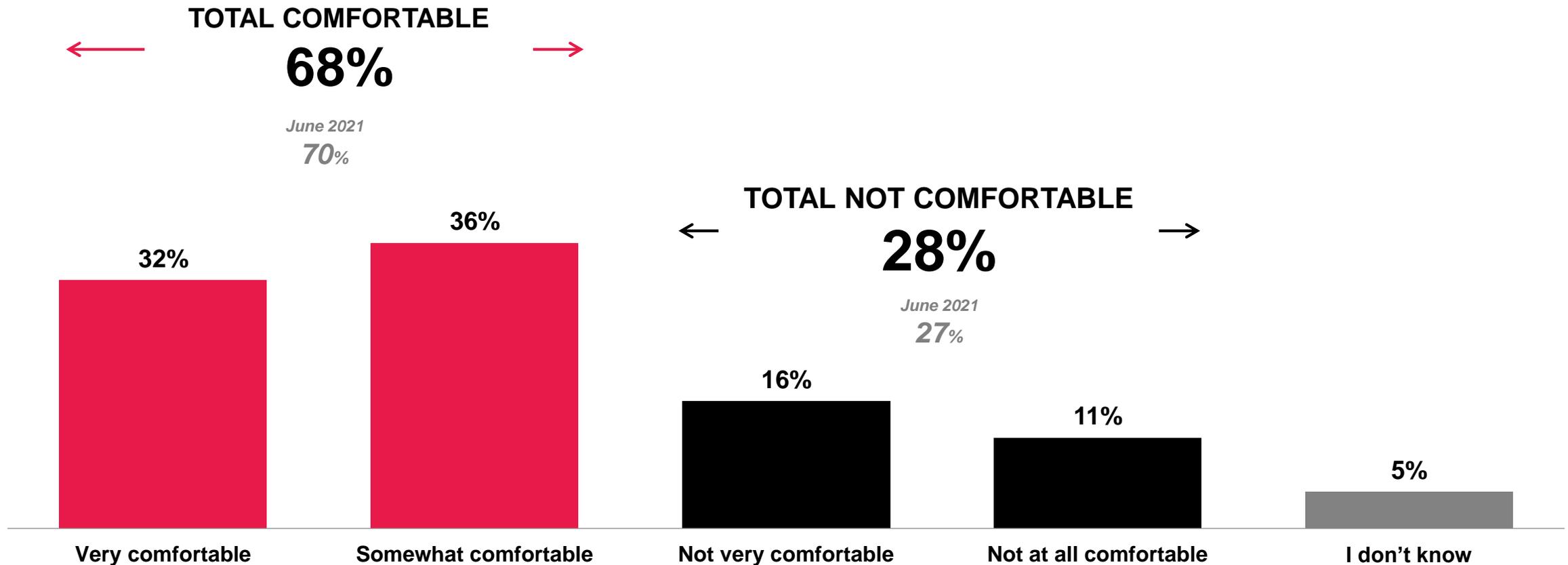


Keeping workers safe in a hybrid model: a key issue





Most workers are comfortable returning to the office

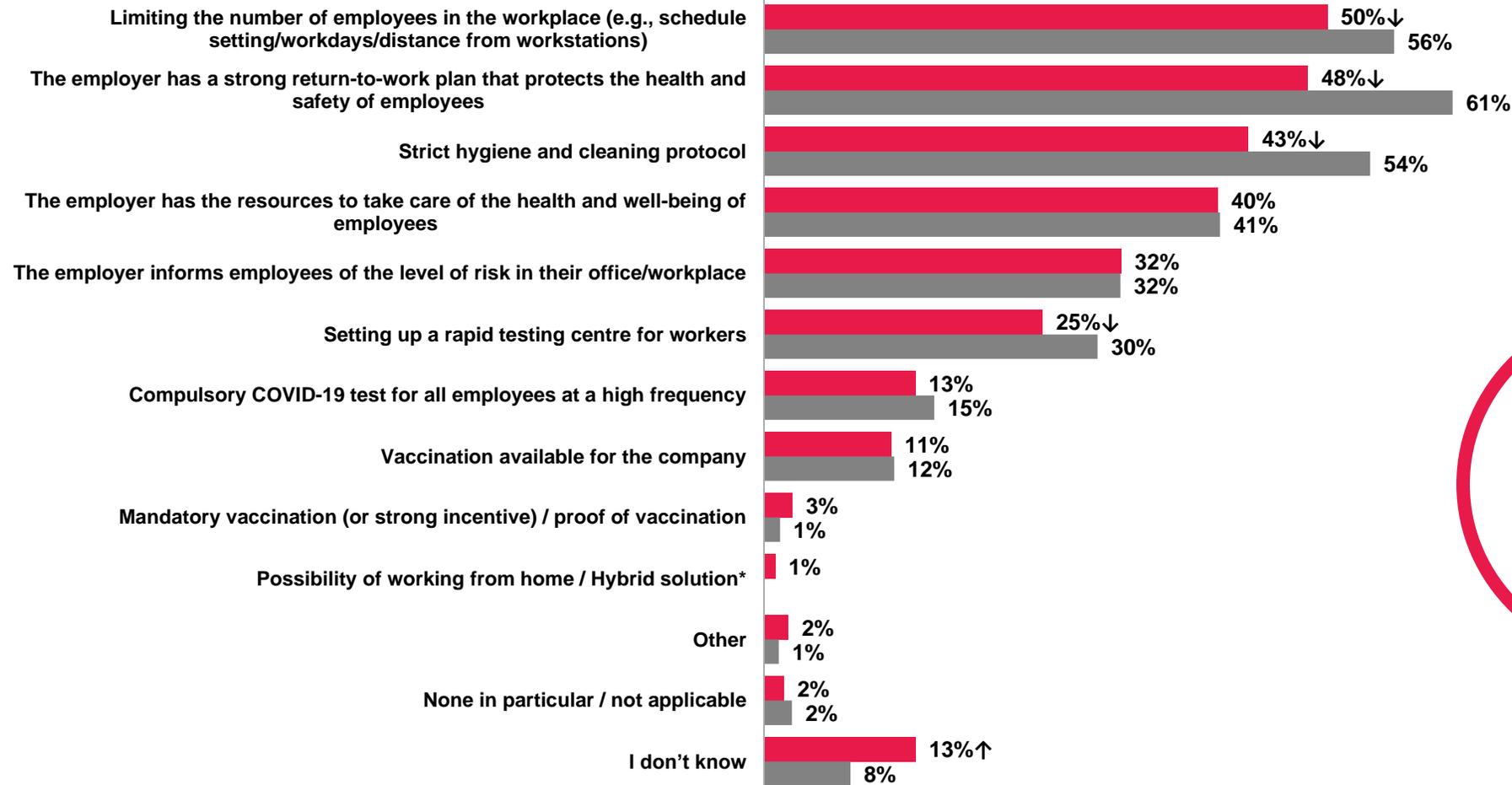


Q13. The government's return-to-work plan for the public and private sectors is banking on a gradual return of workers in September. Do you feel comfortable returning to work at the office/workplace?*

Base: All respondents (n=1,079)

*Question modified in August 2021. In June 2021, the question was: "When the government allows it, will you feel comfortable coming back to the office/workplace?"

