



WELL WORK PLACE

MAKING SPACES
HUMAN AGAIN

A RESEARCH & INSIGHT PUBLICATION



EXECUTIVE SUMMARY



Workplace wellbeing

noun

'wɛl'bi:ɪŋ

The state of being in which an individual is able to realise their potential, cope with the normal stresses of life, can work productively, and is able to drive performance.

The future workplace will look radically different as employers respond to a growing requirement for a work-health balance. The wellbeing industry is a worldwide global phenomenon, but corporates are only beginning to understand and interpret implications for the built environment. More than a 'fad' this is a global socio-economic shift – rue the industry that is not moving to address it.

Technology has eroded work life boundaries, whilst also empowering employees to change the nature of the work contract. Employees will increasingly choose where they want to work and how they want to work. Technology will allow the relationship between 'where we are' and 'how we are' to be laid bare, and it will redefine how we determine the value of real estate.

Most of us work in what are essentially 'unwell' offices. Workplaces that are not 'well' impair employee performance and are at risk of heightened vacancy levels and loss of income potential. Mounting evidence all points in one direction: wellbeing in the workplace is fast becoming a strategic imperative.

INTRODUCTION

This report has been split into eight distinct subsections:

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WELLBEING AND THE WORLD

Human beings, governments and economists have a demonstrable interest in wellbeing. More than a ‘fad’ this is a global socio-political shift – rue the industry that is not moving to address it.

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RISKS TO IMPLEMENTATION

There are three significant risks when it comes to the implementation of wellbeing in the workplace (1) Disregard by leadership, (2) Lack of proof, and (3) Spatial and cost constraints.

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The green movement has been expanding and in the past few years new ratings systems have emerged. Three international standards focus on buildings' direct contribution to occupant wellbeing.

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PREDICTIONS - A WELL FUTURE

The 'well' office will continue to evolve against a changing workplace environment. As this happens (1) Wellness Officers will proliferate, (2) Wellbeing will be critical to attract the highest quality tenants, and (3) Wellbeing metrics will be transformed by technology.

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01



WELLBEING AND THE WORLD



01

WELLBEING AND THE WORLD

THE GAUGE IS FAULTY

Money isn't everything. But, for measuring national success, it has long been the only thing. The specific metric that has prevailed is gross domestic product, or GDP. Based on this measurement, we're 'doing well'; global GDP has grown 5.6% on average annually since the early 1980s and human beings have made the economy over US\$1 trillion each year since the 1990s. But scratch below the surface and we see workers who are both aging at an historic rate (18% will be over 55 years old by 2030), and unhealthy (52% are overweight and preventable chronic diseases are responsible for two-thirds of deaths worldwide)¹. Perhaps we shouldn't be surprised, then, that most workers are unhappy; 76% report they are struggling with wellbeing², and research studies estimate the costs of work-related stress from US\$300 billion in the United States to as high as US\$650 billion in Europe.³ Depression is set to be the second most common cause of ill health worldwide by 2020⁴. GDP takes little notice of human happiness. And in the end, economists and the public don't care about GDP itself; they care about the happiness they receive from the goods and services they consume.

76%

OF WORKERS REPORT THAT THEY ARE STRUGGLING WITH WELLBEING

US\$300_{bn}

COSTS OF WORK-RELATED STRESS IN THE UNITED STATES

US\$650_{bn}

COSTS OF WORK-RELATED STRESS IN EUROPE

THE HAPPINESS METRIC

Given the limitations of GDP as a measure of wellbeing, economists and national leaders are increasingly measuring countries' status with new metrics, including happiness. A 2009 study on alternatives to GDP, commissioned by then French president Nicolas Sarkozy has become a global sensation among academics, politicians and economists. In October 2011 the Organisation for Economic Co-operation and Development – a club of the world's wealthy nations – followed with a “How's Life?” report on wellbeing in its member countries. In 2017, the Sustainable Development Solutions Network, a UN body, ranked countries from the happiest to the least. They calculated that relieving one person of misery in Britain by reducing poverty would cost £180,000, whereas achieving the same goal by treating anxiety or depression would require just £10,000. This is testament to the socio-political and economic consequences of ‘counting’ wellbeing. There are decades-old challenges to GDP too, including the United Nations' Human Development Index and the Kingdom of Bhutan's insistence that it is out to maximize not GDP but GNH – “Gross National Happiness.”

