

A photograph of a city skyline, likely Montreal, with a pink silhouette overlay of the buildings. The sky is bright and hazy.

Extensive survey on getting workers back to the downtown office towers

Highlights – December 1, 2021

In collaboration with:

Leger

Québec 

 **The Chamber of Commerce
of Metropolitan Montreal**



Background

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.* These surveys, which reach between 600 and 1,800 managers and employees each time, help target issues related to the return of workers to in-person work, identify actions to be taken, and gather the resources to finance the necessary actions and strategies.

While these objectives remain the same, each edition addresses new topics as public health recommendations for returning workers to the workplace evolve.

Findings from the two previous editions

In the first edition of the survey, whose results were released in June, workers shared their perceptions of returning to the office, teleworking, mobility issues and incentives that would make in-person work more attractive.

The second edition, conducted in August, demonstrated 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. The results of this survey highlighted that while most workers generally felt positive about working from home, many of them pointed out certain disadvantages. A weakening of team spirit came up regularly (43%), followed by the risk of social isolation (39%) and the difficulty of separating professional and personal life (32%). Lastly, in addition to reiterating the need for some flexibility in their schedules when they return to the office, the workers surveyed wanted their office space to be better adapted to the new health reality.

Findings from this new survey

On November 8, the Quebec government announced the gradual return of public service employees to the workplace after having postponed it during the summer due to the evolving health situation.* This announcement, which was very favourably received by the Chamber, allows many companies to start implementing their return plans.

As a result, the results of this new survey show that the return to the office continues to grow: 61% of workers surveyed say they are back in the office, up from 47% in August and 28% in June.

The implementation of the vaccine passport in businesses, public places and some workplaces provides an opportunity for employers to organize a safe and attractive return and for workers to once again attend various business events in person. The vast majority of respondents would like to meet with customers and suppliers (74%), take part in professional networking events (63%) and attend conferences (63%) in person rather than virtually.

For many workers, these meetings and business events make the employee experience more engaging and interactive. In this regard, workers in companies that have initiated a return are very satisfied with the efforts made by their employer to ensure that their return meets their expectations (70%).

Lastly, this new survey also addresses the mental health of workers, which has been undermined by many months of the pandemic. While a majority of workers feel their mental health is good professionally (51%) and personally (52%), many express a strong interest in mental health programs and tools (49%).

The return to the office for public service and private sector workers is underway and employers are stepping up their efforts to provide an attractive and safe employee experience.

*Although the survey was released after the announcement, it should be noted that workers responded to the survey between October 26 and November 5, before the government's green light.

Objectives and methodology

OBJECTIVES

Léger was mandated by the Chamber of Commerce of Metropolitan Montreal (CCMM) to conduct a study of managers and employees in the Greater Montreal area to measure their attitudes, behaviours, and comfort level in returning to work in Montreal's offices and workplaces when they are allowed to do so.

This report presents the **third wave of this study**.

WHO?

A sample of **604 managers and employees** of companies whose workplace is located on the Island of Montreal, aged 18 and over and able to express themselves in French or English.

Of these, 12% are President/VP, 21% Director/Manager, 33% are professionals and 18% other employees. 55% work downtown, 22% in the West Island, 13% in the East Island and 11% on the North Shore.

WHEN?

The data collection was conducted between **October 26 and November 5, 2021**.

The CCMM sent email blasts to its members and Léger surveyed its panelists (n=304 and n=300 respectively).

NOTE TO READERS

The data presented has been rounded. Therefore, the totals may differ slightly from 100%.

SIGNIFICANT DIFFERENCES BETWEEN SURVEYS 1, 2 AND 3

Results with significant and relevant differences are indicated in a text box next to the presentation of the overall results.

Data in **bold green** indicates a **significantly higher proportion** than other respondents. Conversely, data in **bold red** indicates a **significantly lower proportion** than other respondents.

Comparison between surveys

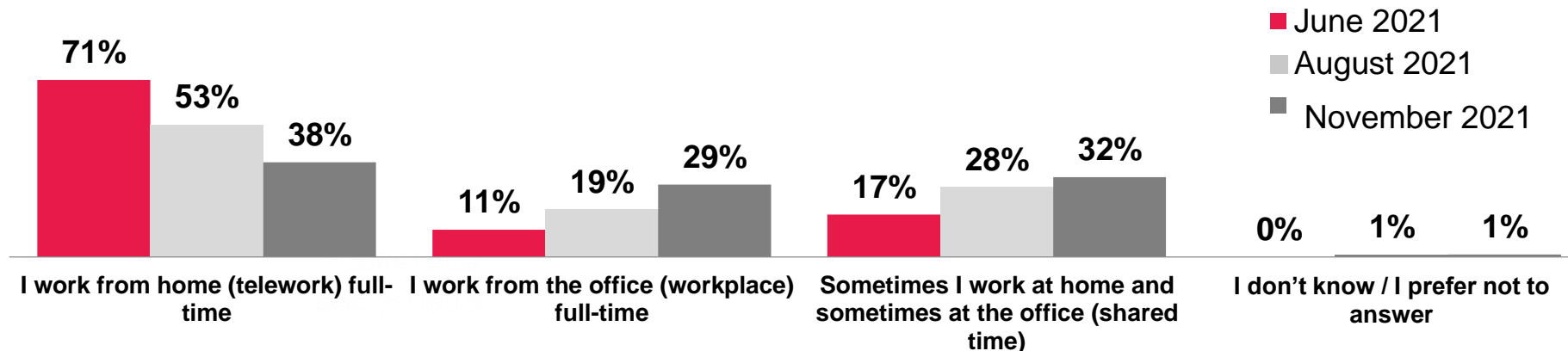
Where possible and relevant, the results of this study are compared with those of the second wave of **August 2021** (web survey conducted between July 30, and August 12, 2021, among **1,079 managers and employees of companies** whose workplace is located on the Island of Montreal, aged 18 and over and able to speak French or English).

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

No arrow means that the proportions are statistically identical.

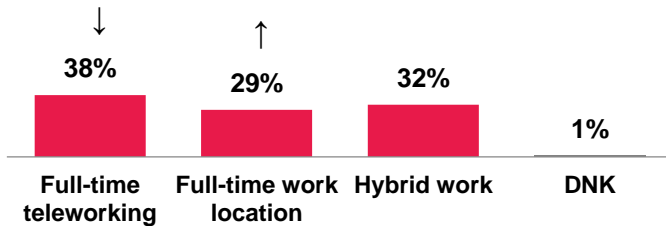
In the example below, the proportion of respondents who say they will be working from home full-time in **November 2021** is significantly lower than in **August 2021** (38%↓ vs. 53%).

On the other hand, the proportion of respondents who say they are working from the office full-time in **November 2021** is significantly higher than the result for **August 2021** (29%↑ vs 19%).

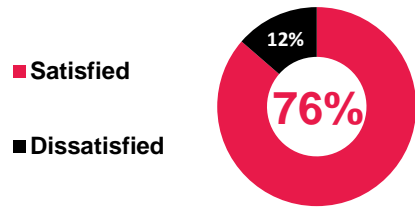


Highlights | Teleworking

TELEWORKING ENVIRONMENT



OVERALL SATISFACTION WITH TELEWORKING

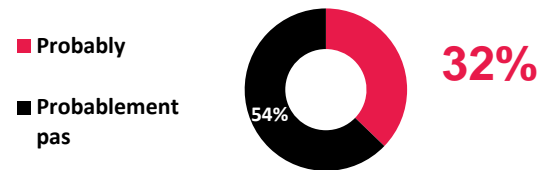


TOP 3 PROFESSIONAL ISSUES IN TELEWORKING

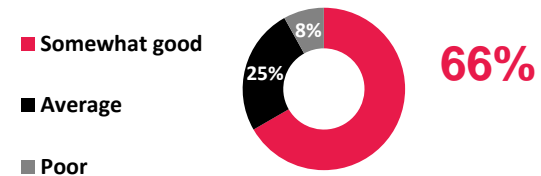
1. Loss of team spirit (40%)
2. Social isolation (35%)
3. Difficulty separating personal and professional life (29%)

IMPACT OF THE PANDEMIC

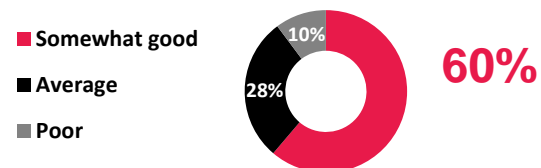
IMPACT OF TEAM SEPARATION ON WORK EFFICIENCY



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



TELEWORKING CONTINUES TO SATISFY, BUT INVOLVES SERIOUS PROFESSIONAL ISSUES

More and more employees say they work from the office full time (29% vs. 19%), at the expense of teleworking.

In general, most workers surveyed are satisfied with their telework experience, although satisfaction is constantly declining from the August and June measurements.

The main professional issues encountered in teleworking are, once again, 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, and these two variables remain constant in comparison to August and June 2021.

Highlights | Return to work in person

RETURN TO THE OFFICE OR WORKPLACE

POLICY REGARDING IN-PERSON PARTICIPATION OF EMPLOYEES IN VARIOUS ACTIVITIES

AUTHORIZED FOR ALL

Professional activities (e.g., meetings with clients and suppliers)	58%
Professional networking events	50%
Business events (e.g., conferences or conventions)	41%
Trade missions abroad	14%

OPINION OF EMPLOYEES REGARDING IN-PERSON PARTICIPATION IN VARIOUS ACTIVITIES

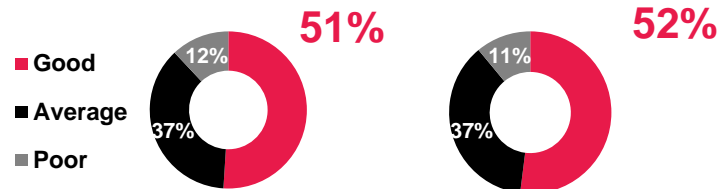
TOTAL FAVOURABLE

Professional activities (e.g., meetings with clients and suppliers)	74%
Professional networking events	63%
Business events (e.g., conferences or conventions)	63%

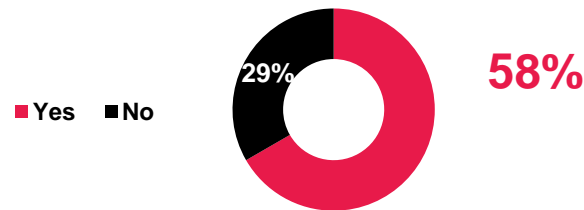
MENTAL HEALTH AFTER MORE THAN A YEAR OF PANDEMIC

PROFESSIONAL

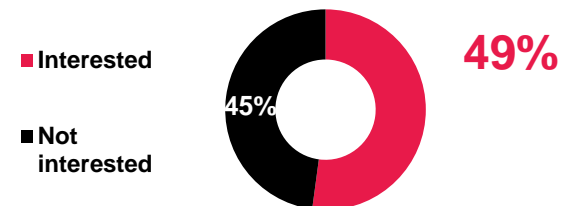
PERSONAL



MENTAL HEALTH SUPPORT PROGRAM OR TOOLS SET UP BY THE EMPLOYER



INTEREST IN A MENTAL HEALTH SUPPORT PROGRAM OR TOOLS



WORKERS ARE EAGER TO RETURN TO FACE-TO-FACE BUSINESS EVENTS AND WANT MENTAL HEALTH SUPPORT TOOLS

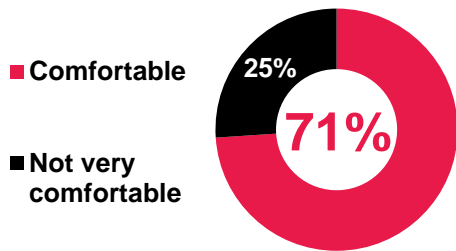
Company policies regarding their employees' in-person participation in various activities is mixed. Half of managers report that professional activities and networking events are authorized for all employees. However, three out of four respondents say they have a favourable view of participating in the three different activities.

Half of respondents say that their mental health is somewhat good, both professionally and personally. More than half of respondents say that their employer has set up a mental health support program or tools. As a result, half of respondents say they are interested in the implementation of a mental health program or tools.

