

PARTNERSHIP FOR NEW YORK CITY

Employee Survey Results

MARCH 2022

ABOUT MORNING CONSULT

MORNING CONSULT IS A **GLOBAL DECISION INTELLIGENCE COMPANY** CHANGING HOW MODERN LEADERS MAKE SMARTER, FASTER, BETTER DECISIONS.



KEY TAKEAWAYS



Safety, homelessness, and mental illness rank as top issues for New York City's private sector employees. They are resisting return to the office until something is done to address them, particularly on public transit.



Most employees are uncertain about the city's future but remain committed to NYC and want to be part of its recovery.



Employees feel strongly that their company should hold public officials accountable for taking action to fight crime and restore quality of life in the city.



Employees also say businesses and employees can contribute to the city's recovery by helping small businesses recover, increasing community engagement, and by rethinking the future of work (hybrid work models and incentives to be in the office).



METHODOLOGY

This poll was conducted between February 17-March 11, 2022, among a sample of 9,386 adults working in New York City offices. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 1 percentage point.

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NEW YORK CITY OUTLOOK

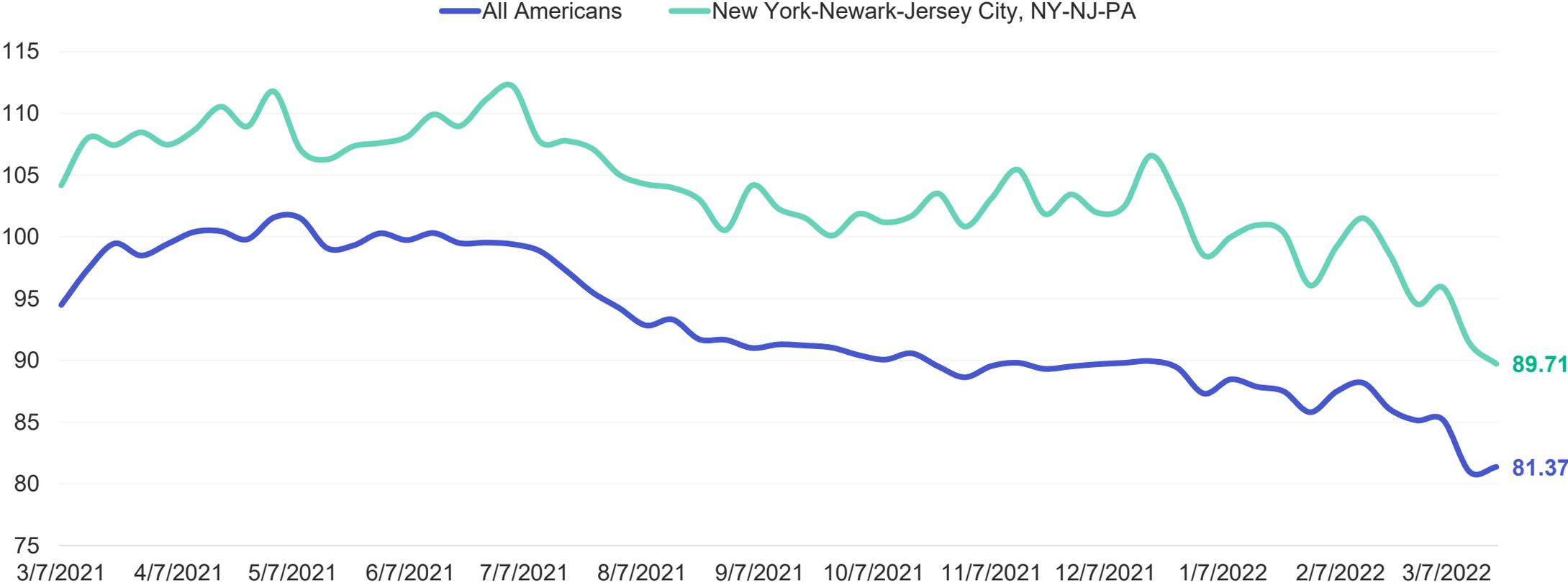


42
Street

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Consumer confidence in NYC has trended downward the past 12 months

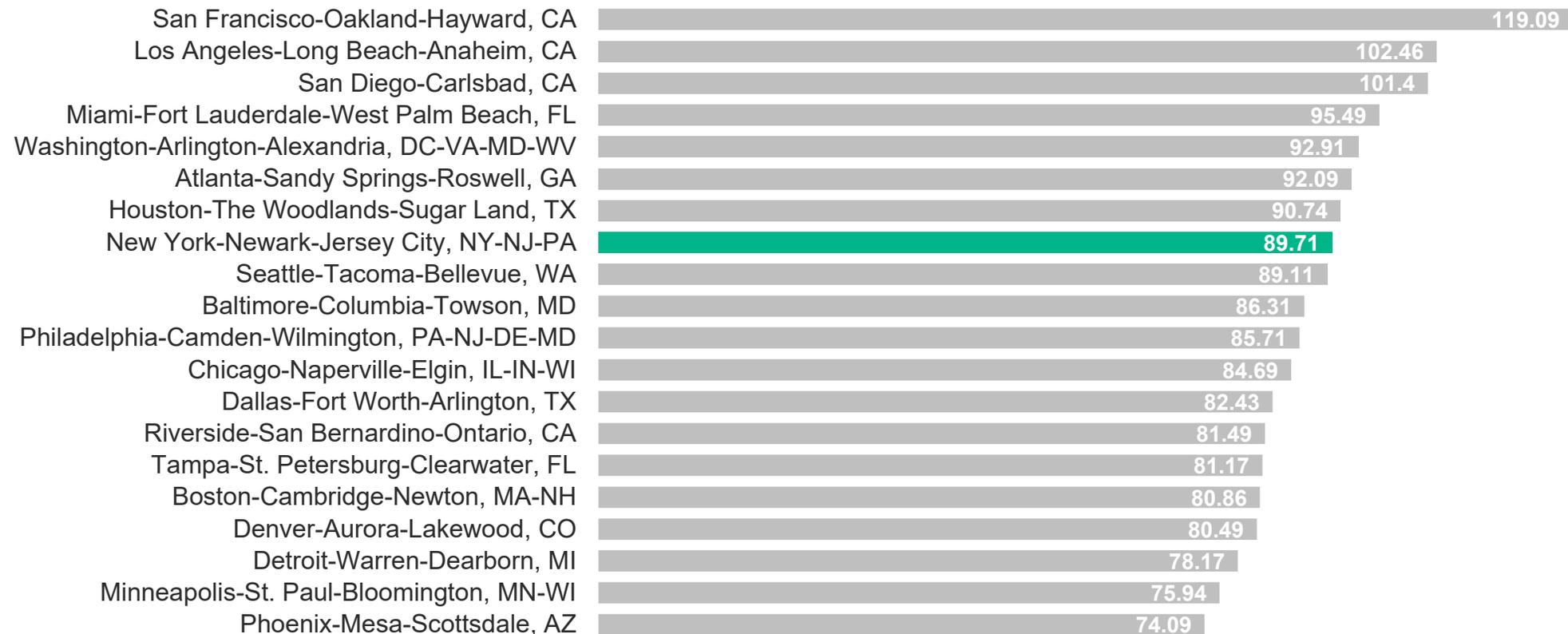
Showing the Index for Consumer Sentiment (ICS) for the 10 largest metropolitan areas in the United States (week of 3/13/22).



Reading this data: Higher numbers indicate greater consumer confidence. In order to gauge consumer sentiment, Morning Consult asks five questions relating to personal finances and business conditions in the country. The results from those five questions are then inputted into these three indices: The ICS is the overall measurement based on the results of all five questions.