The workers want a clear and solid back-to-work plan based on a hybrid work arrangement



Q23. What aspects/conditions would reassure you for a safe return to the office/workplace?

MULTIPLE ANSWERS *Since respondents have the possibility to give up to four answers, the total may exceed 100%.

Base: Employees (n=512)

*Other spontaneous mentions.

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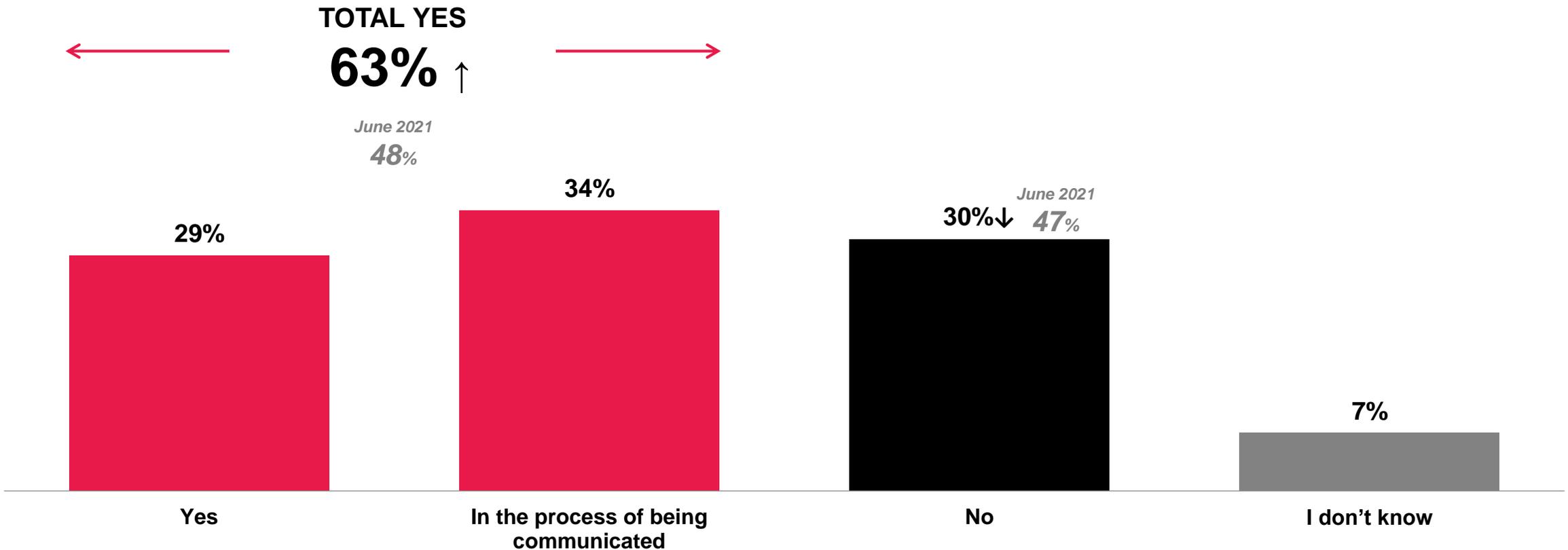


