

# Office Workers Are Back and Appreciate Updated Spaces:

The GWLRA 2024 Office Tenant Survey.

January 2025



In April 2024, GWLRA surveyed our office tenants for the first time since the COVID-19 interruption. We asked how we are doing as building managers, what amenities were most appreciated or desired as well as about their return to office and commute patterns.

As building managers, the largest gains in satisfaction were in buildings where GWLRA had invested in the tenant experience: adding amenities such as gyms, end-of-trip facilities, tenant lounges and re-imagined, inspiring lobbies.

This survey also revealed some fascinating insights into the new nature of office work in Canada.

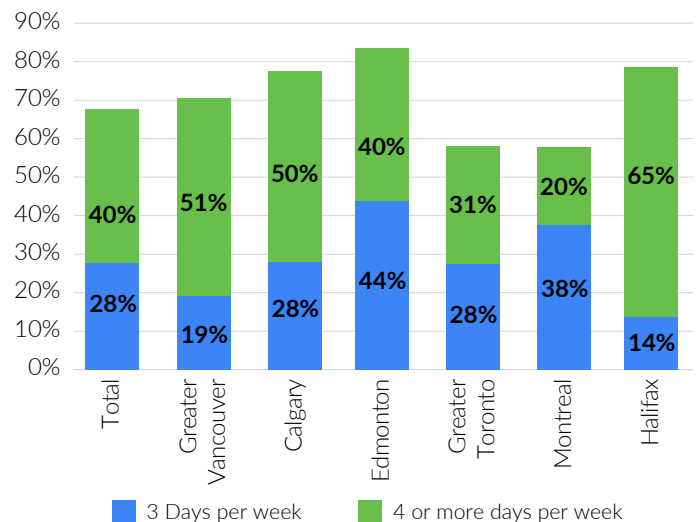
## Office workers are back!

Tenants are back to the office. Over 75% were working 3 or more days in Calgary and Edmonton at the April 2024 survey date, for example. GWLRA places an importance on 3 or more days in the office, as this typically requires space to accommodate everyone at one time at least one day per week, thereby reducing the likelihood of the tenant wanting less space.

The greater prevalence of in-office work outside of Toronto correlates to shorter and/or arguably more pleasant commuting elsewhere in Canada. See figures 1 and 2. Montreal has some longer commutes, but also a greater use of transit than Toronto, which may be a factor in maintaining higher in-office work in that metro region; people can answer emails, read reports or relax when traveling by rail or bus rather than be frustrated in traffic.

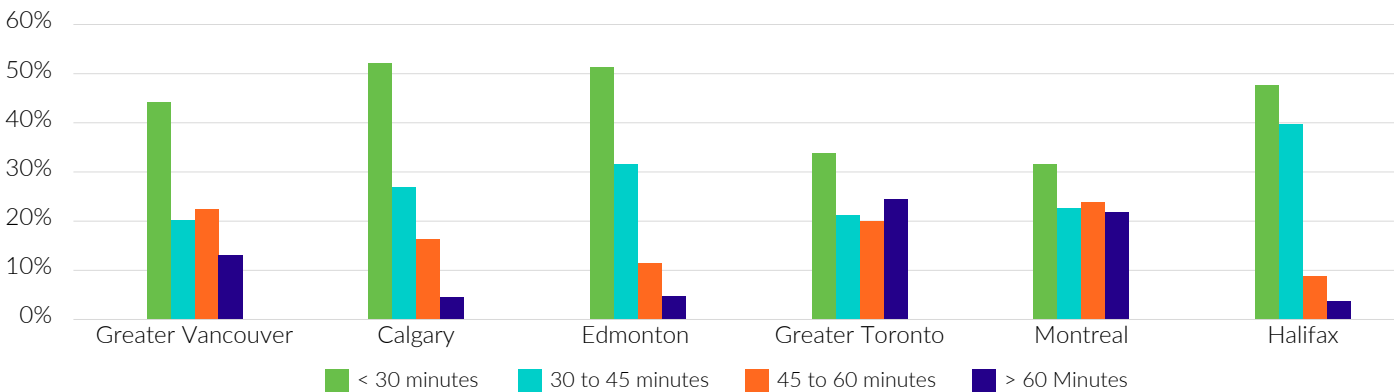
## Figure 1 - Working From The Office 3 or 4 days