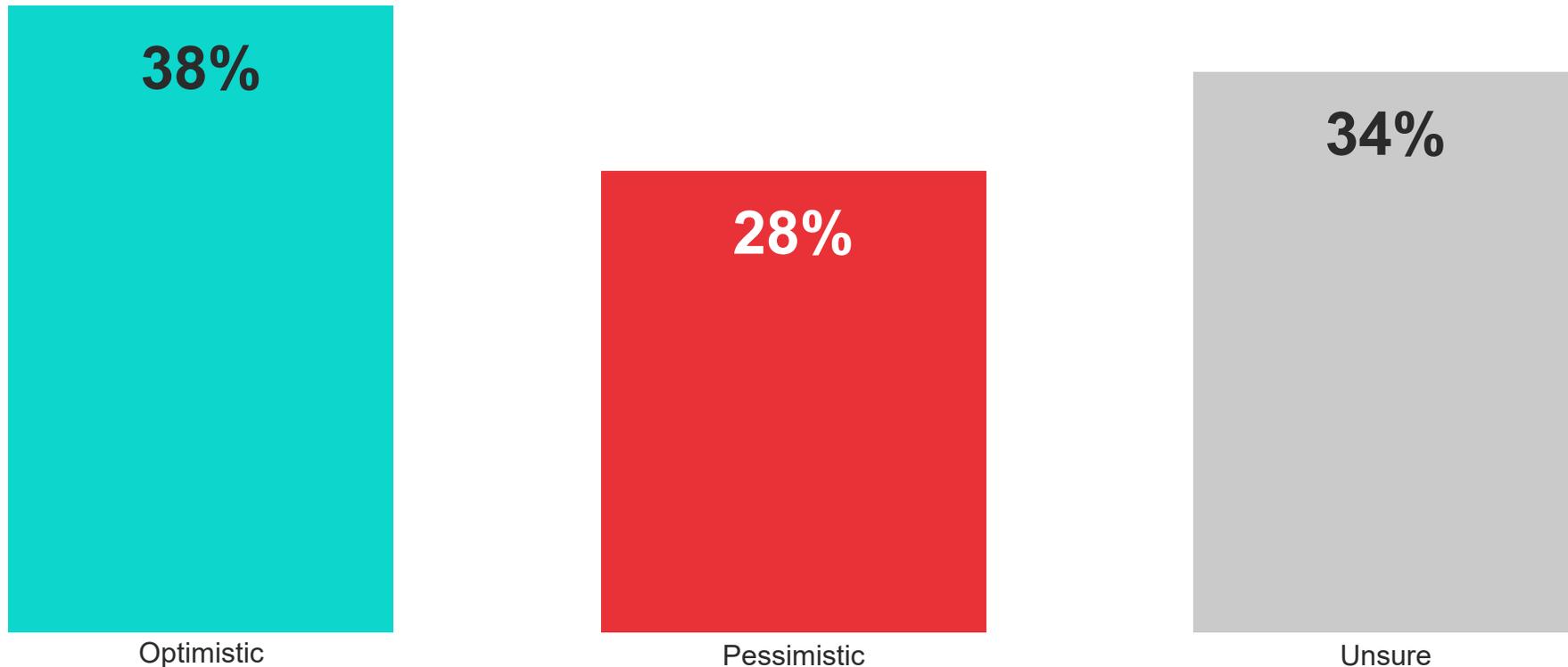
For a national context, consumer sentiment in New York City is behind other major metropolitan areas like San Francisco, Los Angeles, and the DMV

Showing the Index for Consumer Sentiment (ICS) for the 20 largest metropolitan areas in the United States (week of 3/13/22).



While many employees surveyed are optimistic about the future of the city, 62% say they are pessimistic or unsure

Generally speaking, would you say that you are optimistic, pessimistic, or unsure that the city is on the road to recovery?



The Challenge: New Yorkers feel not enough is being done.



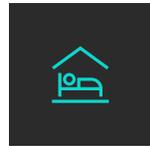
84%

Of New York City-area employees say conditions in the city have worsened over the past two years.



40%

Of employees who live in Manhattan say they are thinking about moving away from NYC.



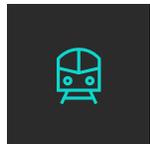
94%

Say not enough is being done to address homelessness and mental illness in the city.



48%

Of employees in other boroughs say the same.

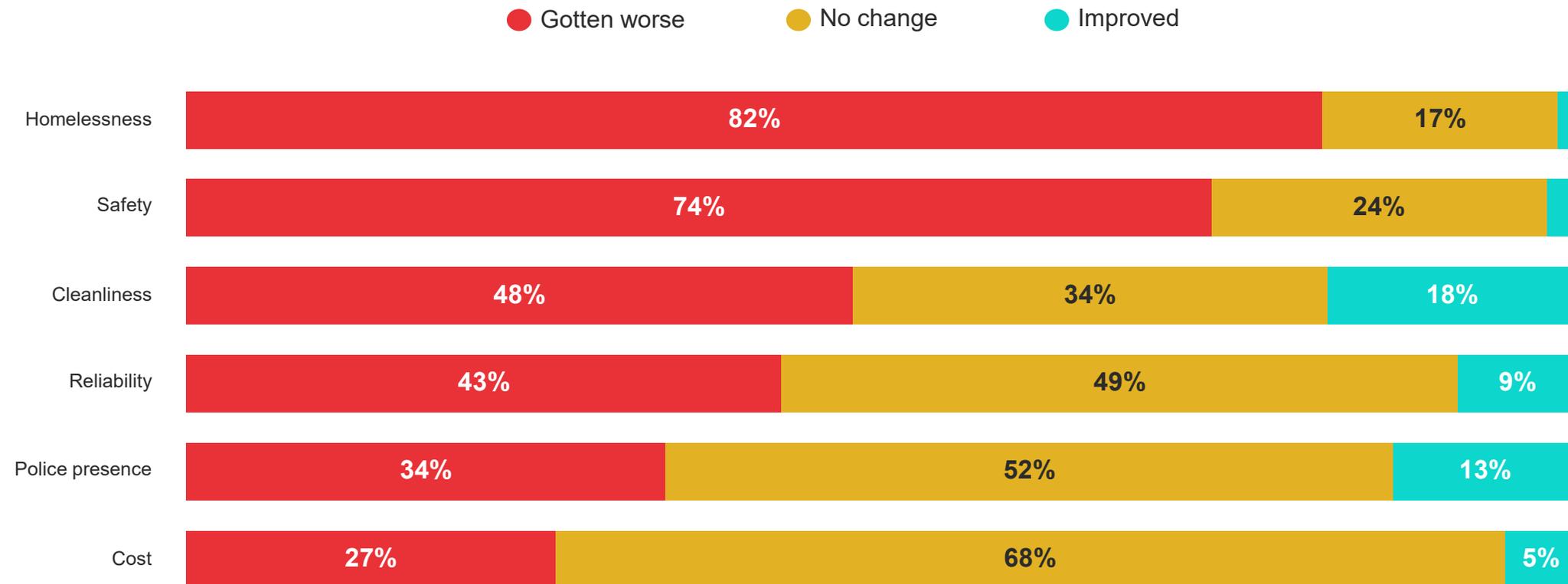


74%

Of commuters using public transit say safety on transit has gotten worse since the beginning of the pandemic.

The majority of NYC-area commuters say homelessness and safety have gotten worse

If you commute to work by public transit, how do conditions of the following on public transit today compare to before the pandemic (prior to March 2020)? (N=4,427)



When asked to choose, commuters say safety is most important to tackle

If you commute to work by public transit, which of the following is MOST important to address on public transit in New York City in 2022? (N=4,427)



