

# Canadian Office Tenant Preference Survey

Presenting Sponsor



**PRESENTED BY:**

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White Paper – \$2,500  
Dataset and Interactive Database - \$5,000  
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# 2019 Launch Plan

Worked With Owners and Employers  
Co-Created Question With Industry Experts

Some 2,000  
Canadians Responded

Worked alongside  
Participating Companies  
Various Channels

Questions Include  
Technology, Automation, Cannabis, Upgrades  
Integration, Amenities, Features, Programs



# Top 5 Reasons This Information Matters

## 1. UNBIASED DECISION MAKING

Survey information provides the ability to focus on employee or market demand vs personal preference when making decisions

## 2. TENANT PREFERENCE GUIDE

Programming, Amenity and Feature Ratings to Inform Owners, Developers and Managers

## 3. OFFICE CONFIGURATION PREFERENCES

Feedback on Office Design and Layout from those Using the Space

## 4. PROPERTY MANAGEMENT AND SERVICE PERFORMANCE

Better Understanding of Satisfaction Results To Improve Tenant Retention

## 5. FUTURE AND NEW TECHNOLOGY ANALYSIS

Review of new and implementation of new technologies and systems

# OFFICE RENTER STATISTICS



# Tenant Make-Up

## Tenant Vs. Real Estate Ex

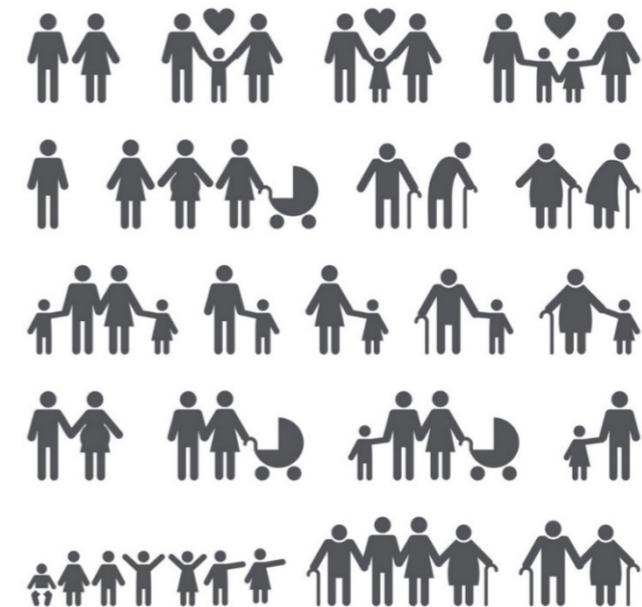
81% Tenant  
19% Corporate Real Estate Executive

## Employment Type

83% Full Time  
10% Consultant  
4% On Contract  
5% Other

## Role in Company Office Decision?

46% No Role  
9% Answered RE Survey  
15% Played a Minor Role  
26% Played Major Role  
4% Other



# Tenant Detail

## Gender?

53%  
of Respondents  
Male

## Salary

27% Under \$60K  
20% \$60K-\$80K  
36% \$80K-\$150K  
17% Above \$150

## Industry?

24% Other  
21% Real Estate  
16% Prof Scientific Technical  
10% Construction  
9% Fire & Insurance  
5% TAMI  
5% Public Admin  
3% Health & Social Assistance  
3% Educational Services  
2% Arts & Entertainment  
2% Manufacturing

## Job Title?

11% Manager  
9% Professional Staff  
3% VP  
3% President

## Age Group

0-25 – 4%  
25-35 – 30%  
35-45 – 26%  
45-55 – 22%  
55-65 – 14%  
65 + - 4%

# Who Else Responded?

## Identified Landlord By Respondents

Allied Properties  
Bentall Kennedy  
Brookfield  
Cadillac  
Dream  
GWL  
Manulife  
Oxford  
QuadReal  
And more..

## Company Size in Past 12 Months?

62% Changed  
24% No Change'

## New Building?

81% No  
10% Yes  
9% Unsure

## Location?

51% Core  
22% Suburb  
22% Urban  
5% Other

# Surprising Renter Profile Findings

10%  
of Canadians  
Surveyed  
Were in a New  
Office Building

50% of Those  
Surveyed  
Were from Toronto  
70%  
Were from Ontario

Building Class?  
45% A / 35% B / 8% C  
2% G / 4% BB  
5% Work from Home Only  
3% Other

## Would Not Rent Without

- Elevator Access
- Abundant Natural Light
- Conference Rooms in Office Space
- Parking Lot
- Free Wi-Fi

## Nice To Have

- Grass Space Outdoors
- Energy Efficient Lighting
- Room Sensors To Control Space
- Fitness Facility
- Energy Certified Building

# 2019 FINDINGS



# Type Of Work Set-Up?

## Where Do Respondents Work The Majority Of Time?

Open Floor Plan – 48%  
Traditional Closed Door – 37%  
Co-Working 8%  
Other 4%  
Hotel – Unreserved – 2%  
Hotel – Reserved – 1%

## Given the Choice Where Would They Want To Work?

Traditional Closed Door 34%  
Work From Home 27%  
Open Floor Plan 25%  
Co-Working 7%  
Hoteling 6%  
Other 3%