**The employers
are preparing for
their workers to
come back**





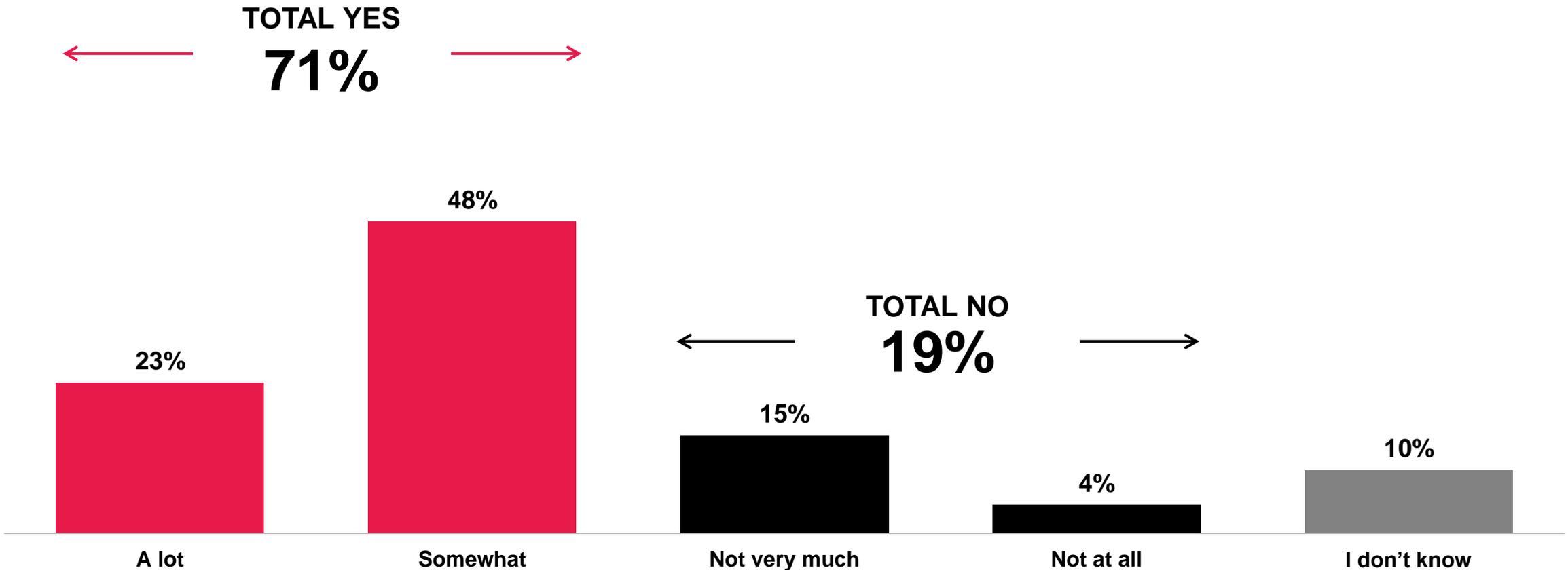
Employers are sharing their back-to-work plans more



Q21. Has a return-to-work plan been provided by your employer?

Base: Employees (n=512)

The back-to-work plans meet the employees' safety expectations

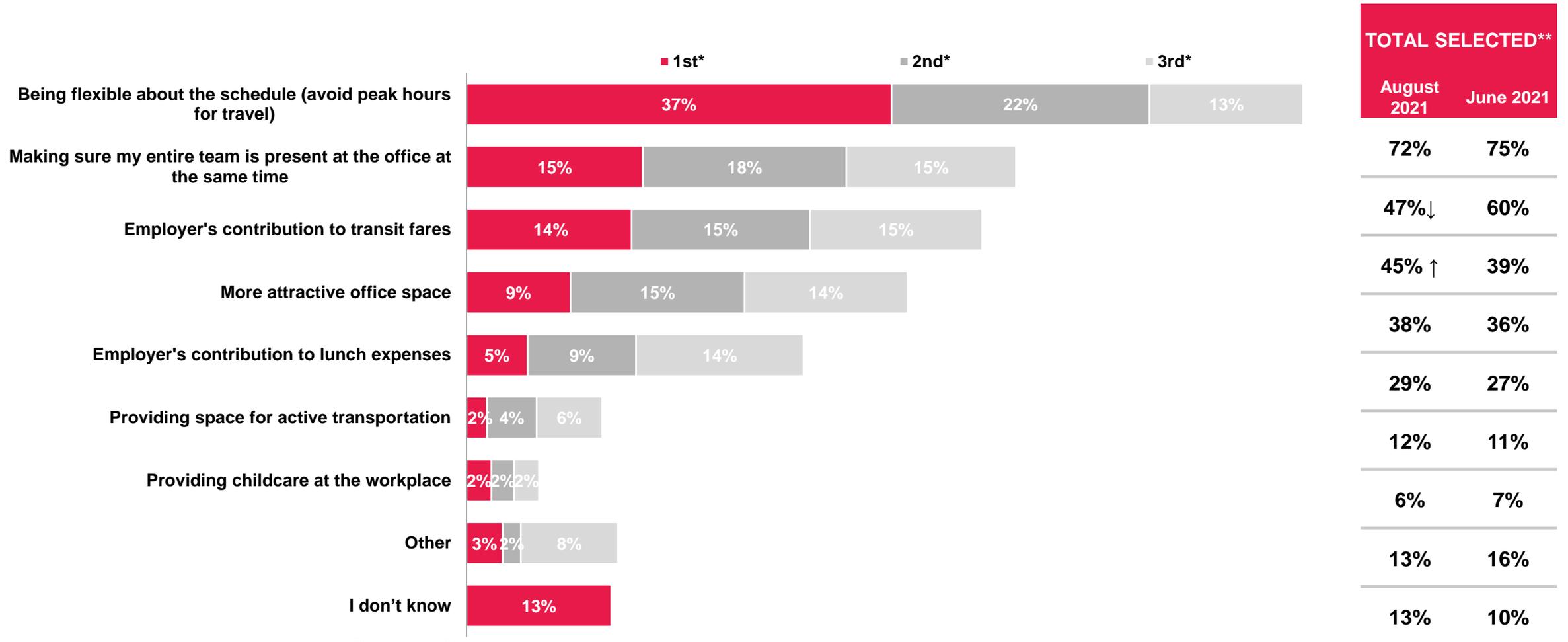


Q21B. Does this return plan meet your expectations in terms your employer's responsibility to ensure the employees' safe return to the office? *