WELLBEING BOOM

From 2013-2015, the wellbeing industry grew by 10.6%, while the global economy shrank by -3.6% in U.S. dollar terms. The industry represented a US\$3.7 trillion economy in 2015, which is almost half the size of all global health expenditures⁶. Research carried out by analysts at Technavio, a global market research company, indicates the global health and wellness market will grow steadily at a moderate CAGR of close to 6% to 2020.

HUMAN BEINGS, GOVERNMENTS AND ECONOMISTS HAVE A DEMONSTRABLE INTEREST IN WELLBEING. MORE THAN A ‘FAD’ THIS IS A GLOBAL SOCIO-POLITICAL SHIFT – RUE THE INDUSTRY THAT IS NOT MOVING TO ADDRESS IT.



We all aspire to live well – whether we are pastoralists in Somalia, factory workers in China or middle managers in the US. The scope of this paper is workplace wellbeing, but we must note the privileged position from which we write. It would be insincere to talk about wellbeing if we didn't also acknowledge the crisis around living wages, inequality and the widening wealth divide.

Northern European states, and other developed countries, tend to rank highly on happiness and wellbeing. But at the other end of the scale lay countries like the Central African Republic, devastated by conflict in recent years. Given the focus of current international development efforts on the short-term imperative of saving lives – talk of wellbeing may seem over-optimistic. Even in 'first world' countries many spaces and workplaces are inaccessible and some are unsafe, rendering them diminutive to citizens' wellbeing. Ultimately of moral importance, wellbeing must be understood in terms of people's geographies, circumstances and their individual capabilities. Although beyond the scope of this paper, we support initiatives within our industry that foster advancements in international development, safety, and inclusivity.







02



WELLBEING AND THE CORPORATE

02

WELLBEING AND THE CORPORATE

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A common assumption about the status of firms in society suggests that they sit in a political vacuum, allowing their decisions and structures to be only evaluated in terms of economic efficiency.⁷

Will Davies,
Political Economist and
author of “The Happiness Industry”

Workplace wellbeing was generally an afterthought for organisations until the 1950s. Johnson & Johnson’s ‘Live for Life’ program – considered a prototype for corporate wellbeing initiatives – was started in 1979. Soon after, *The Journal of Occupational Health* began featuring articles showing how workplace wellbeing could reduce absenteeism and other costs associated with bad health. It was the 1980s when companies began extending their concern to workers’ emotional and mental health.



