

OBI SURVEY

RETURNING TO MANCHESTER

— WHAT THE BUSINESS LEADERS SAY

OBI

SEPTEMBER 2020



INTRODUCTION

The Covid-19 pandemic and subsequent lockdown had a seismic effect on businesses throughout the UK in the first half of 2020, forcing businesses to quickly adopt or expand remote working. Although we are now seeing an increase in businesses returning to their Manchester city centre office, many larger businesses remain working from home, leaving a city that feels under-used.

OBI have undertaken a survey of more than 100 Manchester business leaders, to try and get under the skin of their views regarding a full return to the workplace. The questionnaire was completed by businesses of different sizes and from a range of sectors, so that we could collate the views of a broad spectrum of city centre occupiers.

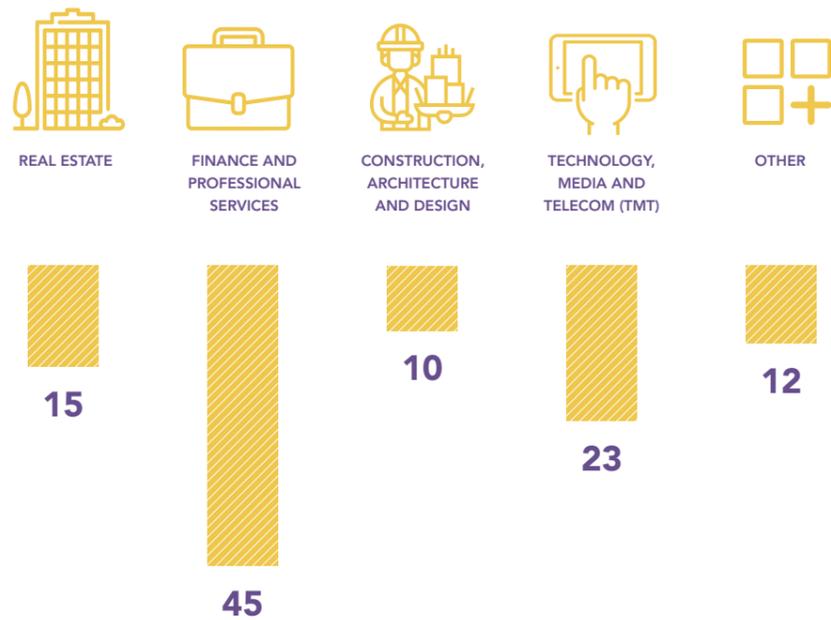
Information was gathered to establish how many businesses had already made the transition back to working in the city, the measures companies have put in place to create safe working environments, and the barriers people feel are still preventing their workforces from returning to the city, including transport to and from the office.

The survey went on to explore which city centre amenities those businesses that have returned are using the most and asked for views on attending socially distanced business networking events once they resume from 1 October 2020.

The objectives of the research were to analyse the sentiment of city centre businesses as things stand, and the questionnaire has furnished us with a greater understanding of what leaders feel are the points preventing a fuller return to something approaching “normal” use of city centre offices. It has given us vital insight into the full picture of when they expect their businesses to fully return to the city.