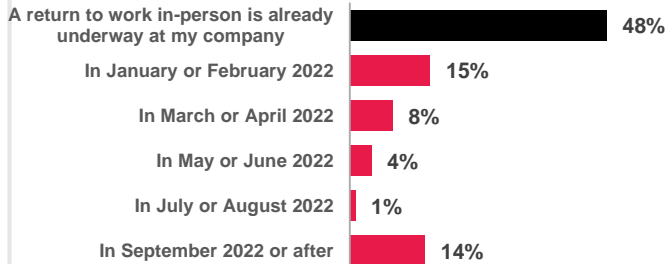
Highlights | Return to work in person

RETURN TO THE OFFICE OR WORKPLACE

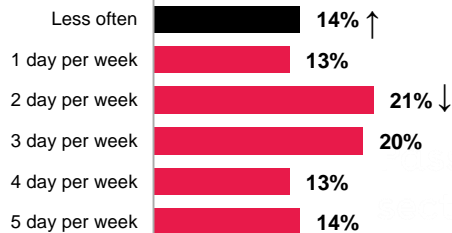
COMFORTABLE ABOUT RETURNING TO WORK



BEST TIME TO RETURN TO WORK



PREFERRED OPTION TO RETURN TO WORK



CONDITIONS AND INCENTIVES FOR RETURN

(among employees: n=334)

INCENTIVES TO RETURN TO THE OFFICE



Being flexible about the schedule	62% ↓
Making sure my entire team is present at the office at the same time	43%
Employer's contribution to transit fares	43%
More attractive office space	37%
Employer's contribution to lunch expenses	33%

THE MAJORITY FEEL COMFORTABLE RETURNING TO THE WORKPLACE

Nearly three out of four 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, but half of the respondents have already returned to work in person, but some of them prefer to wait before doing so.

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

... BUT THEY WILL NEED FLEXIBILITY

Once again, 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 transit fares, ensure more attractive offices, and contribute to lunch costs.

It is also worth noting that one third of 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.

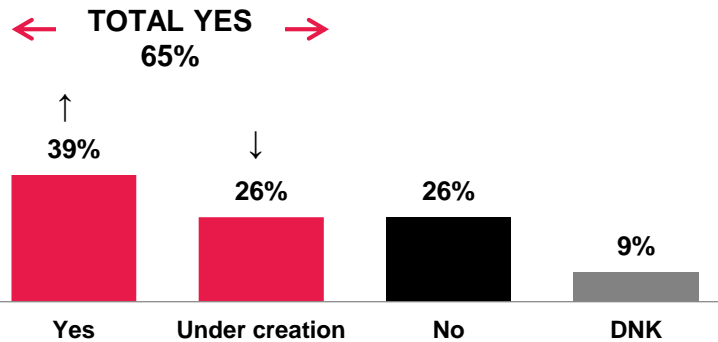
Note: For each graph, the complement to 100% corresponds to the answers "I don't know" and "Refusal".

Highlights | Return to work in person

RETURN-TO-WORK PLAN

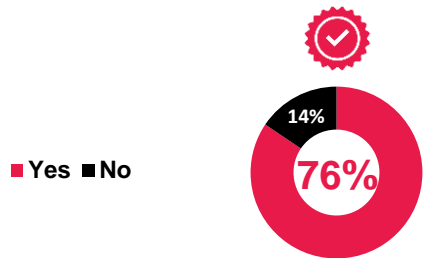
PROVISION OF A RETURN-TO-WORK PLAN BY THE EMPLOYER

(among employees: n=334)



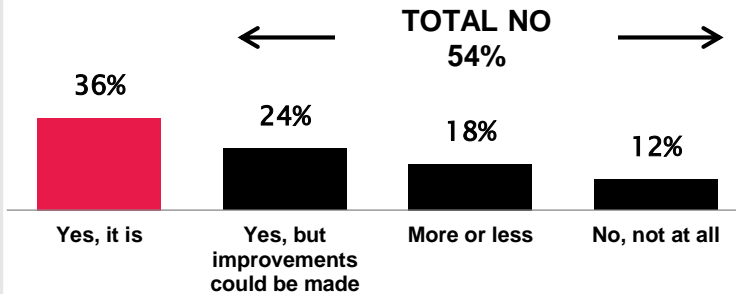
ADEQUACY OF THE RETURN-TO-WORK PLAN IN MEETING SAFETY EXPECTATIONS

(among respondents who were given a return plan, or it is in the process of being communicated: n=216)

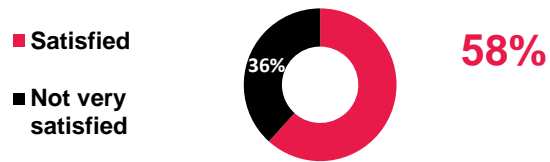


IDEAL OFFICE AND WORK ENVIRONMENT

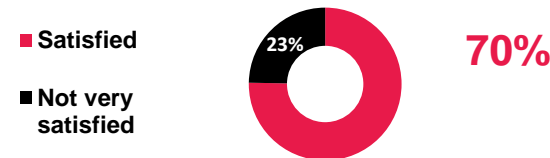
OFFICE ADAPTED TO THE NEEDS OF THE EMPLOYEES



SATISFACTION WITH THE COMMERCIAL, FOOD AND CULTURAL OFFERING DOWNTOWN



SATISFACTION WITH THE EMPLOYEE EXPERIENCE OFFERED BY THE EMPLOYER TO ENSURE AN APPEALING RETURN?



INCREASINGLY, EMPLOYERS ARE PROVIDING THEIR RETURN-TO-WORK PLANS, WHICH IS APPRECIATED BY MOST EMPLOYEES

Two in three employees say a return-to-work plan has been or is being provided by their employer.

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.

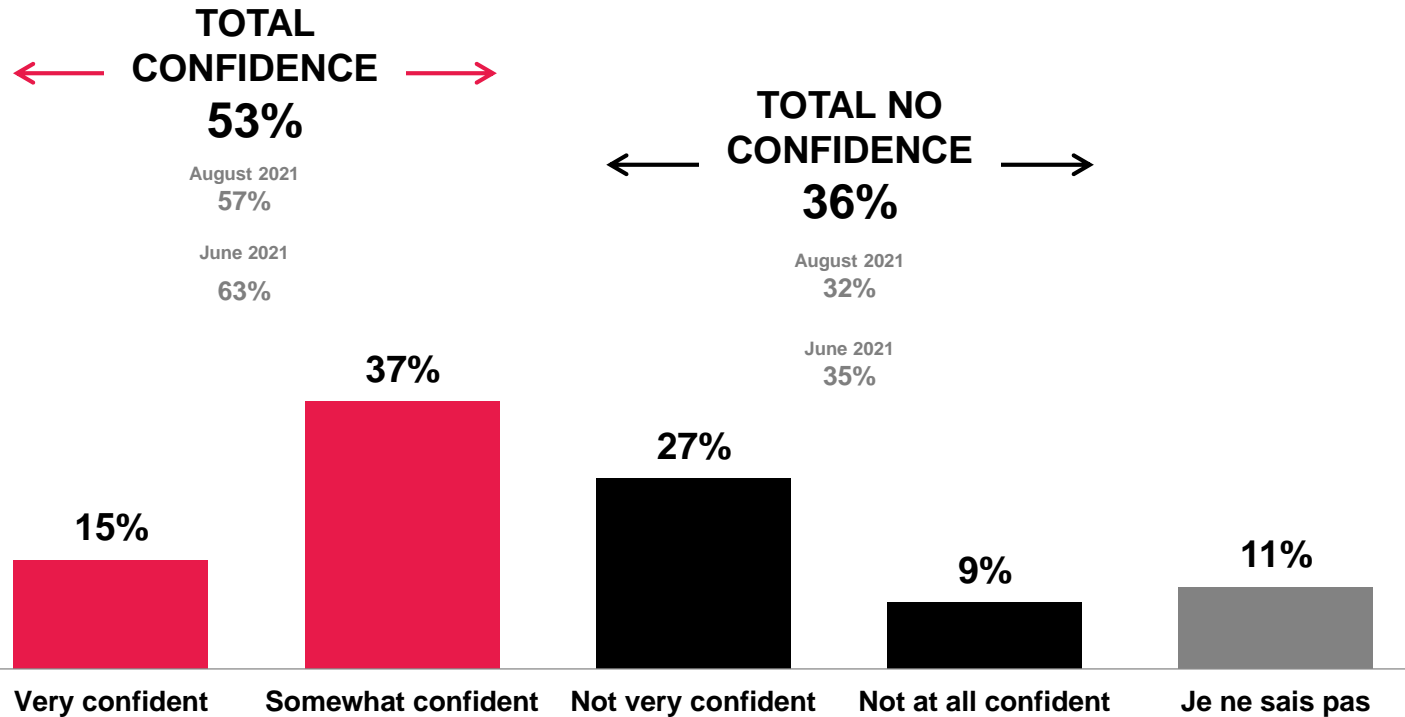
WORKERS WHO HAVE STARTED TO GO BACK TO WORK IN PERSON ARE SATISFIED WITH THE SERVICES OFFERED DOWNTOWN AND BY THEIR EMPLOYER TO ENSURE AN APPEALING RETURN

Slightly more than half of workers who returned to the workplace in person say they are satisfied with the the downtown area's commercial, food, and cultural offering. It is worth mentioning that one third of them are not satisfied with the services offered.

Finally, seven in ten employees say they are satisfied with the efforts made by their employer to offer them an appealing return to work in person.

CONFIDENCE IN THE HEALTH MEASURES IN PLACE ON PUBLIC TRANSIT

(tous les répondants : n=604)



MORE WORK NEEDS TO BE DONE TO INCREASE WORKER CONFIDENCE IN PUBLIC TRANSIT

It is also worth noting that while the majority of respondents said that the car was their primary mode of transportation to work before the pandemic, this will not change when they return to work.

More than half of respondents say they are confident in the health measures in place for public transportation, but this is down slightly from last August and June.

Highlights | Vaccination

CONCERN ABOUT RETURNING TO WORK WITH UNVACCINATED PEOPLE IS QUITE HIGH AMONG WORKERS

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.

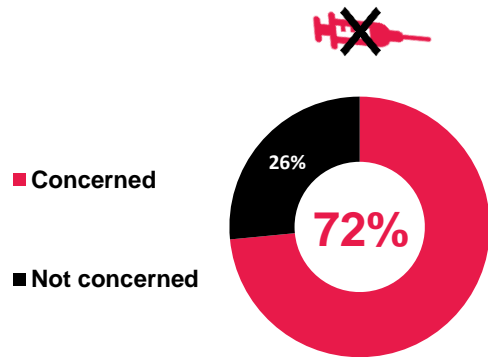
On the other hand, if the employer decides to designate a workplace for those who are double vaccinated, which is separate from those who have not received two doses of a vaccine, just over half of respondents would support this, while one-third would oppose it. This proportion has remained stable compared to August 2021.

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, 18% would return to their place of work provided there was an opportunity to avoid working in close proximity to unvaccinated co-workers.

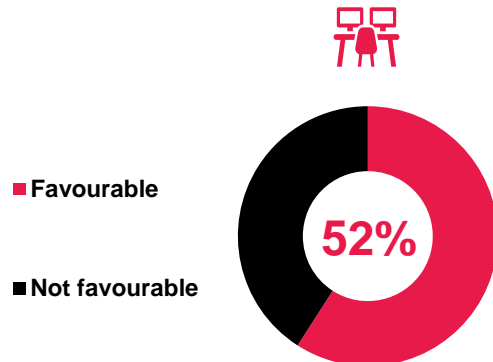
Finally, most workers support proof of vaccination for access to various services or locations. Specifically, eight workers out of 10 support proof of vaccination for access to planes, trains, and conference rooms, their workplace and lastly public transit.

WORKING WITH UNVACCINATED PEOPLE

CONCERNS ABOUT RETURNING TO WORK WITH UNVACCINATED PEOPLE

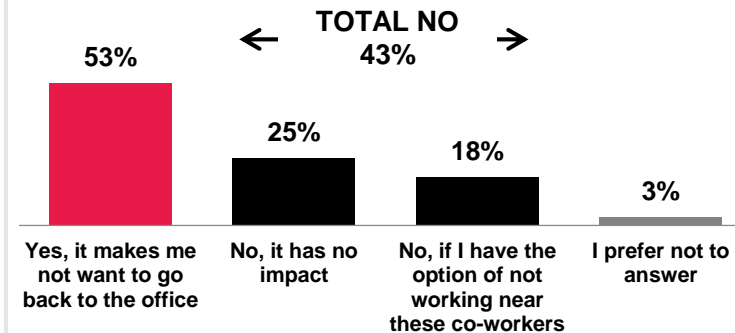


DESIGNATION OF A WORKSPACE FOR THOSE WHO ARE DOUBLE VACCINATED



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



Note: For each graph, the complement to 100% corresponds to the answers "I don't know" and "Refusal".