## Did They Want To Reserve Hoteling Space??

39% Were Indifferent  
35% Disliked It  
26% Like It

# Focus on Co-Working



Have/Want co-working: 51%

Top Preferred Companies

WeWork  
Workhaus  
Regis

Benefits

Atmosphere  
Financial/Business Sense

# COMPANY DECISIONS AND SATISFACTION



Canadian **Office Tenant**  
Preference Survey

Information Classification: General

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# Tenant Loyalty – Past and Future Plans

## What Are Their Future Plans?

22%	Office moved buildings in past 24 months
64%	Have been here over 24 months
7%	We are moving in the next 12 months
4%	Lease is coming up and we are looking for space
3%	Office moves floors in the same building in past 24 months

## How Many Years Did They Think They Were In Their Space

4%	1 Year and Less	5%	6 Years
7%	2 Years	5%	7 Years
9%	3 Years	6%	8 Years
7%	4 Years	2%	9 Years
12%	5 years	44%	10 Years and Move

# Communications Tenant Current and Desired



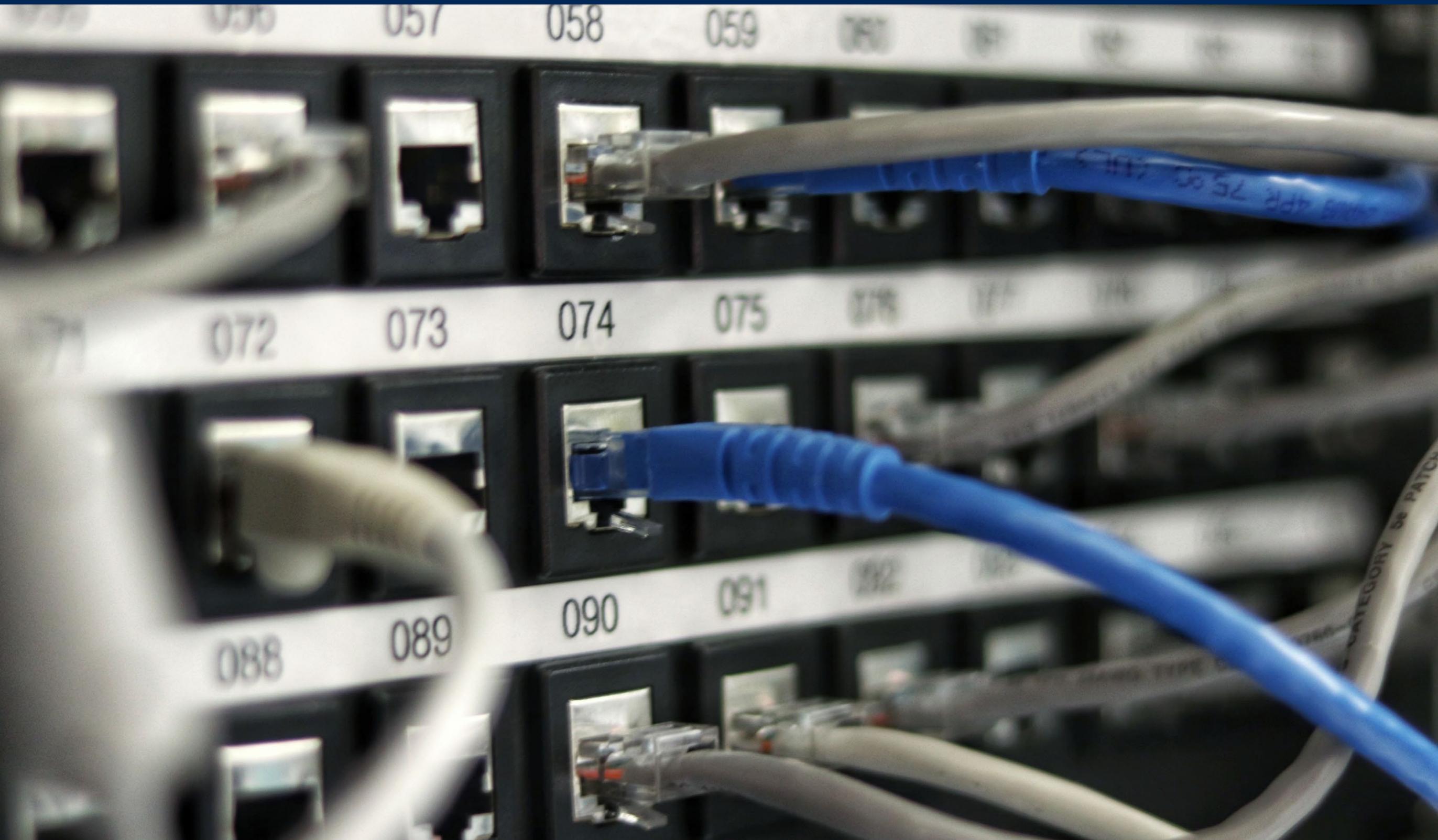
# Current Vs. Desired Social Media Engagement

	Current	Want
I Do Not (Want) Engage	25%	29%
Company Email (From My Company)	23%	23%
LinkedIn	11%	8%
App	10%	14%
Facebook	8%	6%
Instagram	7%	5%
Other	4%	5%
Twitter	3%	2%
YouTube	3%	1%
Community Blog	3%	4%
Pinterest	2%	0%