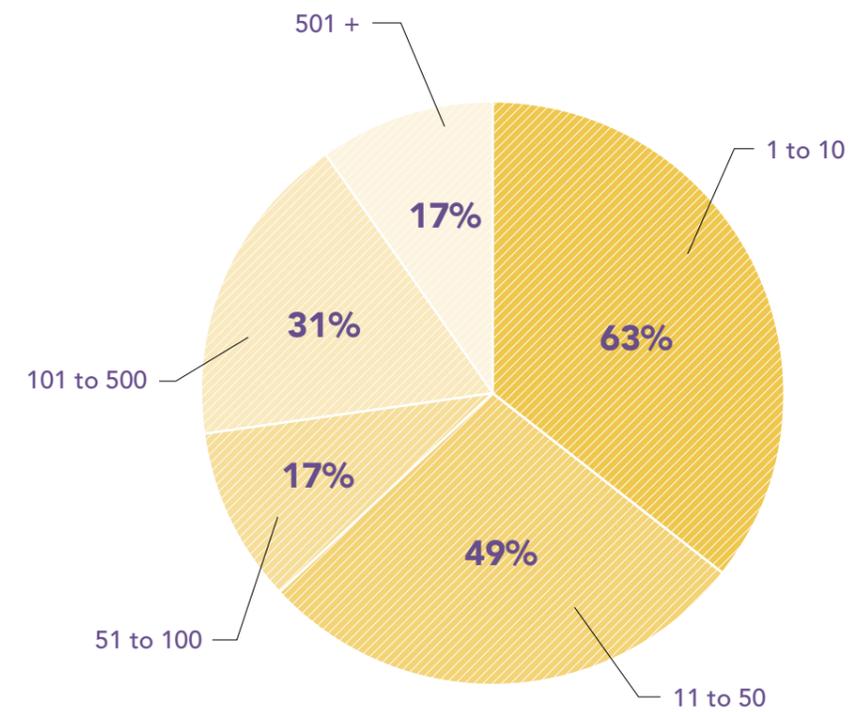
THE SURVEY AND RESULTS

IN WHICH SECTOR IS YOUR BUSINESS?



WE ASKED BUSINESSES WHAT PERCENTAGE OF THEIR EMPLOYEES HAD RETURNED TO THE OFFICE.

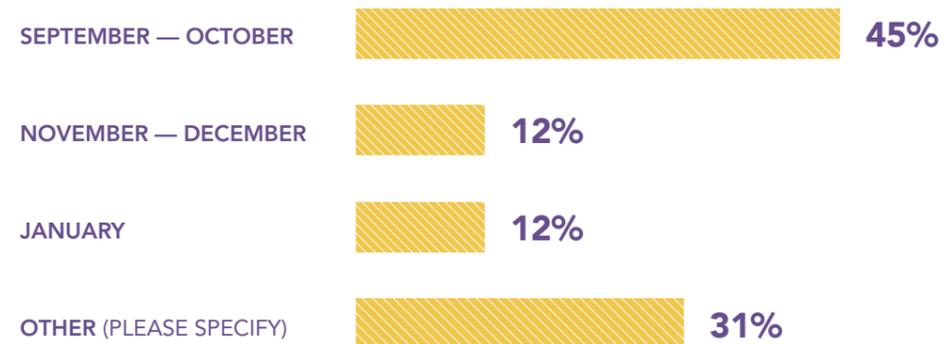
Below we have set out the average percentage of employees back in the office based on business size (number of employees)



Businesses of below 50 staff have 50% of employees back in the office

Our findings illustrate that smaller business of 50 employees and below have been able to adapt more quickly and make a faster transition back to the workplace. On average businesses with sub 50 employees have over 50% of their staff working back in the office.

WE ASKED BUSINESSES WHO HAD NOT YET RETURNED TO THE OFFICE WHEN THEY WILL BE LIKELY TO RETURN?



COMMENTS RECEIVED INCLUDED:

“We are open but not many staff are choosing to return currently”

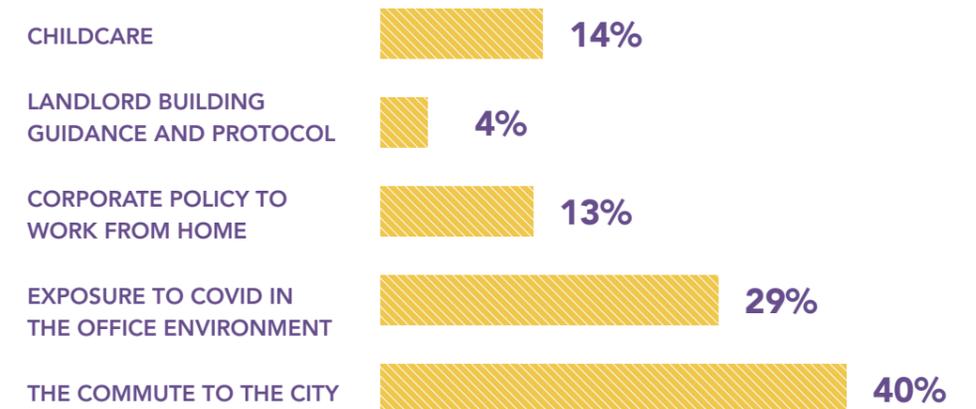
“We will seek a gradual return when children go back to school. The return will not be enforced and will be optional for each staff member”