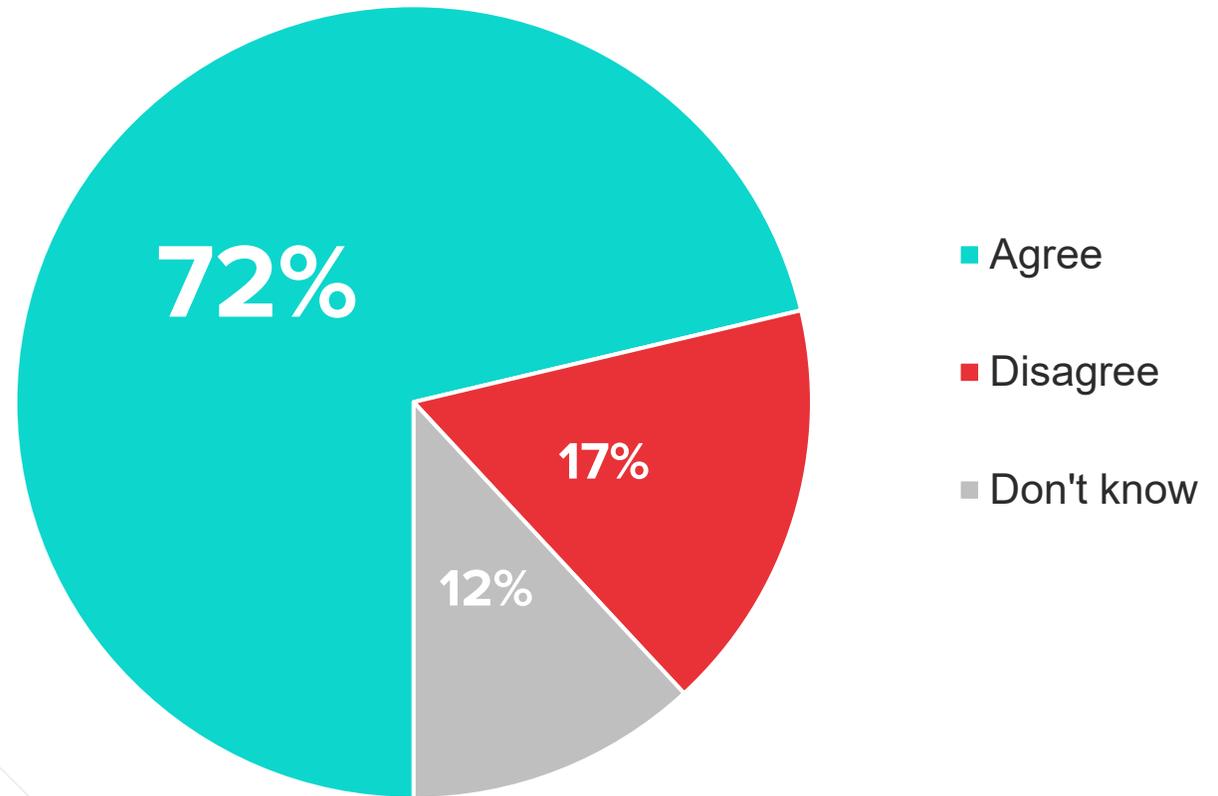
“In order to get people to return to the office, safety needs to be the number 1 priority. I need to feel safe commuting. I need to feel safe walking. I need to overall feel safe about my environment and general surroundings.”

- Employee living and working in Manhattan

Despite challenges,
most say they are
committed to NYC
and want to be part
of the city's
recovery

Do you agree or disagree with the following?

I am committed to NYC and want to be part of its recovery



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WHERE CAN BUSINESS HELP?



Theme #1: Accountability & Engagement

Employees say business can help hold politicians and institutions to account for the city's recovery

“

Hold city officials accountable for actually making quality of life improvements

“

Support police but demand they perform too.

“

Push politicians to take back the city.

“

Make sure employees are educated on issues, candidates, and that they vote.

In one sentence or so, what could our business and employees do to contribute to the city's recovery?

Theme #2: Safety

Personal safety was the most cited roadblock to the city's recovery

“ Our company should be extremely vocal with city officials that employee safety is #1. All businesses should have measures in place to be active in this space.

“ Getting the city's subways safer, cleaner and more reliable would greatly influence people to come into the offices again and use public transportation. If fundraising existed to help get the city's subways in more acceptable working order, our company could contribute towards that.

“ Push for increased police presence on subways, public transportation and in local neighborhoods. Crime is skyrocketing around the city, and it is increasingly feeling unsafe to leave your home.

“ Partner with the new mayor and governor to give them support/cover to tackle issues like crime, homelessness, transportation.

In one sentence or so, what could our business and employees do to contribute to the city's recovery?

Theme #3: Homelessness and Mental Health

Homelessness and the dangers posed by mentally ill people on public transit and the Manhattan streets is the personal safety issue that most concerns employees.

“

Use the power of the firm to voice our opinion regarding the state of the city, the level of crime, homelessness and mental illness and to hopefully influence policy and other decisions regarding the future of the city.

“

Enhance resources for the homeless or mentally ill that are creating uncomfortable or unsafe environments in the subways and stations for both themselves and others around them.

“

Contribute financially, materially and in the form of legal pro bono work to organizations that support - and do advocacy/policy work with and on behalf of - the city's most vulnerable populations.

“

Our business could get involved in charities that aid the homeless and are working to address the mental health problems of homeless in the city.

In one sentence or so, what could our business and employees do to contribute to the city's recovery?

Theme #4: Small Business Recovery

Employees say their companies can partner with small businesses to help with recovery

“ Local small businesses have suffered tremendously during this time. Come up with a company plan to pick a local business each week and actively promote and encourage employees within office to do what they can to try and support the business once or twice during that week.

“ Support small businesses as much as we can. Through using them to order meals or inviting small boutiques to sell their items in the cafeteria. I think we used to do this, and it was helpful to see the types of stores that were around.

“ Our business can make an investment to spend money at local businesses around the office to entice our colleagues to come back - i.e., offer free/ discounted meals in the office that are purchased from local establishments.

“ Support small businesses around the office (catering, cleaning, shopping) to encourage more people back into the city and help with unemployment.

In one sentence or so, what could our business and employees do to contribute to the city's recovery?

Theme #5: Return to the Office

Employees support hybrid work models, with flexibility to work remotely, but also want to get back to the office when the city is safe.

“ Businesses that want to recover should permit employees to work remotely 1-2 days a week, so they don't lose employees to businesses that permit flexible work schedules. Hybrid work arrangements enrich the neighborhoods that employees live in and promote good mental health and positive work-life balance.

“ Create incentives (monetary or otherwise) to get people to come into the office in order to show it is safe and beneficial to work collaboratively.

“ Remote work has laid bare that NYC is unlivable relative to other places.

Put pressure on government to enforce the rule of law.

“ Stop trying to pretend we can revert to the world as it was in 2019. The nature of work and office buildings has permanently changed.

In one sentence or so, what could our business and employees do to contribute to the city's recovery?



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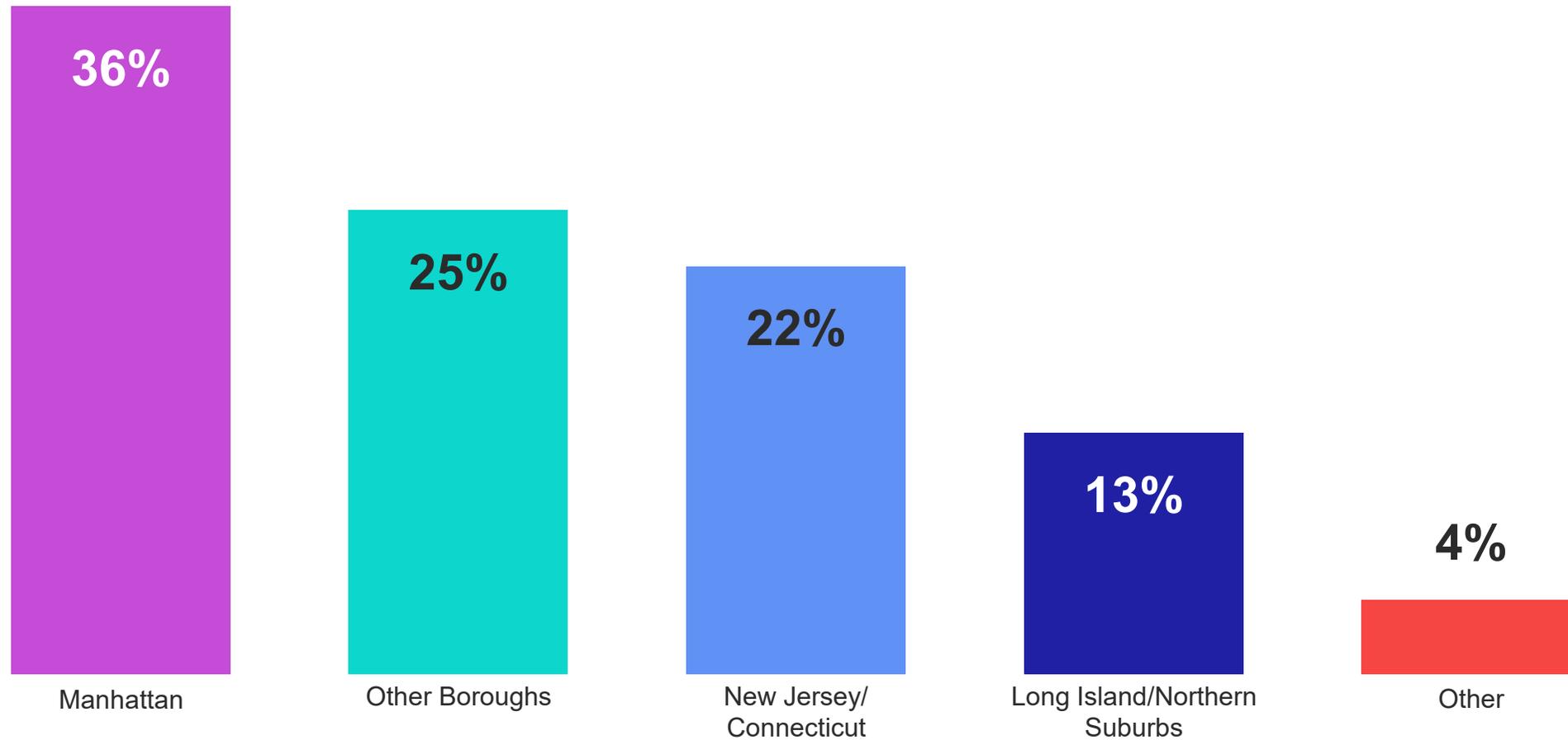
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APPENDIX