# Current Vs. Desired Events and Building Issues

	Current	Want
Email	48%	65%
Poster In Building	13%	5%
In Person	7%	4%
An App	7%	9%
Digital Screen In Elevator	6%	4%
Monthly Newsletter	4%	3%
Flyer Under The Door	3%	1%
Written Letter Mailed	3%	0%
Phone or Voice Drop	2%	1%
Digital Portal	2%	3%
Internet / Social Media	2%	2%
Other	2%	0%
Text	1%	1%
Property Specific Web Page	1%	2%

# OPERATIONS & TECHNOLOGY



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# Connectivity of Building and Space

## Connectivity For Computer & Systems In Building & Space

81% Great with no issues

18% Spotty and sometimes have outages

1% Really bad and have a hard time connecting

1% Unable to connect to network

## Mobile Device Reception In Building & Space

76% Great with no issues

20% Spotty and sometimes have outages

3% Really bad and have a hard time  
connecting

1% Unable to connect to network

## How Much Work Is Carried Out Online & Dependant On Technology

49% Most Work

46% All Work

5% Very Little Work

0% None

# Commute Method To Work



## Interesting Facts:

- 46% Drive → Earned \$200K- \$250k
- 46% Public Transit or walk → Earned \$40K-\$60K
- Least used: Lyft, Taxi, Uber, Bike or carpool

# Time To Get To Work

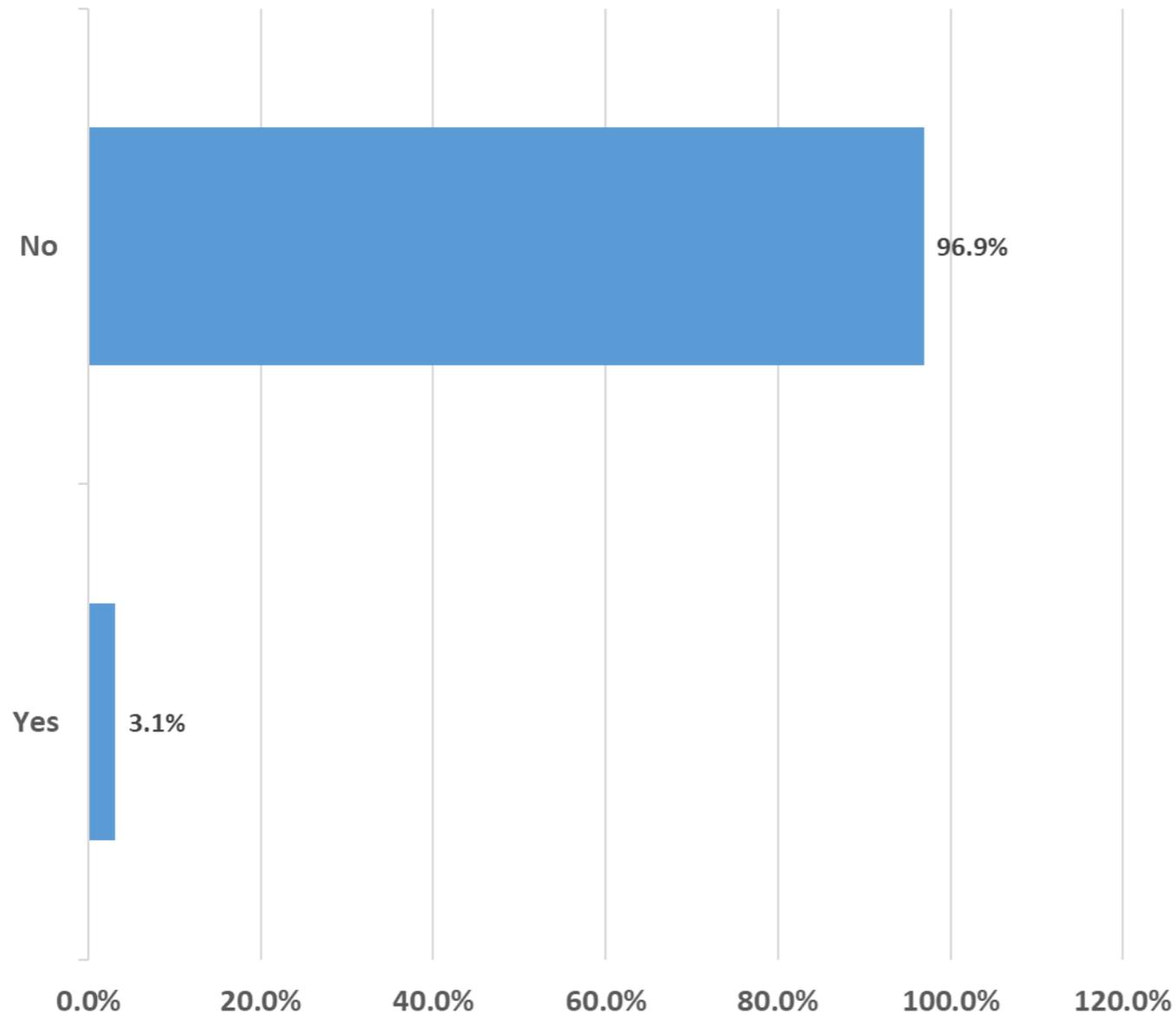
## Interesting Facts:

- 51% commute less than 30 mins to work
- 30% of Principal, President and CEO commute less than 15 mins to work



# Do You Have An Electric Bike, Car, Scooter?

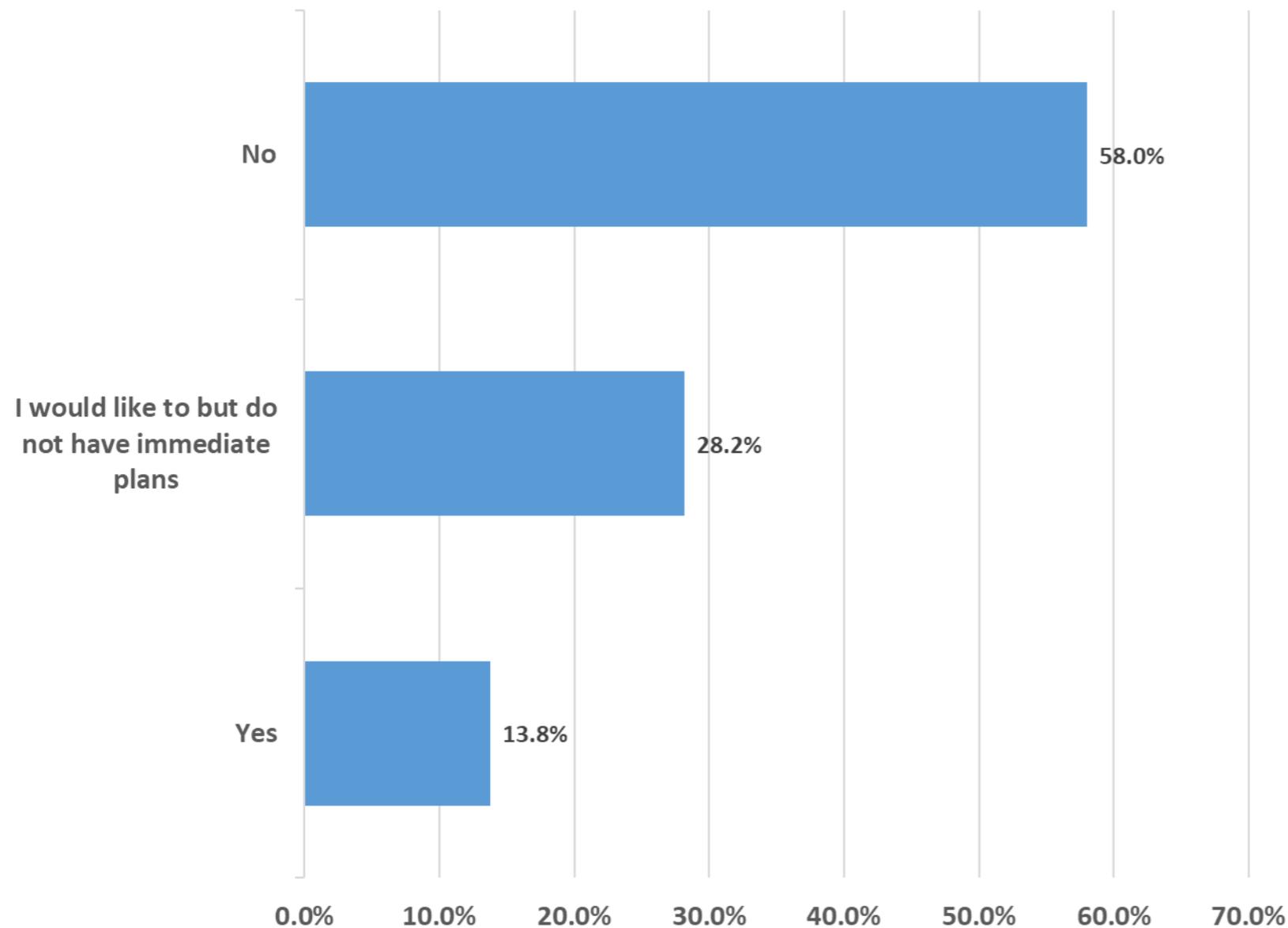
Q52 - Do you have an electric vehicle that requires a charging station?



Interestingly 5% responded yes that were 35-39 years of age and 4% that were 30-34 years of age.

# What About The Next 1-3 Years?

Q53 - Do you have plans in the next 1-3 years to purchase an electric car that would require a charging station in your building?



- Interestingly 17% responded yes that were 30-34 years of age and 39% that were 20-24 years of age would like to but do not have immediate plans.
- In addition 18% males said yes and 10% of females said yes.