“It is likely to be based on personal preference”

“Our return to the office will be led by government advice”

The start of September and the re-opening of schools is likely to allow additional employees with childcare commitments to make a further transition back to the workplace, though from comments received, many businesses were not going to enforce a compulsory date as to when employees should return.

WHAT ARE THE MAIN CONCERNS ABOUT RETURNING TO THE OFFICE?



COMMENTS RECEIVED INCLUDE THE FOLLOWING:

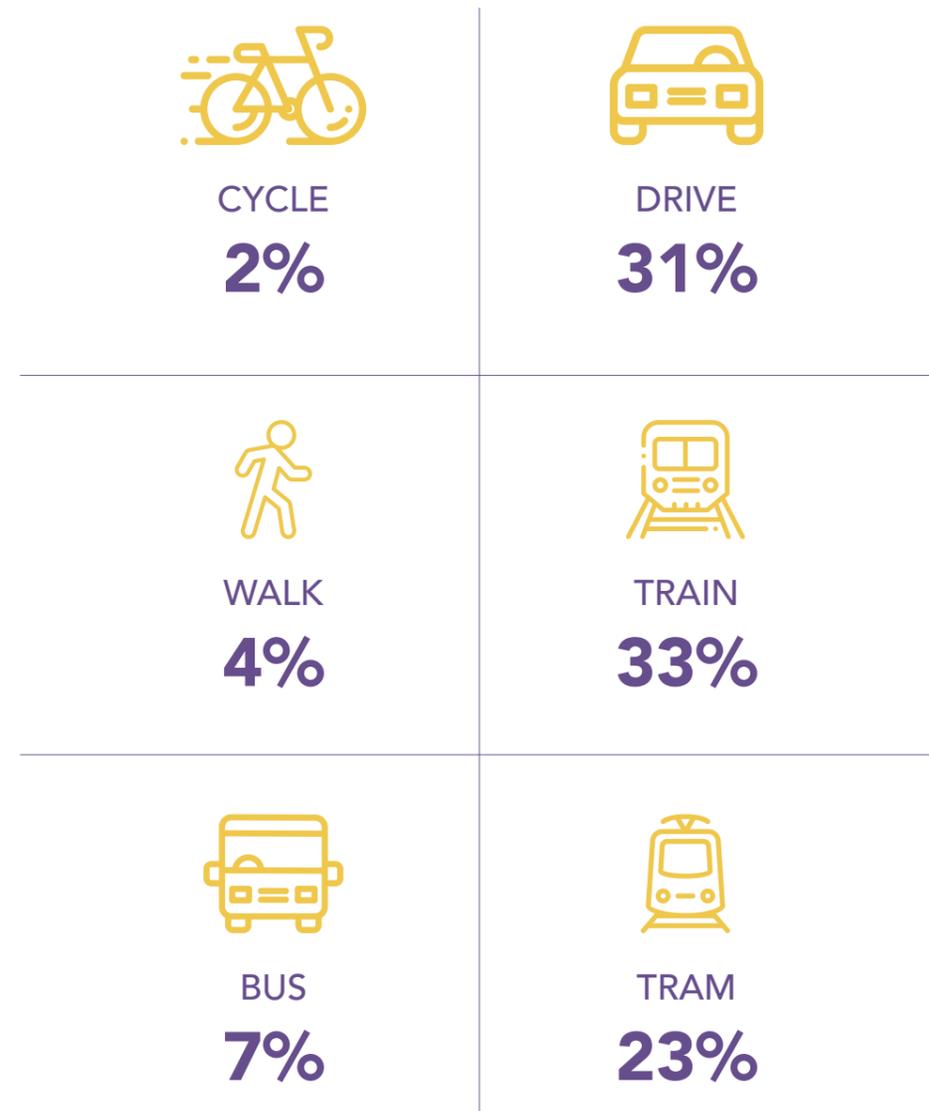
“COVID in the city and on public transport are the bigger concern than COVID in the office”

“We have completed an anonymous survey amongst our team. The majority wanted to return to work, due to mental health issues with working from home. Flexibility is our answer, we have core days Mon/Wed/Fri and Tuesday and Thursday are flexible”

40%
of employees have concerns about their commute.