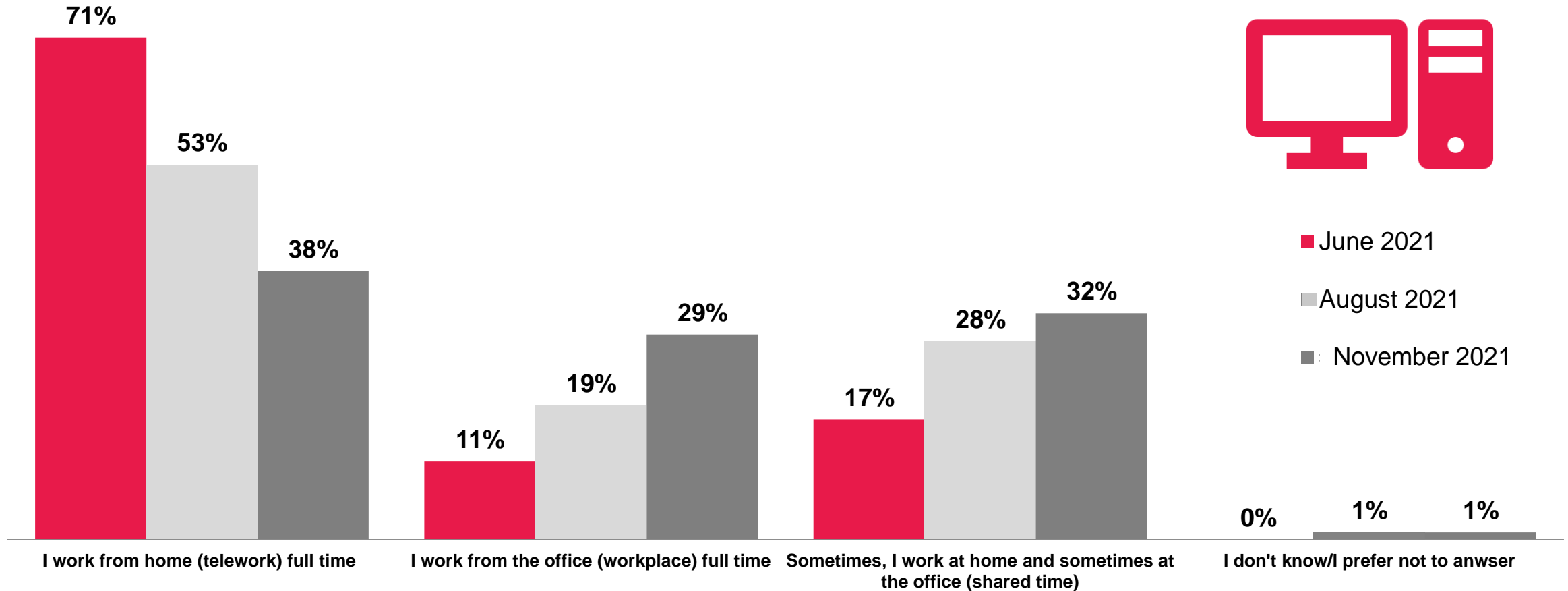
I love
working
downtown



The gradual
return to work
in person



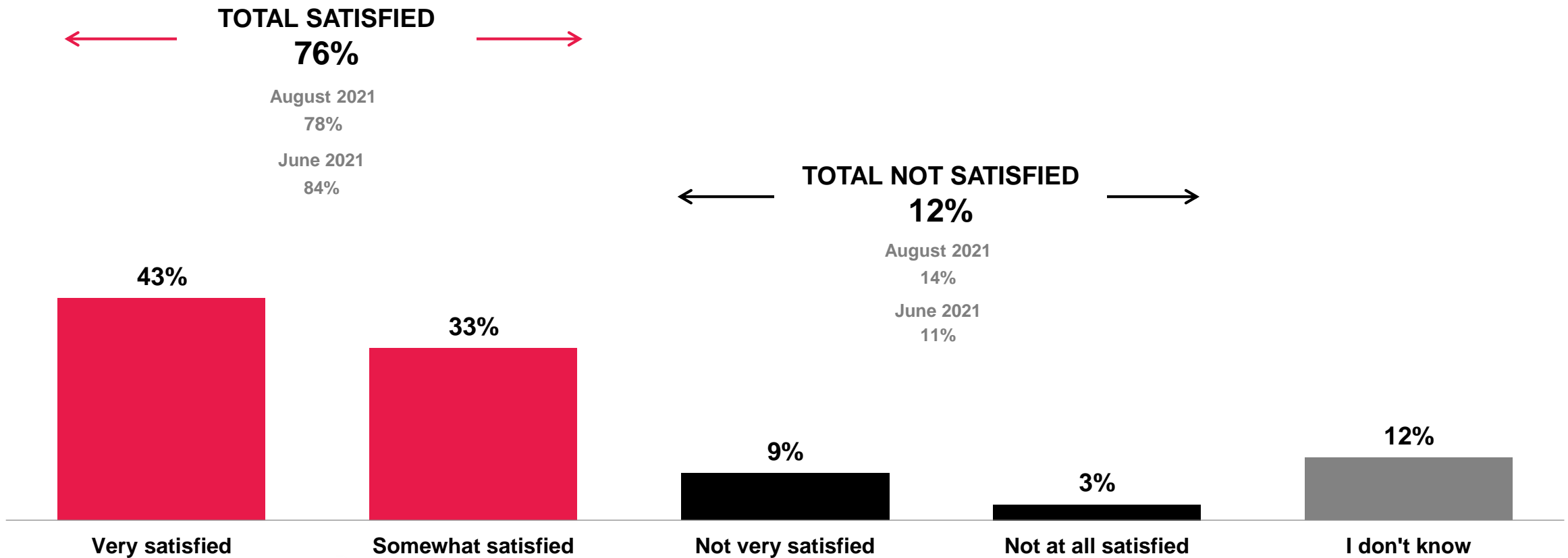
The current situation of the workers



■ June 2021
 ■ August 2021
 ■ November 2021

Q1. What is the situation, among the following, that best illustrates your current work environment?
 Base: All respondents (n=604)

Lower overall satisfaction with the telework experience



Q5. How satisfied are you with your telework experience in general?
Base: All respondents (n=604)

Professional issues with teleworking



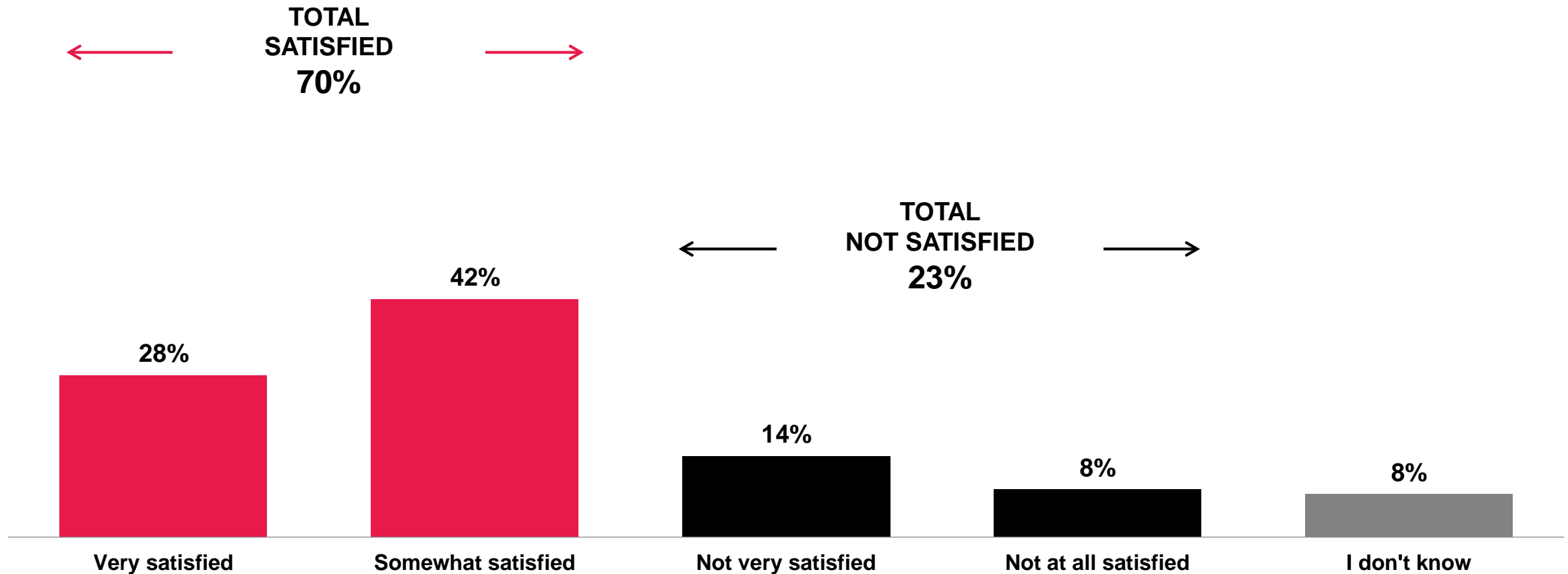
Q201. What are the professional issues you currently face with teleworking?

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

Base: All respondents (604)



Satisfaction with employee experience offered by the employer to ensure an appealing return



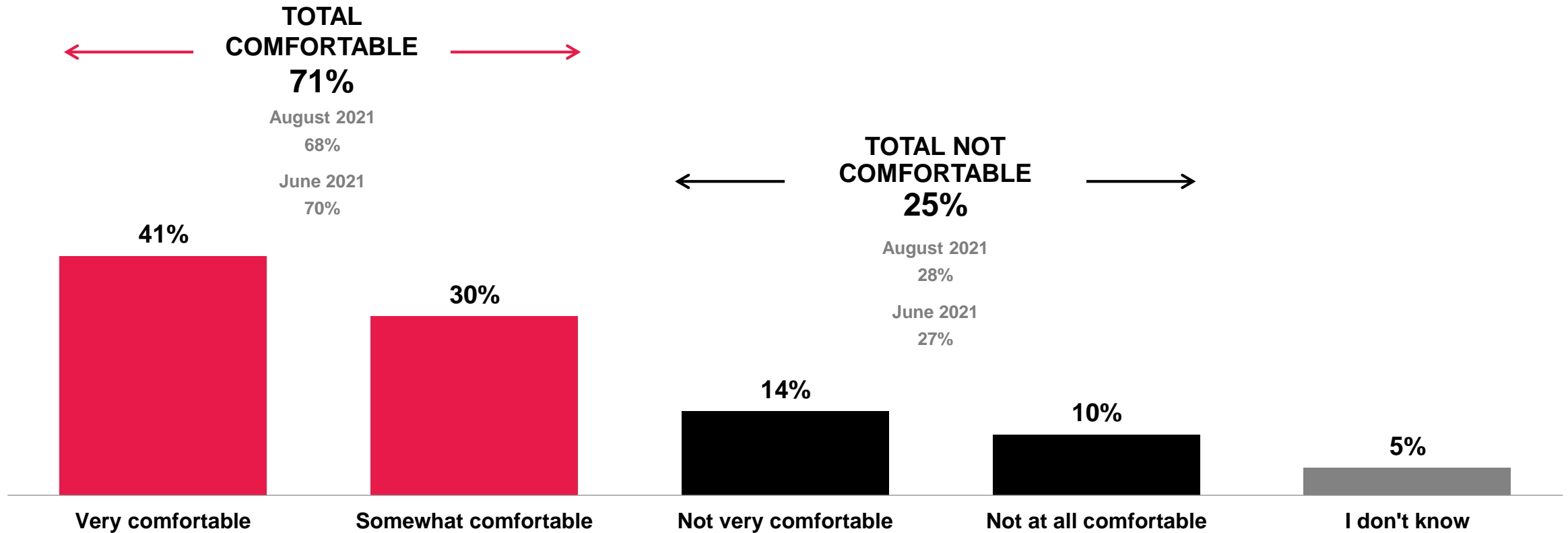
Q11B: Since your return to the office is already underway, how satisfied are you with the employee experience offered by your employer to ensure an appealing return?

