

The Return to Office: Recovery Still Underway

Dive into the data to explore the state of office recovery in 2024 and see how evolving office visit patterns are impacting ground transportation hubs, fast-casual dining, and more.

- 1. In 2024, office visits were 34.3% below pre-COVID (2019) levels and 10.0% above 2023 numbers.** And if past data trends are any indication, Q4 2024's temporary dip may be followed by a substantial Q1 2025 rebound – especially given the slew of RTO mandates set to be implemented this year.
- 2. Despite rising office attendance, the TGIF work week is more resilient than ever.** In 2024, 24.6% of weekday office visits took place on Tuesdays, making it the busiest day of the week. Meanwhile, Mondays accounted for 17.9% of visits while Fridays accounted for just 12.3% – down from 13.3% in 2022.
- 3. Rush hour is much quieter than it used to be - especially in the mornings.** Foot traffic patterns at major ground transportation hubs reflect the evolving work week, with visits down substantially in the mornings and on Mondays and Fridays.
- 4. 2024 commuters were more likely to be big city dwellers - and less likely to be suburbanites - than in 2019.** The share of “Suburban Periphery” households in the captured markets of ground transportation hubs decreased from 39.1% in 2019 to 32.7% in 2024. Meanwhile, the share of “Principal Urban Center” households increased from 29.5% to 34.7%.
- 5. Workplace visits to leading fast-casual chains and coffee shops are on the rise.** As the RTO has gathered steam, the share of fast-casual visits originating from workplaces, and the share of coffee visits preceding workplace visits, has increased steadily.

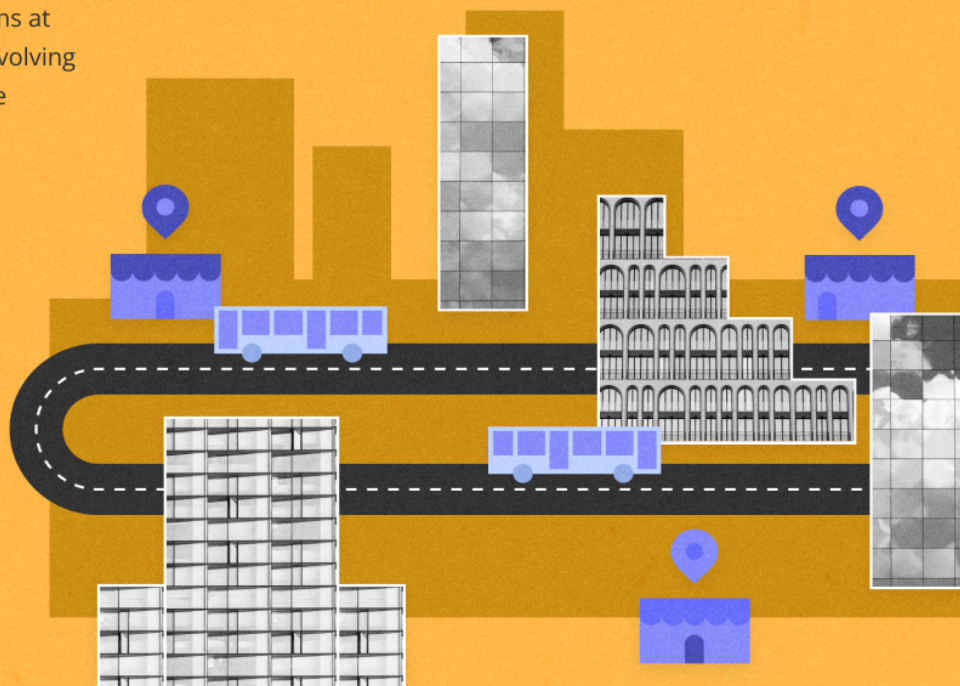


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Starbucks. Amazon. Barclays. AT&T. UPS. These are just some of the major corporations that have made waves in recent [months](#) with [return-to-office \(RTO\) mandates requiring](#) employees to show up in person more often – some of them five days a week.

But how are crackdowns like these taking shape on the ground? Is the office recovery still underway, or has it run its course? And how are evolving in-office work patterns impacting commuting hubs and dining trends? This white paper dives into the data to assess the state of office recovery in 2024 – and to explore what lies ahead for the sector in 2025.