Data: GWLRA Office Tenant Survey April-May 2024



**Figure 2 - Commute Lengths. GWLRA Office Tenants**

Data: 2024 Office Tenant Survey



**Office workers place increased value on security**

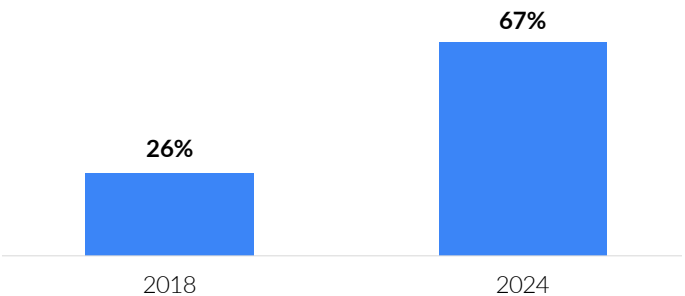
The importance of the overall office experience has grown since 2018, particularly in perceptions of safety. 24-7 security in the buildings was the top ranked and valued amenity in many downtown buildings. The urban disorder nearby some of our office buildings has likely contributed to an added appreciation for seeing a smiling security professional when tenants walk into the building.

**Changing workplace styles and valuing seating options throughout the building.**

Tenants valued places to work in the building, outside of their office suite. This included having seating in the entry lobby, a tenant lounge, outdoor area as well as in bookable meeting rooms. A desire for alternative places in which to work or to take a break within the building is consistent with the larger trend of people working from cafes or coworking places to focus and sometimes for the energy that comes from being with others.

This appreciation for workplaces outside the office may also be connected to a significant change in workplace styles since 2018. In 2024, 67% of tenants report having either agile seating or a mix of both agile and assigned seating—up from 26% in 2018. More people work in open-plan areas. These layouts prioritize collaboration but can be noisier and sometimes make private conversations challenging--likely a reason why tenants appreciate additional work spaces in the building. Also, because workers are now typically mobile with laptops on WIFI, they find it much easier than in the past to relocate for quiet, privacy, or that coffee-shop buzz.

**Figure 3 - Using Agile Seating (including mix of agile and assigned desks)**



**A Focus on wellbeing**

Wellbeing amenities consistently ranked the highest in our survey. Healthy food options in the building or close by, end-of-trip facilities (showers, bike lockers, etc.) onsite, and fitness opportunities scored highly where we have them, and as most desired where GWLRA does not yet offer the amenity.

**The arrival experience and lobby**

In buildings where GWLRA has changed the arrival experience by upgrading the lobby, tenants rated this feature highly. GWLRA is currently exploring more ways to augment building entrances, lobbies, and the shared spaces within office buildings.

**Wrap up**

A key takeaway for GWLRA from this survey is that overall experience matters. From arrival in a welcoming lobby with security professionals saying hello, to break time in coffee shops or sit down restaurants in the building, and the option to find alternate workspaces on site, tenants now expect and appreciate quality touch points throughout the day. Tenants also want the option to get some exercise in a gym or through an active commute; and they want to find healthy food choices. As GWLRA prepares for more upgrades of our office stock, these considerations are top of mind.



## Transforming Tenant Experience: New Amenities at First & Jasper

GWLRA's top performing building for overall tenant satisfaction in 2024 was First & Jasper in the Edmonton financial district.

The positive feedback from tenants showcased the success of the major capital investment GWLRA made in the asset between 2018 and 2023.

### The improved tenant experience includes:

- New fitness & end of trip facilities
- Tenant lounges in which to relax
- Private and open spaces to work outside of their office
- Conference rooms for internal or client meetings

This project highlights GWLRA's commitment to smart investments in Alberta and top-quality spaces. The updated First & Jasper is now certified in Sustainability and Accessibility, reflecting GWLRA's commitments in both these areas.

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