# Electric Vehicles – Priority Parking and Charging



## Interesting Facts:

- 46% of buildings do not provide priority parking for electric
- 41% of buildings do not provide a charging station
- More than 33% are unaware of either amenity

# UNIT / BUILDING FEATURES



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Preference Survey

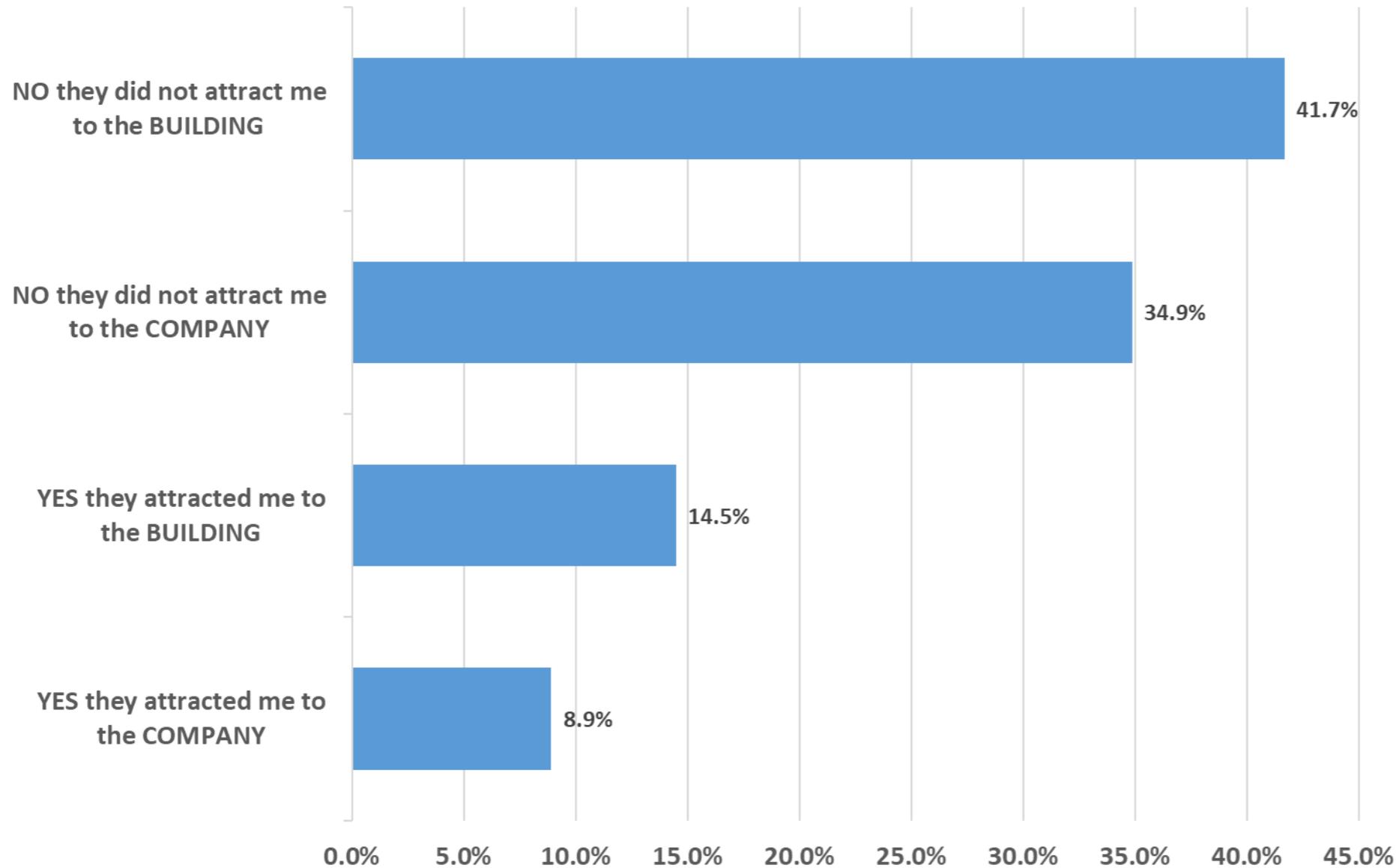
Information Classification: General

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# Real Estate Impacting Career Direction?

Q62 - Did any of the building amenities specifically impact your decision to work in that building or for your current company



# Cannabis and Tenant Space

## Are there cannabis Companies that are tenants in your building?

Answer	Overall	Tenant	Corporate RE Ex.
No and it does not bother me either way	36%	33%	48%
No and I would not like there to be	22%	20%	30%
Do not know – do not care either way	31%	35%	12%
Do not know – but would not like it	3%	10%	5%
Yes and I am fine with it	3%	2%	4%
Yes and it bothers me	1%	0%	2%

# Does Location Really Matter?

Desired Amentities	Essential - would not rent without	Essential + Nice to Have
Working near Other public transit like bus and streetcars	46.5%	86.3%
Working near Subway system	42.1%	87.2%
Working near Restaurants and retail	30.0%	94.3%
Working near Home	23.7%	88.6%
Working near Parks and outdoor space	14.8%	86.5%
Working near Grocery store	9.1%	79.1%
Working near Children's schools including daycare	3.5%	43.7%
Working near Bars and nightlife	2.7%	48.5%
Working near Colleges or universities	2.3%	26.3%

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Working near Colleges or universities	2.3%	26.3%

