

Office-Worker Attitudes in the United States

A Report to:

Blumberg Office Properties

Fleishman-Hillard Research
Fleishman-Hillard, Inc.

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Blumberg Office Properties Online Office-Worker Survey

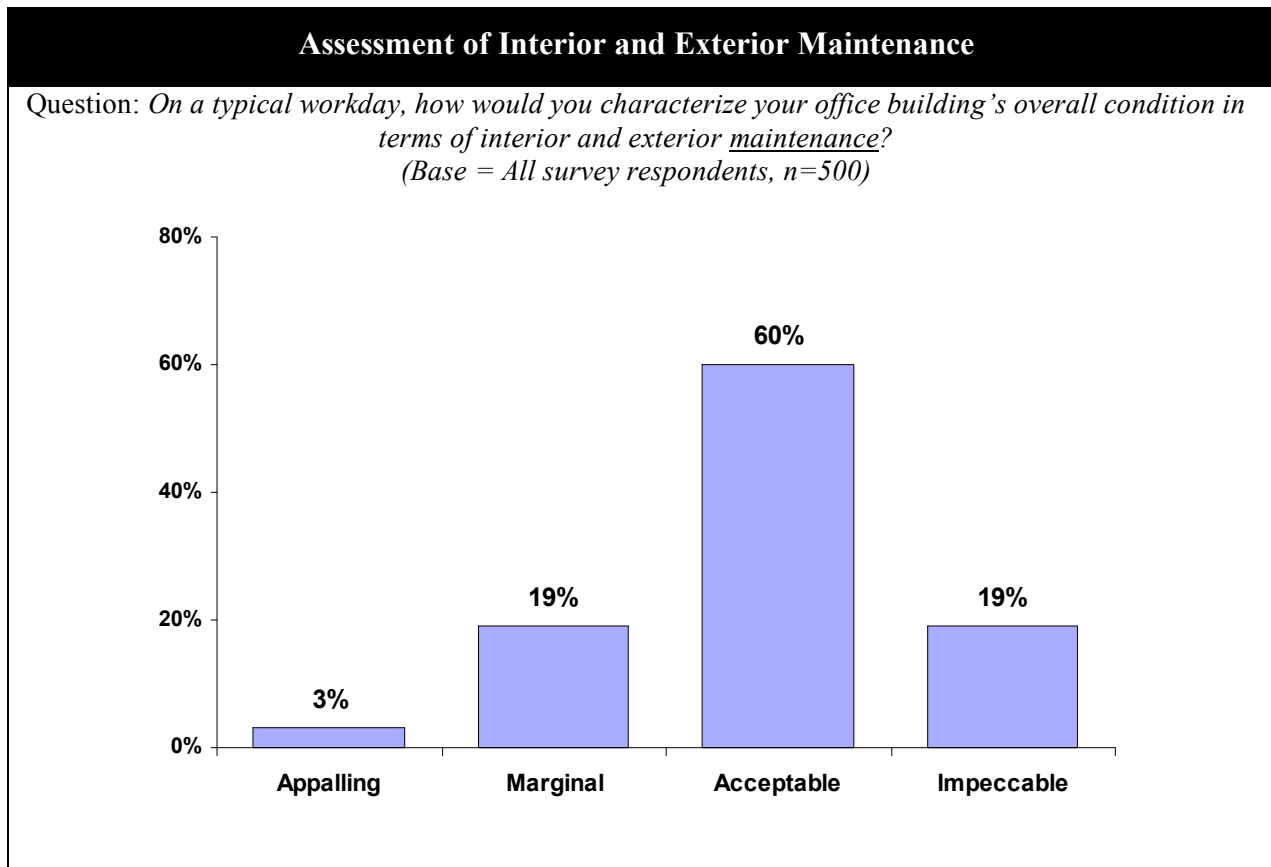
About the Survey

This survey of office building workers in the United States was commissioned by Blumberg Office Properties to gauge office-building workers' attitudes and opinions about various aspects of their office-building facilities. The findings are based on a national online survey of 500 adults who spend the majority of their workday in one office building. The survey was conducted from December 14-17, 2007 by Fleishman-Hillard Research using a nationwide Internet panel from EMI Surveys. The sample included 291 women and 209 men. Demographics were also collected for income level, job type, age, region, education level, and building type.

Key Survey Findings

- ◆ **Extreme temperatures are, by far, the single biggest office worker complaint, followed by messy restrooms, outdated décor, rodents/insects, leaky ceilings and persistent odors.**
- ◆ **One in three workers have accepted or left a job due to the condition of the building or the building amenities.**
- ◆ **An overwhelming majority (78%) of office workers say the overall condition of their office building affects how they view their employer.**
- ◆ **Buildings make a difference in workers' productivity and motivation. More than 69% of workers say the condition of their office building affects their productivity and motivation, either positively (49%) or negatively (20%).**
- ◆ **Most workers say their buildings are adequately maintained and cleaned. However, more than 30% of workers say they are concerned they might get sick or injured from unhealthy or unsafe conditions in their building.**
- ◆ **More than one-third (36%) of workers describe the "personalities" of their buildings as "bland," though nearly one-fifth (19%) would use the term "warm."**
- ◆ **Though an overwhelming majority of people feel personally safe in their buildings, men feel safer than women; 95% of men feel personally safe vs. 85% of women. Both men and women are less optimistic about the safety of their personal belongings. Findings also show a gap between desired security measures and actual security measures in place.**
- ◆ **The two amenities most desired by workers in their buildings are subsidized cafeterias/restaurants and covered parking.**

Most office workers say their office buildings are adequately maintained.

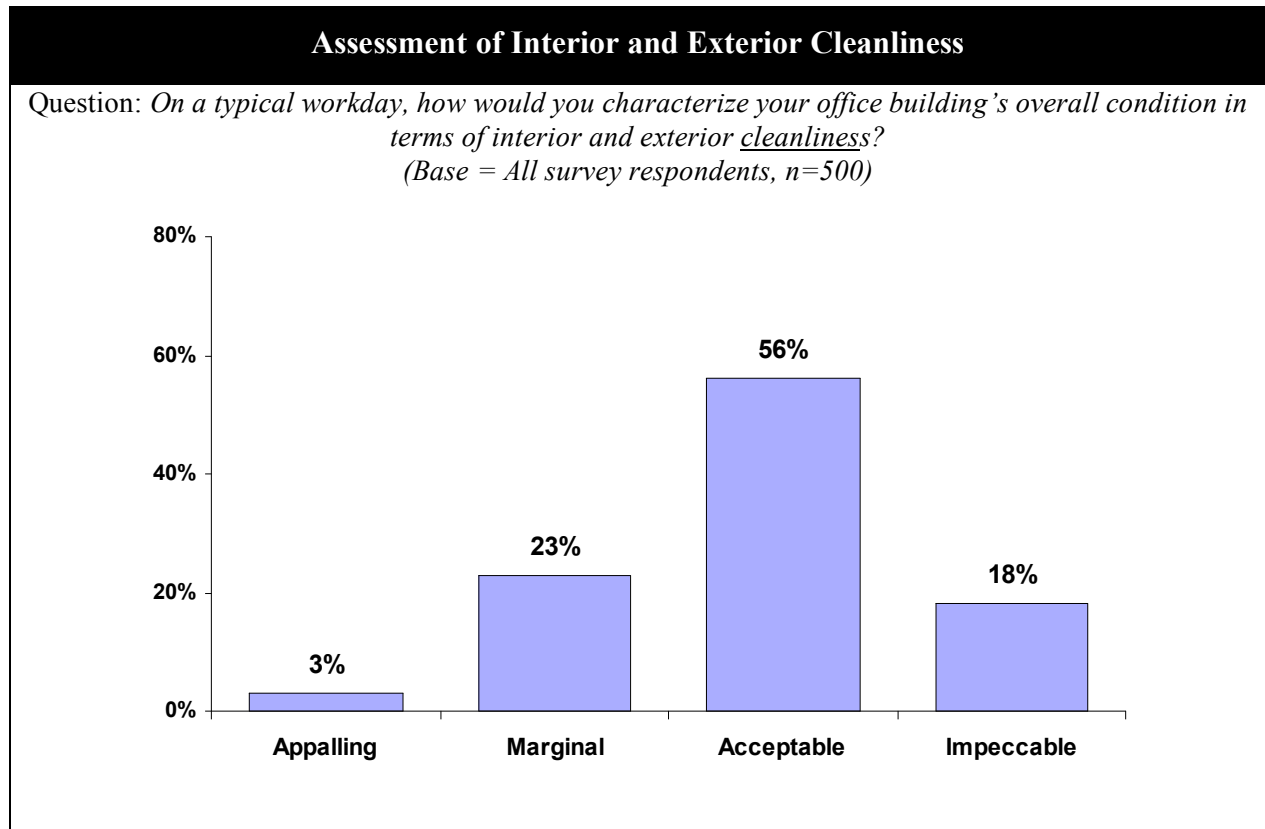


Note: Percentages may not total 100% because of rounding.

Key Findings:

- ◆ Building maintenance is not a major concern among office workers. Only 22% rated their buildings “appalling” or “marginal,” while the majority (79%) judged their buildings to be in either “acceptable” or “impeccable” condition.
- ◆ When judging the condition of a building’s maintenance, there were no significant differences between men and women, among education levels, or among holders of different job types.
- ◆ More workers in the Northeast (73%) than in the South (57%), Midwest (59%) or West (55%), were likely to say their office building was in acceptable condition.
- ◆ Workers who rated their building’s condition as “marginal” were more likely to be in the South (22%) or the West (24%) than in the Northeast.
- ◆ A larger percentage of younger people, ages 18-24 (73%), found their building’s condition “acceptable,” vs. those ages 45-54 (54%).
- ◆ Building maintenance appears to be linked to productivity. Fifty-three percent (53%) of workers who rated their buildings in “acceptable” condition also said the overall condition of their building increased their productivity, while 49% of workers who rated their buildings as “marginal” said the overall condition of their buildings decreased their productivity.