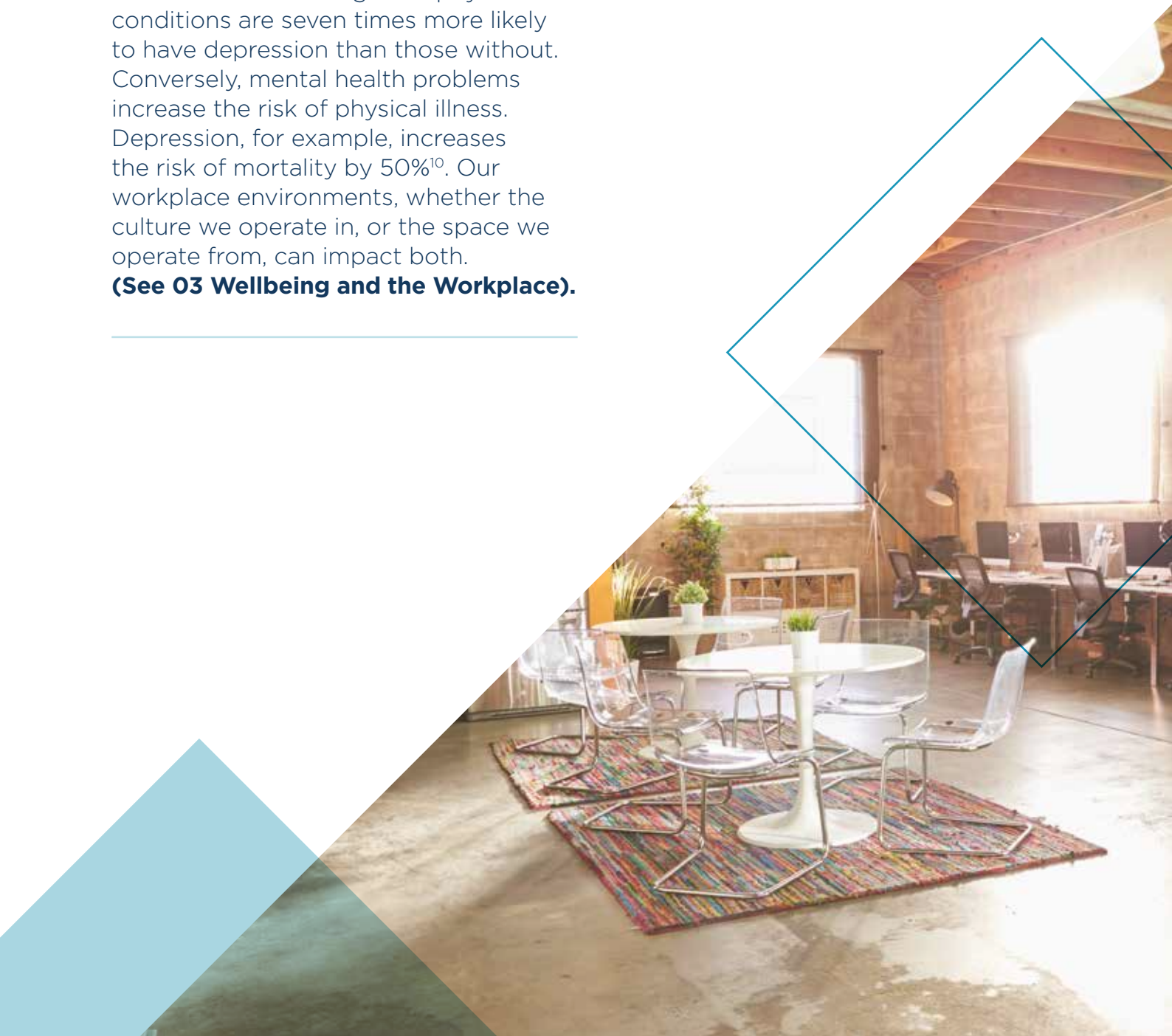
BODY & MIND

The mind plays a vital role in an individual's overall wellbeing. Mental health problems are a major cause of presenteeism⁸, which costs businesses US\$1,500 billion per year – ten times higher than the cost of absenteeism⁹. Organisations know mental and physical health are closely related; people with two or more long term physical conditions are seven times more likely to have depression than those without. Conversely, mental health problems increase the risk of physical illness. Depression, for example, increases the risk of mortality by 50%¹⁰. Our workplace environments, whether the culture we operate in, or the space we operate from, can impact both.

(See 03 Wellbeing and the Workplace).

US\$1,500_{BN}

THE COST OF PRESENTEEISM TO BUSINESSES PER YEAR, TEN TIMES HIGHER THAN THE COST OF ABSENTEEISM



THE BOTTOM LINE

An abundance of research demonstrates links between employee wellbeing and bottom line financial outcomes. Human happiness has been found to have large and positive causal effects on productivity. Positive emotions appear to motivate, while negative emotions have the opposite effect. A study by PwC found cost-benefit ratios ranging from 2:3 to 1:10 – meaning for every US\$1 spent, an organisation can expect to receive US\$10 in value back¹¹. Tim Munden, chief learning officer at Unilever, reinforces this. He estimates that Unilever recoups an estimated €6 for every €1 invested in wellbeing programmes across its European businesses.

A LONGER-TERM STUDY, STRETCHING FROM 2000 TO 2014, FOUND COMPANIES NURTURING A CULTURE OF HEALTH **OUTPERFORMED THE REST OF THE S&P 500 BY A FACTOR OF 3:1¹²**, WHILE FTSE 100 COMPANIES THAT PRIORITISE EMPLOYEE ENGAGEMENT AND WELLBEING HAVE BEEN SHOWN TO **OUTPERFORM THE REST OF THE STOCK MARKET BY AN AVERAGE OF 10%¹³**.

Gallup breaks the potential benefits of 'wellbeing' down further. Their global meta-analysis suggests businesses with highly satisfied, engaged employees are rewarded with

37%

LOWER ABSENTEEISM

21%

HIGHER PRODUCTIVITY

10%

HIGHER CUSTOMER SATISFACTION THAN THOSE WITHOUT¹⁴



FTSE WELLBEING

Research conducted by Business in the Community (BITC) and Ipsos Mori indicates a critical link between strong human capital management and organisational performance. The benchmark tracked companies' public reporting in five key areas: better physical and psychological health, better work, better specialist support, better relationships and working well. All FTSE 100 companies were benchmarked against the BITC public reporting guidelines on employee wellness and engagement, and assessed by professional services firm Towers Watson. Those that prioritised employee engagement and wellbeing were shown to outperform the rest by an average of 10%¹⁵.