Base: Employees who say a return-to-work plan has been or is being provided (n=320)

*New question in 2021 No comparison possible with June 2021.

Flexible schedules are still the best incentive for workers



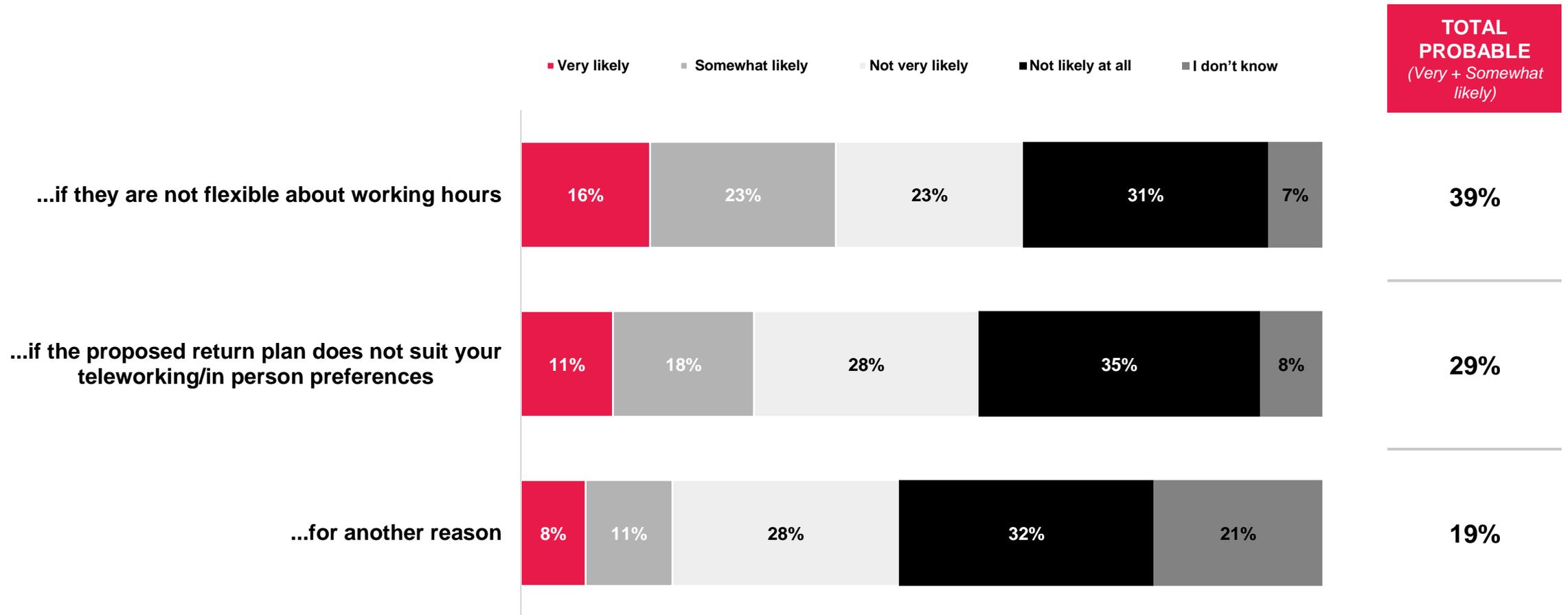
Q18. What could your employer do to get you to come back to the office?

Base: Employees (n=512)

*The percentages 1st, 2nd, 3rd, etc. represent the proportion of respondents who ranked the item as most important, 2nd most important and 3rd most important.

**The "Total Selected" represents the proportion of respondents who selected the item from their top three items (= %1st + %2nd + %3rd).

Why workers would be prepared to leave their current employers



Q205 How likely are you to leave your employer?

Base: All respondents (n=1,079)

*New question in August 2021. No comparison possible with June 2021.