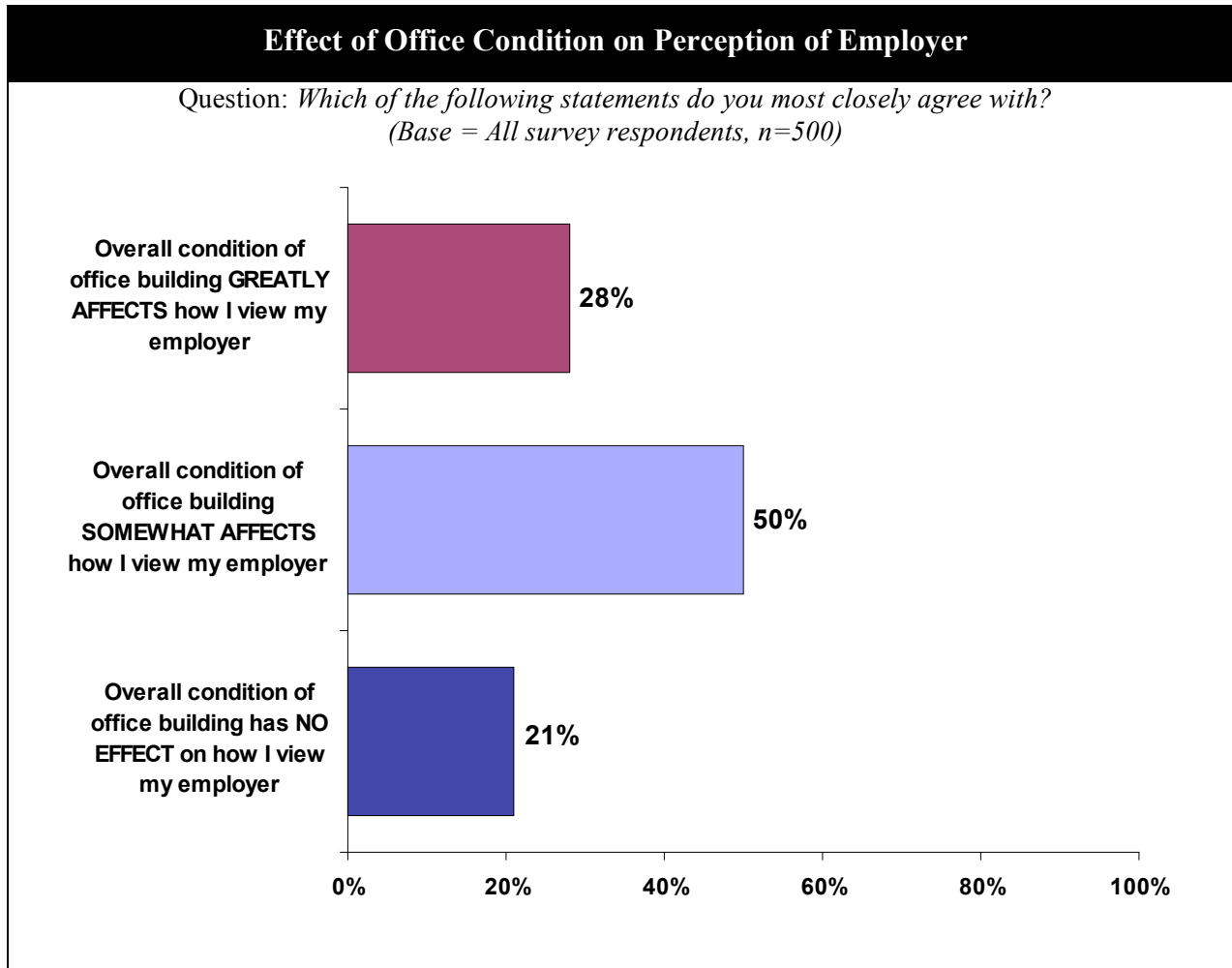
The majority of office workers say their office buildings are acceptably clean.



Key Findings:

- ◆ Most office-building workers are happy with the cleanliness of their buildings. Nearly three fourths (74%) say their building is cleaned to “acceptable” or “impeccable” levels, while 26% say their buildings are “marginal” or “appalling.”
- ◆ When judging building cleanliness, there were no significant differences between men and women or among workers with different income levels or job titles.
- ◆ Workers in buildings with 1-3 floors were more likely to rate their building’s cleanliness as “marginal” (27%) than those who worked in buildings with 4-10 floors (14%). Those in buildings with 4-10 floors rated their buildings as “impeccable” (26%) more often than those with either 1-3 floors or 11-20 floors.
- ◆ Regional differences did not appear to play a significant role in building cleanliness; however, there were no workers in the Northeast who rated their building’s cleanliness as “appalling.”
- ◆ Building cleanliness appears to be linked to productivity. Fifty-six percent (56%) of workers who rated their buildings in “acceptable” or “impeccable” condition also said the overall condition of their building increased their productivity, while 44% of those who said their building was “marginal,” or “appalling” also said their building’s overall condition decreased their productivity.

The condition of office buildings affects workers' perceptions of their employers.

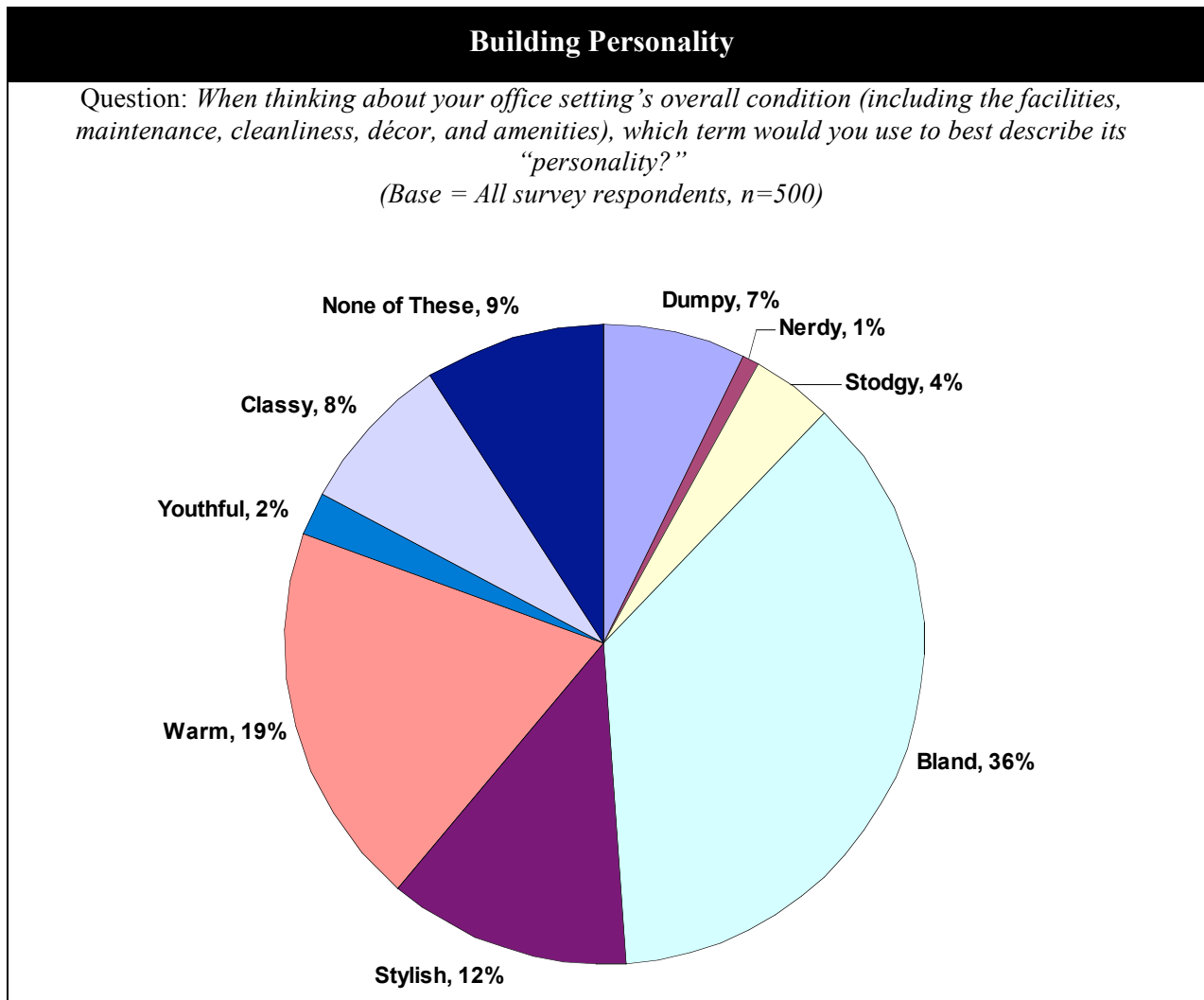


*Note: Percentages may not equal 100% because of rounding.

Key Findings:

- ◆ Most office-building workers (78%) say the condition of their office buildings affects their view of their employers. Of these, 28% say their buildings greatly affect their perception, while half (50%) say it somewhat affects their perception.
- ◆ Among job titles, managerial and professional workers (82%) were more likely than clerical workers (68%) to say their building's condition affected their view of their employer. Clerical workers (32%) were more likely than managerial and professional workers (18%) to say their office building *does not affect* their view of their employer.
- ◆ Workers in the Northeast (86%) were more likely than workers in the South (74%) to say their office building affected their view of their employer.
- ◆ There appears to be a relationship between effect on view of employer and effect on productivity. Fifty-four percent (54%) of those who said their office building's condition affected their view of their employer also said the condition of their office building increased their productivity, while 21% of those said their building's condition decreased their productivity.