Base: Employees whose return to the office is already underway (n=120)

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



More and more workers are expressing comfort with returning to the office

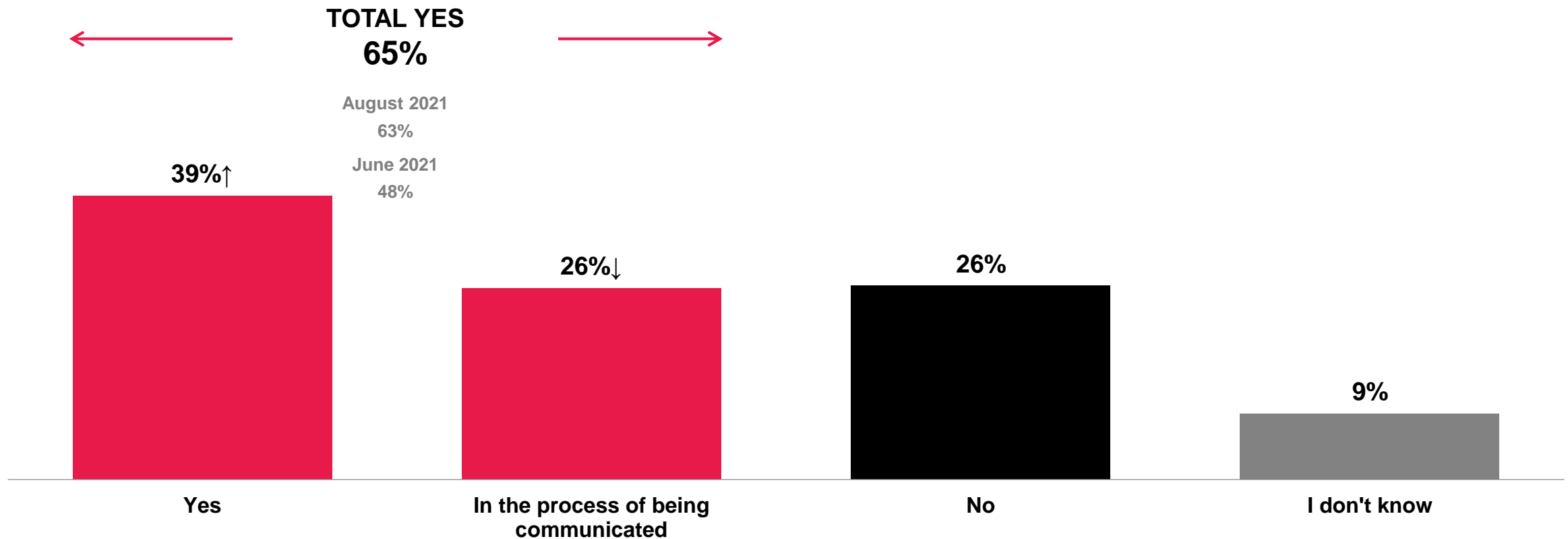


Q13. Some companies have initiated their plan for a return to work in-person, others haven't. As of today, do you feel comfortable progressively returning to work at the office/workplace?*

Base: All respondents (n=604)

*Question modified in November 2021. In August 2021, the question was: "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?"

Employers are continuing their efforts and communicate their return plans to their employees

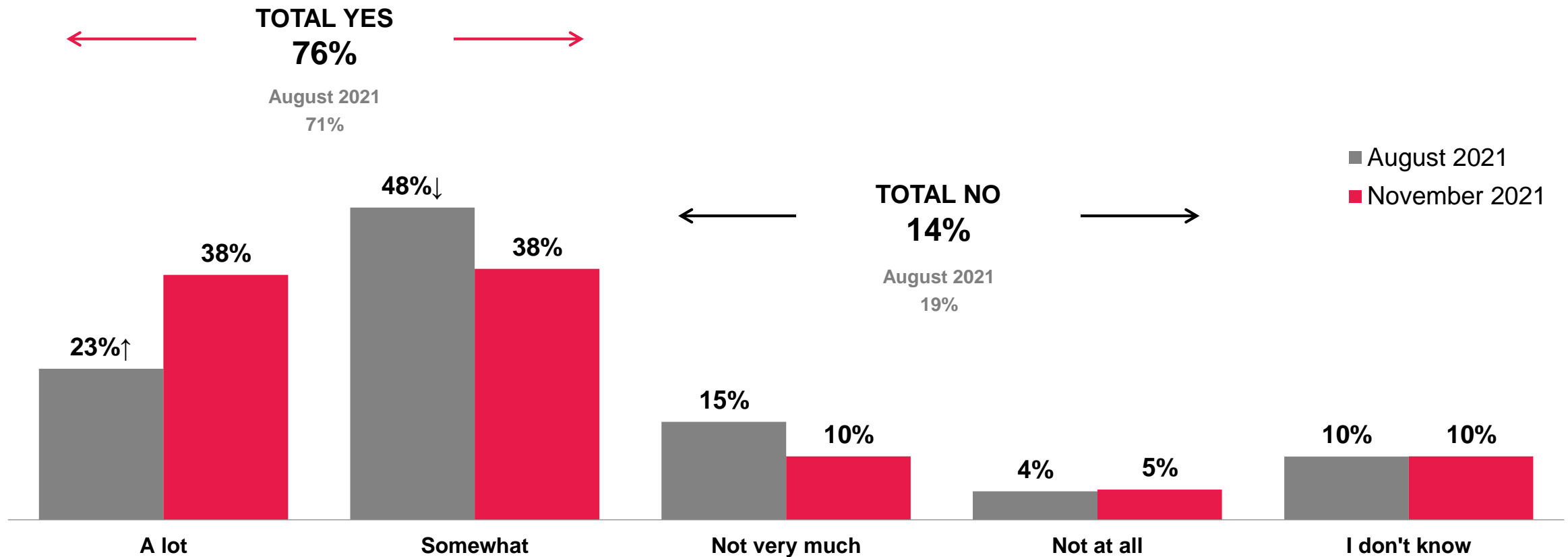


Q21. Has a return-to-work plan been provided by your employer?

Base: Employees (n=334)

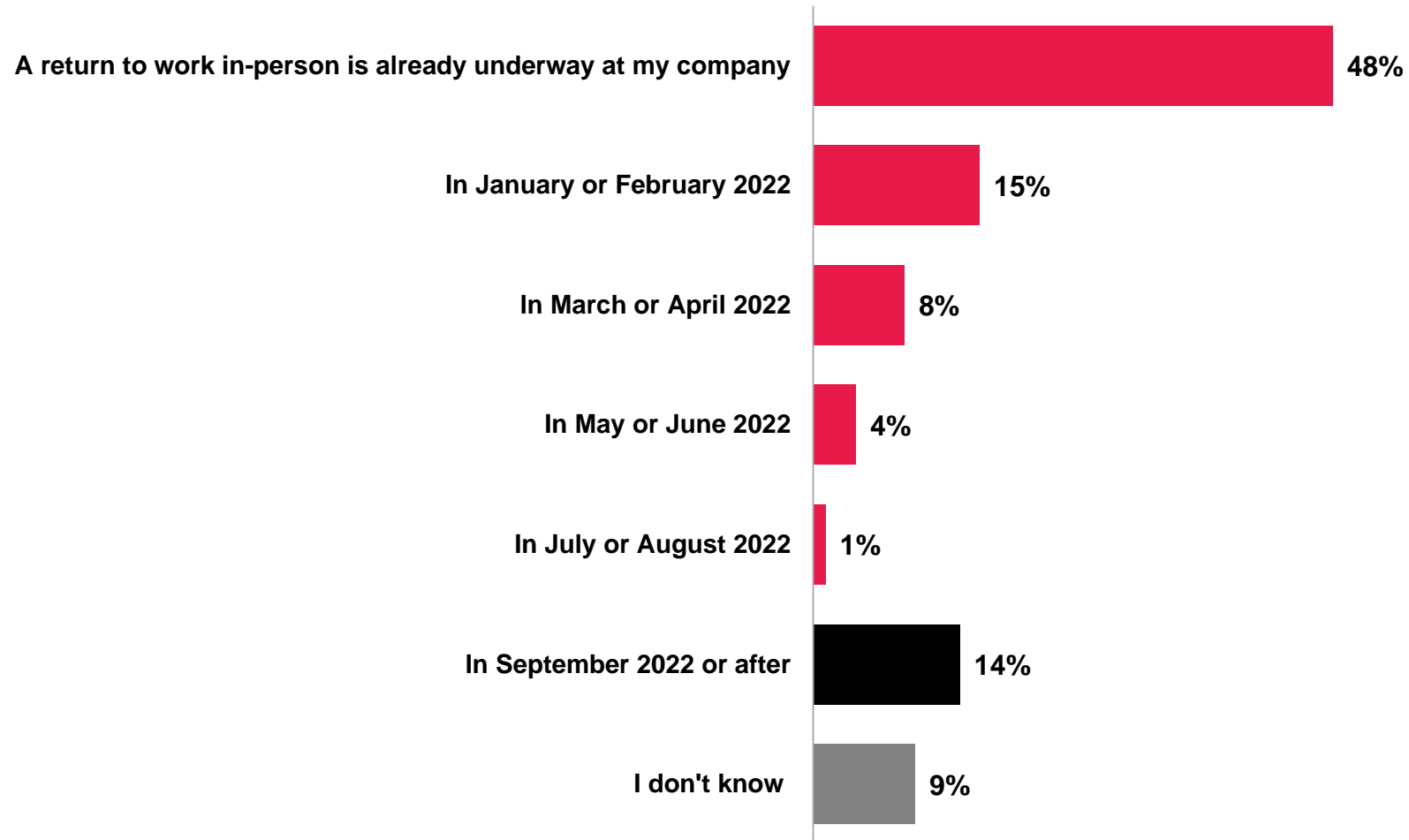


Communicated return plans are safe and meet workers' expectations



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=216)

Workers who have not yet returned to the office plan to do so as early as January 2022

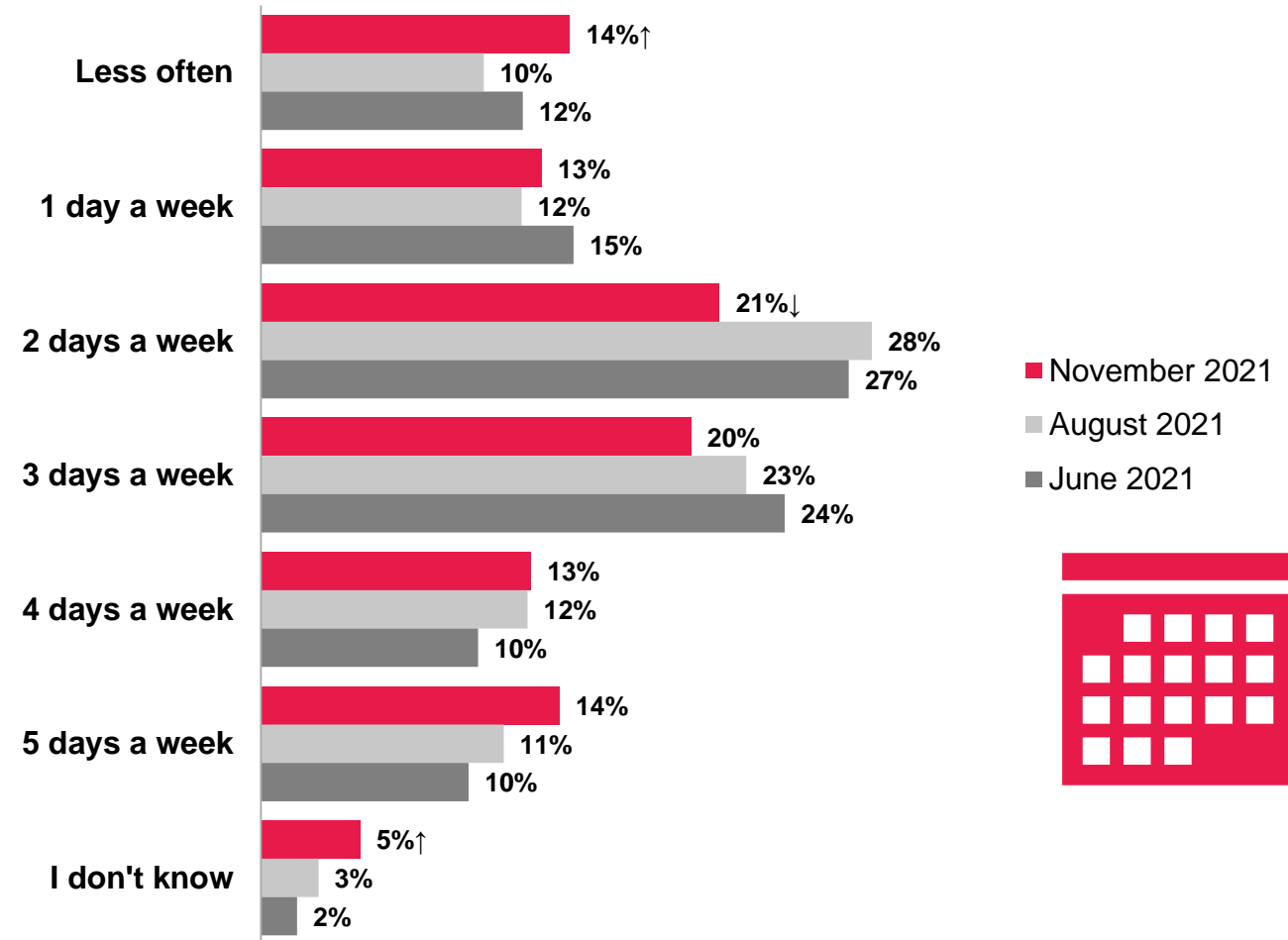


Q14. When would you feel most comfortable progressively returning to work in person?