THE BONUS

The topic of executive compensation generates heated discussion. Corporations are increasingly looking at ways to incentivise a focus on long term performance and are reviewing options linked to both financial and non-financial performance measures. As a result, executive remuneration packages are beginning to be linked to employee wellbeing.

FROM NEXT YEAR, HALF OF THE BONUS OF THE CHIEF EXECUTIVE OF THE COMMONWEALTH BANK OF AUSTRALIA WILL NOT DEPEND ON THE FINANCIAL PERFORMANCE OF THE BANK, BUT ON 'SOFT' TARGETS, INCLUDING 'PEOPLE' AND 'COMMUNITY'.

Medibank Private Chief Executive Craig Drummond comments "Hitting a corporate plan, hitting a certain return on capital, those types of measures are predominant - but there should absolutely be softer components which reflect culture, which reflect workplace health." The antipodeans are perhaps ahead in this respect, but the sentiment is echoed by other multinationals. Dame Fiona Kendrick, Nestlé's UK chief executive, comments "We all recognise there are public health issues facing the population, and companies have a responsibility to play a part at work and beyond."



WELLBEING@WORK

Deloitte's Wellbeing@Work Index measures workplace wellbeing across four pillars. Firstly, 'mind': what is the mental health and resilience of your employees? Secondly, 'body': What is the physical health of your employees? Thirdly, 'purpose': Are your employees connected to your company's purpose and values? And lastly, 'place': Does the physical and social environment and leadership of your organisation, support and enable wellbeing? Organisations are given a score and a benchmark to improve upon. Although not taken up by organisations universally, such indexes reflect a change in the way corporations are measuring success.



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If an employee walks out the door, a significant investment was just lost – and the organisation has probably lost a lot of knowledge, too [...] the idea is not ‘let’s get them to be more productive.’ Rather, I think it’s ‘let’s get them to want to be here, engage them, and help them to perform at their best.’¹⁶

Lois Wellwood,
SOM Architecture New York & Washington D.C.





TALENT

77% of CEOs globally see accessing and retaining skilled labour as the biggest threat to their businesses¹⁷. Attracting talent is not easy, and losing it is expensive; anywhere from 50 to 200% of a lost employee's salary is spent on recruiting and on boarding. Some banks are incurring up to US\$1 billion annually in costs associated with replacing employees¹⁸.

The 'well' workplace can be a valuable attraction and retention tool. A 2013 survey by mental health charity Mind found 60% of staff more likely to recommend their organisation as a good place to work if the employer takes action to support wellbeing¹⁹. While global analysis shows that

COMPANIES WITH SATISFIED, ENGAGED WORKERS HAVE 25-65% LOWER EMPLOYEE TURNOVER²⁰. WELLBEING IS THEREFORE BECOMING A STRATEGIC IMPERATIVE, WITH 78% OF MULTATIONALS DEEMING IT A CRITICAL PART OF BUSINESS PLANS²¹.

77%

OF CEOS GLOBALLY NOW SEE AVAILABILITY OF SKILLS AS THE BIGGEST THREAT

COMPANIES WITH SATISFIED, ENGAGED WORKERS HAVE

25-65%

LOWER EMPLOYEE TURNOVER







MY GENERATION

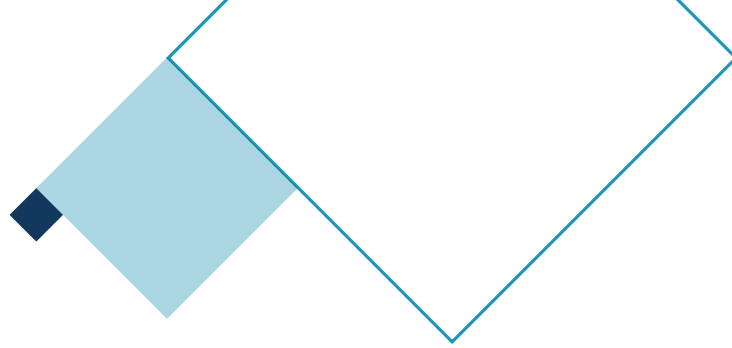
For the first time in history, the global workplace will include five generations working side-by-side: Maturists, Baby Boomers, Generation X, Generation Y (Millennials), and Generation Z. Each have grown up in differing economic, social and historical contexts, resulting in varying aspirations and behaviours.