The greatest concern about the return to the office surrounded an employee’s ability to commute in to, and out of the city safely. Exposure to COVID in the office also highlights the importance of businesses putting measures in place to make people feel safe and protected from exposure to the virus.

HOW DO YOUR EMPLOYEES COMMUTE TO THE OFFICE AT PRESENT?



With 63% of employees using a mode of public transport to commute to the office, and with commuting being peoples greatest concern about their return, it highlights the importance of safe and regular public transport services to get people back into the city centre.

HAVE YOU MADE ANY PHYSICAL ALTERATIONS TO YOUR OFFICE?



COMMENTS RECEIVED INCLUDE THE FOLLOWING:

"We have implemented one-way systems, only one person in the kitchen at a time, social distance restrictions in meetings and face masks in communal areas"

"Hand sanitizer stations around the office"

"We have the office professionally deep cleaned twice a week"

"We have a rota system with only 25% of staff in the office at one"



63%
of employees
commute by
public transport.

Despite the pandemic, a surprisingly high number of businesses have not adjusted their workplace or made adaptations to make it a safer environment to work. This may be a factor in employees' reluctance to return to the workplace, or simply that businesses have less employees within their offices and can adequately distance without having to make physical alterations to their space.

WHAT CITY CENTRE AMENITIES ARE YOUR EMPLOYEES USING WHEN WORKING FROM THE OFFICE?



COFFEE SHOPS



38%



RESTAURANTS



19%



BARS



17%

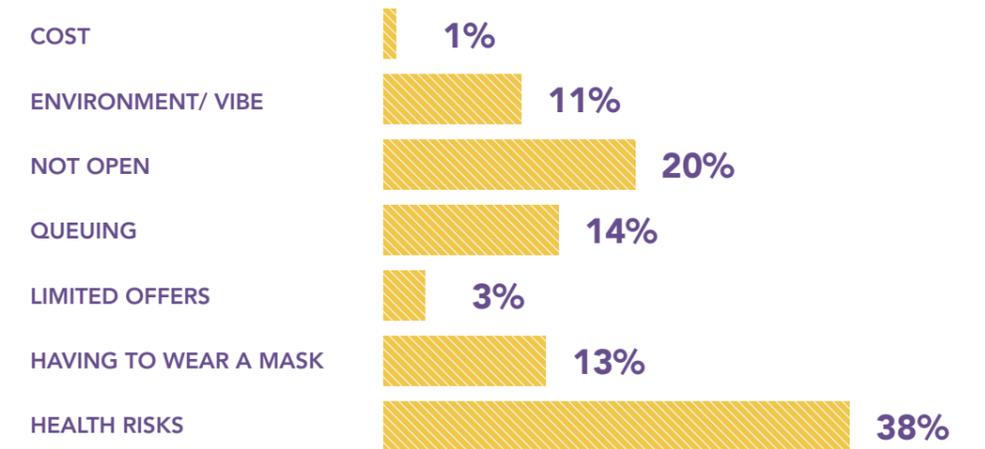


RETAIL OUTLETS



26%

WHAT ARE THE BIGGEST CONCERNS ABOUT USING LOCAL AMENITIES?