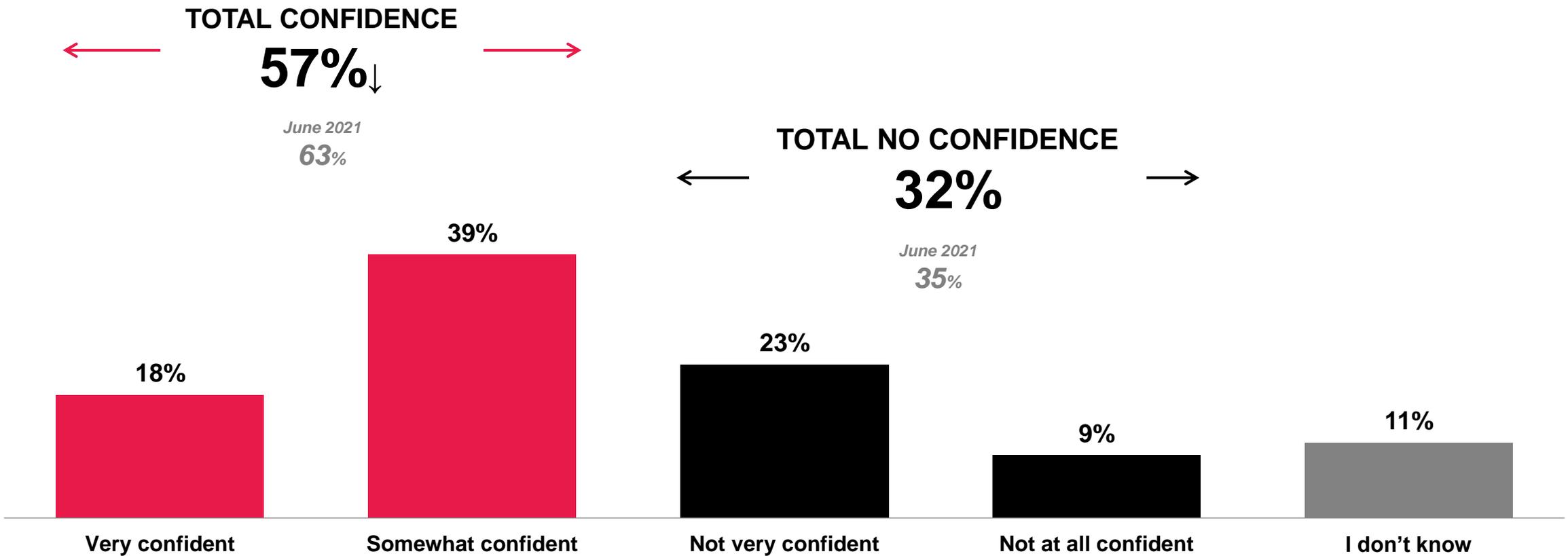
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The workers' confidence in and use of public transit



Workers are still mostly confident that public transit health measures will be effective

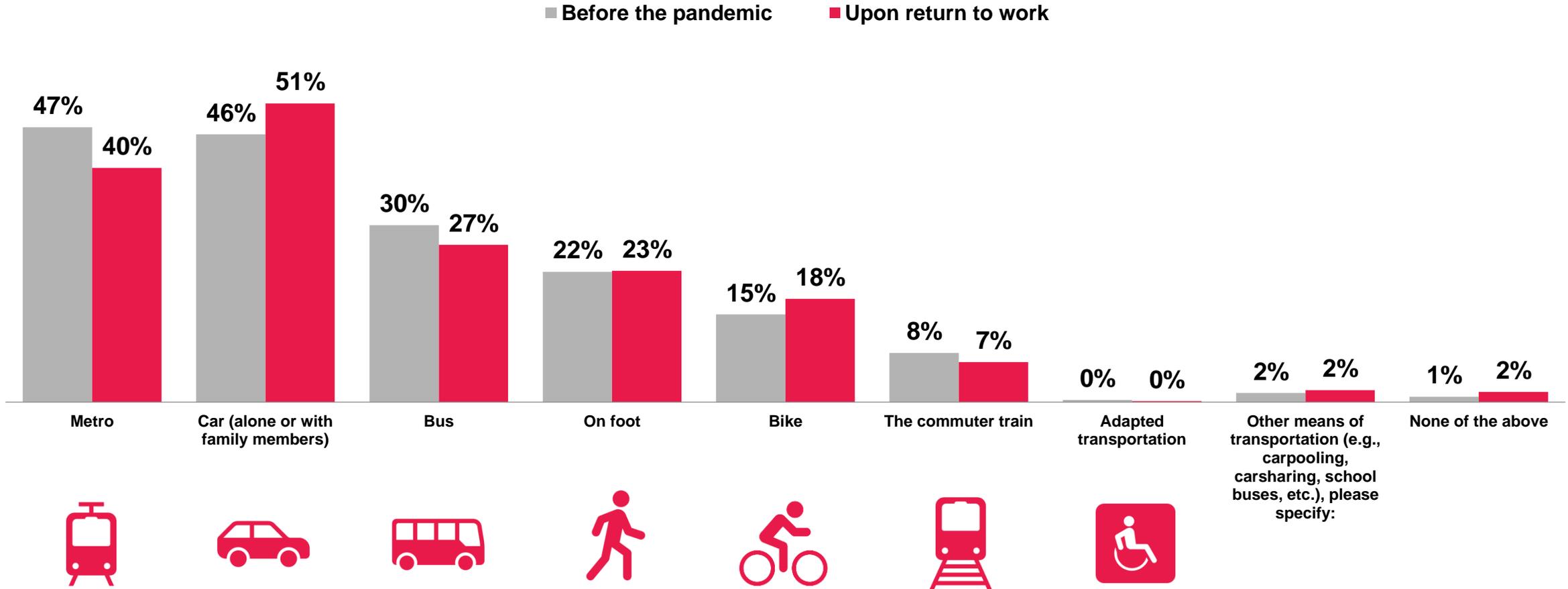


Q3. To what extent are you confident in the sanitation measures in place on public transit to resume taking public transit when you return to your workplace?*

Base: All respondents (n=1,079)

*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?"