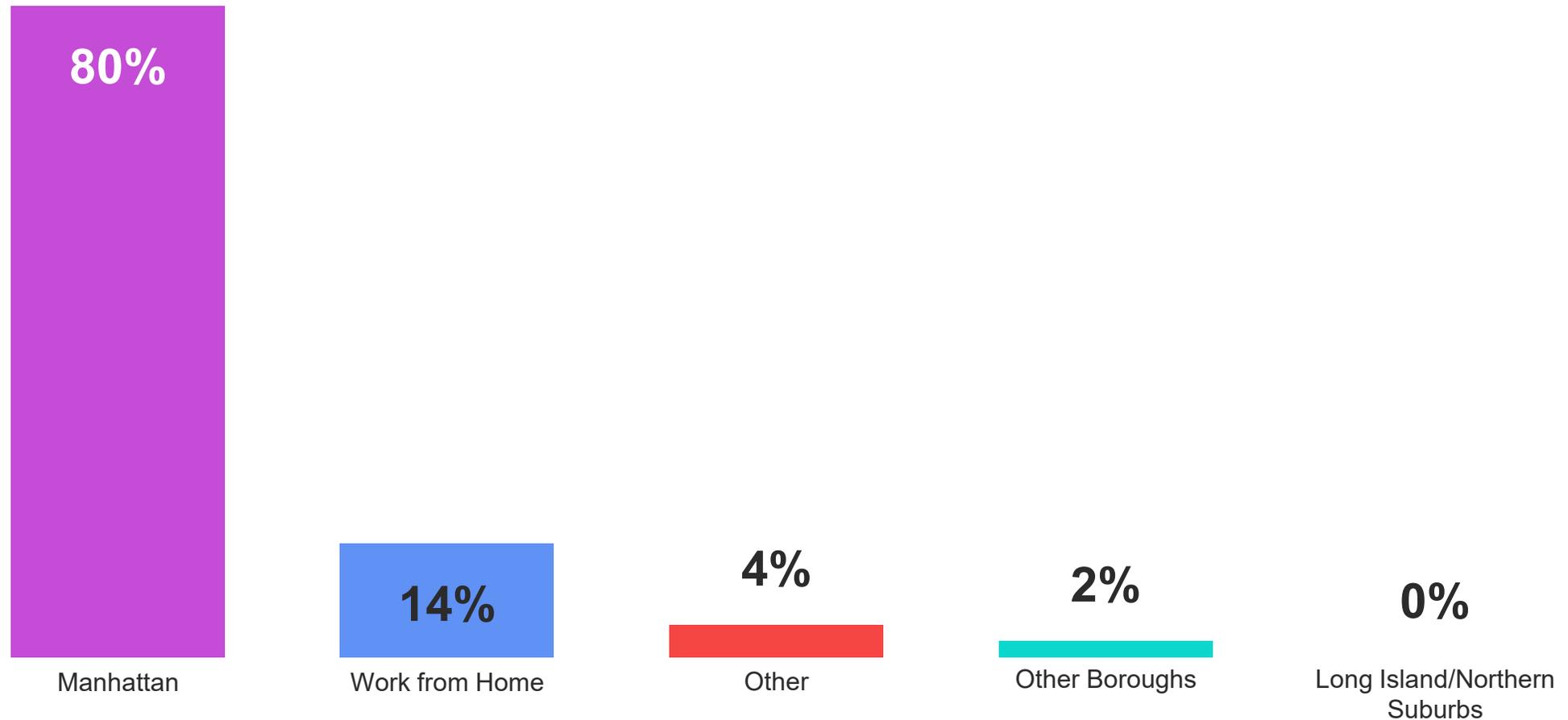
A plurality of employee respondents say they live in Manhattan

Where do you live?



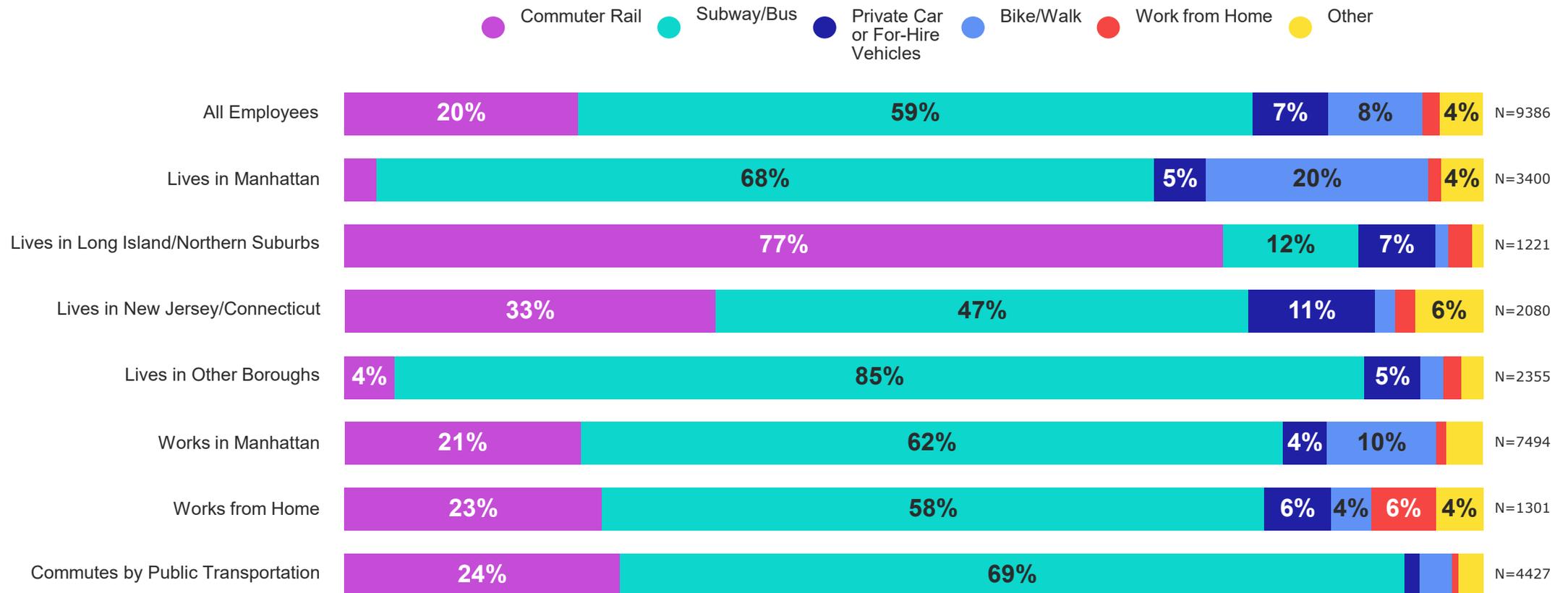
80% of employee respondents say they work in Manhattan, 14% work from home

Where do you work?