The global phenomenon of technology enablement is redefining the workplace as employees with a laptop computer and internet connection are increasingly able to work anywhere, causing businesses to reconsider their real estate strategy around more flexible options. Being digital natives, Generation Y will take up remote and flexible working practices to an extent not seen in preceding generations.

Generation Y value similar things in an employer brand as they do in a consumer brand.

	MATURISTS (PRE-1945)	BABY BOOMERS (1945-1960)
 Attitude toward career	Jobs are for life	Organisational – careers are defined by employers
 Aspiration	Home ownership	Job security
 Communication media	Formal letter	Telephone
 Communication preference	Face-to-face	Face-to-face ideally, but telephone or email if required

CHARACTERISTICS



This means multinationals will require not only a flexible workplace offering in the markets they operate in, but a universal brand across their global and local office networks. ‘Well’ office design across property portfolios, along with a ‘well’ company ethos, will be effective in creating this brand.

And we shouldn’t expect successive, or preceding, generations to want less from the workplace. Oxford Economics recently conducted a survey called ‘Workforce 2020: A Millennial Misunderstanding’ across 27 countries, including more than 5,500 executives and employees in large organisations. They found that the generations are not significantly different.

Their research indicated that Generation Y (21%) are roughly as likely as non-Generation Y (23%) to leave their jobs in the next six months. And 31% of non-Generation Y say flexibility towards work life balance is important to their job satisfaction, compared with 29% of Generation Y.

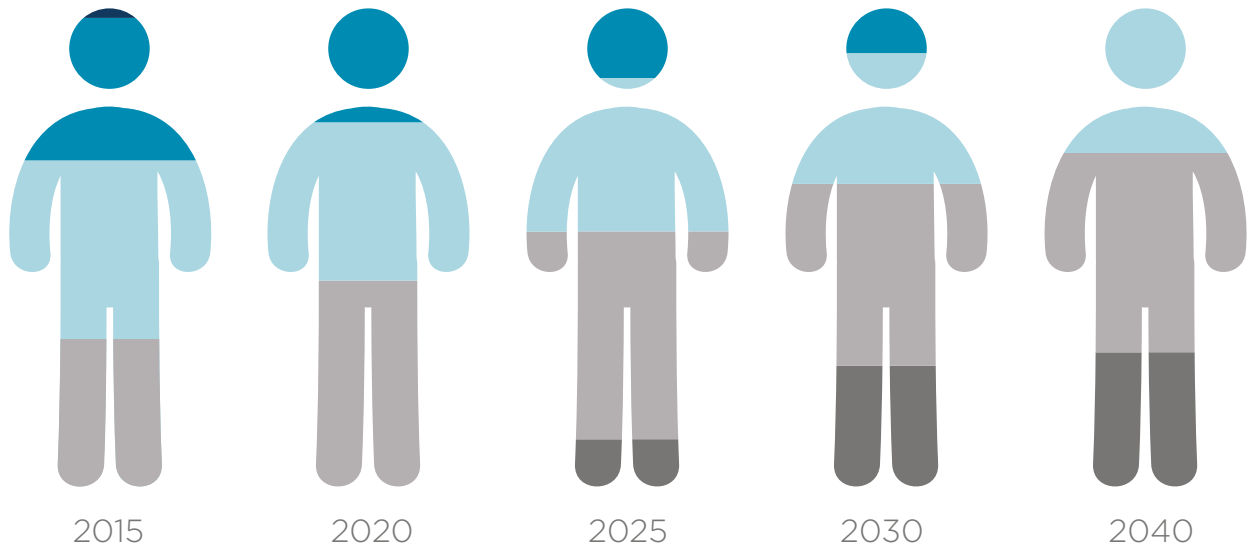
What is certain is the **presence of all**. We will see a fourfold rise in over-65s by 2050, meaning **each generation will stay in the workplace longer**. Employers will increasingly be required to balance the needs of emerging adulthood and an aging workforce: two distinct age groups will be mingling in the workplace. A flexible but committed response from employers, and workspace designers, is required.