# And It Changes By Gender?

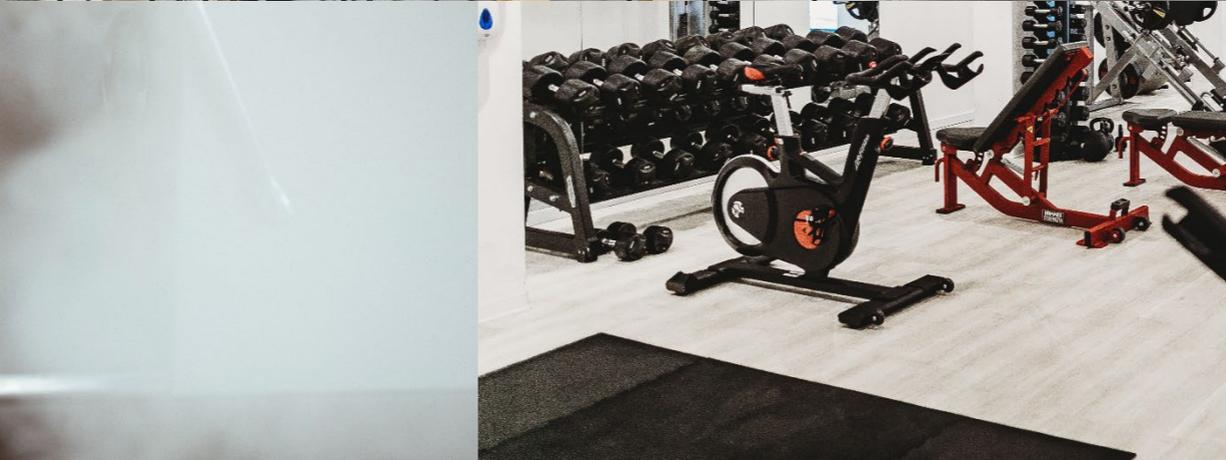
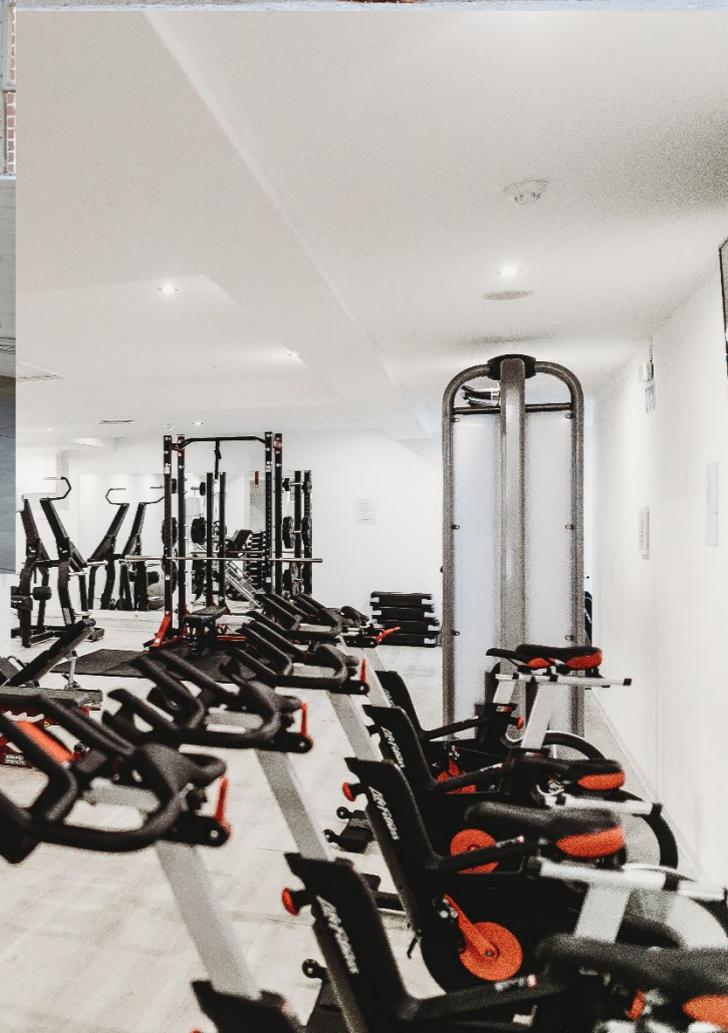
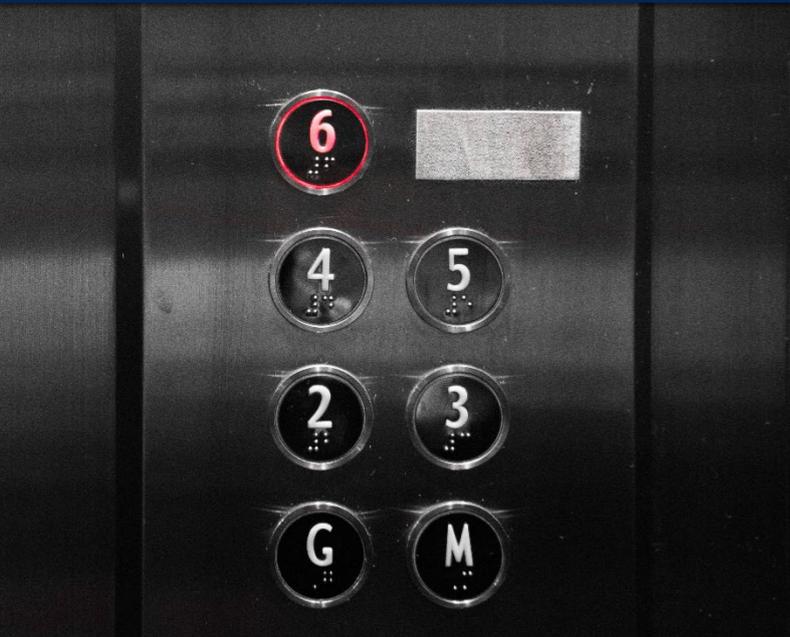
## FEMALE

