

Survey of Employers

The Partnership for New York City surveyed major employers between October 19 and October 29, 2021, to gauge the status of return to office among Manhattan's one million office workers and the projected implications of remote work for jobs and office space demand in the future.

As of the end of October, 28% of Manhattan office workers are at the workplace on an average weekday. Only 8% are in the office five days a week, while 54% remain fully remote.

Employers expect that 49% of office workers will be in the office on an average weekday by January 30, 2022, with 57% in the office at least three days a week while 21% remain fully remote.

A third of employers expect that their office space needs will decline over the next five years and 13% anticipate a reduction in jobs located in New York City, with the greatest job losses in the financial services industry.

The Partnership survey of employers found:

On an average weekday, 28% of Manhattan office workers are in the workplace as of late October 2021.

- 8% of Manhattan office workers are in the office full time (five days a week)
- 10% are in four days per week
- 12% are in three days per week
- 8% are in two days per week
- 8% are in one day per week
- 54% of Manhattan office workers are still fully remote

49% of Manhattan office workers are expected to be in the workplace on an average weekday by the end of January 2022.

- 13% of Manhattan office workers are expected to be in the workplace five days per week by the end of January 2022
- 11% will be in four days per week
- 33% will be in three days per week
- 15% will be in two days per week
- 7% will be in one day per week
- 21% of Manhattan office workers will still be fully remote

The real estate industry has by far the highest average daily attendance (77%) as of late October, followed by financial services (27%) and law firms (27%).

- By the end of January, real estate firms expect 80% average daily attendance of Manhattan office employees; law firms expect 61%; financial services firms expect 47%.
- Industries with the lowest projected return to the office include accounting (36% daily attendance), consulting (30%), and tech (24%)

Larger firms project the slowest pace of return to offices:

- Among firms with fewer than 500 employees, 39% of employees have returned to the office on the average weekday. Average daily attendance is expected to increase to 58% by the end of January 2022.
- Among firms with more than 5,000 employees, 28% of employees are currently in the office on the average weekday and 46% are expected back by the end of January 2022.

The Partnership asked employers to provide their post-pandemic outlook on remote work policies, office space needs, and NYC headcount:

- 80% of employers expect a permanent change in their remote work policies.
 - 47% expect that a portion of their New York City-based workforce will work remotely for more than three days a week after the pandemic.
- 34% of companies expect a reduction in New York City office space requirements in the next five years.
 - The share of companies anticipating a reduced footprint was highest in the accounting (86%), public relations (43%) and tech (38%) sectors and lowest among real estate (15%) and consumer products (13%) companies.
- 13% of employers expect to reduce their New York City-based workforce in the next five years, including 22% of financial services firms, the highest share of any industry.

The Partnership asked employers to rank factors to which they attribute the slow return to the office:

- The status of COVID-19 ranked as the largest factor, with 48% citing it as the primary concern.
- Employees' preference for remote work ranked second, with 33% of employers indicating it was a primary driver—a marked increase from the Partnership's June 2021 survey, when only 16% of employers indicated it was a primary driver.
- Challenges for employees with children under the age of 12 who could not be vaccinated when the survey was fielded ranked third, with 14% ranking it as a primary concern.
- Commuting issues ranked a close fourth, with 13% citing it was a primary concern.
- Employers noted that perceptions of public safety—particularly in Midtown Manhattan—are also affecting the rate at which employees return to the office.

The Partnership also asked employers about their office policies:

- 49% of companies that disclosed their vaccination policy are requiring that all employees are vaccinated for COVID-19 (with applicable exemptions), 39% will require that employees who return to the office are vaccinated or regularly tested, and 11% have no vaccination policy.
 - 46% plan to require that office guests are vaccinated.
- Of employers who provided information on office protocols for unvaccinated employees, 47% say they will restrict unvaccinated employees' attendance at in-person meetings, 42% will restrict attendance at client meetings and 38% will restrict business travel for unvaccinated employees.
- 44% of employers will require all returning employees to wear masks while in the office, 27% will mandate masks only for unvaccinated employees and 29% of employers will not mandate masks.
 - 10% of employers noted their mask policy applies only in common areas or when social distancing is not possible.
- 43% of employers say their company COVID-19 policy differs across geographic locations, 28% report their policy differs based on COVID-19 conditions in the community where the job site is located and 9% say their policy differs based on employee job classifications and functions.
- 39% of employers reported that remote work policies vary by employee job classification, 21% noted policies vary by health conditions of employee or employee's family, 20% say policies vary by employee vaccination status.
- Nearly one-third (32%) of employers are offering incentives not offered pre-COVID-19 to employees who return to the office. The most common benefits offered include free or subsidized meals, transportation benefits (e.g., discounted parking or rideshare services) and child care support.

Additional information:

- The majority of surveyed employers have offices in Midtown West (37%), Midtown East (32%) or the Financial District (16%).
- The majority of respondents are in financial services (33%), real estate (18%), law (10%), media (7%), consulting (5%), tech (4%) and accounting (4%).
- 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](#), [June](#) and [August 2021](#).