Base: All respondents (n=604)

*Several response choices were modified in November 2021. For this reason, no comparison is possible with August 2021.

Coming back to the office 2 or 3 days a week remains the favorite option for workers



Q15. What would be your preferred option to return to work at the office/workplace?

Base: All respondents (n=604)

I love
working
downtown

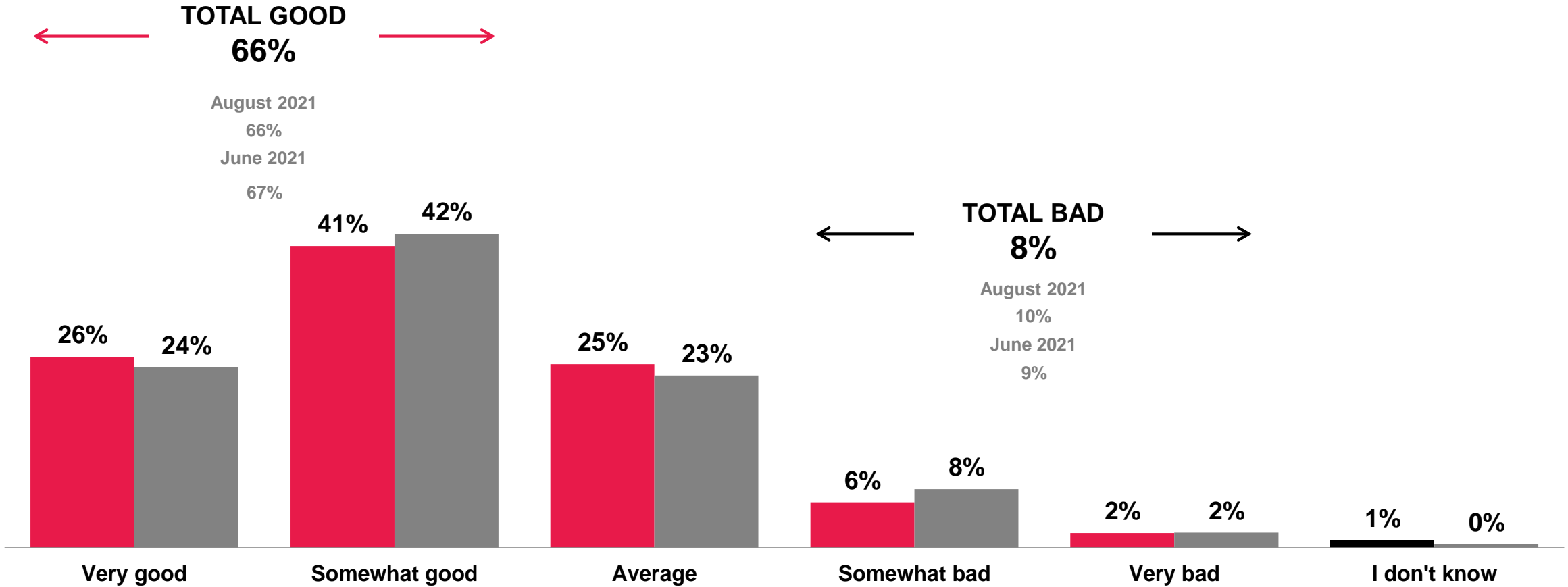


How workers
view the
operation of
hybrid work





After more than a year of pandemic, workers' morale and motivation remain high

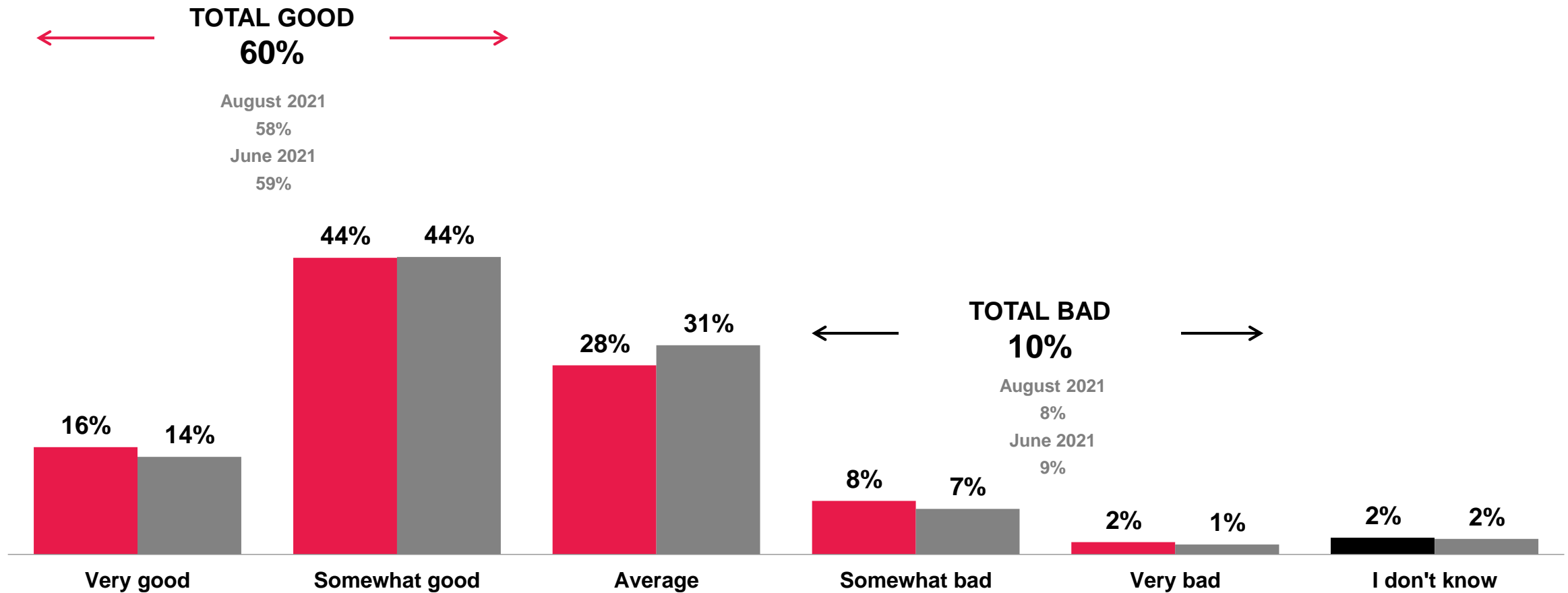


Q8. After more than a year of pandemic, how would you describe your morale and motivation at work?

Base: All respondents (n=604)



Emotional climate of work team after more than a year if pandemic remains good...

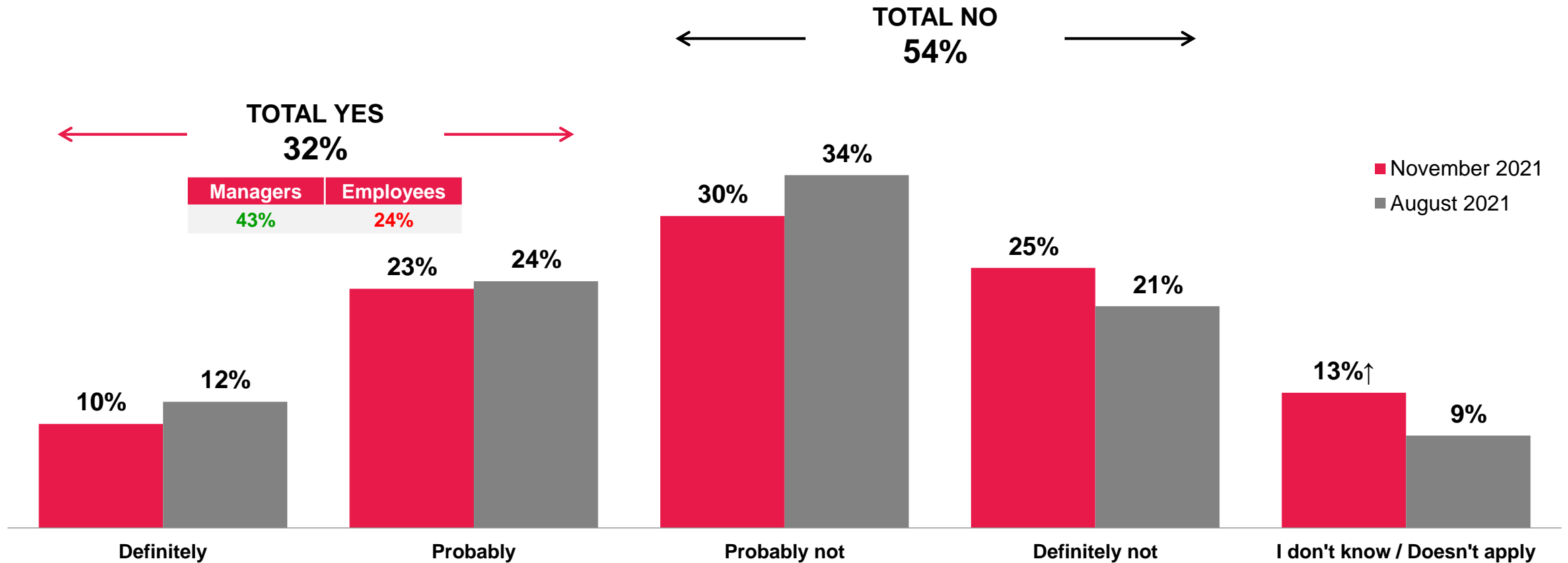


Q9. After more than a year of pandemic, how would you describe the emotional climate of your work team?

Base: All respondents (n=604)



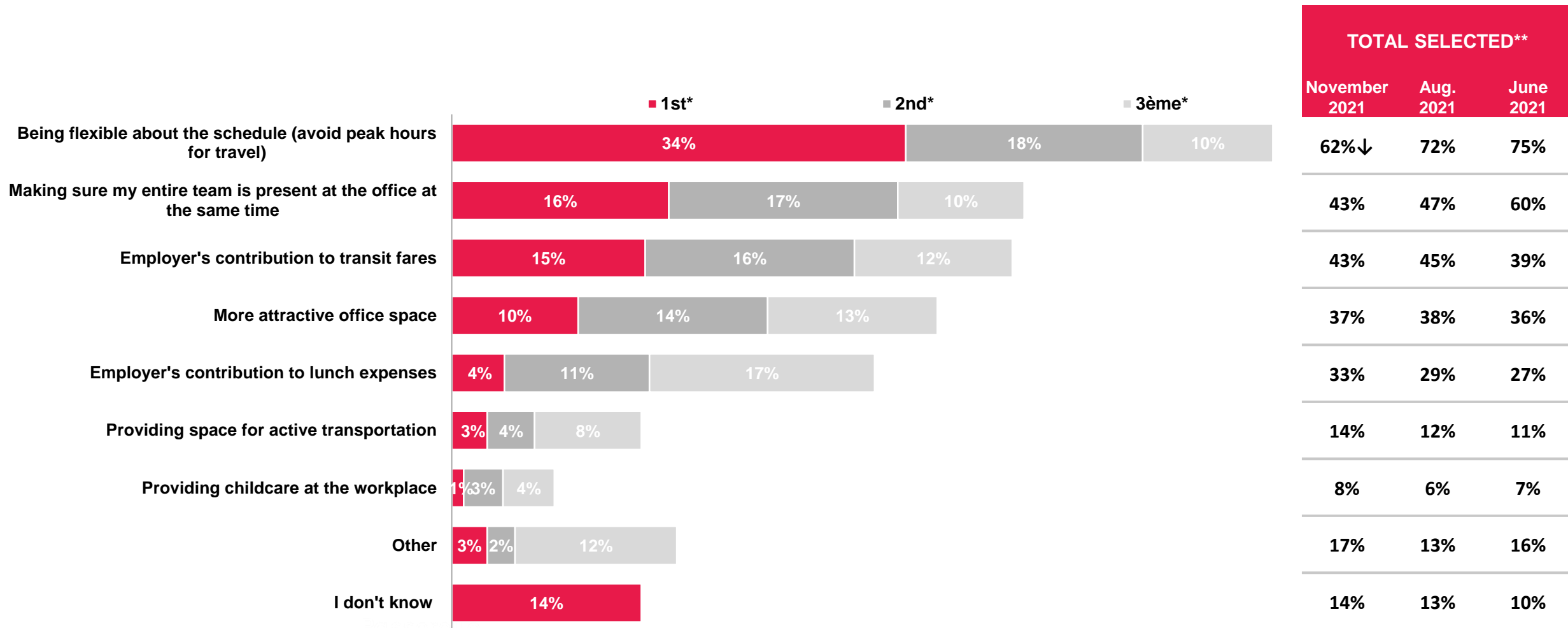
... but more than a third of workers are less effective when one part of their team is remote while another is present