A Marathon, Not a Sprint

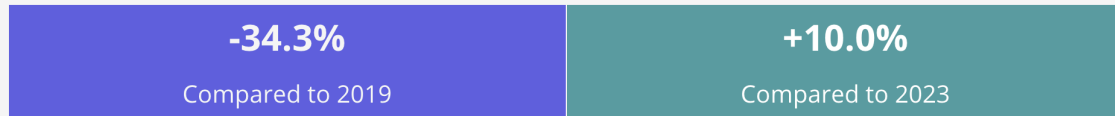
In 2024, office foot traffic continued its slow upward climb, with visits to the Placer.ai Office Index down just 34.3% compared to 2019. (In other words, visits to the Placer.ai Office Index were 65.7% of their pre-COVID levels). And zooming in on year-over-year (YoY) trends reveals that office visits grew by 10.0% in 2024 compared to 2023 – showing that employee (and [manager](#)) pushback notwithstanding, the RTO is still very much taking place.

Indeed, diving into quarterly office visit fluctuations since Q4 2019 shows that office visits have been on a slow, steady upward trajectory since Q2 2020, following – at least since 2022 – a fairly consistent seasonal pattern. In Q1, Q2, and Q3 of each year, office visit levels increased steadily before dipping in holiday-heavy Q4 – only to recover to an even higher start-of-year baseline in the following Q1.

Between Q1 and Q3 2022, for example, the post pandemic office visit gap (compared to a Q4 2019 baseline) narrowed from 63.1% to 47.5%. It then widened temporarily in Q4 before reaching a new low – 41.4% – in Q1 2023. The same pattern repeated itself in both 2023 and 2024. So even though Q4 2024 saw a predictable visit decline, the first quarter of Q1 2025 may well set a new RTO record – especially given the slew of [strict](#) RTO mandates set to take effect in Q1 at companies like AT&T and Amazon.

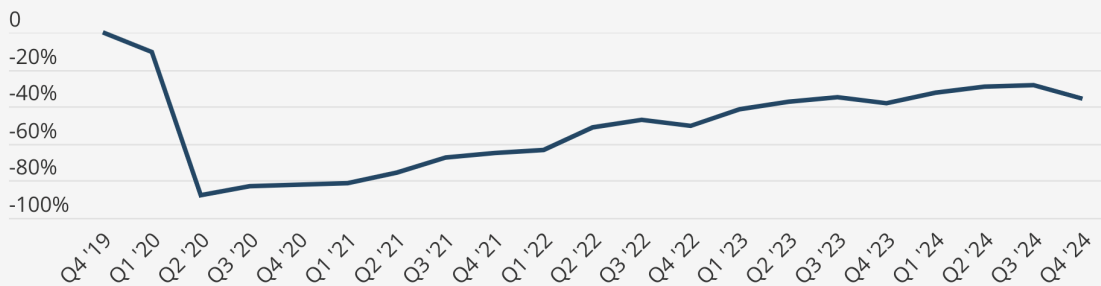
Office Recovery Continued Apace in 2024

Yearly Office Visits, 2024 Compared to 2019 and 2023



Download data

Quarterly Office Visits Compared to Q4 2019 Baseline



Download data



The Stubborn Staying Power of the TGIF Workweek

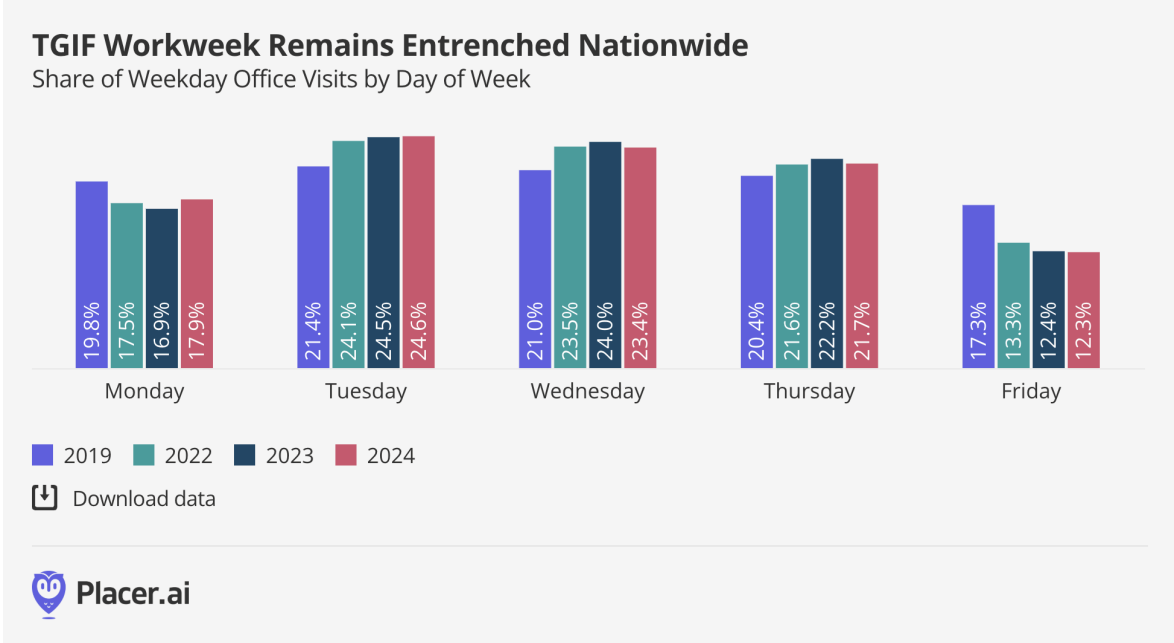
Despite the ongoing recovery, the TGIF work week – which sees remote-capable employees concentrating office visits midweek and working remotely on Fridays – remains more firmly entrenched than ever.