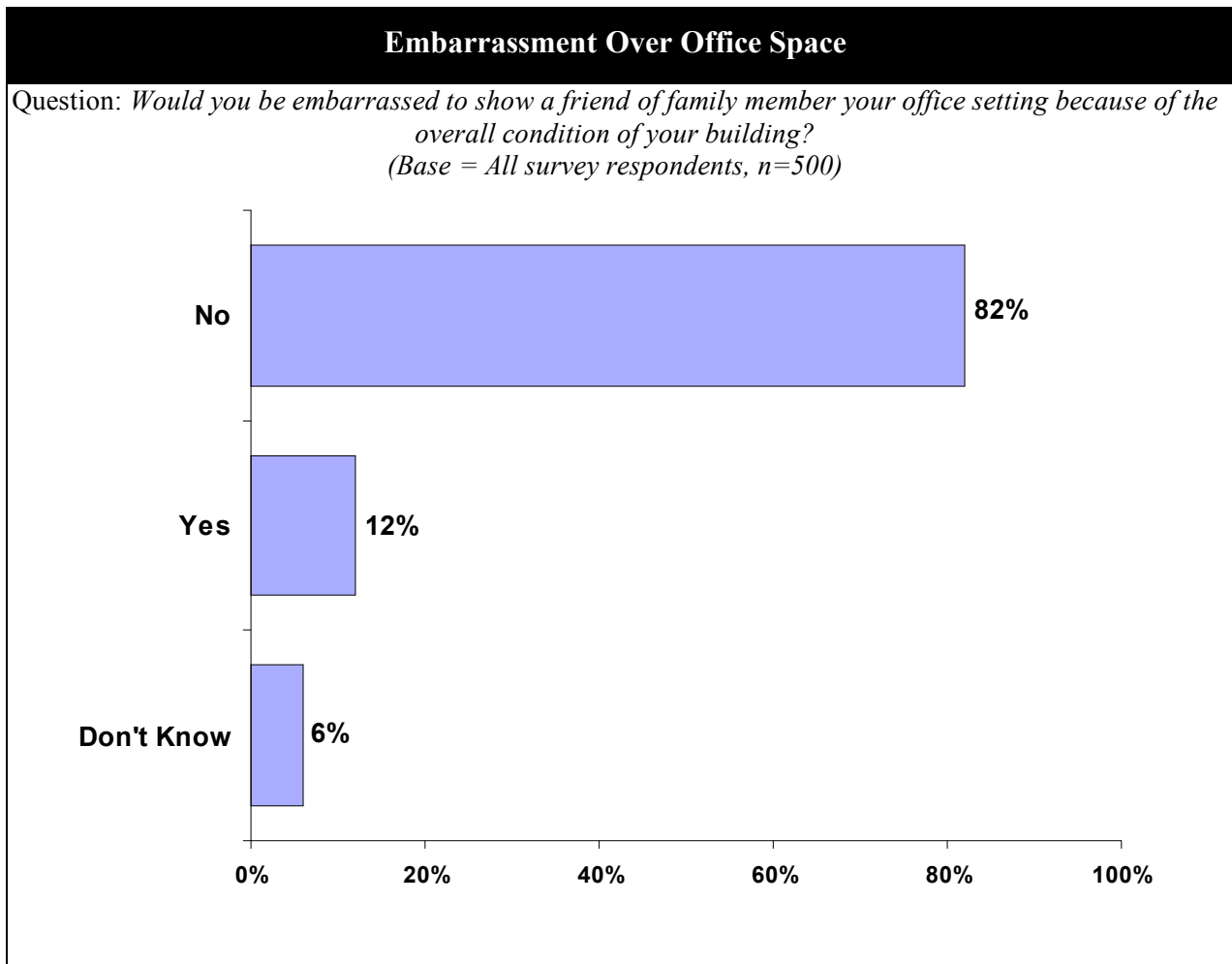
More than a third of office workers would characterize their office building as “bland.”



Key Findings:

- ◆ Technical and clerical workers (46%) were more likely than managerial or professional workers (30%) to rate their building as “bland.” Managerial and professional workers (23%) were more likely to rate their buildings as “warm” than technical workers (11%).
- ◆ Younger workers, ages 18-24 (57%), were more likely than older workers to rate their buildings as “bland.”
- ◆ Workers in smaller buildings, with 1-3 floors (39%), were more likely than those with 4-10 floors (25%) to rate their building as “bland.”
- ◆ Among workers who characterized their building as “bland,” 32% said their building’s condition increased their productivity, 30% said it decreased their productivity, and 38% said it had no effect on productivity.
- ◆ 70% of workers who rated their buildings as “dumpy” worked in buildings with 1-3 floors.
- ◆ No workers with incomes less than \$25K characterized their building as “stylish.”

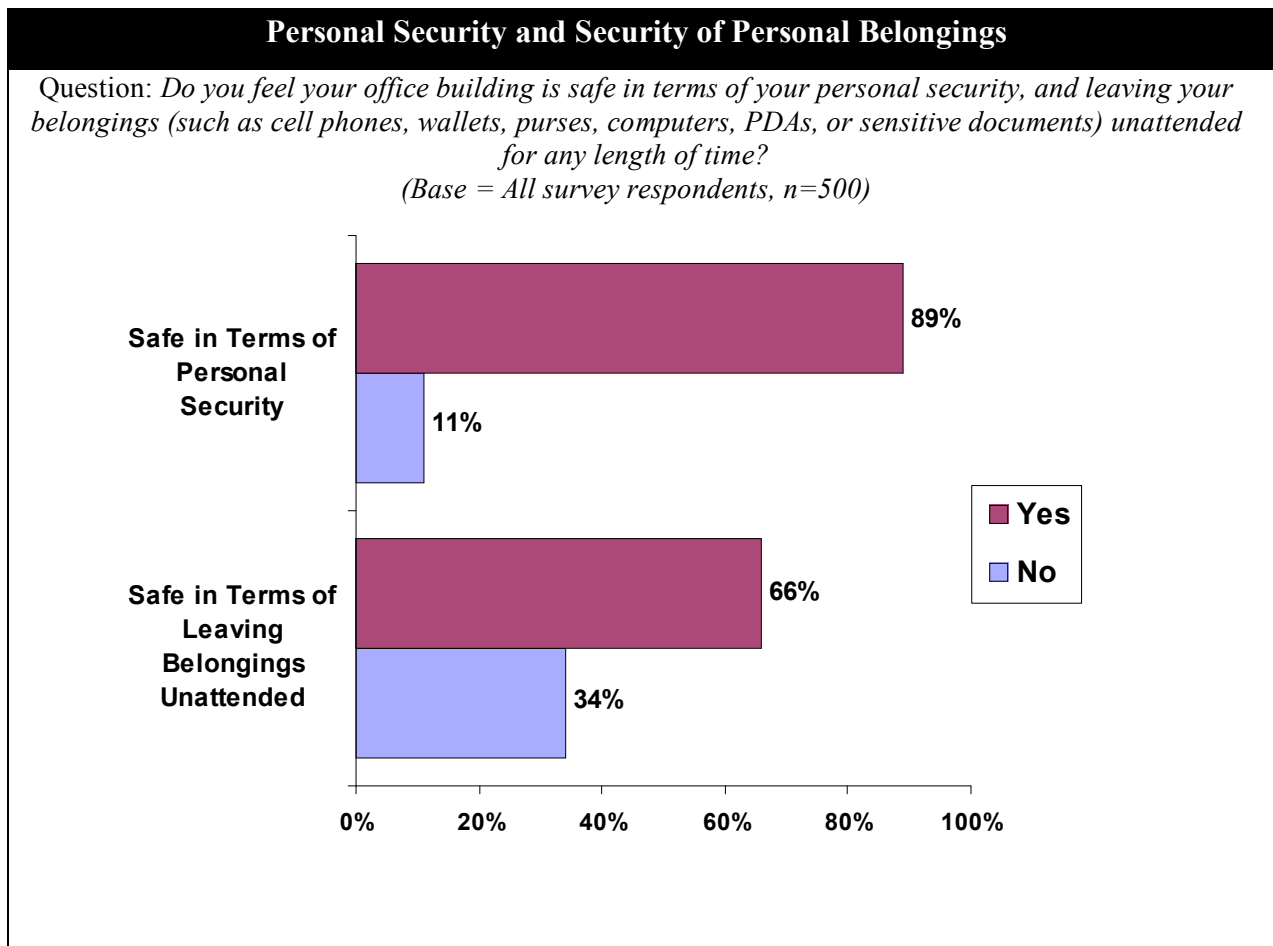
Most office workers are not embarrassed by their office setting's condition.



Key Findings:

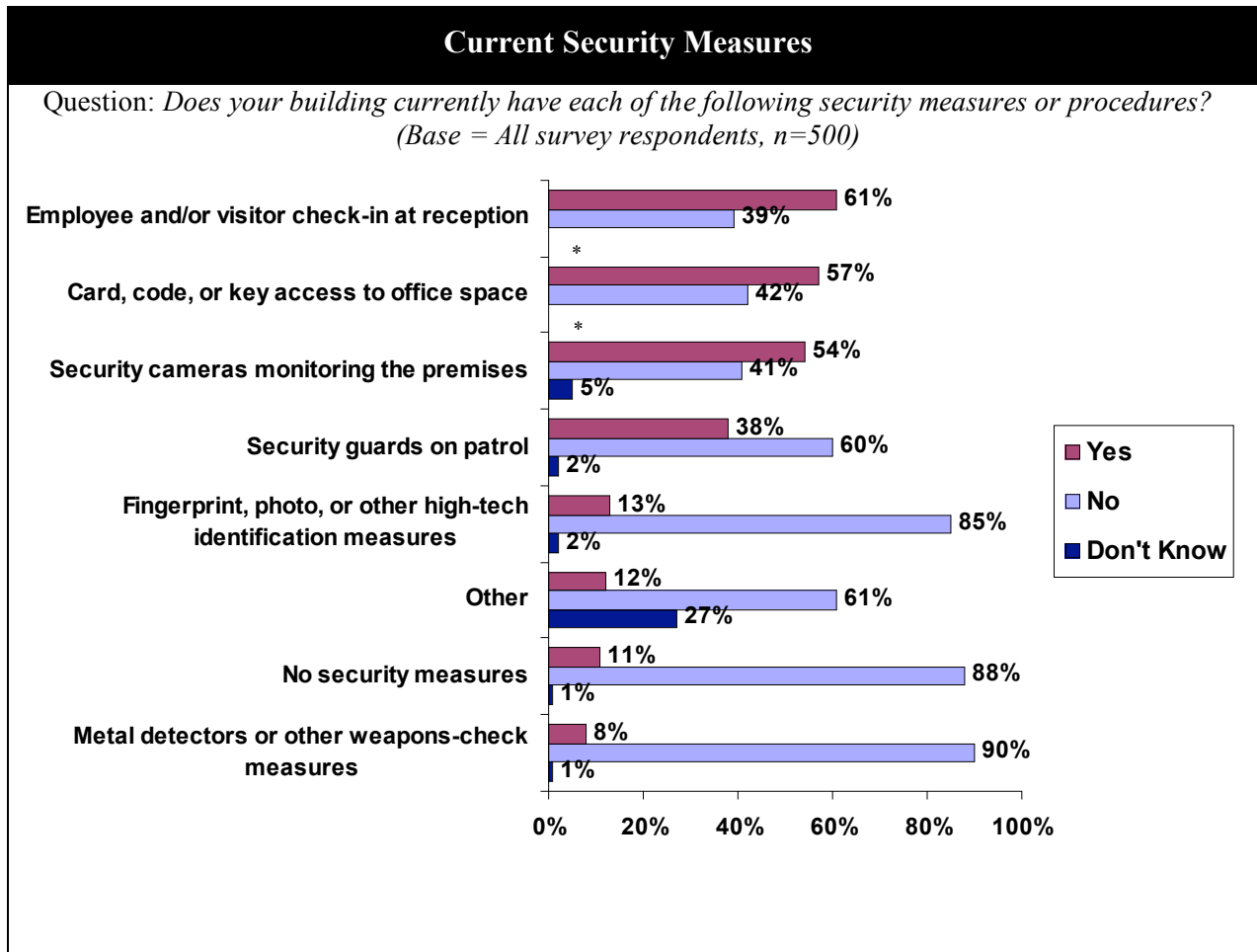
- ◆ The overwhelming majority of office workers (82%) would not be embarrassed to show a friend or family member their office space.
- ◆ Of those who said they would be embarrassed, 72% had managerial or professional job titles, and 35% were ages 45-54. Older workers, over age 55 (89%), were less likely than those 45-54 (75%) to say they would be embarrassed.
- ◆ 91% of workers who make more than \$100,000 year said they would not be embarrassed. This is more than workers who make less than \$50,000 year (75%).
- ◆ Among larger states, 91% of respondents from Texas said they would not be embarrassed. Those numbers were 76% for California and 75% for Florida.
- ◆ Among those who said they would be embarrassed, 47% also said that the overall condition of their office building decreases their productivity.