Q202. Could having one part of your team in the office while another works remotely have a negative impact on your work efficiency?
Base: All respondents (n=604)



Workers reaffirm the need for flexibility in working hours



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

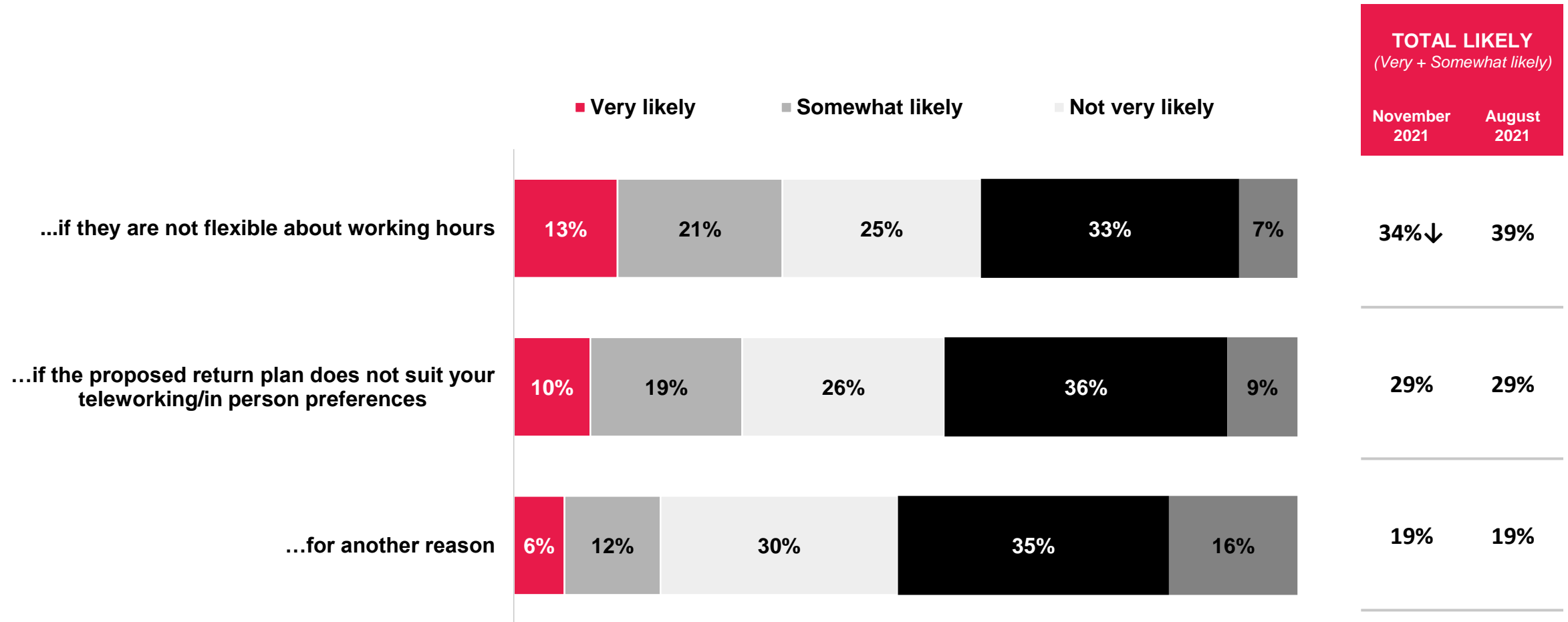
Base: Employees (n=334)

*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).



One-third of workers would be willing to leave their employer if it is not flexible on work hours

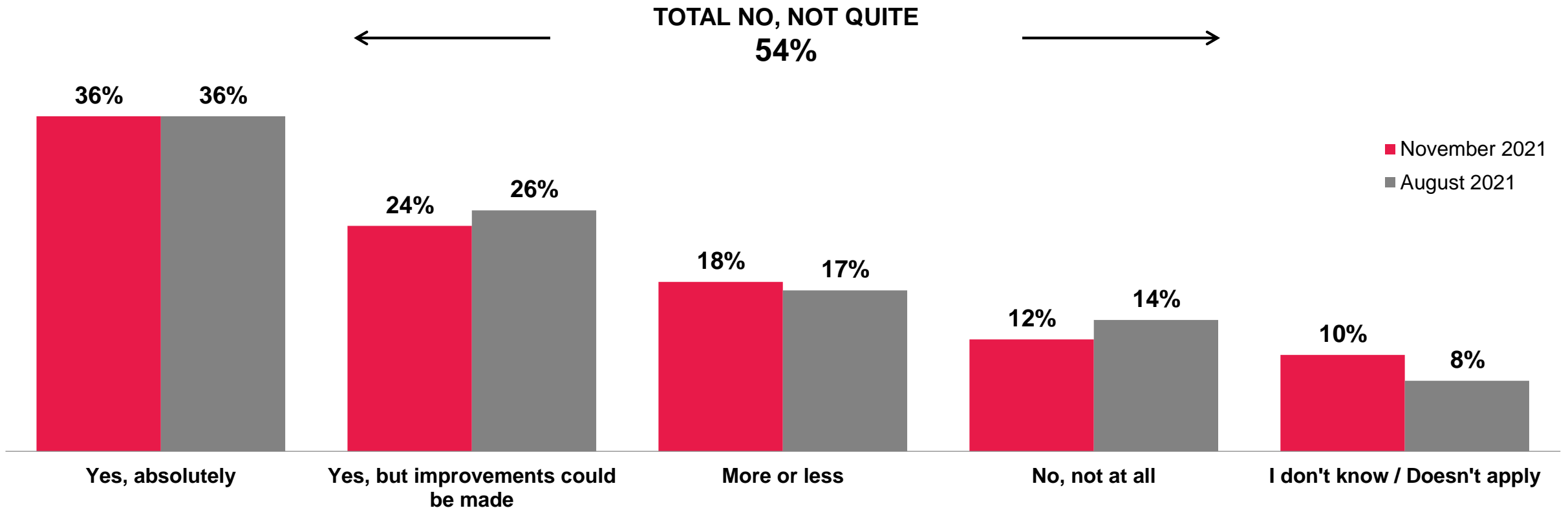


Q205. How likely are you to leave your employer ...?

Base: All respondents (n=604)

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

The offices that workers occupied before the pandemic are no longer suitable for 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=604)

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

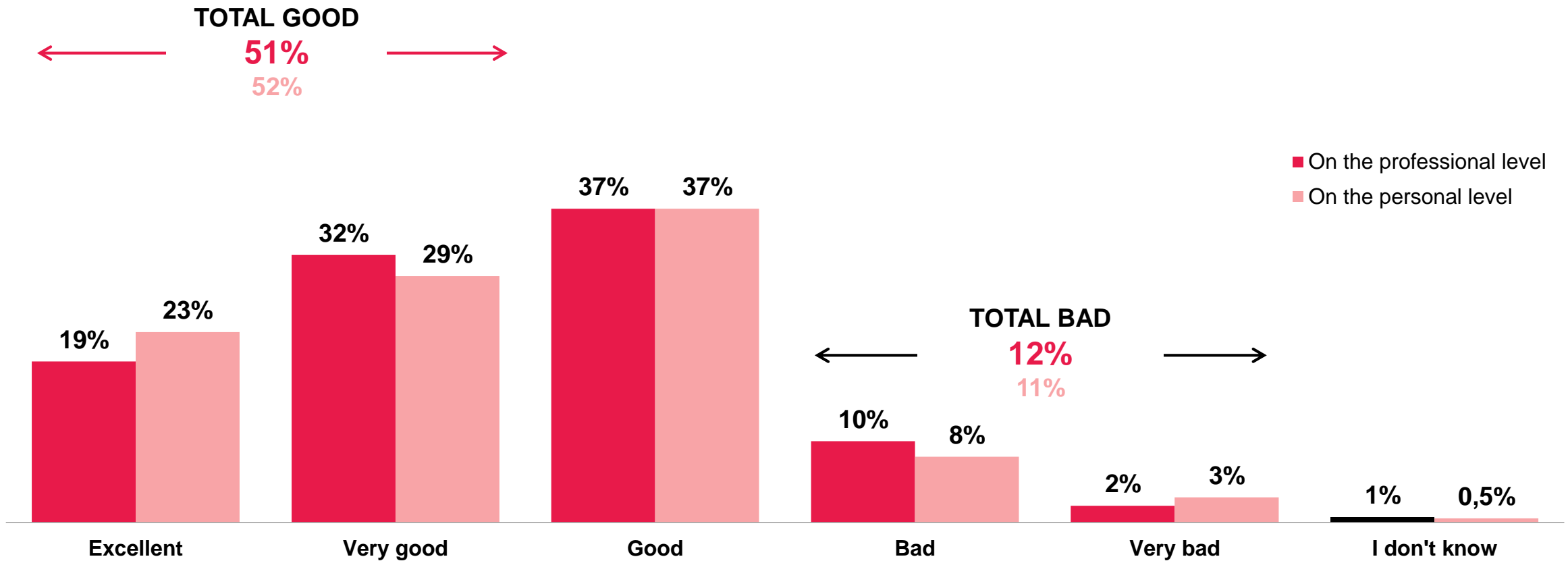
I love
working
downtown



Workers' mental health



Workers assess their occupational and personal mental health

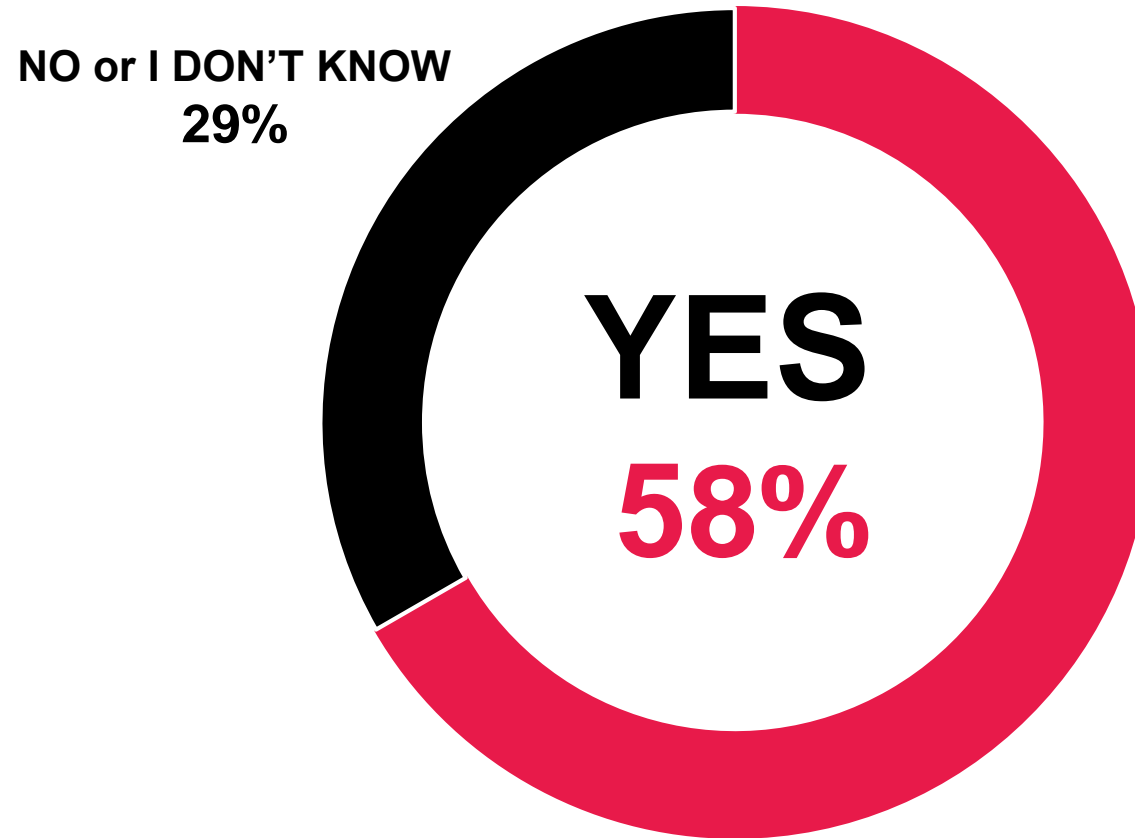


Q301: After more than a year of pandemic, how would you rate your mental health?