Desired Amentities	Essential - would not rent without	Essential + Nice to Have
Working near Restaurants and retail	28.8%	94.5%
Working near Home	23.8%	89.6%
Working near Parks and outdoor space	15.5%	89.3%
Working near Other public transit like bus and	51.6%	88.8%
Working near Subway system	45.5%	88.6%
Working near Grocery store	9.0%	84.9%
Working near Children's schools including	4.1%	44.6%
Working near Bars and nightlife	1.4%	43.9%
Working near Colleges or universities	2.0%	25.4%

## MALE

Desired Amentities	Essential - would not rent without	Essential + Nice to Have
Working near Restaurants and retail	31.3%	94.1%
Working near Home	23.4%	87.7%
Working near Subway system	38.4%	85.6%
Working near Other public transit like bus and	41.2%	83.9%
Working near Parks and outdoor space	14.0%	83.7%
Working near Grocery store	9.2%	73.5%
Working near Bars and nightlife	3.9%	52.8%
Working near Children's schools including	3.1%	42.8%
Working near Colleges or universities	2.5%	26.9%

# Preferences, Services & Amenities Surveyed



# Essential Would Not Rent Without

44%	Elevator Access
42%	Abundant Natural Light
39%	Conference Rooms in Office Space
30%	Parking Lot
29%	Free Wi-Fi

# Features Not Considered Important

78%	Valet Parking
70%	Hotel Rooms or Connected to Hotel Building
64%	Co-Working Company Located In Building
60%	Car Detailing Service
59%	Winter and Summer Tire Storage

When Essential and Nice To Have are combined  
true preference is revealed

# Landlord Should Pay

85%	Energy Certified Buildings
84%	On-Site Property Manager
84%	Outdoor Common Area
84%	Grass Space Outdoors
83%	Energy Efficient Lighting

# Tenant Company Should Pay

59%	Conference Rooms / Meeting Space In Office
51%	In-Suite Storage Room
47%	Nap Pods
44%	Additional Storage for Packages and Supplies
42%	Ability To Receive Packages During Work Hours



# Conclusions



# 2019 Summary

## Notable Findings:

- Difference in preference between open plan office and traditional space is notable: 48% Currently work in open floor and only 25% want to
- Nice to have amenities, services and features focused primarily on green, sustainable, self control and wellness
- Respondents had a preference for unreserved hoteling spaces in their office. Strong indication that most were indifferent and/or did not want a reserved spot
- Gender does have an impact on preferences and comfort level with tenant buildings and space but does not impact top 3 must have building locations
- Many respondents were unsure on the offerings of their space – more communication would be highly valued
- Tenants want communication through an app or email



# What Does The Dashboard & Trend Report Offer

- Segment specific responses to qualify your inquiry
- Landlord Benchmarking – Portfolio or building compared to market
- Tailor the data to your needs – filter for age, income, rent, geographic area, dependants etc.....
- Figure out how much tenants value different features, amenities and services
- See the difference between those that use the space and those that make the real estate decisions

# Excel Dashboard Interface – Chart Creation

**Category**

**Search Term**

<<<< Previous
Next >>>>
Save Chart & Table
RESET ALL FILTERS
Show Excel Controls

**Step 1: Select a Question**

Q60 - How does your office landlord/owner/manager CURRENTLY communicate with you on social events and building issues?

