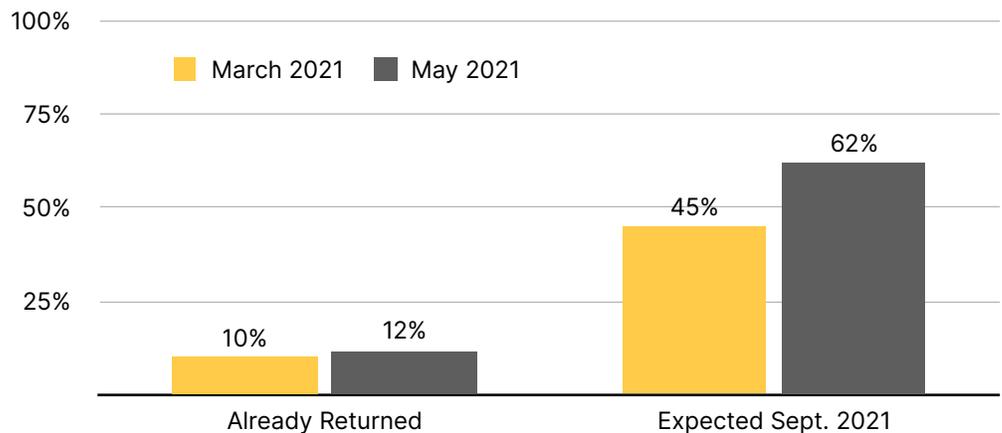


Return to Office Survey Results

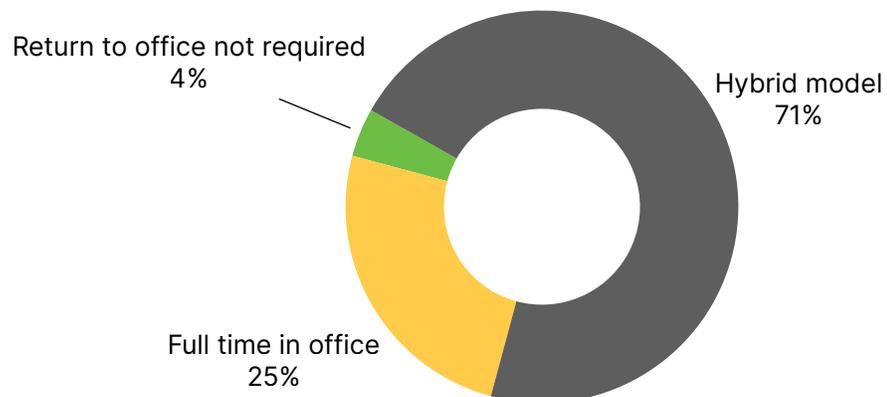
The Partnership for New York City surveyed major employers between May 17 and June 2, 2021, to develop projections on how long Manhattan's one million office workers will continue to work remotely.

Findings are decidedly more optimistic than previous surveys conducted over the past year: 62% of office employees are expected to return to the workplace after Labor Day, 2021—up from 45% in a survey taken in March—reflecting the impact of relatively rapid vaccination rates. In response to employee preference and continued protective policies, however, most employers will be following a hybrid model where employees are in the office on a rotating basis less than five days per week.

Employer optimism around return to the office increased since March



Employer approach to return to office



The Partnership survey of employers found:

- 12% of Manhattan office employees have returned to the workplace as of late May, up slightly from 10% in early March.
- Employers expect that 29% of employees will have returned by the end of July 2021.
- The total share of office employees expected to return by the end of September 2021 is 62%; a 37% increase since March estimates of 45%.
- Employer confidence in the pace of return has also increased. In March, 14% could not provide estimates; now only 3% say they do not know when most employees will be back in the office.
- 84% of employers report that employee perceptions of mass transit are still an obstacle to returning to the office due largely to concerns about personal safety (cleanliness of the system is less of a concern than in earlier surveys).
- Employers in most industries increased their expectations of office occupancy. Financial services employers expect 61% of employees to be back in the office by the end of September, up from the previous estimate of 50%. Tech employers, on the other hand, expect the fewest employees (40%) to return by the end of September, down from the 51% in the Partnership's March survey.
- Consistent with previous survey findings, the real estate industry has been the most aggressive in bringing employees back to the office.
 - 70% of real estate employees are currently in the office—far more than the 14% share of the next highest industry, financial services.
 - Real estate employers expect 90% of employees to return by July 2021 and nearly all (98%) by September 2021, up from the 82% previously projected.
- Larger employers continue to bring employees back to the office at a slower pace. While 24% of employees have returned to the office among employers with fewer than 500 employees, only 8% have returned to the office at companies with over 5,000 employees.
 - Employers with fewer than 500 employees expect 83% of employees in the office by September, compared to 52% for employers with over 5,000 employees.
- The vast majority (71%) of employers plan to adopt a rotating or “hybrid” office schedule; of those employers implementing a hybrid model, most (63%) will require employees to be in the office three days per week.
 - 25% of employers will require employees to be in the office full time; only 4% will not require employees to return to the office at all.