Most people feel personally safe in their buildings, though they feel their unattended belongings are less safe.



Key Findings:

- ◆ The overwhelming majority of office workers (89%) say they feel personally safe in their office settings. However, the percentage was significantly lower (66%) when assessing the safety of unattended personal belongings.
- ◆ When considering personal security, there was a significant difference between men and women. While 95% of men felt personally secure, only 85% of women did. There was no gender difference in terms of leaving unattended belongings.
- ◆ Sixty-three percent (63%) of total respondents say they feel safe in terms of both personal security and leaving their belongings unattended. Only 9% of total respondents feel that their personal security and belongings are both unsafe.
- ◆ Respondents in the Northeast (96%) feel more personally secure than those in the South (90%) and Midwest (83%).
- ◆ People with advanced degrees (74%) felt safer overall than those with only a high-school education (56%), while those making more than \$100,000 (77%) felt safer than those making less than \$75,000 (58%).

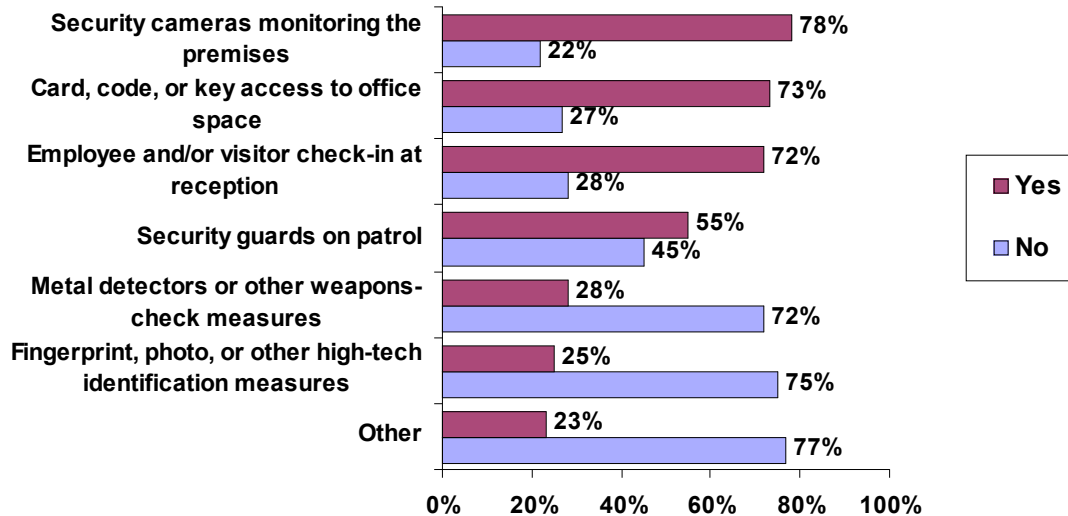


Key Findings:

- ◆ The most common security measures cited in buildings were employee/visitor check-in at reception (61%); card, code, or key access to office space (57%); and security cameras (54%).
- ◆ Seventy-three percent (73%) of those with technical jobs say their buildings have security cameras. This was a significant difference over those with other job types.
- ◆ Workers in the Northeast were more likely than those in the Midwest to have card, code, or key access to office space and security guards. They were more likely than those in the West to have security cameras.
- ◆ Those with advanced degrees (68%) were more likely to have card, code or key access than those with a high-school education (52%).
- ◆ Those who cited having various security measures also reported that their building's condition increased their productivity. Of those who said their building had employee check-in at reception, 55% also said their building's condition increased their productivity. These numbers were 56% for card, code, or key access; 55% for security cameras; and 59% for security guards.
- ◆ Those working in buildings with more than three floors were more likely to report more security measures than those in buildings with 1-3 floors.

Desired Security Measures

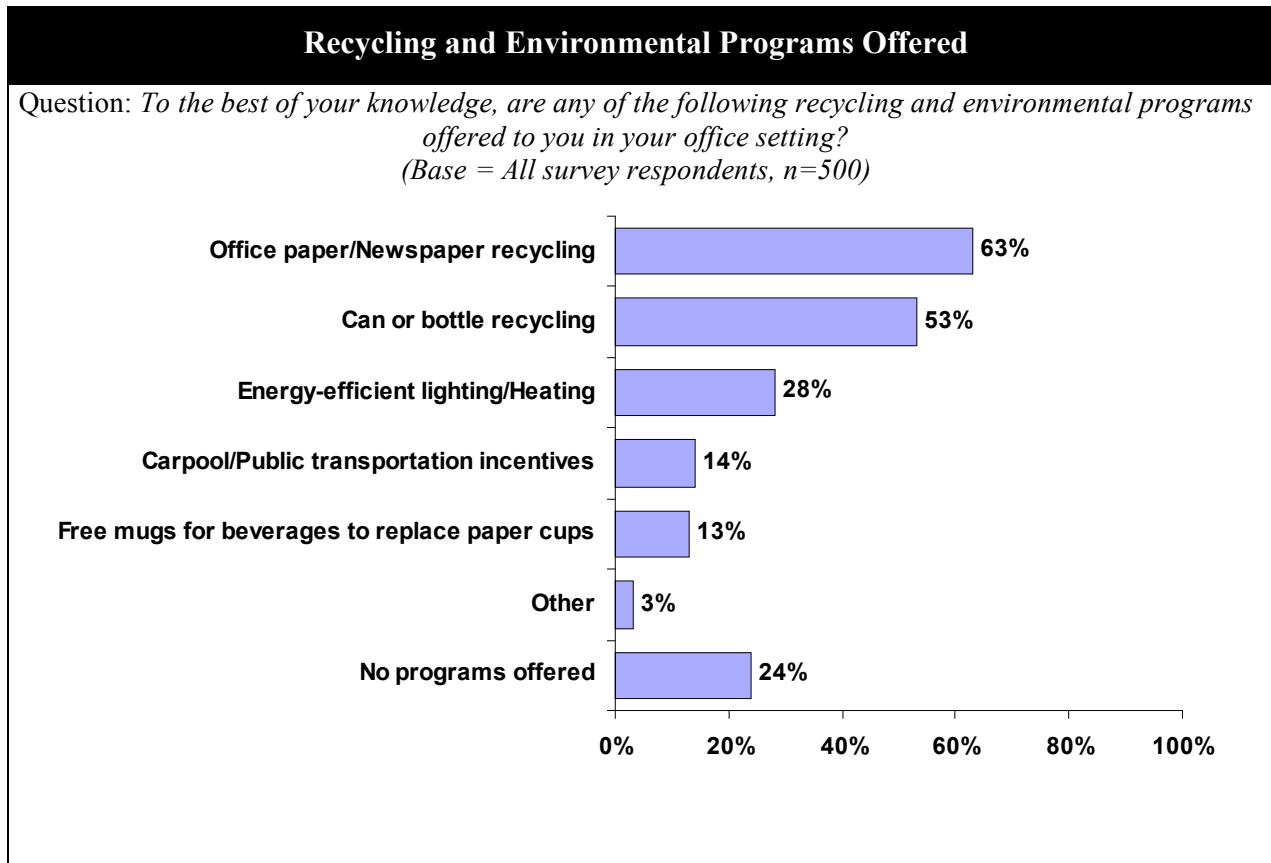
Question: *In your opinion, do you think your building should have each of the following security measures or procedures, regardless of whether your building currently has them or not??*
(Base = All survey respondents, n=500)



Key Findings:

- ◆ The most highly desired security measures were security cameras (desired by 78%); card, code, or key access (desired by 73%); and employee and visitor check-in at reception (desired by 72%).
- ◆ Respondents report that their buildings should have many measures in higher numbers than are now implemented:
 - 23% of workers say their building needs security cameras but does not have them. 88% of these people work in buildings with 1-3 floors.
 - 20% say their building needs metal detectors/weapons-check measures but does not have them. Workers over age 55 made up 22% of this total.
 - 67% of those who reported having metal detectors also reported that their office building's condition increased their productivity.
 - 18% of people say their building needs security guards but does not have them. Among these people, women desired security guards (68%) in higher numbers than men (32%). 43% of people who have and say they should have security guards also report that their office building's condition increases their productivity.
 - 17% of workers say their building needs card, code, or key access but does not have it.
 - 12% say their building needs employee or visitor check-in but does not have it.
- ◆ Seventy-three percent (73%) of people say they don't have and don't need fingerprint, photo, or other high-tech identification measures; 78% of these people worked in buildings with 1-3 floors.
- ◆ Those in the Northeast (82%) report that their buildings should have card, code, or key access to office space more often than those in the Midwest (70%).