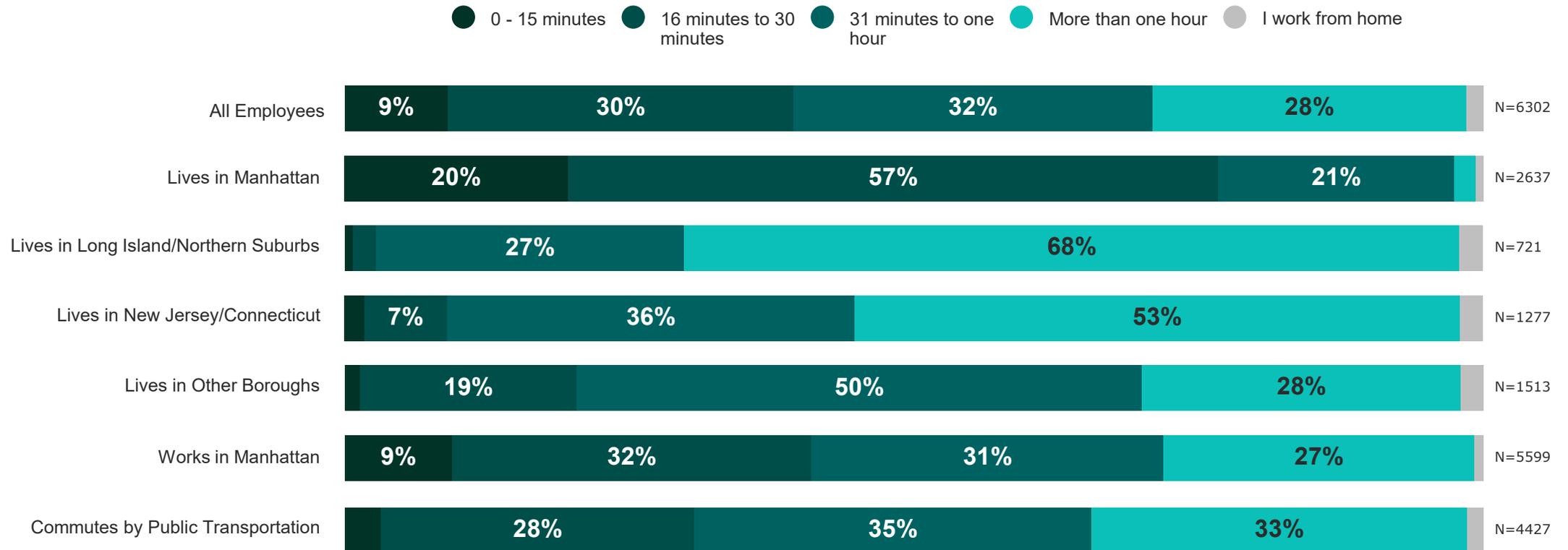
79% of employees say they got to work using public transportation prior to the pandemic

How did you usually get to work before the pandemic (prior to March 2020)?



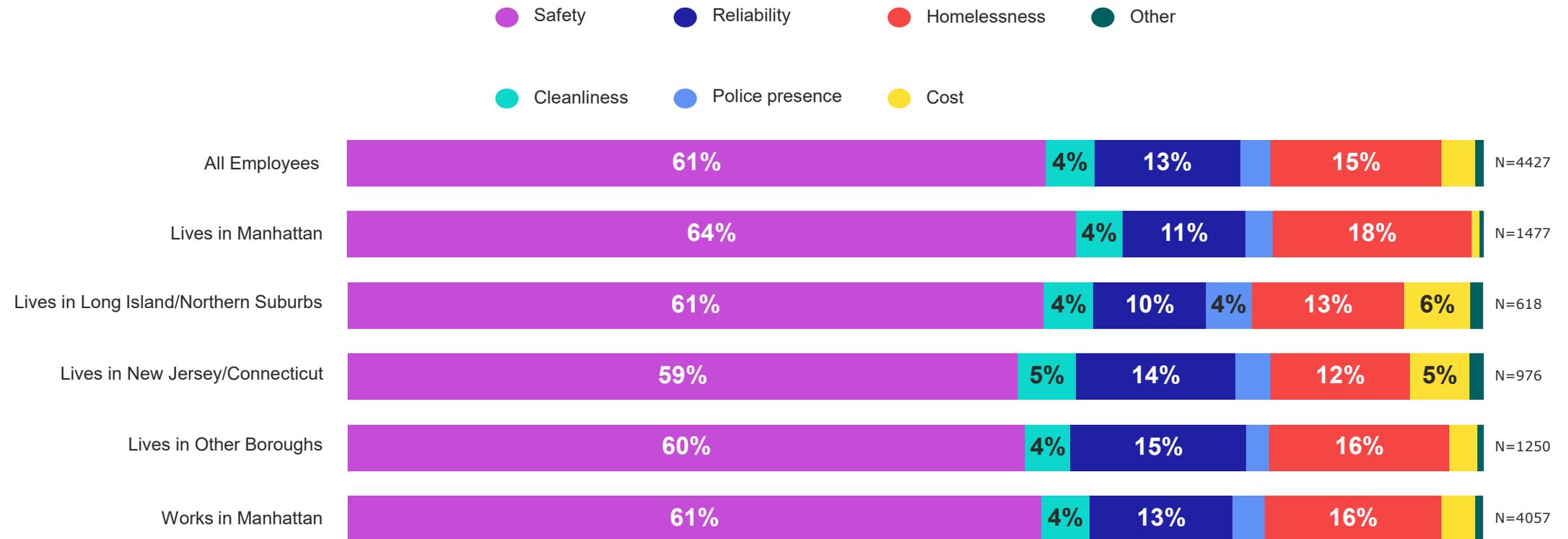
71% of commuters say their commute is under an hour each way

How long is your commute each way today?



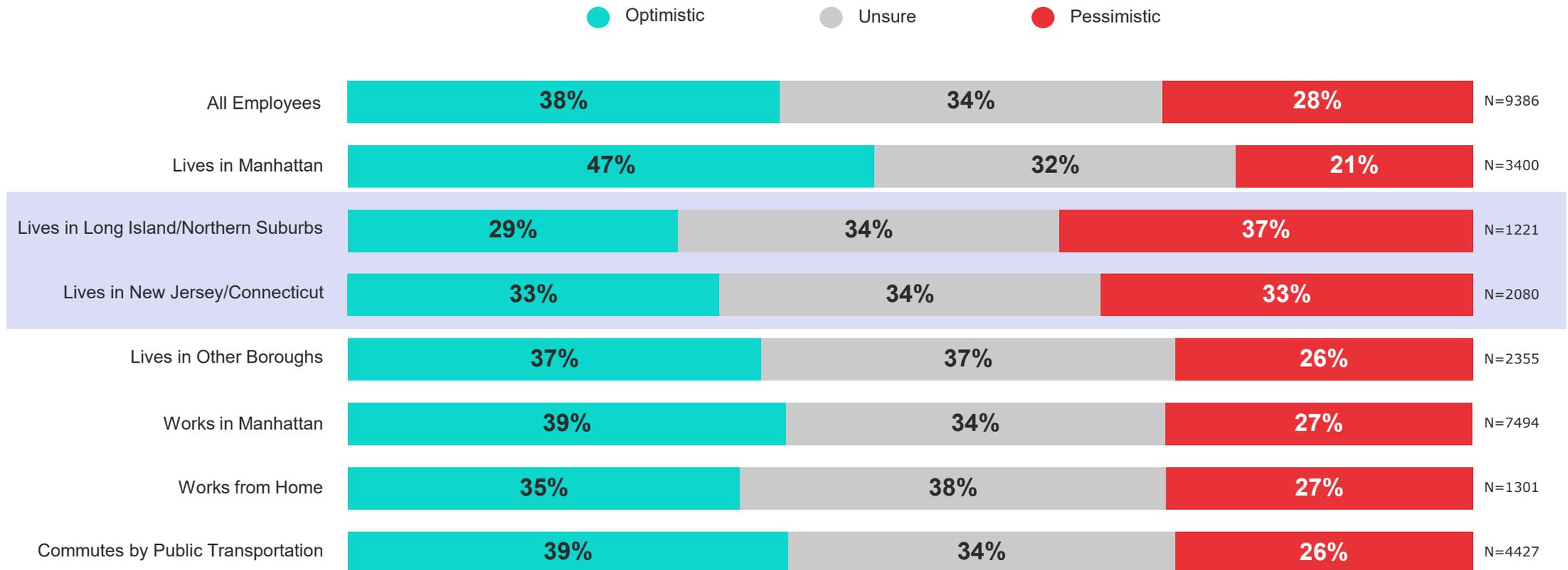
Among commuters, safety is the most important thing to address on public transit regardless of where people live

If you commute to work by public transit, which of the following is MOST important to address on public transit in New York City in 2022?