The Partnership asked employers about COVID-19 testing and vaccination policies:

- Only 27 of 180 companies that participated in the survey plan to require that all employees be vaccinated for COVID-19 (with appropriate exemptions).
- 72% of employers will not require that returning employees are vaccinated; of these employers, 22% noted they will actively encourage employees to get vaccinated.
- 10% of employers have not yet decided whether to require vaccinations for returning office employees.
- Of employers who provided information on office protocols for unvaccinated employees, 43% say they will restrict unvaccinated employees' attendance at in-person and/or client meetings, 34% will require unvaccinated employees to wear masks and/or social distance in the office, and 27% will restrict business travel for unvaccinated employees.
- 12% of employers will require office guests to be vaccinated; the balance will follow CDC guidelines on indoor space.
- About two-thirds (68%) of employers will not require a negative COVID-19 test for employees who return to the office unless they have symptoms or recent exposure; 13% will require regular tests for unvaccinated employees.

The Partnership also asked employers when business travel will resume:

- 62% of employers have resumed business travel in some capacity, compared to 25% as of March. One third (33%) expect to resume business travel in the second half of 2021; only 6% say business travel will not return until 2022.
- 42% of employers say business travel is currently or will be limited—at least initially—to business critical or domestic trips.

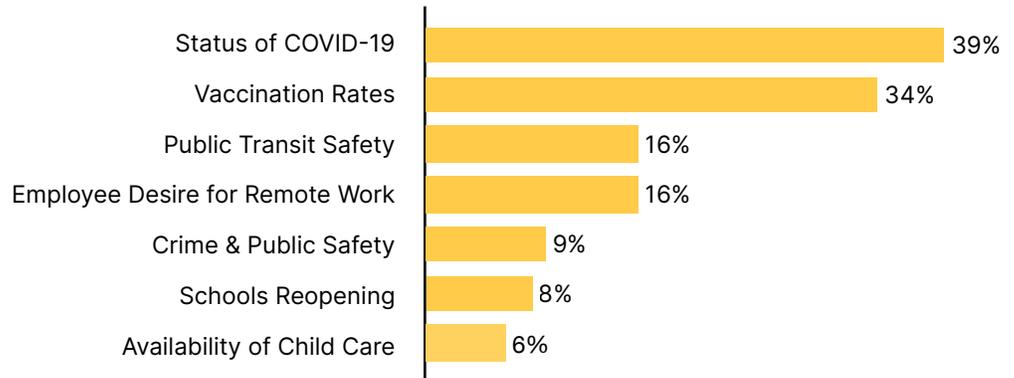
The Partnership asked employers to rank factors that they believe are the greatest impediments to employees' return to the office:

- The status of COVID-19 ranked as the largest factor, with 39% citing it as the primary concern.
- Vaccination rates ranked a close second, with 34% of employers indicating it was their employees' primary concern.
- Public transit safety and employee desire to continue working from home were both ranked primary concerns by 16% of employers. Employers specifically noted employee concerns around the safety in and around public transit hubs like Grand Central and Penn Station.

- Crime and public safety ranked fifth, with 9% citing it as a primary concern. Several employers noted employees have voiced safety concerns due to increased hate crimes against Asian-Americans.
- Schools reopening and availability of child care ranked sixth and seventh, respectively, with 8% of employers ranking reopening of schools as a primary concern and 6% ranking child care as a primary concern.

Note: Data will not total 100% due to several companies citing multiple primary concerns

Factors that employers believe are the greatest impediments to employees' return to the office



Additional information:

- The majority of surveyed employers have offices in Midtown West (37%), Midtown East (34%) or the Financial District (17%).
- The majority of respondents are in financial services (35%), real estate (18%), law (8%), consulting (6%), tech (6%) and media (5%).
- The Partnership published its initial survey conducted in late May in their report [A Call for Action and Collaboration](#) and released subsequent surveys in [August](#) and [October 2020](#) and [March 2021](#).