Most workers report that they have at least one recycling or environmental program offered in their office setting.

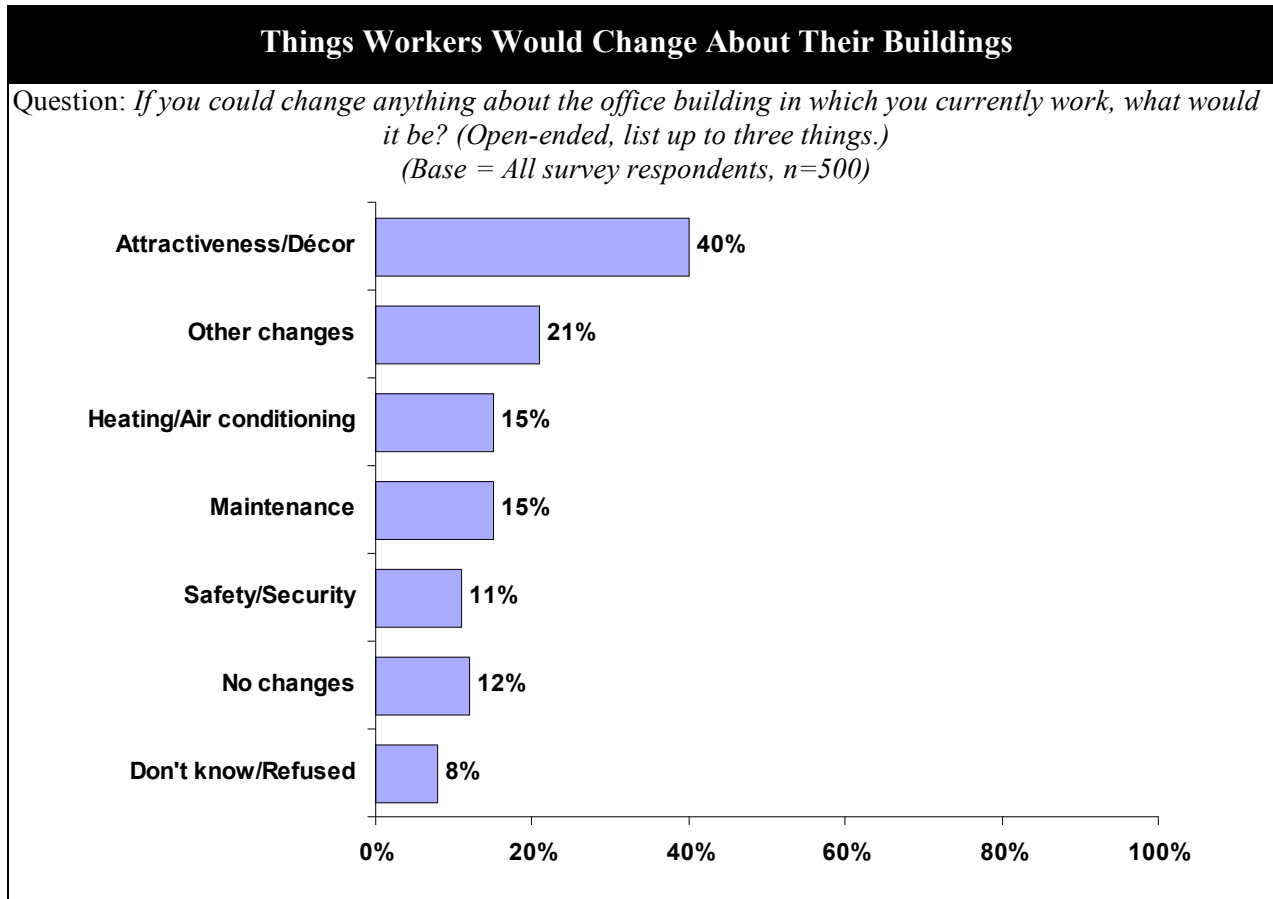


Note: Percentages do not total 100% because of the opportunity to select multiple answers.

Key Findings:

- ◆ On average, men report the incidence of paper and can/bottle recycling, energy-efficient lighting/heating, carpool/public transportation options at higher percentages than women. Women (29%) were more likely to report that there were no such programs offered in their office settings.
- ◆ Workers in higher-income categories reported that their buildings had energy-efficient lighting/heating more than their lower-income counterparts. Forty-two percent (42%) of workers making more than \$100,000 reported having these programs. The number was 25% among workers making \$25,000-\$99,999.
- ◆ Workers in the West (21%) report incentives for public transportation and carpooling in higher numbers than those in the Midwest (9%). Workers in the Midwest (60%) reported can or bottle recycling more often than those in the South (47%).
- ◆ College graduates and those with advanced degrees report paper recycling programs (66%) and carpool/public transportation options (17%) more often than those with high-school diplomas (54% and 8%, respectively).
- ◆ Among those who said their office had paper recycling programs, 54% also said that the condition of their office building increased their productivity. Sixty-five percent (65%) of those who said their building had energy-efficient lighting/heating also said their office building's condition increased their work productivity.

Workers most want to change building features related to attractiveness and décor.



Key Findings:

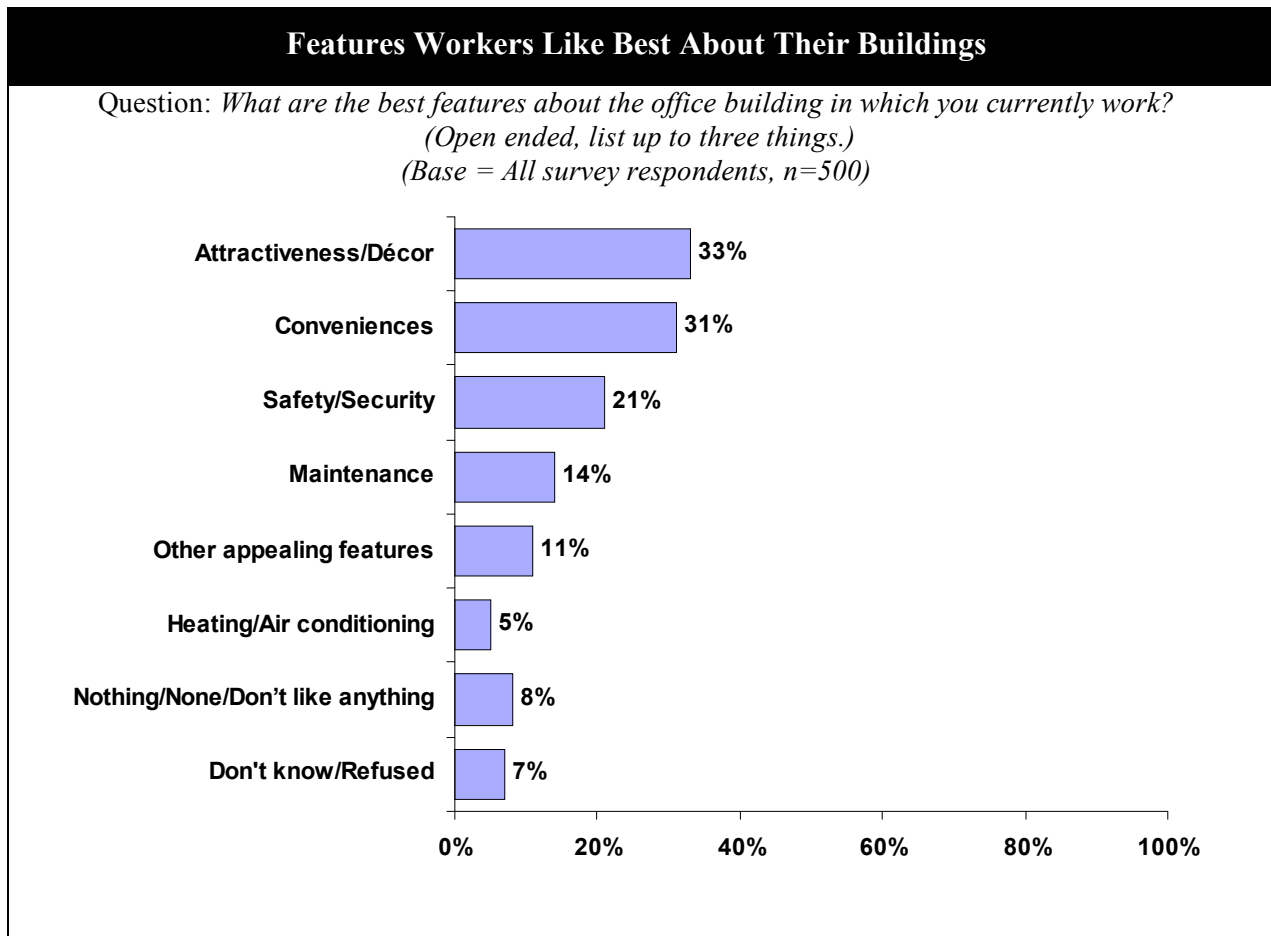
- ◆ Eighty percent (80%) of respondents were able to cite at least one thing they would change about their office building; 12% said their building did not need any changes.
- ◆ Concepts related to changing the attractiveness and décor were among the most common answers to this open-ended question. Among these:
 - 12% wanted a larger building or bigger space
 - 9% wanted different colors or new paint
 - 8% wanted lighting changes or brighter lighting
 - Other suggestions included better décor, requests for more contemporary space, better/newer carpet and more windows
- ◆ Among those citing changes to heating and air conditioning:
 - 7% want heating or a warmer temperature
 - 6% want air conditioning
 - 3% want air filtration and ventilation
 - 3% want better temperature control

- ◆ Among those citing changes to maintenance:
 - 8% want their offices cleaner or with better cleaning services
 - 7% want better bathrooms
 - 2% desire elevator improvements

- ◆ Among those citing safety and security changes:
 - 5% want better overall safety
 - 3% want security cameras and security guards/escorts

- ◆ Suggested changes categorized as “other” include newer equipment and updated computers, recycling programs, better parking, locations closer to home, more privacy, and other conveniences.