**Step 2: Break Down By \***

**Step 4: Choose Chart Type:**

**Step 5:**

Update Chart

**Step 3:**

Set Primary Filters

**Age Group**

**Province**

**CMA**

**City**

\* optional in most cases

Set Secondary Filters

**Question 1:**

**Question 2:**

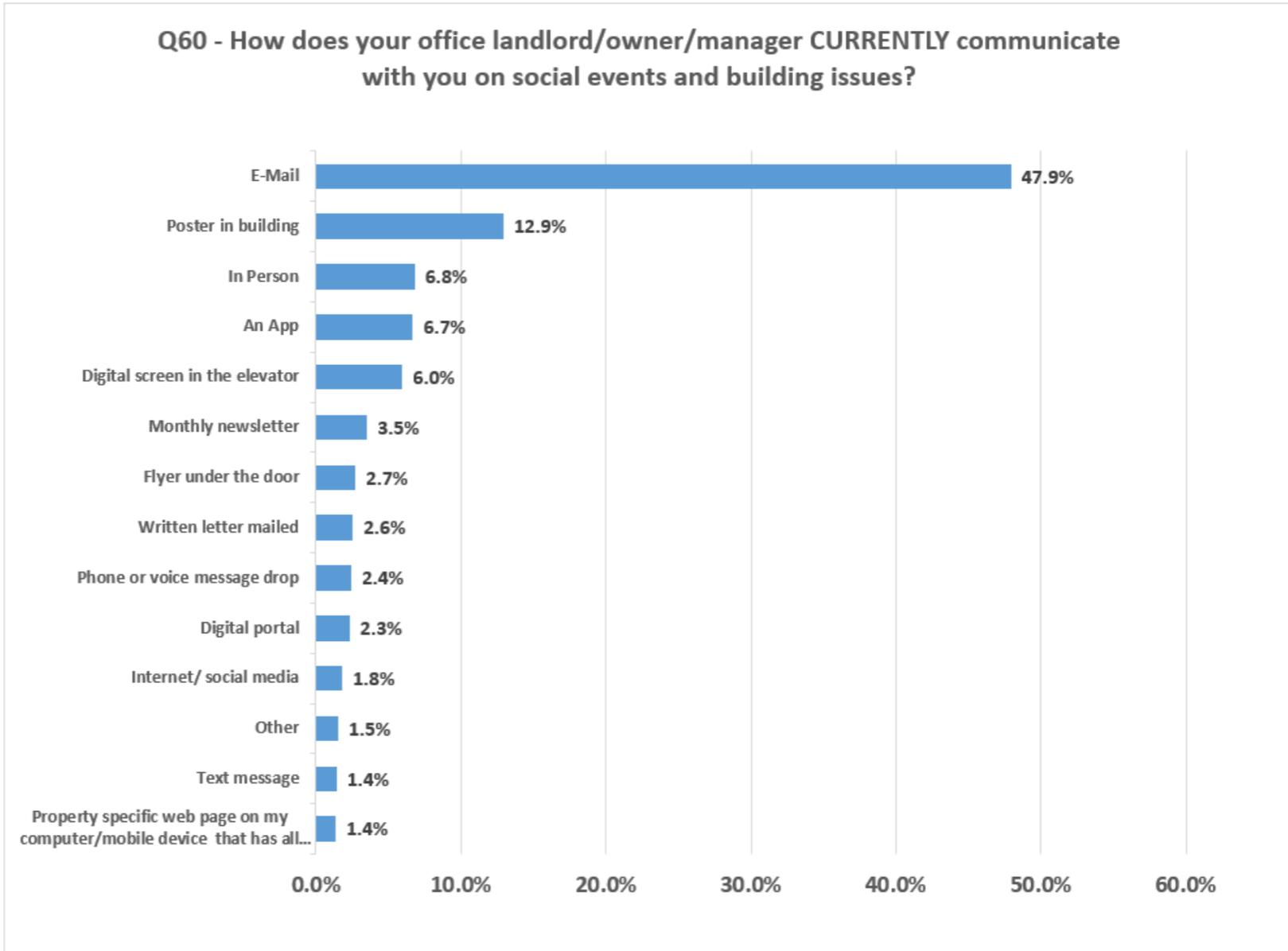
**Question 3:**

**SORT ORDER:**

**DATA LABELS:**

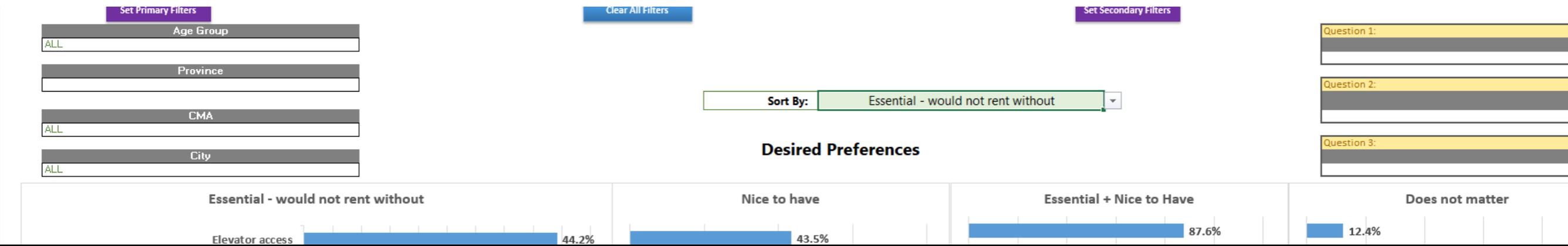
**Display Percent as:**

**Q60 - How does your office landlord/owner/manager CURRENTLY communicate with you on social events and building issues?**



Communication Method	Percentage
E-Mail	47.9%
Poster in building	12.9%
In Person	6.8%
An App	6.7%
Digital screen in the elevator	6.0%
Monthly newsletter	3.5%
Flyer under the door	2.7%
Written letter mailed	2.6%
Phone or voice message drop	2.4%
Digital portal	2.3%
Internet/ social media	1.8%
Other	1.5%
Text message	1.4%
Property specific web page on my computer/mobile device that has all...	1.4%

# Excel Dashboard Interface – Ranking System



Interested in purchasing the dataset?

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Dataset and Interactive Database - \$5,000

Plus applicable taxes

Please email [sarah.segal@informa.com](mailto:sarah.segal@informa.com) to inquire about purchasing