Workers will change the way they travel when they go back to work



Q2A. Before the pandemic, what means of transportation did you use to get to your workplace?

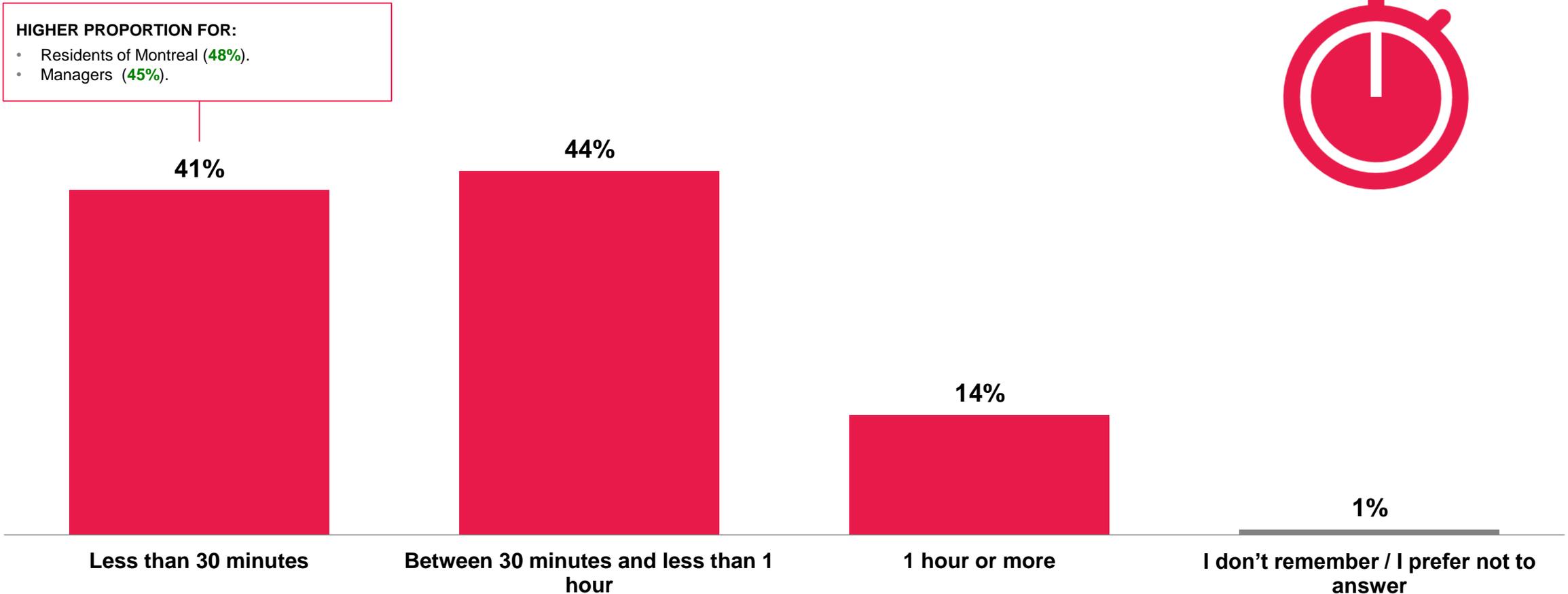
Q2B. When you return to work in person, what means of transportation will you use to get to your workplace?

MULTIPLE ANSWERS: *Since respondents have the possibility to give up to four answers, the total may exceed 100%.

Base: All respondents (n=1,079)



Most workers used to take less than hour to get to work



Q2AA How long does it take you to get to work? Please indicate your typical pre-pandemic travel time*

Base: All respondents (n=1,079)

*New question in August 2021 No comparison possible with June 2021.

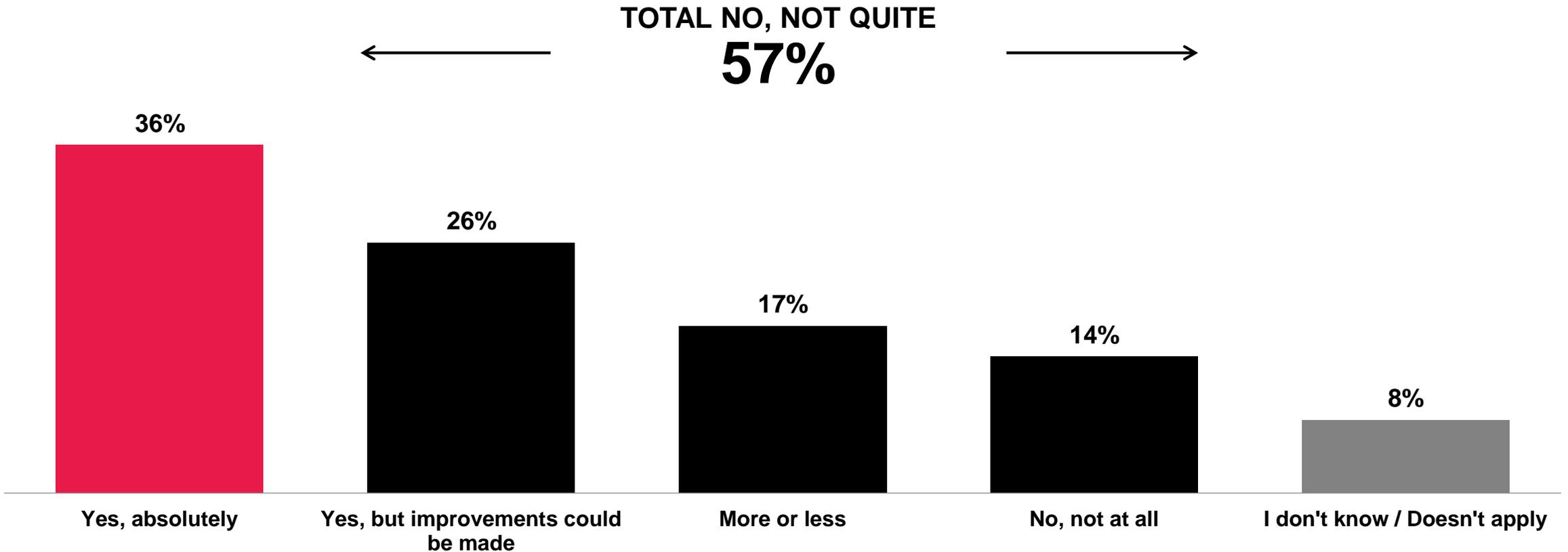
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The ideal post-
pandemic work
environment