Workers like building features best that are related to attractiveness and décor.



Key Findings:

- ◆ Eighty-five percent (85%) of respondents were able to cite at least one thing they liked about their building; 8% said there was nothing they liked about their building.
- ◆ Concepts related to building attractiveness and décor were the most common answers to this open-ended question. Among these:
 - 11% said their building was attractive; they liked the design or the paint colors.
 - 11% said they had adequate, large space
 - 5% cited good lighting
 - 5% said windows were among their favorite features
 - 3% liked their buildings because they were new
 - College graduates (36%) were more likely than high-school graduates (25%) to cite décor as one of the best features about their buildings
- ◆ Workers also said they liked the conveniences associated with their buildings. Highlights include:
 - 20% said their building was convenient, had an appealing location, and/or is close to home
 - 8% said their building is comfortable
 - 5% cited break rooms, coffee machines, and/or snack machines

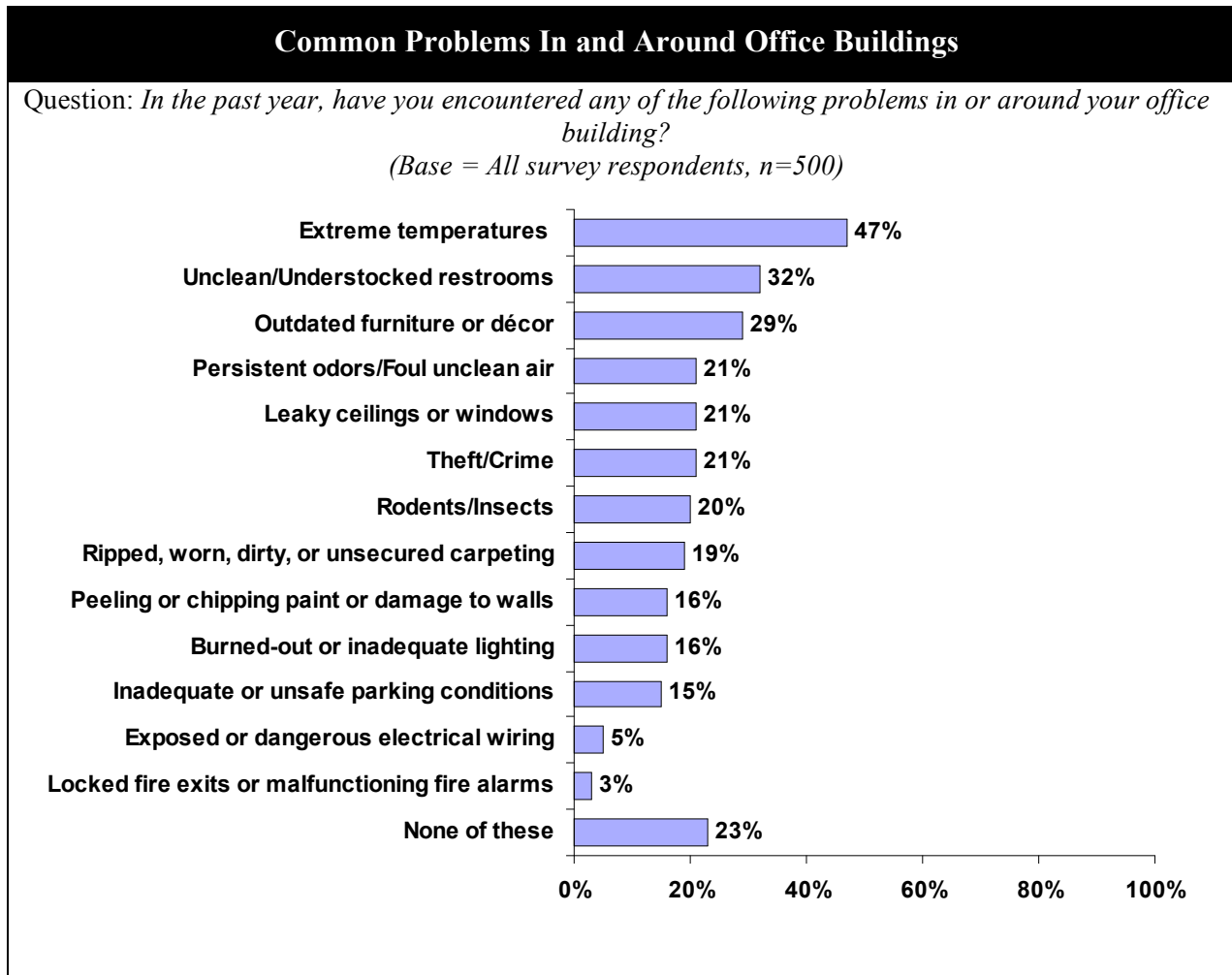
- ◆ Good maintenance and cleanliness were cited by 14% of office workers:
 - Clean buildings and good cleaning services were best features for 11%
 - Well-maintained buildings were the favorite of 4% of respondents

- ◆ Safety and security were also among features that office workers liked about their buildings:
 - 17% said that the safety/security was among the best things about their building
 - 4% cited card access and limited access
 - 2% cited security cameras

- ◆ Other appealing features cited:
 - 5% of people mentioned features related to parking
 - 4% mentioned friendly staff and friendly people
 - 2% cited newer equipment and updated computers

- ◆ Heating and air-conditioning issues included:
 - 4% mentioned good heating, temperature controls, and warmer temperatures
 - 1% mentioned good air conditioning systems

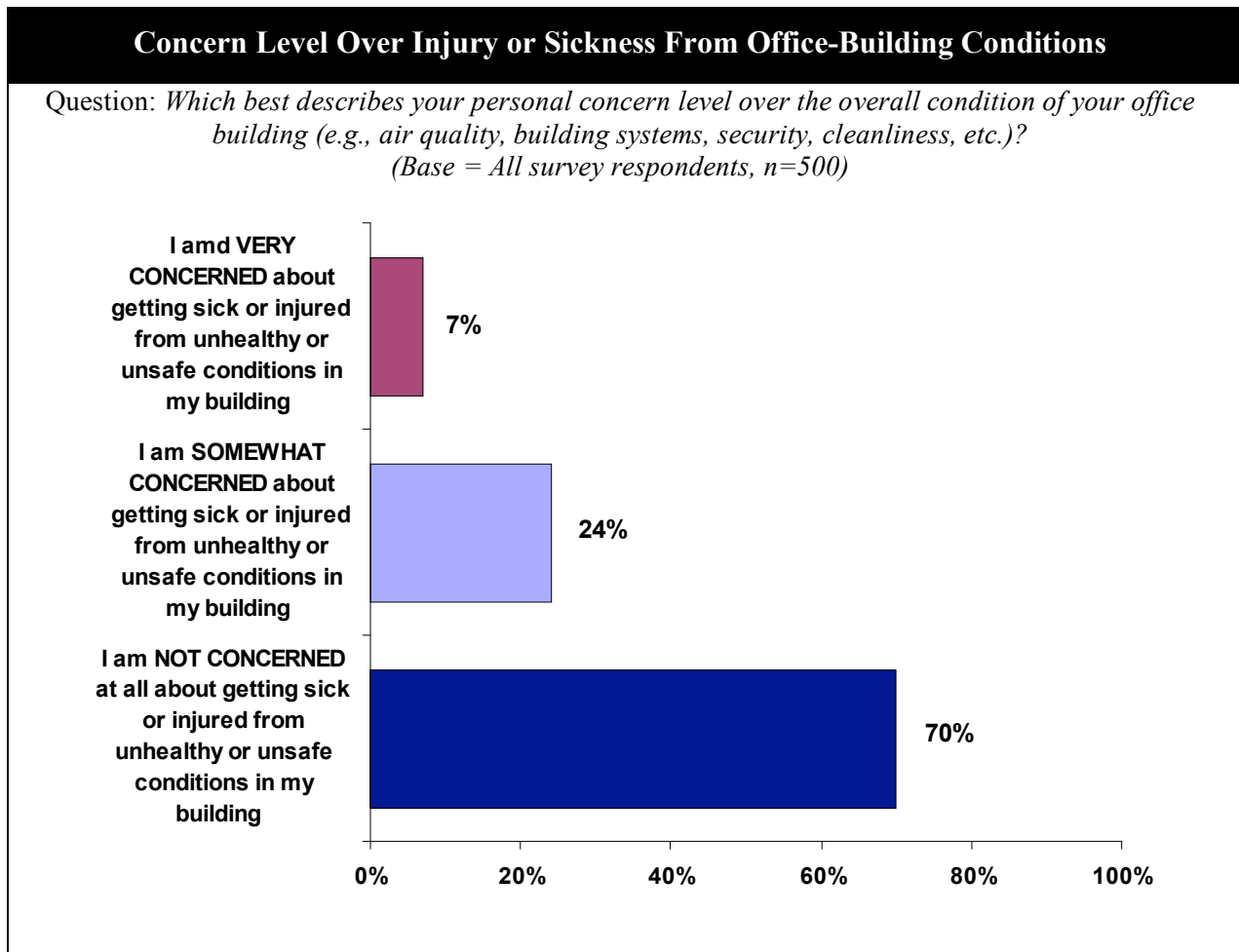
Extreme temperatures and restroom issues are the most common problems in office buildings.



Key Findings:

- ◆ A higher percentage of female office workers (51% vs. 41% of males) cited extreme temperatures in their buildings because of poor heating, air conditioning and ventilation systems.
- ◆ A higher percentage of respondents in the West (30%) cited theft and crime, vs. respondents in the Northeast and Midwest (15% and 16%, respectively). Respondents in the South cited rodents and insects (26%) more than those in the Northeast or West (12%).
- ◆ More respondents in buildings with 1-3 floors cited extreme temperatures (49%) vs. those in buildings with more than 20 floors.
- ◆ Eighty percent (80%) of people who cited inadequate or unsafe parking conditions worked in buildings with 1-3 floors.
- ◆ Those in lower income categories cited leaky ceilings and windows more than those with incomes of \$100,000 or more.