GENERATION X (1961-1980)	GENERATION Y (1981-1995)	GENERATION Z (BORN AFTER 1995)
Early ‘portfolio’ careers – loyal to profession, not necessarily to employer	Digital entrepreneurs – work ‘with’ organisations ‘not for’	Career multitaskers – will move seamlessly between organisations and ‘pop up’ businesses
Work-life balance	Freedom and flexibility	Security and stability
E-mail and text message	Text or social media	Hand-held (or integrated into clothing) communication devices
Text message or e-mail	Online and mobile	Facetime



WORLD POPULATION BY GENERATION

Worldwide and in the U.S. Millennials will dominate the workforce





03





WELLBEING AND THE WORKPLACE

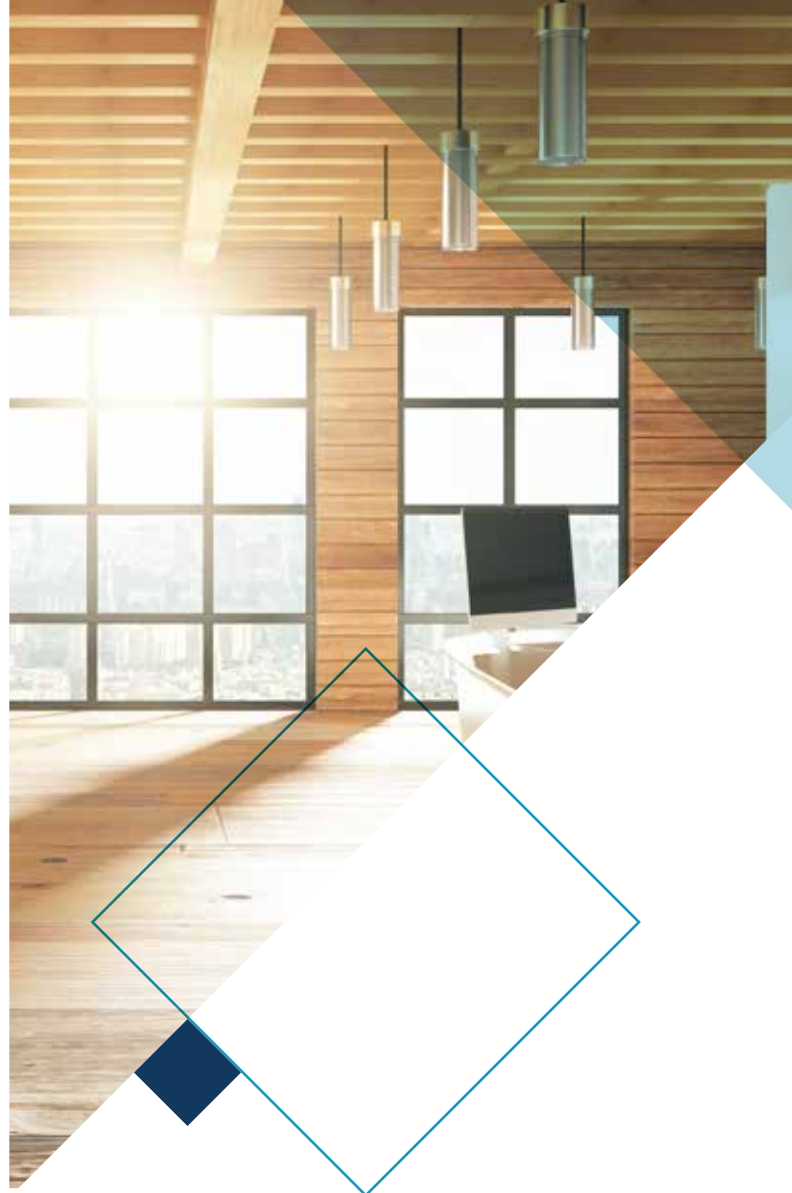
03

WELLBEING AND THE WORKPLACE

The vast majority of built environment professionals believe human health is inextricably linked with real estate²⁴. This is not without good grounds.

TAKE A BREATH

Indoor air pollutants cause a higher health risk than those outside. A study by Harvard T.H. Chan School of Public Health found that a well ventilated office can double cognitive ability²⁵, while several studies have shown that substandard ventilation rates negatively impact cognitive function. Poor ventilation has further been associated with increased absences, decreased productivity, and higher operational costs²⁶.



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Putting both health and wellbeing, and the environment, at the heart of buildings is a no brainer for businesses' employees and the bottom line.