Low Friday Visit Share

In 2024, just 12.3% of office visits took place on Fridays – less than in 2022 (13.3%) and on par with 2023 (12.4%). Though Fridays were always popular vacation days – after all, why not take a [long weekend](#) if you can – this shift represents a significant departure from the pre-COVID norm, which saw Fridays accounting for 17.3% of weekday office visits.



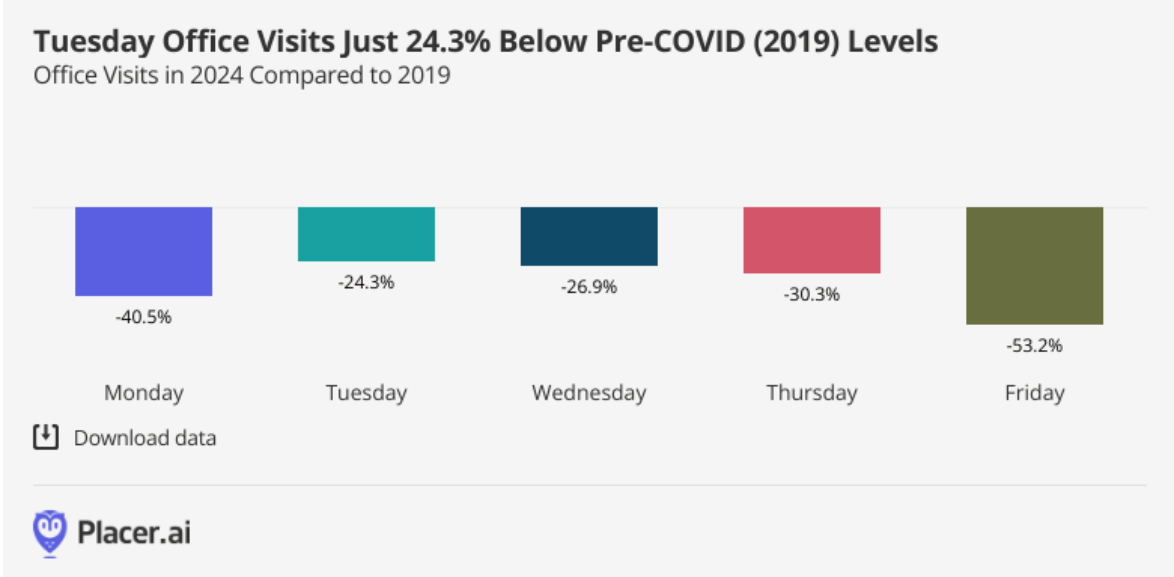
Unsurprisingly, Tuesdays and Wednesdays remained the busiest in-office days of the week, followed by Thursdays. And Mondays saw a slight resurgence in visit share – up to 17.9% from 16.9% in 2023 – suggesting that as the RTO progresses, [Manic Mondays](#) are once again on the agenda.



Tuesday Visit Gap Just 24.3%

Indeed, a closer look at year-over-five-year (Yo5Y) visit trends throughout the work week shows that on Tuesdays and Wednesdays, 2024 office foot traffic was down just 24.3% and 26.9%, respectively, compared to 2019 levels. The Thursday visit gap registered at 30.3%, while the Monday gap came in at 40.5%.