Employees who live outside of Manhattan tend to be less optimistic about the future of the city

Generally speaking, would you say that you are optimistic, pessimistic, or unsure that the city is on the road to recovery?



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72% of employees say they feel committed to NYC and want to be part of the city's recovery

Do you agree or disagree with the following statements?

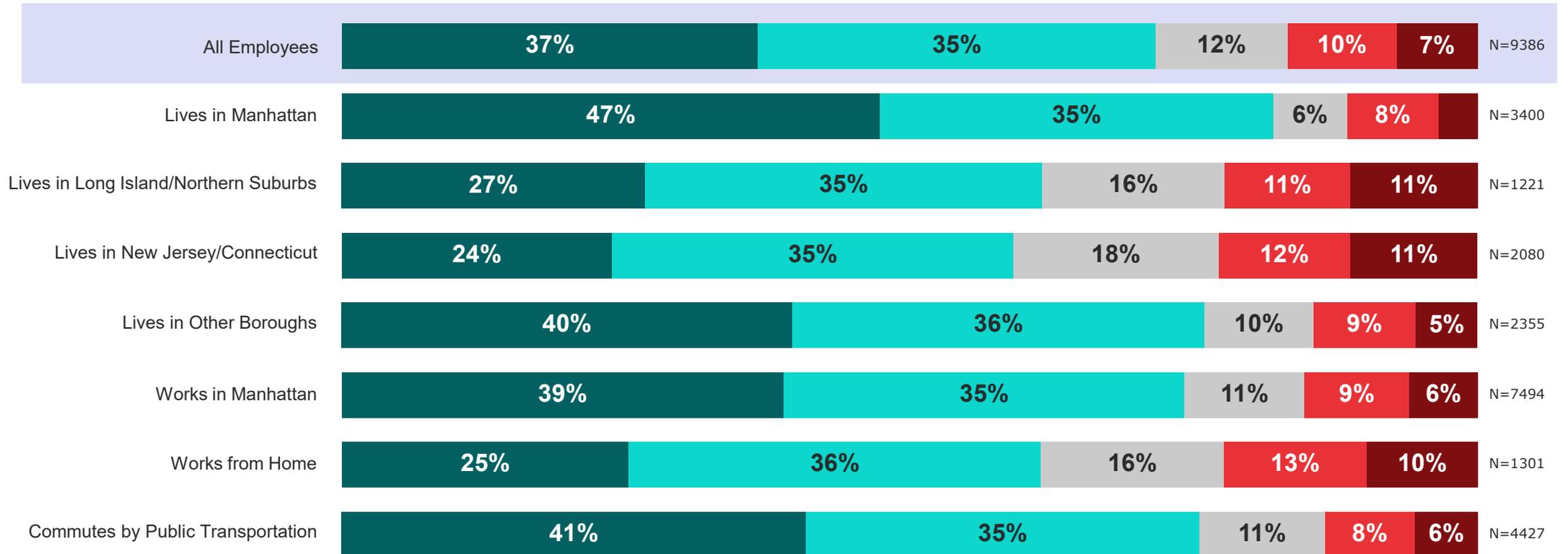
● Strongly agree ● Somewhat agree ● Don't know ● Somewhat disagree ● Strongly disagree



72% of all employees say they feel committed to NYC and want to be part of the city's recovery

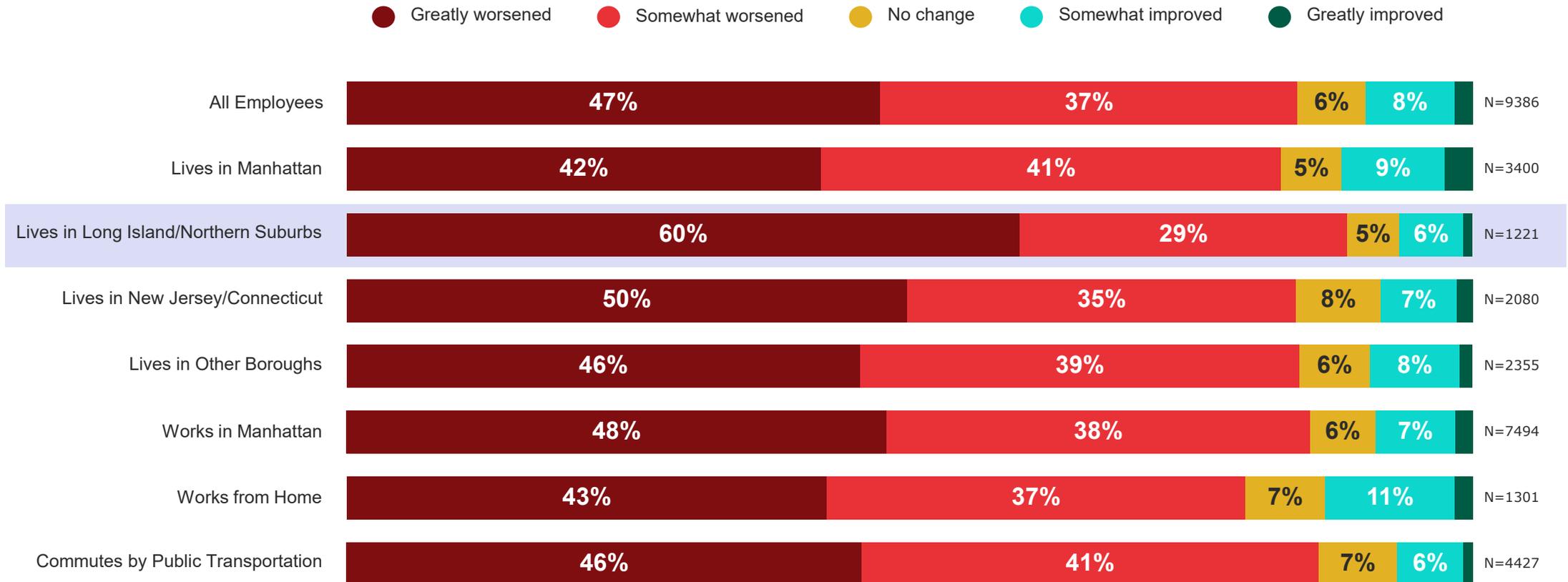
Do you agree or disagree with the following statement: I am committed to NYC and want to be part of its recovery

● Strongly agree
 ● Somewhat agree
 ● Don't know
 ● Somewhat disagree
 ● Strongly disagree



