



The How and When of Returning to the Office, Post-COVID-19:

Key Findings from a Worldwide Member Survey

21 May 2020

Executive Summary

From 13-18 May, CoreNet Global conducted an updated survey of its 11,000 members to gain insight on a key question confronting corporate real estate (CRE) professionals: how, when and under what circumstances will employees begin to return to their typical workplace – the office – when the health and safety concerns posed by COVID-19 have diminished. One hundred seventy-five members responded to the survey.

The survey was an update to a previous survey sent to the worldwide membership from 8-13 April.

Key findings include:

- Fifty-three percent of survey respondents report that employees will not begin returning to the office until June 2020 or later. Thirty percent stated that it is still too early to say when employees will begin returning to the office. Seven percent stated that employees have already begun returning to the office or will do so later in May 2020. A sampling of comments provided by respondents include:
 - Employees can potentially work from home for the rest of 2020 if they choose to do so
 - Fall 2020 or even January 2021
 - Our first offices will open later in May 2020
 - January 2021
 - September 2020
 - July 2020 or later
 - Between June and August 2020
 - We are already back in some markets
 - We will not see everyone return until there is an effective vaccine
- Ninety-four percent of survey respondents indicated that they plan to bring employees back in waves (up from 84 percent in the previous survey). Only six percent reported plans to bring all employees back at the same time (down from 16 percent in the previous survey). A sampling of approaches for bringing employees back in waves includes:
 - We are marking up our floor plans to show 50 percent or less occupancy, but groups may come back only at 20 percent of their capacity
 - We will initially bring back 25 percent of our headcount, by groupings based on employee demand
 - Initially we will have a two-team approach, with alternating teams never coming in contact
 - We will return in four waves: 10 percent, 25 percent, 50 percent, and 100 percent
 - Our plan calls for three to four phases of six weeks each, with a two-week gap in between phases to aid ramp-up to the next phase, with employees chosen based on need and criticality
 - Employees can voluntarily return and then use every third seat
 - Our approach will be conservative and slow, starting with less than 25 percent of our staff, and each succeeding step will be taken only if the level of risk continues to be stable or declines

- Just 41 percent of survey respondents report that they will consider it safe to return to the office when government state-at-home orders expire (down from 65 percent in the previous survey). Meanwhile, 39 percent of respondents indicate that certain country, state or local thresholds must be met first, such as when there are no confirmed new cases for 14 days (up from 25 percent in the previous survey).
- Some 82 percent of survey respondents reported that they look to state health officials for guidance in terms of when it will be safe to return to the office (up from 73 percent in the previous survey). Seventy-seven percent of survey respondents reported that they look to the U.S. Centers for Disease Control (virtually unchanged from 78 percent in the previous survey), and 54 percent stated that they look to the World Health Organization (down slightly from 59 percent in the previous survey).
- Ninety-four percent of respondents stated that C-Suite or other senior executives are in their decision tree in terms of when it will be safe to return to the office (up slightly from 92 percent in the previous survey). Seventy percent of respondents stated that state or local health officials are in their decision tree (down from 78 percent in the previous survey), and 41 percent stated that federal health officials are in their decision tree (down from 52 percent in the previous survey).
- Sixty percent of survey respondents stated that the option to continue working remotely will be offered to associates who might be uncomfortable returning to the office, up from 49 percent in the previous survey.
- Seventy percent of respondents stated that their companies are making accommodations for employees who have day-care challenges as a result of school being cancelled, virtually unchanged from the previous survey (71 percent).
- For employees who must report to an office now for a necessary business need, the most cited strategy to ensure employee safety is continuing social distancing in the office, cited by 94 percent of respondents. Following were expanded cleaning protocols (88 percent), expanded hand-washing requirements and limiting in-person group meetings (each 76 percent), keeping associates separated by having only a portion in the office at a time (68 percent) and temperature checks (36 percent).
- Sixty-five percent of survey respondents report having a more positive view of remote working than previously (virtually unchanged from the 66 percent reported in the previous survey). Only two percent of respondents say they have a more negative view of remote working than previously (virtually unchanged from 1 percent in the previous survey).
- Some 87 percent of survey respondents think that additional cleaning protocols will still be in place six months after employees return to the office, followed by continued emphasis on hand-washing (83 percent), limits on in-person group meetings (69 percent), continuing social distancing rules with six feet of separation (66 percent) and expanded work hours and other strategies to limit the number of people in the office at one time (51 percent).
- HR is the corporate function most often represented in companies' COVID-19 task forces, cited by 85 percent of respondents. Following were CRE and Operations (each 76 percent), IT (64 percent), Communications (63 percent), Health and Safety (56 percent) and Security (51 percent).
- Fifty-three percent of respondents reported that all or part of their company's operations are considered essential (down from 58 percent in the previous survey). Of those respondents, about one-third offer hazard pay, while two-thirds do not.

About CoreNet Global

CoreNet Global is the world's leading professional association for corporate real estate (CRE) and workplace executives, service providers, and economic developers. CoreNet Global's more than 11,000 members, who include 70% of the top 100 U.S. companies and nearly half of the Global 2000, meet locally, globally and virtually to develop networks, share knowledge, learn and thrive professionally. For more information, please visit www.corenetglobal.org or follow @CoreNetGlobal on Twitter.