Most workers' offices are no longer suited to their needs

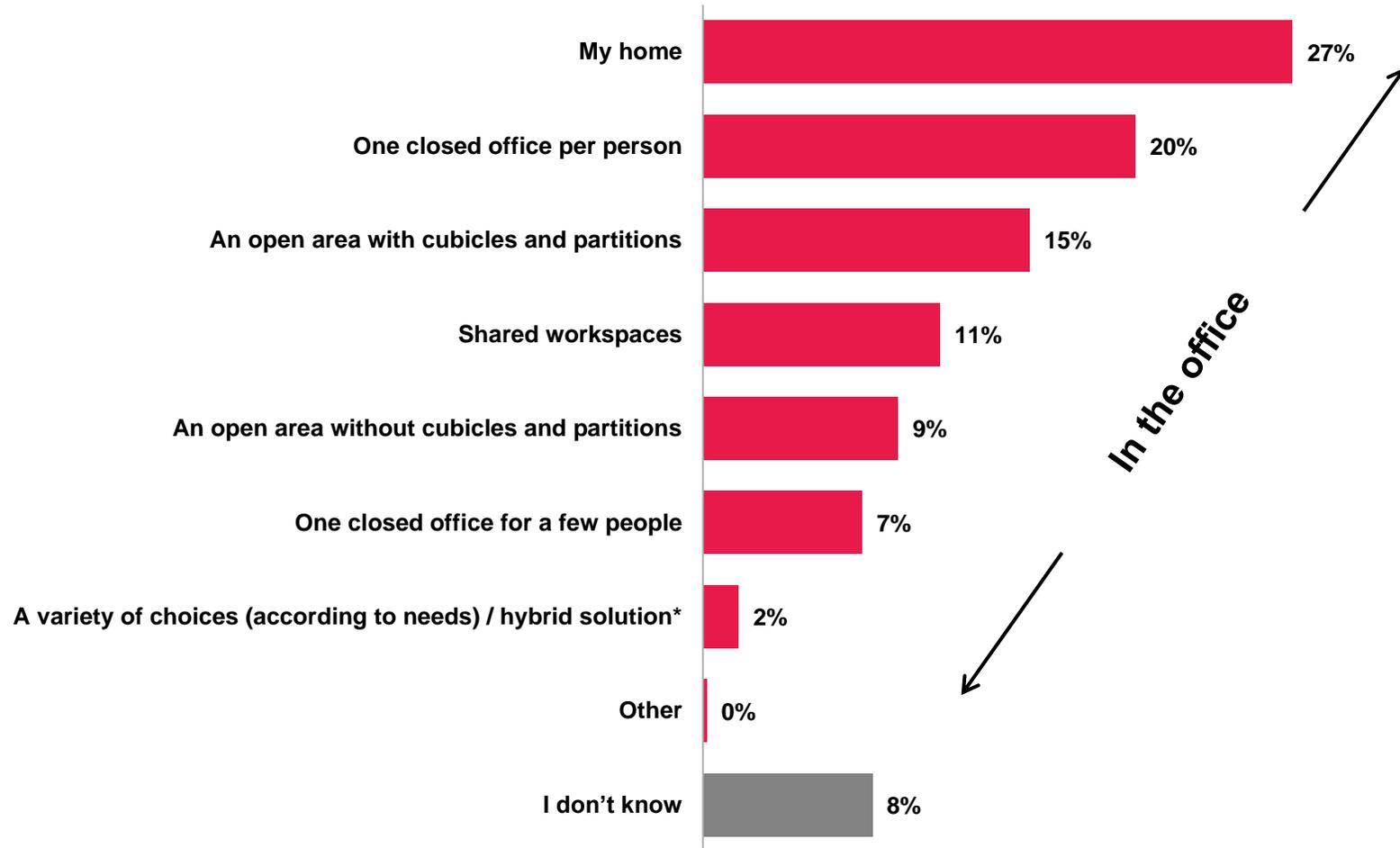


Q203 When you think about returning to work in person, do you consider the offices you occupied before the pandemic to be adapted to your needs?*

Base: All respondents (n=1,079)

*New question in 2021 No comparison possible with June 2021.