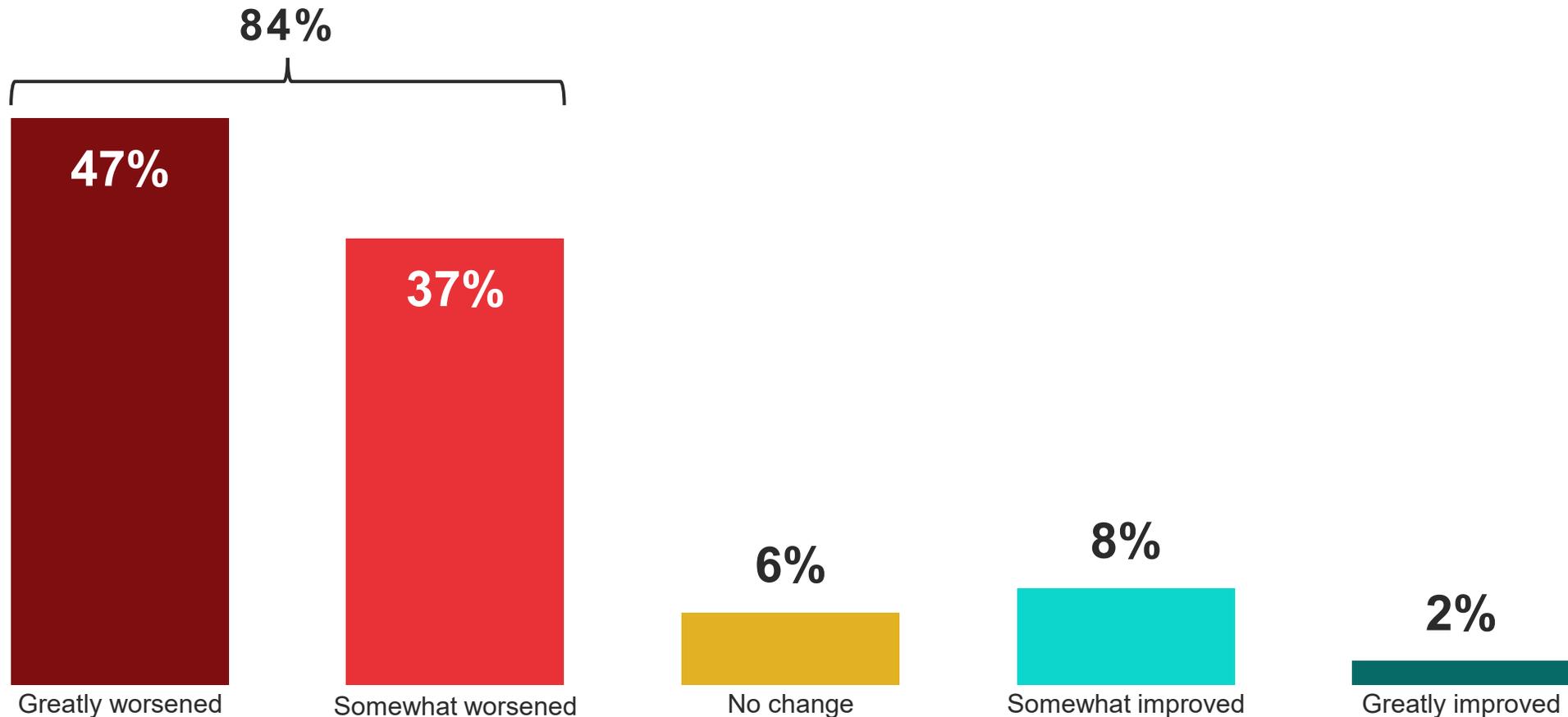
Employees who live in Long Island or the northern suburbs are most likely to say conditions have greatly worsened

Have general conditions in the city worsened or improved in the past two years (since March 2020)?



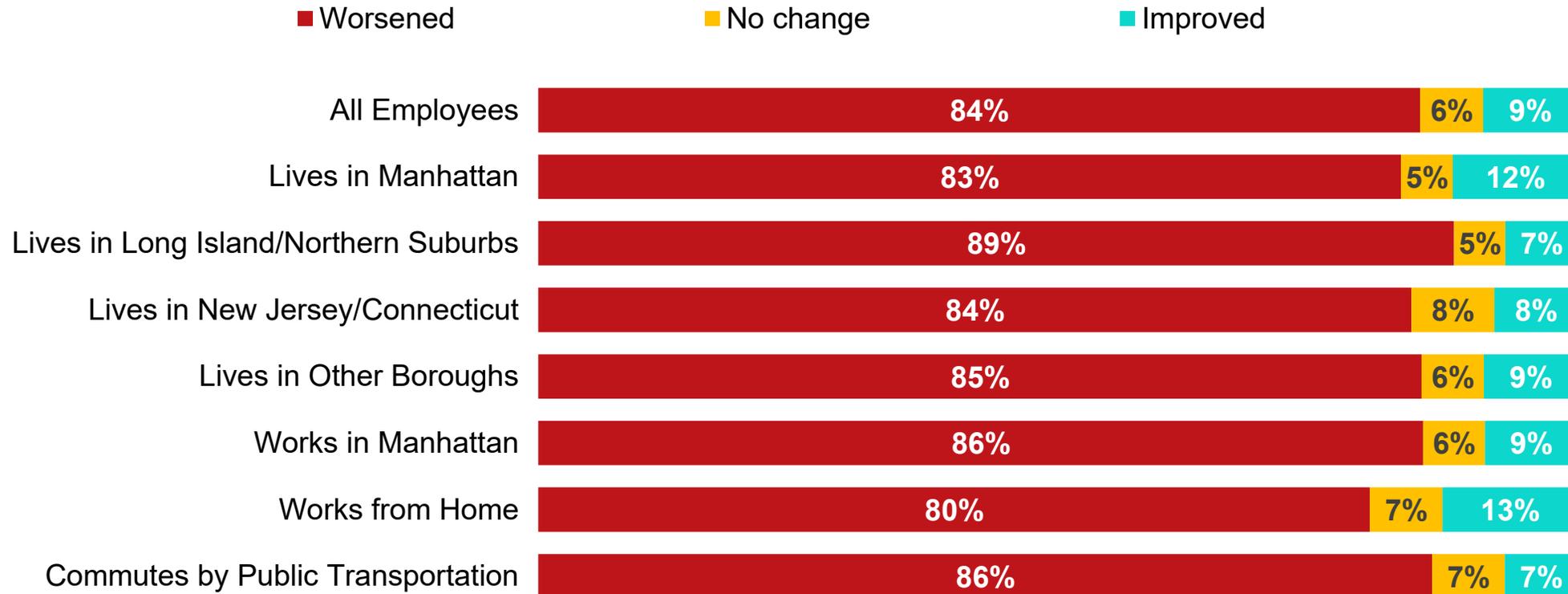
Most employees (84%) say conditions in the city have worsened over the past 2 years

Have general conditions in the city worsened or improved in the past two years (since March 2020)?



Employees who live in Long Island or northern suburbs are most likely to say conditions have greatly worsened

Have general conditions in the city worsened or improved in the past two years (since March 2020)?



How can businesses help?

In one sentence or so, what could our business and employees do to contribute to the city's recovery?

SAFETY

“ Our company should be extremely vocal with city officials that employee safety is #1. All businesses should have measures in place to be active in this space.

“ Getting the city's subways safer, cleaner and more reliable would greatly influence people to come into the offices again and use public transportation. If fundraising existed to help get the city's subways in more acceptable working order, our company could contribute towards that.

SMALL BIZ RECOVERY

“ Support local small businesses that have suffered tremendously during this time. Come up with a company plan to pick a local business each week and actively promote and encourage employees within office to do what they can to try and support the business once or twice during that week.

“ Support small businesses as much as we can through using them to order meals or inviting small boutiques to sell their items in the cafeteria. I think we used to do this, and it was helpful to see the types of stores that were around.

HYBRID WORK MODELS

“ Businesses that want to recover should permit employees to work remotely 1-2 days a week, so they don't lose employees to businesses that permit flexible work schedules. Hybrid work arrangements enrich the neighborhoods that employees live in and promote good mental health and positive work-life balance.

“ Recognize that non-Manhattan neighborhoods have actually benefited from work-from-home and stop centering the recovery on return to office.