Terri Wills,
CEO of the World Green Building Council



LET IN THE LIGHT

Humans have internal clocks that synchronize physiological functions to a 24-hour cycle called the circadian rhythm. Light plays a key role, regulating many aspects of physiology, metabolism and behaviour. Daylight exposure and access to windows at work has been linked to improved sleep duration and mood, reduced sleepiness, lower blood pressure and increased physical activity, whereas lack of natural light has been associated with physiological, sleep, and depressive symptoms²⁷.



In building, wellbeing is the new sustainability [...] the goal is to make our built environment more physically healthy for people.²⁸

Jonathan Penndorf,
Perkins+Will Washington

STAY COOL

Thermal conditions are integral to the occupant experience. Studies on the relationship between temperature and performance indicate a 10% reduction in performance at both 30°C and 15°C compared with a baseline between 21°C and 23°C.²⁹ When indoor environments are too warm, there is evidence of increases in sick building syndrome symptoms, negative moods, heart rate, respiratory symptoms, and feelings of fatigue.³⁰

Delta Development Group's new 12-story global headquarters for Heerema in Leiden (NL) significantly raised the satisfaction of its 1,100 employees by improving air quality, increasing thermal comfort and maximising daylight. The marine contractors expect to realise a net present value of US\$47 million over 20 years in productivity, staff retention and reduced absenteeism.³¹



EMBRACE NATURE

Access to green views through windows have been linked to significantly faster recovery from stress and mental fatigue and better attentional functioning.³²

GERMAN RESEARCHERS HAVE SHOWN SEEING THE COLOUR GREEN FOR JUST A FEW SECONDS BOOSTS CREATIVITY LEVELS.³³

While the International Journal of Environmental Research and Public Health has reported that levels of cortisol – a stress indicator – decrease significantly after 20 minutes in a natural setting.³⁴

LISTEN

53% of employees report that ambient noise reduces their work satisfaction and productivity.³⁶ Performance drops of 66% can occur when employees are exposed to background noise.³⁷ But spaces can also be too quiet, and not all sound is unwanted. In fact, there is evidence to suggest that certain soundscapes, such as more natural, rather than urban ones, can be restorative.³⁸

Saint-Gobain's new North American headquarters has a fitness centre, 1.3 miles of walking trails for staff, more than 100 collaborative workspaces, including some outdoors. 92% of offices have outdoor views. Call centre staff doubled their productivity after moving in, with a 97% increase in sales-generated leads and 101% increase in leads per call.³⁵

After Skanska rebuilt its new Northern UK hub it saw 3.5 times fewer building-related sick days than other UK offices, saving the company £28,000 in staff costs in 2015. Improvements to layout and noise, indoor air quality, and a central light well bringing more daylight into the building saw staff satisfaction with the office jump from 58% to 78%.³⁹





66%

PERFORMANCE DECLINE WHEN EMPLOYEES ARE EXPOSED TO BACKGROUND NOISE

6-9%

DEATHS WORLDWIDE ACCOUNTED FOR BY PHYSICAL INACTIVITY

GO, EAT

Physical inactivity is the fourth leading risk factor for mortality, accounting for 6-9% of deaths worldwide – or three to five million mortalities every year.⁴⁰ Building design strategies can encourage physical activity, and discourage sedentariness and bad eating habits. Moving around and interacting with others also creates workplace connections, supporting innovation and creativity.

Medibank’s new plant-filled office in Melbourne, Australia includes 26 types of workspaces, from tranquil areas to collaborative hubs, fireplaces on every floor, edible gardens and sports facilities. Two in three staff feel healthier, 80% are working more collaboratively and absenteeism is down 5%.⁴¹





04



**WELLBEING
AS STANDARD**

04

WELLBEING AS STANDARD

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I remember even 15 years ago when we talked about LEED, a developer said, ‘LEED-schmeed, do you know how much that costs?’ Now he has LEED Gold and Platinum plaques on every one of his buildings.⁴²

Susan Orlandi,
SOM Architecture San Francisco & Los Angeles



Since its development in the 1990s, the Leadership in Energy and Environmental Design rating system (LEED) has been applied to over 19.1 billion commercial square feet worldwide.⁴³ Along with other systems like the Building Research Establishment Environmental Assessment Method (BREEAM), Energy Star, and the Living Building Challenge, LEED has helped maximise the efficiency of buildings and minimise their impact on the environment. The green movement has been expanding, and in the past few years new ratings systems have emerged. Here, we set out three international frameworks that focus on the direct contribution of buildings to occupant wellbeing.