Though an overwhelming majority of office workers are not concerned they will get injured or sick from the condition of their office buildings, there are still some workers who are.



Note: Percentages may not equal 100% because of rounding.

Key Findings:

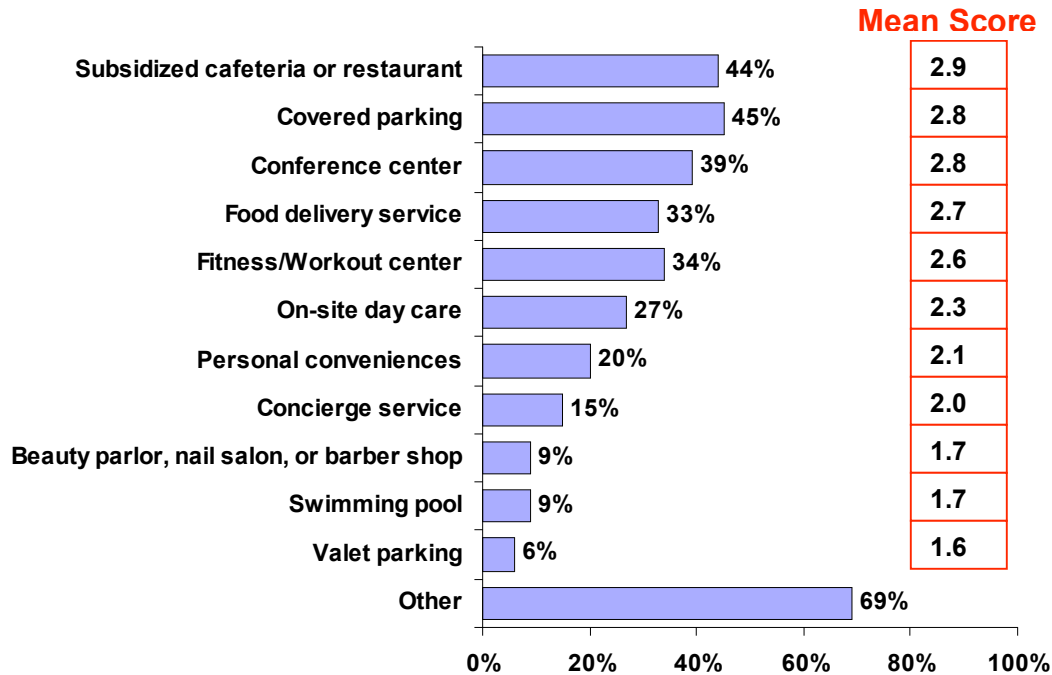
- ◆ The majority of people surveyed said they were not at all concerned about getting sick or injured from their buildings.
- ◆ Of respondents who were concerned, a higher percentage of women (27%) than men (19%) said they were somewhat concerned about getting sick or injured from their buildings.
- ◆ Of respondents who said they were either “somewhat” or “very” concerned about getting sick or injured, 87% also said the overall condition of their building affected their view of their employer.
- ◆ Of those who said they were “somewhat” or “very” concerned about getting sick or injured from their buildings, 70% also said they had experienced extreme temperatures; 56% said they encountered unclean/understocked restrooms; 42% experienced foul or unclean air; 41% experienced rodents or insects; 41% experienced theft or crime; 27% experienced inadequate or unsafe parking conditions.

Most Desirable Amenities

Question: *Please rate the following amenities on a scale from 1 to 5 based on how important they would be in your decision to work in a particular office building.*

(Base for mean score = All survey respondents, n=500)

Base for graph = Survey respondents answering "4" or "5," n=135)

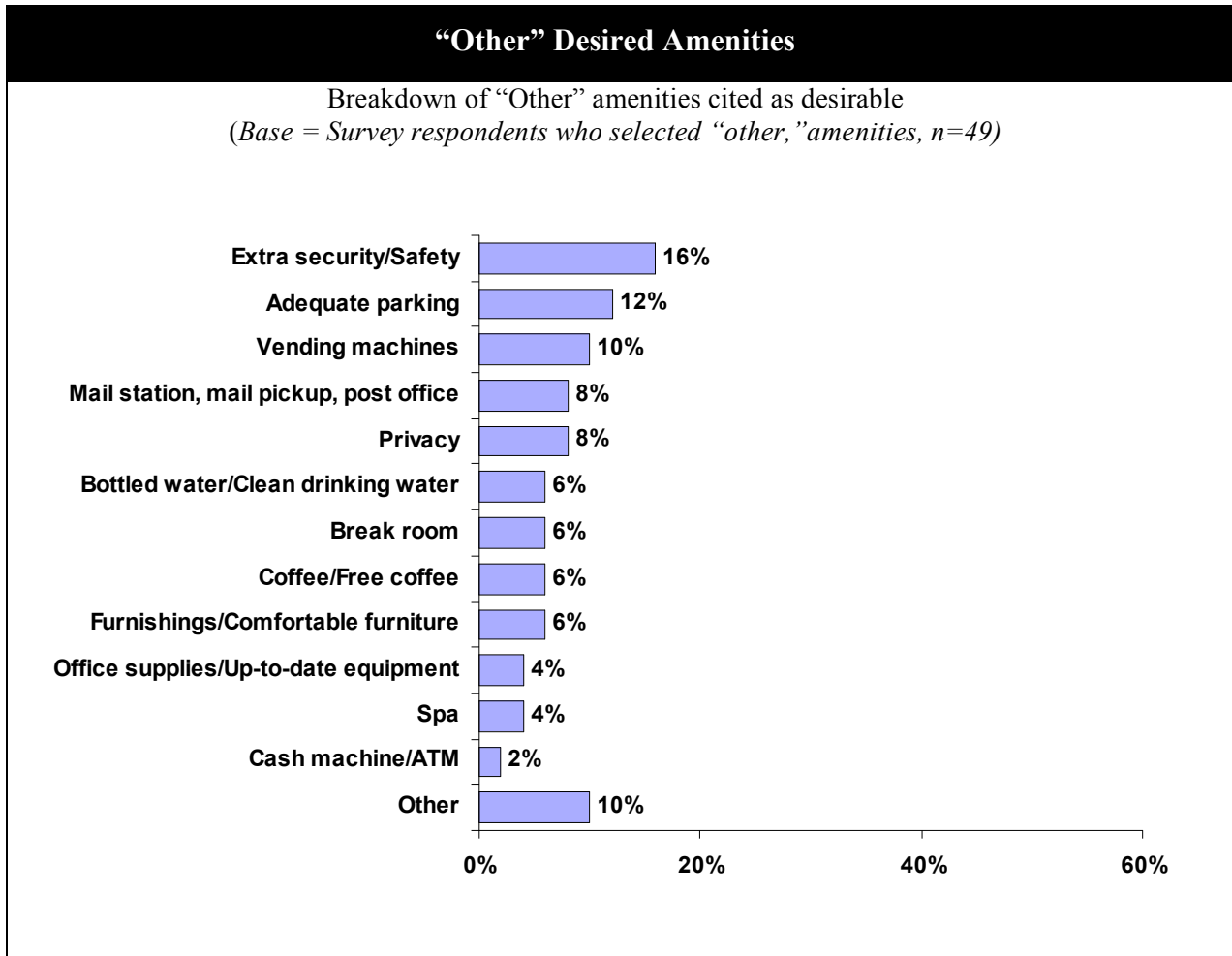


Note: Percentages do not equal 100% because of the opportunity for multiple responses.

Key Findings:

- ◆ Though covered parking received the highest percentage of respondents rating it a "4" or "5," subsidized cafeteria/restaurant received the highest overall mean score.
- ◆ Younger age groups say subsidized cafeterias and restaurants are more important than older age groups do. The mean score for ages 25-34 and 35-44 is 3.2 and 3.0, respectively, versus ages 45-54 (2.8) and 55+ (2.4).
- ◆ Overall, men rated on-site conveniences (such as dry cleaning, food/drug store, oil-change service, and shoe shine), concierge service, beauty parlor, nail salon or barber shop, swimming pool and valet parking higher than women.
- ◆ Respondents in the Northeast rated on-site day care (2.6) higher than those in the West (2.1).
- ◆ Those with incomes over \$100K rated covered parking, subsidized cafeteria/restaurant, conference center, fitness/workout center, and personal conveniences higher than workers with lower incomes.

