



## Mercer Survey on the Return to the Workplace

*Conducted by Mercer as a virtual focus group with 114 participants on May 20, 2020*

### **Top Line Results**

- Transit/subway/train & bus stations are what people are most concerned about when economy reopens
  - 78% strongly agreed or agreed that access to public spaces is very important when considering return to work
  - 88% are still working normal hours at the same pay
  - 75% normally work in an office but are now working from home
  - 70% agreed or strongly agreed that they are concerned about their personal safety at work upon return
  - 85% agreed or strongly agreed that they are concerned with their personal safety during their commute upon return
  - For those that plan to work at the office less frequently in the future, 23% said due to concerns with transit (most common answer)
  - 49% do not plan to change their commute method, while 47% do plan to change.
  - Staggered work hours and health screenings were universally favorable (most common) as measures that would make people feel comfortable about returning to work.
  - A vaccine was strongly favorable (most common reason) as what would make people feel more comfortable with NYC life outside of the office.
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### **Participant Profile**

#### Respondents work in the following industries

More than two-fifths of respondents work in FIRE, nearly one-fifth work in professional services, and the rest across more than 10 industries.

- 44.7% - Real Estate, Finance and Insurance
- 17.5% - Professional Services
- 8.8% - Other
- 7.9% - Information & Technology
- 7% - Education Services
- 3.5% - Retail Trade
- 3.5% - Arts, Entertainment & Recreation
- 1.8% - Construction; Energy
- 0.9% - Manufacturing; Transportation & Warehousing; Utilities; and Wholesale Trade

#### Office setup/arrangement

- Just over half (56.1%) work in an office, one-quarter (26.3%) work in an open workspace, and 8% work in a cubicle. Only 4.4% work in a shared office.

### Respondents live in the following locations

Half of the respondents live in Manhattan and almost three-quarters (72%) live in the five boroughs.

- 48.3% - Manhattan
- 15.8% - Brooklyn
- 8.8% - New York state (outside of NYC and LI)
- 7.9% - Long Island
- 7% - New Jersey
- 5.3% - Queens
- 3.5% - Connecticut
- 2.6% - Bronx
- 0.9% - Other

### Of those that commute, the following modes are used

(Respondents were asked to select ALL that apply. More than one mode may be used by each respondent.)

- 38% use the subway
- 19% walk
- 17% use rail (commuter train)
- 8.4% use buses
- 8.4% use car/carpool
- 5% use for-hire vehicles
- Less than 2% use a bicycle, ferry or other

### Jobs that typically require being at a work location

- 96% of respondents are either required or do most of their work from a work location
- 61% are required to be at a work location by their employer
- 35% are not required to be at a work location, but most of their work is done from the office
- 3.5% typically work remotely

### Office locations for those who commute

- Nearly 90% of respondents' offices are in Manhattan
- 2.6% of offices are in Brooklyn, Queens or in NY state (outside of NYC or LI)
- Less than 1% in CT, NJ or other

### Respondents are responsible at home/ during the workday for the following

- Nearly three-quarters (72%) of respondents are not responsible for care of children or an elderly or sick household member
- 22% care for/supervise children
- 3.4% care for elderly

- 1.7% care for a sick household member

#### Age of respondents

- 9% were 21 to 29 years old
- 23% were 30 to 39 years old
- 30% were 40 to 49 years old
- 25% were 50 to 59 years old
- 13% were 60 or older

#### Employer response to the pandemic

Almost all of respondents believe their employer responded to the pandemic very effectively (73%) or effectively (24%). Only 2.6% of respondents felt their employer responded very ineffectively.

#### **Mid-conversation polls**

Access to public spaces is very important to me when considering going to work / returning to your office/ worksite.

- 45.2% Agree
- 33.3% Strongly agree
- 14% Neither agree nor disagree
- 3.2% Disagree
- 2.2% Strongly disagree or did not know.

#### Work status of respondents since the pandemic

- 88% are working normal hours at same pay
- 6% are working normal hours for reduced pay
- 2% have reduced hours
- 1% had job furloughed

#### Description of work setup at the moment of the poll

- 75% normally work in the office, but are currently working from home
- 16% mostly work from home
- 8% split time between office and work

Question: Are you concerned about personal safety at work upon return to the office/ worksite?

- 25.7% strongly agree
- 43.8% agree
- 10.5% disagree
- 8.6% strongly disagree
- 10.5% are neutral

Question: Are you concerned about personal safety during commute to work upon return to office/worksite?

- 61.8% strongly agree
- 22.5% agree
- 5.9% strongly disagree
- 4.9% disagree
- 3.9% are neutral

If planning to work at the office/worksite less frequently, the primary reasons are:

- 22.5% do not want to take public transport
- 16.3% fear of infection or (want) more flexibility
- 13.8% think it is unnecessary
- 11.3% do not plan to go less frequently
- 7.5% company won't allow a return to the previous schedule
- 6.3% child care and other family responsibilities
- 5% less time commuting
- 1.3% have a plan to relocate further from the office/worksite in NYC

Changes to Commute Mode

- 46.7% of respondents plan to change their commute mode, while about the same (48.6%) do not plan to change their commute mode.

Open Questions/Conversations (Open-ended questions where participants gave answers and also voted on others' answers.)

1. When the economy reopens, which public spaces are you the most concerned about returning to?

- By far, the most popular answer was public transportation (subway, rail, buses). Some noted large terminals (Grand Central and Penn Station).
- Other popular answers included any place with a large group of people (sporting events, concerts, beaches), tight office spaces/elevators, restaurants, bars and gyms.

2. What are your biggest concerns about returning to your office/worksite?

- The commute (public transit crowding) was the most popular response.
- Other people's behavior/compliance (wearing masks, social distancing, washing hands) was the next most popular.
- Also ranked moderately high was ability to social distance/wear a mask throughout the day in the office setting in shared spaces (bathrooms/pantry).

3. What measures would need to be taken for you to feel comfortable to return to the office?

- Staggered work hours, health screenings.
- Modification of (office) space according to social distancing rules, no group meetings.

- Other popular answers include deep cleaning/availability of disinfectant, hand sanitizers and masks; availability of a vaccine; and successful ways to social distance on public transit.

4. What would make you feel more comfortable with NYC life outside of the office?

- Most popular answer by far is an effective vaccine, followed by a drastic reduction in number and rate of infection and availability of testing.
- Other popular answers include limited capacity in restaurants and other entertainment venues as well as people abiding by the rules (wearing face masks).