Base: All respondents (n=604)

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

A majority of employers offer mental health support tools



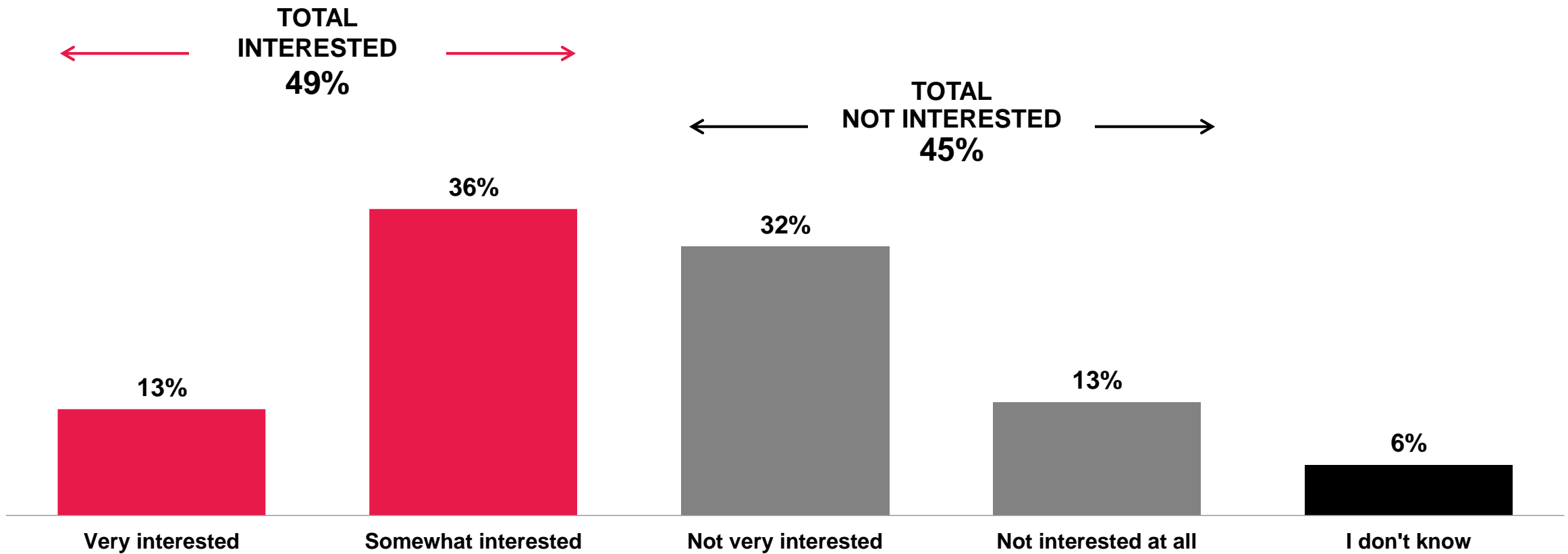
Q302: Did your employer set up a mental health support program or tools?

Base: All respondents (n=604)

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

**Due to the number of respondents (n<30), results are presented for illustrative purposes only.

Workers show interest in mental health programs



Q303: How interested would you be in a mental health support program or tools?

Base: All respondents (n=604)

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

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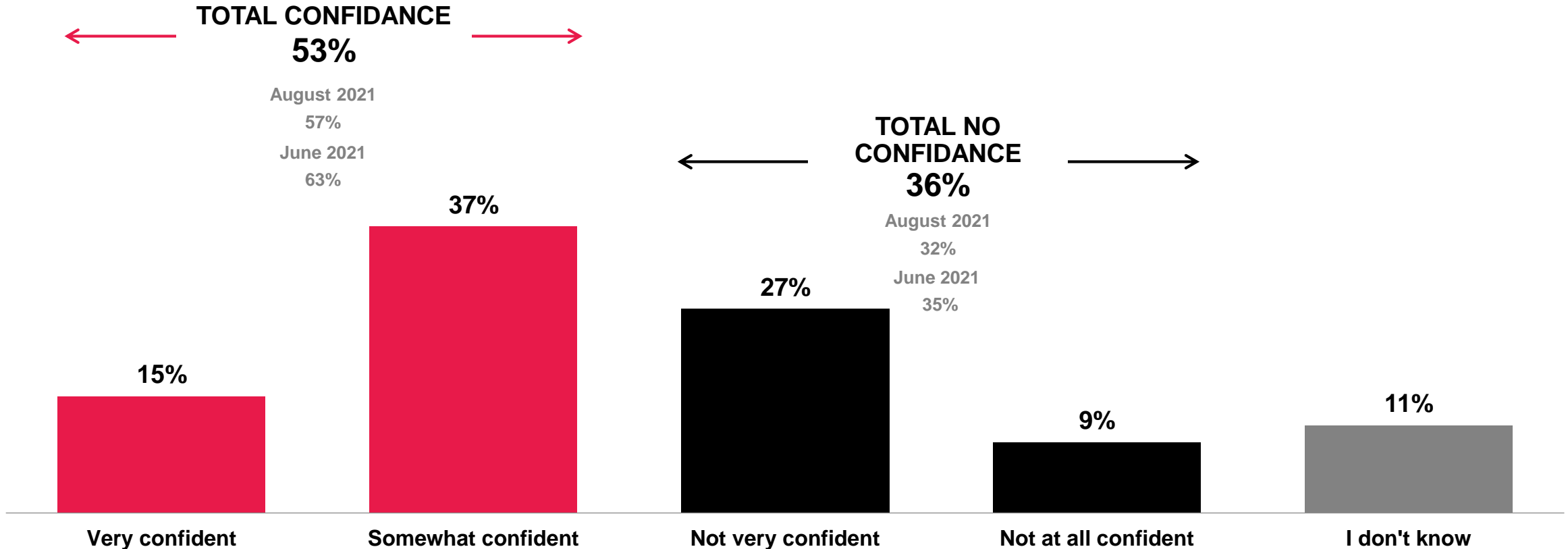


Confidence in
transportation
to the office





More work to be done to improve worker confidence in public transit

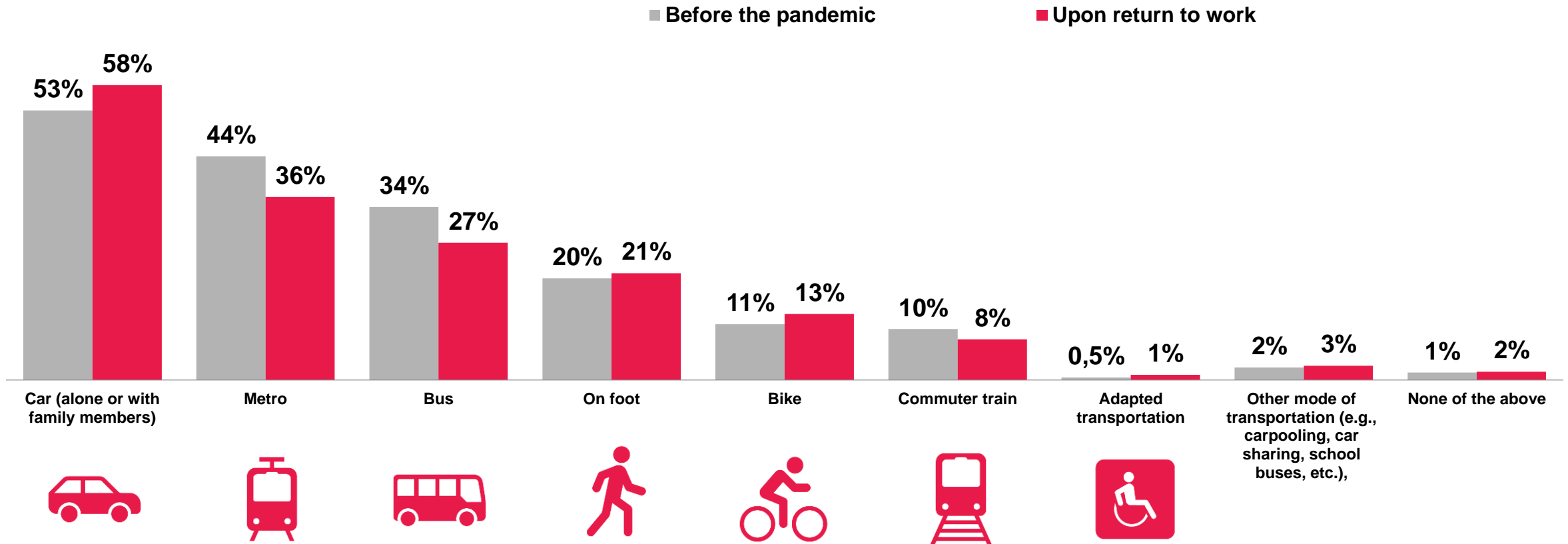


Q3. To what extent are you confident in the sanitation measures in place on public transit to resume taking public transit when you return to your workplace?*

Base: All respondents (n=604)

*Question modified 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?"

Some workers are changing their transportation habits to get to the office



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?

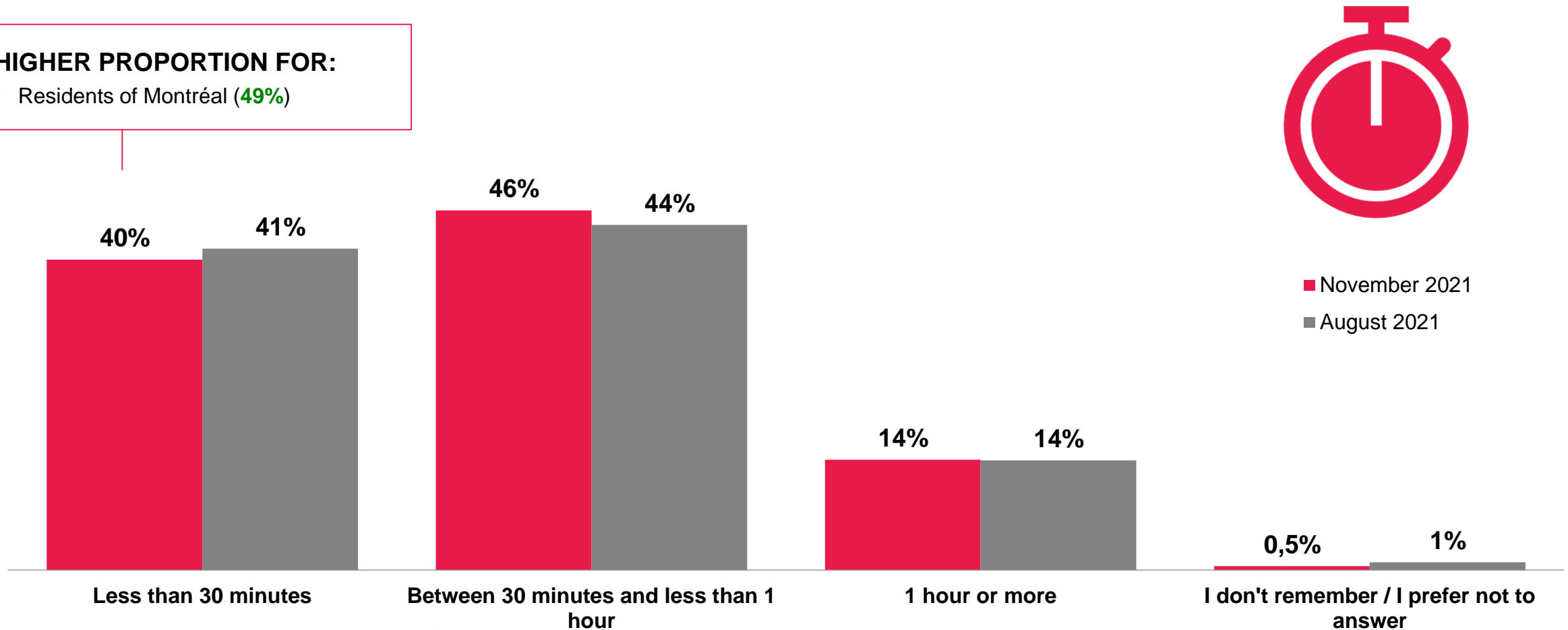
MULTIPLE ANSWERS: Since respondents have the possibility to give multiple answers, the total may exceed 100%.