But on Fridays, offices were less than half as busy as they were in 2019 – with foot traffic down a substantial 53.2% compared to 2019.



Hybrid Travel Trends

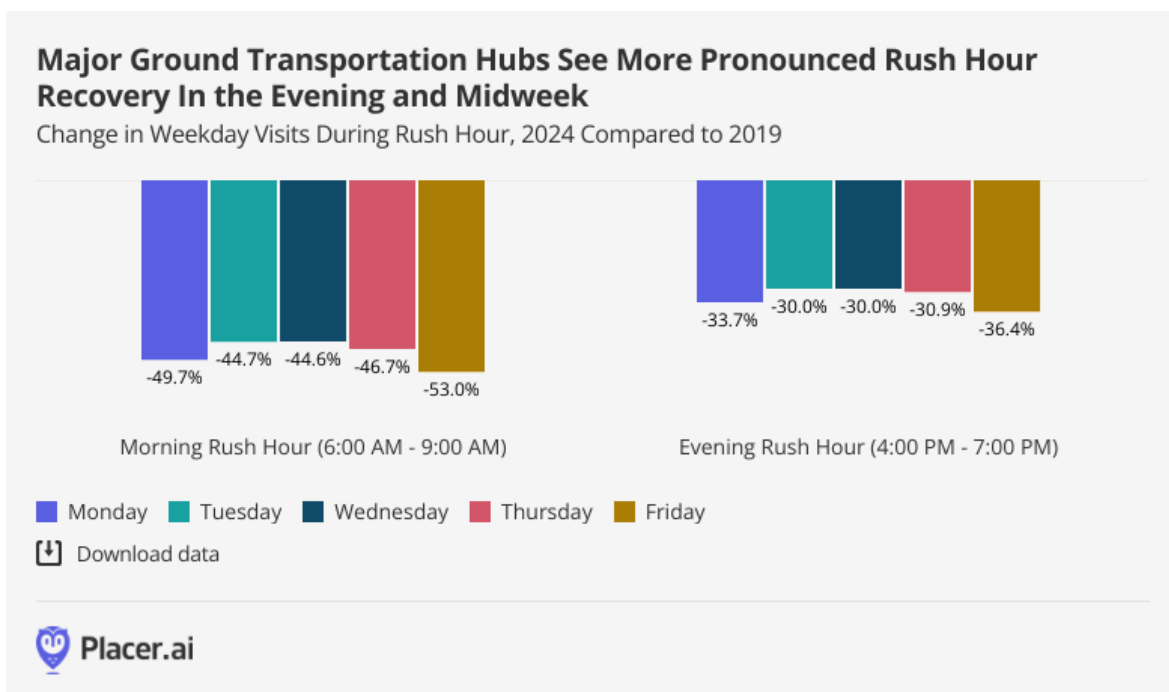
Before COVID, long commutes on crowded subways, trains, and buses were a mainstay of the nine-to-five grind. But the rise of remote and hybrid work put a dent in rush hour traffic – leading to a substantial slowdown in the utilization of public transportation. As the office recovery continues to pick up steam, examining foot traffic patterns at major ground transportation commuting hubs, such as Penn Station in New York or Union Station in Washington, D.C., offers additional insight into the state of RTO.

A Not-So-Rush Hour

Rush hour, for one thing – especially in the mornings – isn’t quite what it used to be. In 2024, overall visits to ground transportation hubs were down 25.0% compared to 2019. But during morning rush hour – weekdays between 6:00 AM and 9:00 AM – visits were down between 44.6% and 53.0%, with Fridays (53.0%) and Mondays (49.7%) seeing the steepest drops. Even as people return to the office, it seems, many may be coming in later – leaning into their [biological clocks](#) and getting more [sleep](#). And with today’s office-goers less likely to be suburban commuters than in the past

(see below), hubs like Penn Station aren't as bustling first thing in the morning as they were pre-pandemic.

Evening rush hour, meanwhile, has been quicker to bounce back, with 2024 visit gaps ranging from 36.4% on Fridays to 30.0% on Tuesdays and Wednesdays. Office-goers likely form a smaller part of the late afternoon and evening rush hour crowd, which may include more travelers heading to a variety of places. And commuters going to work later in the day – including “[coffee badgers](#)” – may still be apt to head home between four and seven.