Security and parking rate high on the list of other desired amenities

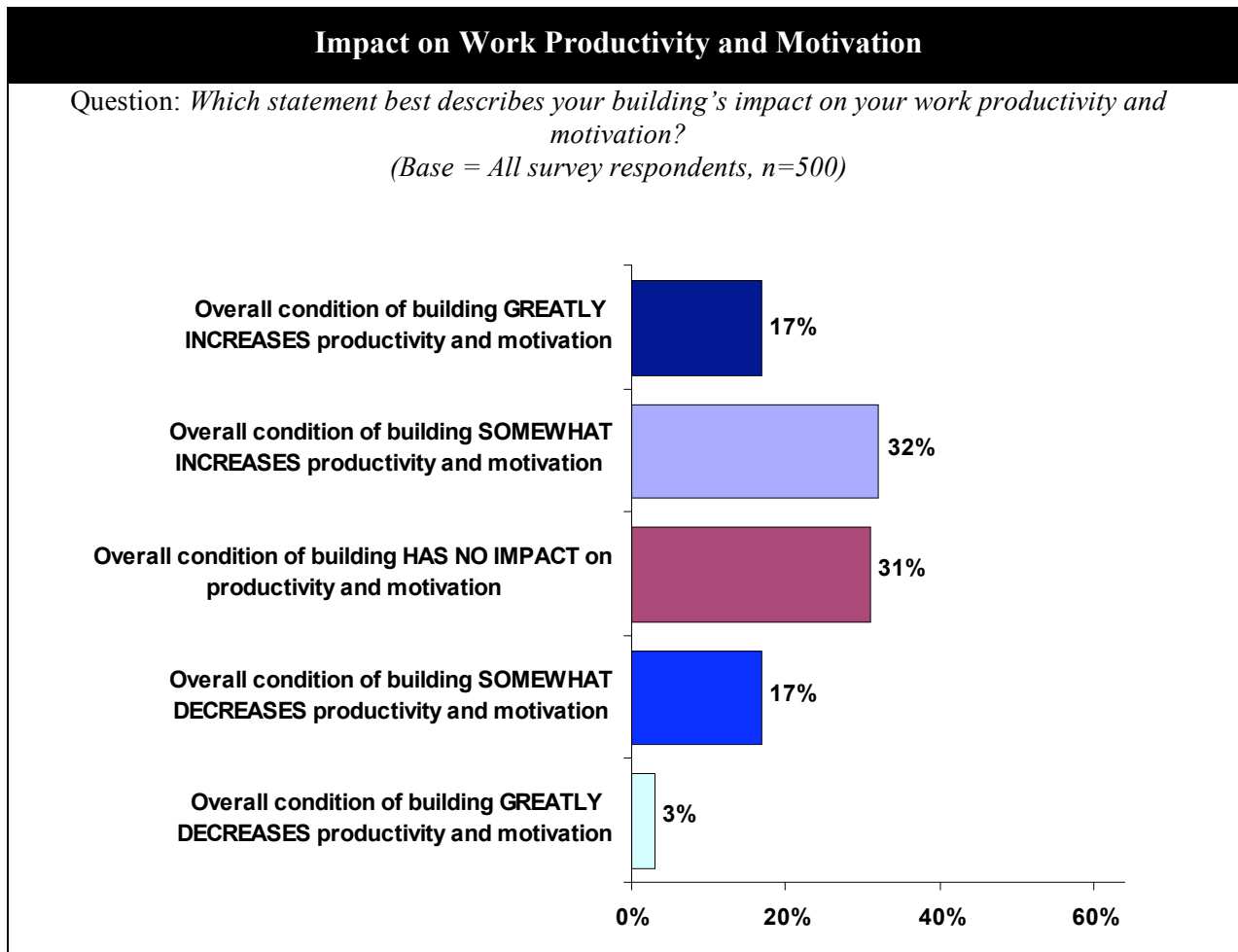


Note: Percentages do not equal 100% because of rounding.

Key Findings:

- ◆ Respondents who selected “other” amenities had the opportunity to write-in their own responses. Verbatim responses in the “other” category listed as important amenities included:
 - Extra safety/security, mentioned by 8 respondents
 - Adequate parking, mentioned by 6 respondents
 - Vending machines, mentioned by 5 respondents
 - Mail station/mail pickup/post office, mentioned by 4 respondents
 - Privacy, mentioned by 4 respondents
 - Bottled water/clean drinking water, mentioned by 3 respondents
 - Other amenities mentioned also included free coffee, comfortable furniture, office supplies, up-to-date equipment, spa, and cash machine/ATM

Nearly half of office workers say their building has an impact on their work productivity and motivation.



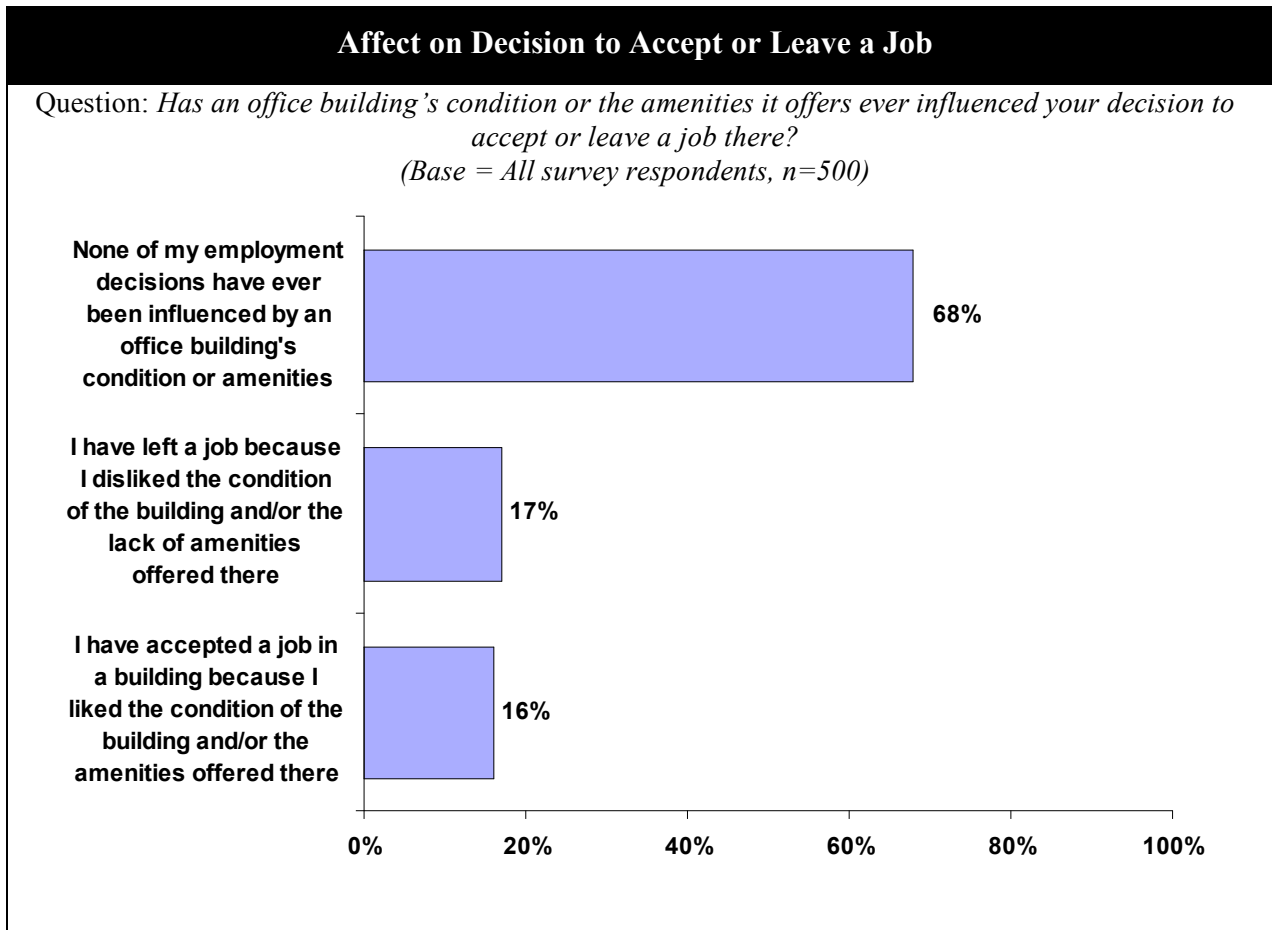
Note: Percentages may not equal 100% because of rounding.

Key Findings:

- ◆ While nearly half of office workers said their buildings increased their productivity and motivation, one-fifth (20%) said their building's condition decreased their productivity and motivation.
- ◆ Managerial and professional workers were more likely than clerical and technical workers to say their building's condition increased their productivity and motivation.
- ◆ Women (20%) were more likely than men (13%) to say a building's condition "greatly" increased their productivity and motivation.
- ◆ Workers who identified themselves as "clerical," were more likely than professional and technical workers to say their building has no effect on their productivity and motivation.
- ◆ Those with college and advanced degrees (55%) said their building's condition increased their productivity more than those with high-school educations (35%). Those with high-school diplomas (30%) were more likely than those with college and advanced degrees (16%) to say their building's condition decreased their productivity and motivation.

- ◆ Those with incomes over \$100,000 were more likely than all other income groups to say their building's condition increased their motivation and productivity at work.
- ◆ Eighty-seven percent (87%) of those who said their building increased their productivity and motivation also said their building's condition affected their view of their employer. Eighty-four percent (84%) of those who said their building decreased their productivity and motivation also said their building's condition affected their view of their employer.
- ◆ Eighty-eight percent (88%) of workers who said the overall condition of their building increased their work productivity and motivation also judged their building to be acceptable or impeccably maintained. Similarly, 84% of workers who cited an increase in productivity and motivation said their building was acceptably or impeccably cleaned.

An office building's condition is not a major factor in accepting or declining a job in that building.



Key Findings:

- ◆ While the majority of people have never let their building's condition or amenities affect an employment decision, 33% of respondents say they have. Of these, 51% have left or turned down a job because of a building. 49% have accepted a job because of a building's condition or amenities.
- ◆ Managerial, professional, and technical workers (19%) were more likely than clerical workers (6%) to have accepted a job in a building because of the building's condition or amenities.
- ◆ Workers ages 25-34 (24%) were more likely than workers older than 35 (12%) to have accepted a job because of a building's condition or amenities. Workers in the 25-44 age group (20%) were more likely to have turned down a job because of a building than workers over 55 (9%).
- ◆ Clerical workers, workers over 55, and those with high school educations are the most likely groups to say none of their employment decisions have been impacted by buildings.
- ◆ Among respondents who have left or turned down a job because of building condition or amenities, many are experiencing problems in their current buildings. Forty-nine percent (49%) say they have experienced extreme temperatures, 38% have encountered outdated furniture or décor, 36% have encountered unclean/understocked restrooms, and 36% have experienced theft or crime.

Demographic Information

Job Type

Question: How would you best describe your current position?

Managerial	37%
Professional	23%
Technical	13%
Clerical	21%
Other	7%

Age

Question: What is your age range?

18-24	6%
25-34	27%
35-44	28%
45-54	25%
55-64	13%
65+	2%

Location

Question: What is the ZIP code where your office building is located?

Northeast	17%
South	35%
Midwest	29%
West	19%
Refused	1%

Building Type

Question: Which of the following best describes the type of office building you work in?

One to three floors	72%
Four to 10 floors	20%
11 to 20 floors	4%
More than 20 floors	4%

Education

Question: What is the highest level of education you have completed?

High school or less	17%
Technical/vocational school	11%
Two-year college	27%
Four-year college	35%
Advanced degree	10%

Income

Question: What is your annual household income range?

Less than \$25,000	7%
\$25,000 to \$49,999	29%
\$50,000 to \$74,999	24%
\$75,000 to \$99,999	21%
\$100,000 or more	18%
Refused	1%