Base: All respondents (n=604)

The time it takes workers to get to their workplace

HIGHER PROPORTION FOR:

- Residents of Montréal (49%)



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

Base: All respondents (n=604)

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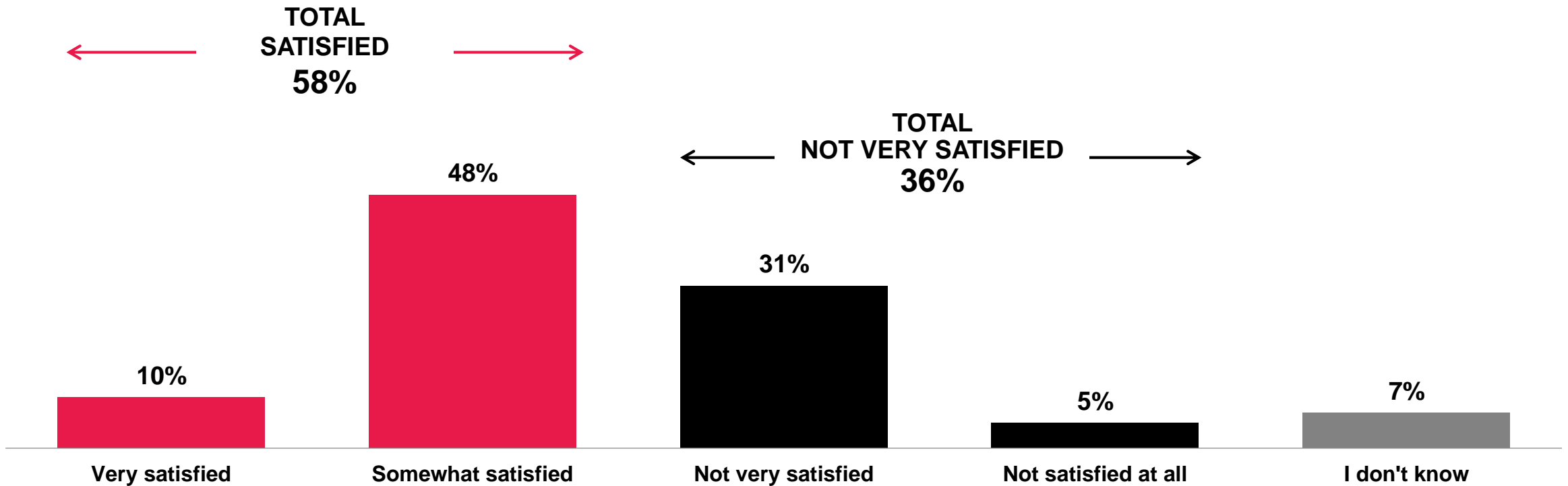


In person
meeting and
business event
participation





The majority of workers are satisfied with the commercial, food and cultural services offered downtown, but more than a third need to be convinced



Q11A: Since your return to the office is already underway, how satisfied are you with the downtown area's commercial, food, and cultural offering right now?

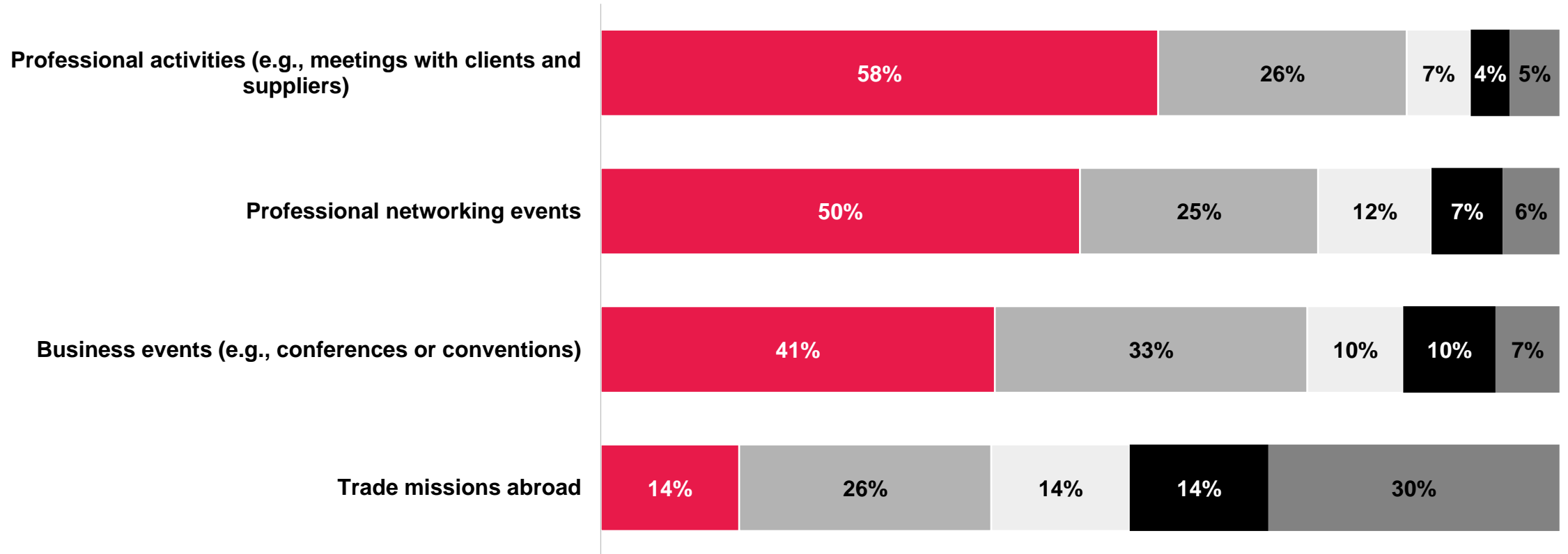
Base: Respondents who have already started to return to the office and who work downtown (n=104)

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



Company policy regarding in-person participation in various activities

■ This is authorized for all employees ■ This is authorized for certain functions only (e.g., manager) ■ This will soon be authorized ■ This is prohibited ■ Not applicable



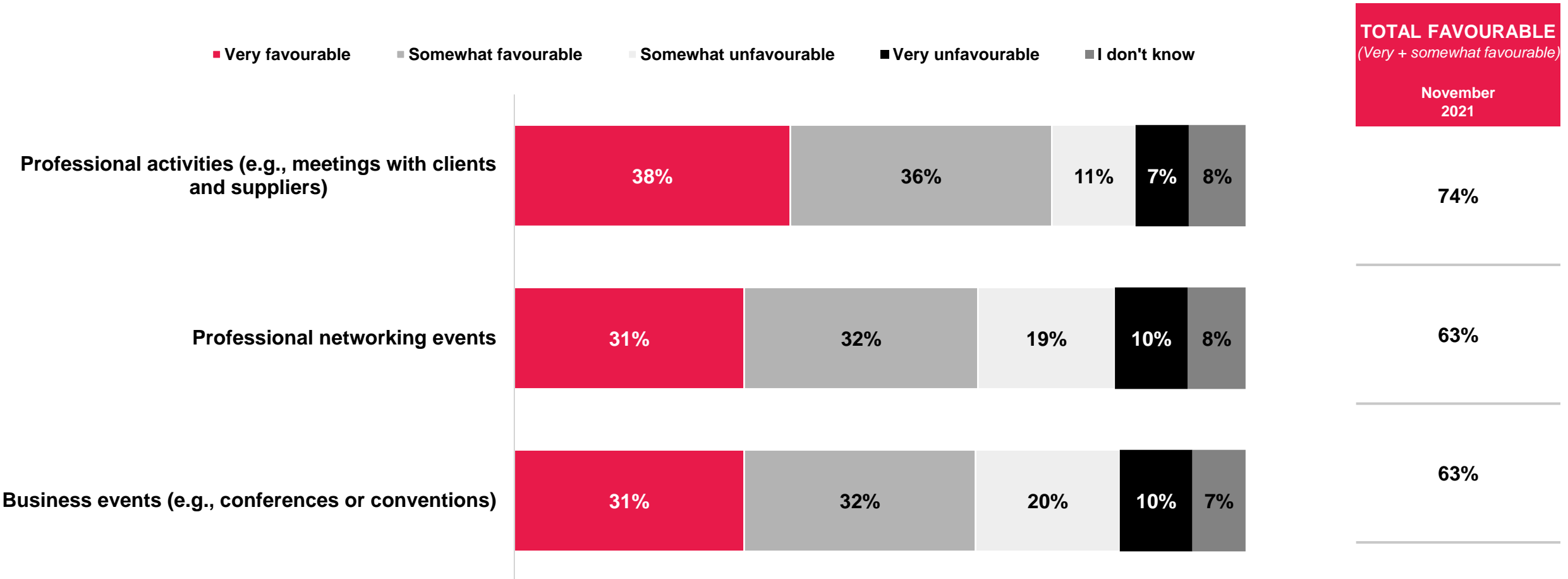
Q305. What is your company's policy regarding in-person participation of your employees in the following activities?*

Base: Managers (n=270)

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



Workers overwhelmingly support returning to various in-person business events



Q306. In the coming months, to what extent would you be favourable to physically participating (in-person) in the following different activities...?*

Base: All respondents (n=604)

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

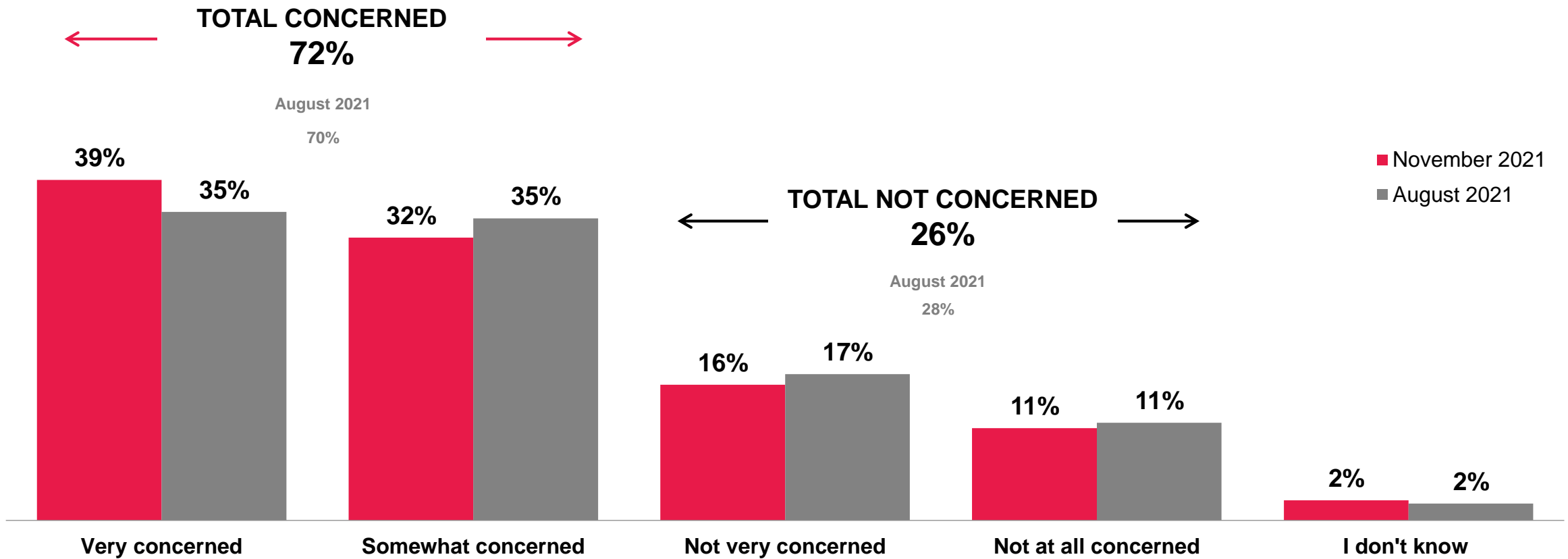
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Workers' perceptions of workplace vaccination



Workers are concerned about returning to the office in the presence of unvaccinated people



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

Base: All respondents (n=604)

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

Conclusion

A RETURN IN PROGRESS

More and more workers who responded to this extensive survey are beginning to return to the office.

A GRADUAL RETURN

Faced with the uncertainty caused by the epidemiological situation, workers welcome hybrid work arrangements by planning to return to the office 2 or 3 days a week.

A HEALTHY HYBRID RETURN

The benefits of teleworking remain relevant for workers who are once again asserting their need for flexibility. That being said, this mode of work also contributes to social isolation and implies a consequent loss of team spirit. To remedy this situation, workers prefer a hybrid work mode that is flexible and respects their mental health needs.

AN INTERACTIVE RETURN

Workers have expressed their enthusiasm for participating in various business events again. The implementation of the vaccine passport in businesses, public places and some workplaces will allow us all to be in compliance with health measures.

NEXT STEPS

In the coming months, the Chamber of Commerce of Metropolitan Montreal will continue to provide employers and workers, through various events and publications, with resources and tools to support their return to the office towers. The communications and marketing campaign designed to spread the word about all the mobilizing initiatives of *I love working downtown* has been launched and is already allowing many stakeholders to raise awareness among the business community and political decision-makers about the issues of workers returning to the downtown area. For more details, visit [our web page](#) and stay tuned!

Toolbox



Access useful resources to help you
plan for the safe and efficient
return of your workers.

[ACCESS THE TOOLBOX](#)