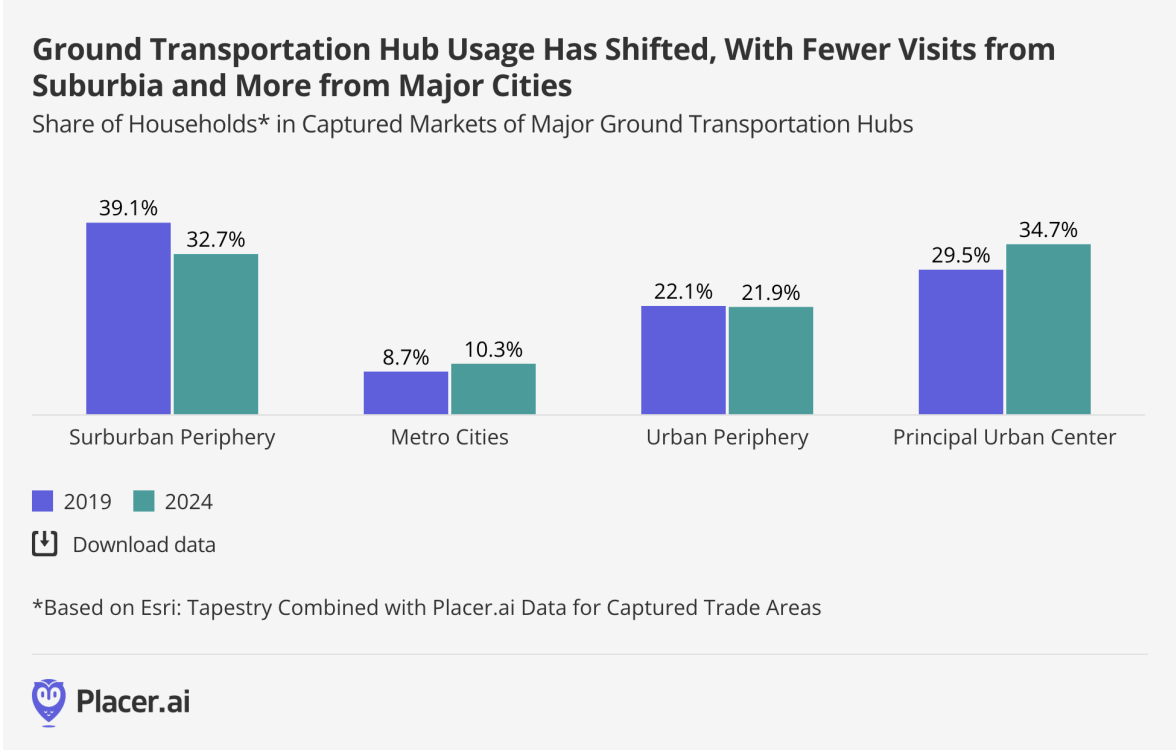


An Urban Shift

The drop in early-morning public transportation traffic may also be due to a shift in the geographical distribution of would-be commuters. Data from Placer.ai's [RTO dashboard](#) shows that visits originating from areas closer to office locations have recovered faster than visits from farther away – indicating that people living closer to work are more likely to be back at their desks.

And analyzing the [captured markets](#) of major ground transportation hubs shows that the share of households from “Principal Urban Centers” (the most densely populated neighborhoods of the largest cities) rose substantially over the past five years. At the same time, the share of households from the “Suburban Periphery” dropped from 39.1% in 2019 to 32.7% in 2024. (A location’s captured market refers to the census block groups (CBGs) from which it draws its visitors, weighted to reflect the share of visits from each one – and thus reflects the profile of the location’s visitor base.)

This shift in the profile of public transportation consumers may explain the relatively slow recovery of morning transportation visits: City dwellers , who seem to be coming into the office more frequently than suburbanites, may not need to get as early a start to make it in on time.



Dining Ripple Effects

While the RTO debate is often framed around employer and worker interests, what happens in the office doesn't stay in the office. Office attendance levels leave their mark on everything from local real estate markets to nationwide relocation patterns. And industries from apparel to dining have undergone significant shifts in the face of evolving work routines.