Workers' ideal post-pandemic work environments



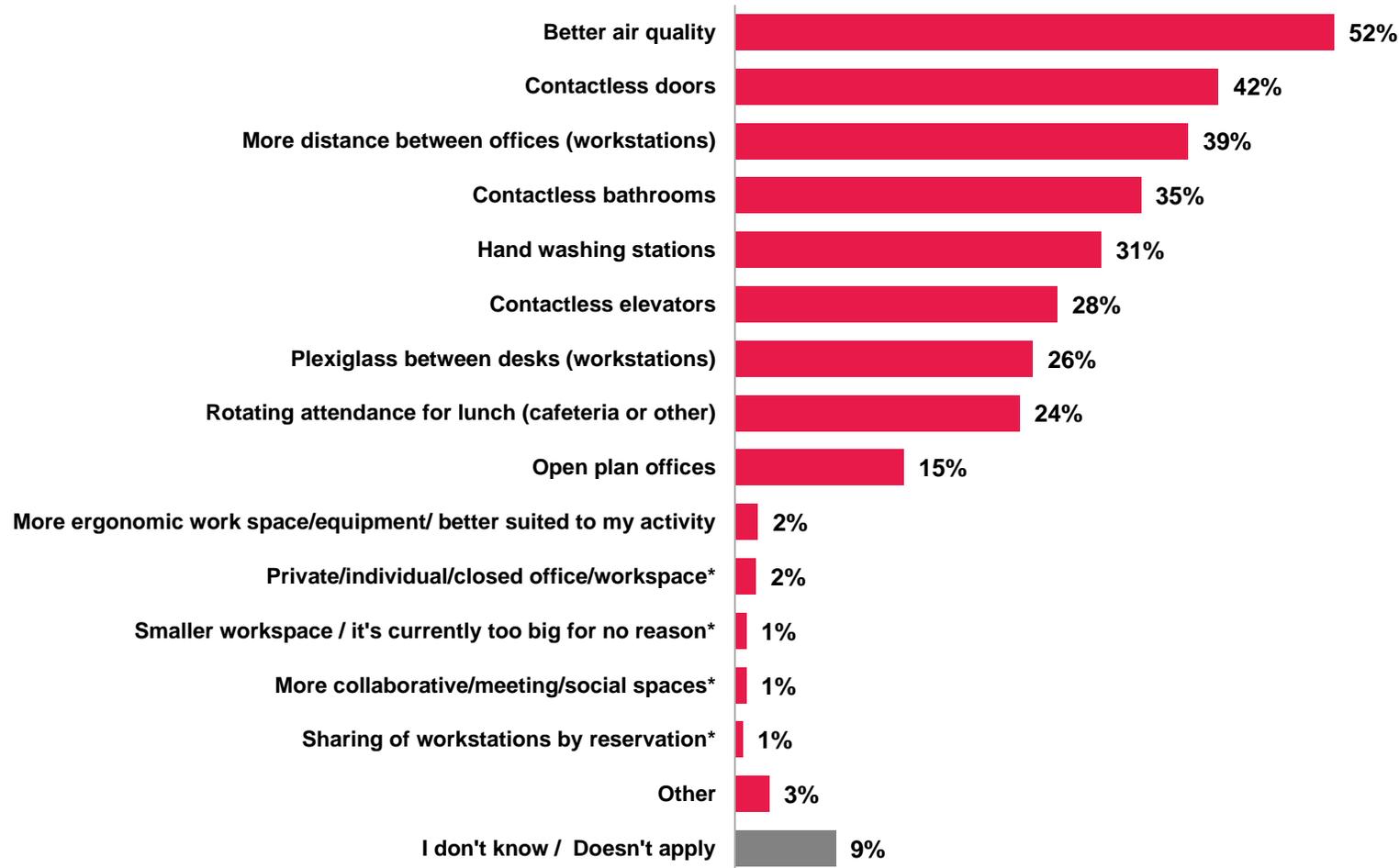
Q204B. What would be your ideal work environment after the pandemic?*

Base: All respondents (n=1,079)

*Other spontaneous mention

**New question in August 2021. No comparison possible with June 2021.

Workers would like their work spaces to be better suited to today's health requirements



Q204 What aspects could be improved to make offices suitable for a return to work in person?*

Base: Respondents who feel their office is not well suited to their needs (n=613)

*Other spontaneous mentions

**New question in 2021 No comparison possible with June 2021.

Conclusion

PEOPLE WANT TO GO BACK

Many of the workers who responded to this extensive survey are eager and comfortable with the idea of going back to their offices and using public transit.

A GRADUAL RETURN

Faced with the uncertainties caused by the pandemic, workers want a gradual return to normal this fall, and are favourable to hybrid travelling arrangements, planning to spend 2 to 3 days a week in their offices.

A HYBRID RETURN

Teleworking came with many benefits for the workers, but it also contributed to a sense of social isolation and a resulting loss of team spirit. The workers are in favour of hybrid and flexible work schedules.

A SAFE RETURN

The workers' safety is the most important issue of this return. Although the vaccination campaign was a success, the workers will have to pick up new habits once they are back in their offices to ensure both their own safety and the safety of others. The employers, who are responsible for providing safe and sound work environments, have fully understood this.

NEXT STEPS

The CCMM will continue providing back-to-work themed resources and tools over the coming months by way of a variety of events and publications aimed at both employers and workers. A communications and marketing campaign to promote all the initiatives of **I love working downtown** will also be launched during the fall. Check our [website](#) for more details, and stay tuned!

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