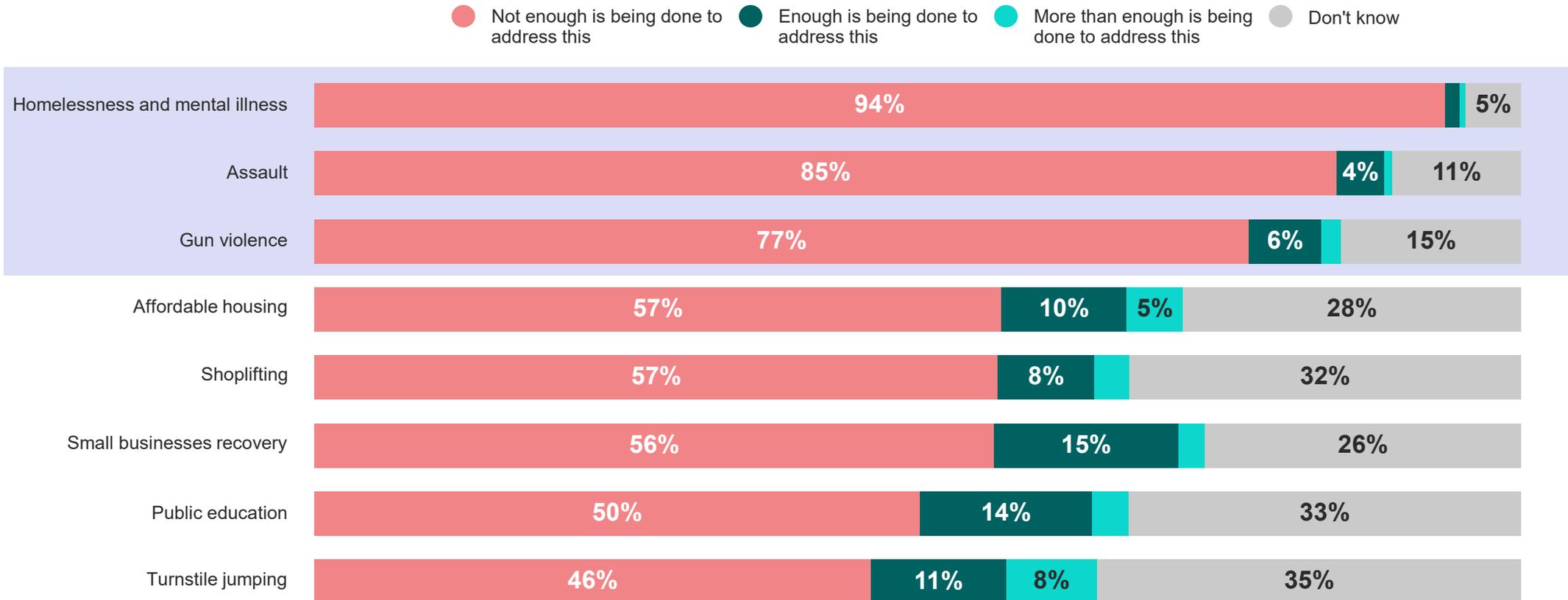
HOMELESSNESS & MENTAL HEALTH

“ Directly fund mental health services and homeless housing because the city appears incapable of even recognizing that those two things are fundamental and related problems.

“ Awareness is always key and enhancing resources for the homeless or mentally ill that are, especially in the winter, creating uncomfortable or unsafe environments in the subways and stations for both themselves and others around them.

Homelessness, mental illness, assault, and gun violence are the top issues that employees say are not being sufficiently addressed in NYC

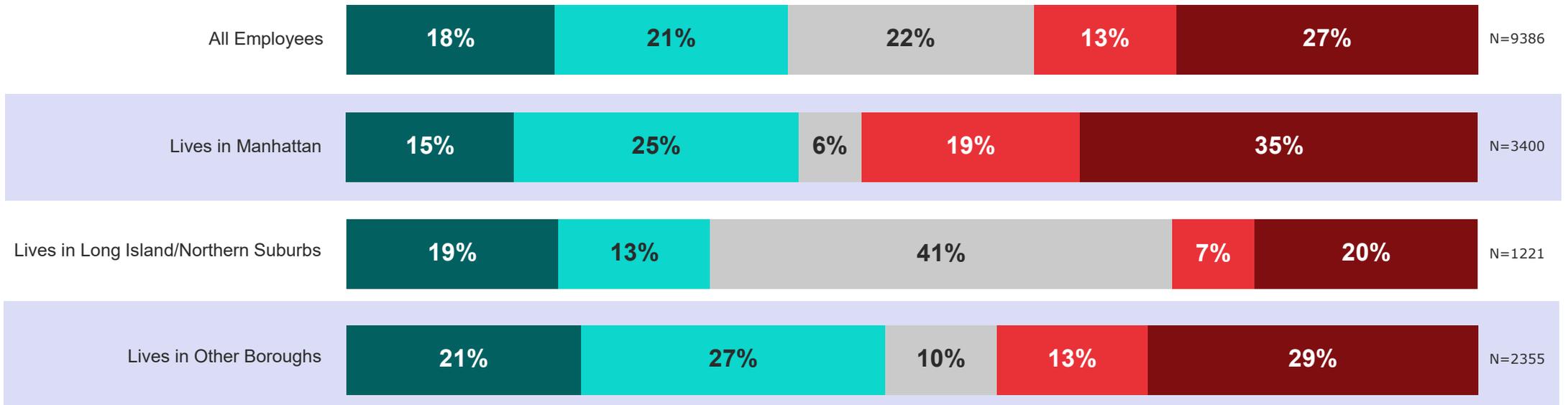
In your view, is enough being done to address each of the following in New York City?



40% of employees who live in Manhattan and 48% in other boroughs say they are thinking about moving out of NYC

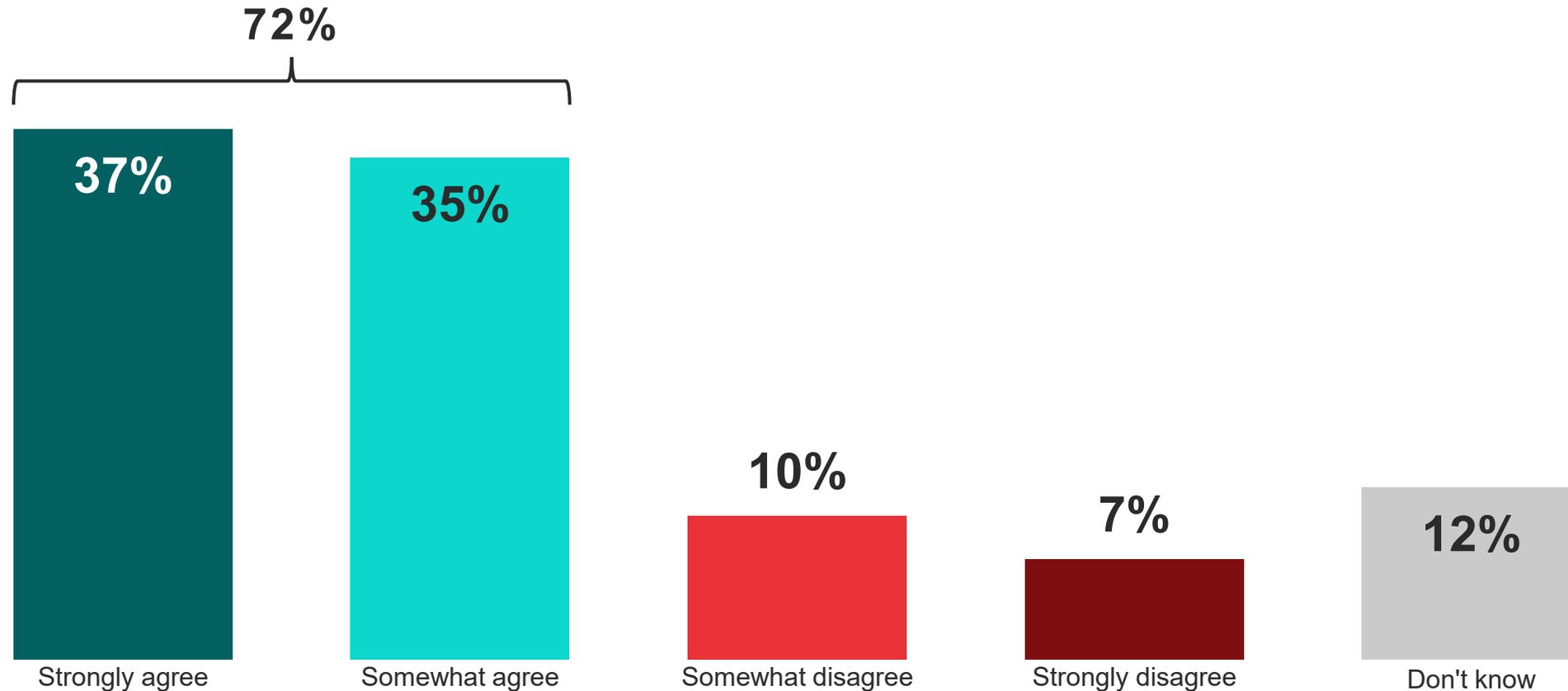
Do you agree or disagree with the following statement: I am thinking about moving out of NYC

● Strongly agree
 ● Somewhat agree
 ● Don't know
 ● Somewhat disagree
 ● Strongly disagree



Despite challenges, most say they are committed to NYC and want to be part of the city's recovery

Do you agree or disagree with the following statement: I am committed to NYC and want to be part of its recovery



Personal safety is ranked as the top concern for New York City-area employees when thinking of returning to the workplace; child care is lowest ranked.

If you have been working remotely part or all of the time since March 2020, what are your biggest concerns about returning to the office/workplace?