Out to Lunch

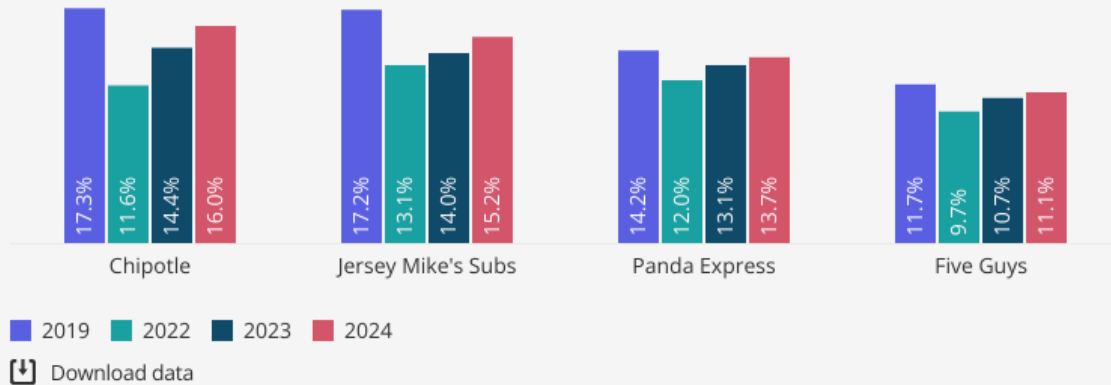
Within the dining space, for example, fast-casual chains have always been workplace favorites. Offering quick, healthy, and inexpensive lunch options, these restaurants appeal to busy office workers seeking to fuel up during a long day at their desks.

Traditionally, the category has drawn a significant share of its traffic from workplaces. And after dropping precipitously during COVID, the share of visits to leading fast-casual brands coming from workplaces is once again on the rise.

In 2019, for example, 17.3% of visits to Chipotle came directly from workplaces, a share that fell to just 10.8% in 2021. But each year since, the share has increased – reaching 16.0% in 2024. Similar patterns have emerged at other segment leaders, including Jersey Mike's Subs, Panda Express, and Five Guys. So as people increasingly go back to the office, they are also returning to their favorite lunch spots.

Workplace Visits to Leading Fast-Casual Chains Are on the Rise – Approaching Pre-Pandemic Levels

Share of Visitors to Leading Fast-Casual Chains Coming Directly From Their Workplace



More Coffee Please!

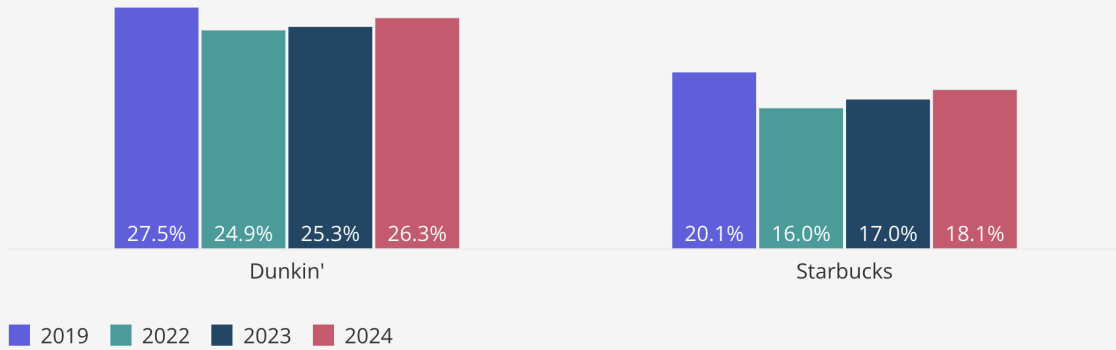
For many Americans, coffee is an integral part of the working day. So it may come as no surprise that shifting work routines are also reflected in visit patterns at leading coffee chains.


In 2019, 27.5% of visits to Dunkin' and 20.1% of visits to Starbucks were immediately followed by a workplace visit, as many employees grabbed a cup of Joe on the way to work or popped out of the office for a midday coffee break. In the wake of COVID, this share plummeted for both coffee leaders. But since 2022, it has been steadily rebounding – another sign of how the RTO is shaping consumer behavior beyond the office.



Workplace Coffee Visits are Also on the Rebound

Share of Coffee Chain Visitors Proceeding to Workplace Following Coffee Stop



 Download data



A Developing Story

Five years after the pandemic upended work routines and supercharged the soft pants [revolution](#), the office recovery story is still being written. Workplace attendance is still on the rise, and restaurants and coffee chains are in the process of reclaiming their roles as office mainstays. Still, office visit data and foot traffic patterns at commuting hubs show that the TGIF work week is holding firm – and that people aren't coming in as early or from as far away as they used to. As new office mandates take effect in 2025, the office recovery and its ripple effects will remain a story to watch.