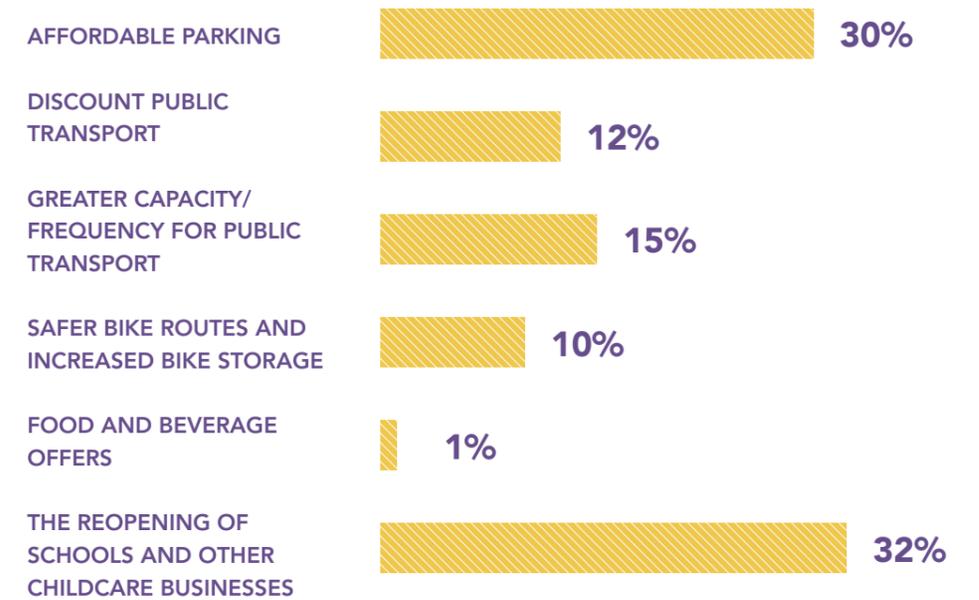
The current low number of workers within the city are causing a number of F&B operators to remain closed and some may never reopen.

WOULD YOU FEEL COMFORTABLE ATTENDING A SOCIALLY DISTANCED BUSINESS EVENT?



As business events, conferences, exhibitions and events centers are able to open on 1st October, 68% of businesses leaders said they would feel comfortable attending an event that adhered to social distancing measures.

HOW CAN MANCHESTER ENCOURAGE MORE BUSINESSES TO REOPEN THEIR OFFICES, OR REBUILD THEIR PRESENCE IN THE CITY?



With the reopening of schools taking place, the addition of more affordable parking in the city centre could be a factor to encourage people to return to work.

CONCLUSION

KEY FINDINGS

1. The biggest percentage of employees back in the office are smaller businesses with 1-50 employees.
2. 45% of businesses expect to return to the office between September and October.
3. The two main concerns about the return to the office are the commute to the city and exposure to COVID in the office environment.
4. Increased confidence around the safety of using public transport will entice commuters into the office and city centre.
5. The provision of better value car parking will also assist in bringing more businesses back to the workplace.
6. The reopening of schools and childcare will help parents to return to the workplace.

The survey found that many businesses are eager to return to the office, although some smaller businesses have commented that they found working from home to be cost-effective and productive and therefore they may not fully return to an office environment. Businesses below 50 employees have been the quickest to return and the larger businesses still have the lowest percentage of their workforce back in the office.

The commute to and from the city centre is a major concern to people returning to the office. Responses confirm that people feel that public transport can feel unsafe, due to issues with busy carriages. For many, driving is not an option as city centre car parking is expensive. A common theme from the survey is that businesses feel that employees will not be enticed to return until 'commute concerns' are overcome.

In preparation for returning to the workplace several commented that short-term alterations have been made to their workplace to comply with social distancing and to ensure the safety of their staff. Many though had not made any changes, and this may be causing some employees to have concern over safety in the work environment. One explanation for not making safety-driven alterations is some businesses introducing flexible working patterns, thus reducing densities within the workplace and reducing the need for changes.

Another major barrier we identified from our data was childcare. If childcare options and schools are closed, this creates a huge obstacle in being able to return to the office, but with schools now reopened we expect this will encourage more businesses to return to the city. We expect the city centre to become busier in September and October as 45% of businesses have said that they will return to their offices. The survey has also shown that 31% of businesses remain unsure as to when they will return to their workplace.

OBi

WWW.OBIPROPERTY.CO.UK