WORLD GBC 'BETTER PLACES FOR PEOPLE' OFFICE FRAMEWORK

The World GBC has developed a three pillar framework to help assess and quantify the health, wellbeing and productivity of people in buildings. Firstly, there is a focus on environment. This involves measuring workplace features to determine how they affect occupants. Secondly, comes experience. This means surveying occupant perceptions of the workplace, including their feelings about whether the environment supports or detracts from their wellbeing and performance. Thirdly, economic factors are taken into consideration; metrics already collected at a corporate level are tracked over time as improvements are made to the office environment.



THE INTERNATIONAL WELL BUILDING STANDARD™

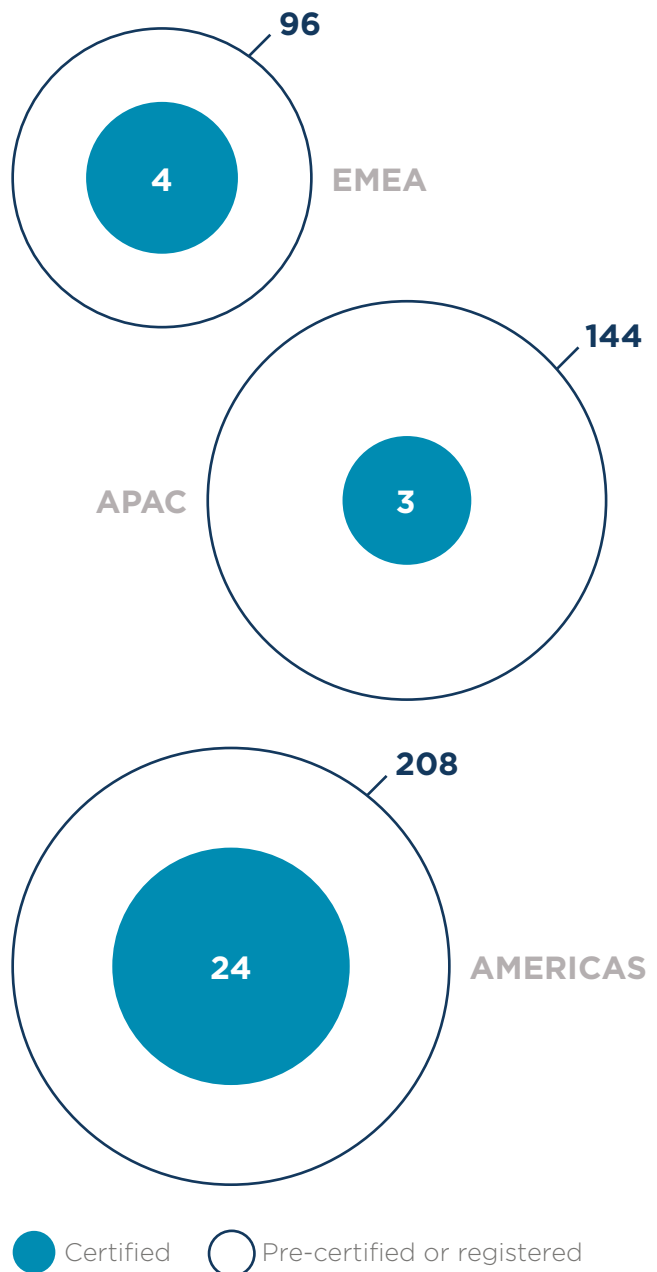
Launched in New Orleans in 2014, the WELL Building Standard™ is the first certification to focus exclusively on wellbeing. Having a similar framework and documentation process to LEED and BREEAM, its compliance requirements fall into seven areas: air, water, nourishment, light, fitness, comfort and mind. Each category is scored out of 10 and – depending on the total achieved –

silver, gold or platinum certification is awarded. Usually discussed early in the project design process, WELL™ requires members of the architecture, engineering, and operations teams to work together to submit documentation. Taking substantial effort and cost, at present⁴⁴ it is best suited to a few locations within large portfolios.

A FOCUS ON EUROPE

It was late 2016 when the first European office achieved WELL™ certification and 2017 when the first was certified under Fitwel. Both offices were located in the City of London, and both certifications were pursued by engineering sector tenants. Like demand for ‘flexible’ and for ‘smart’, demand for ‘well’ ‘has been driven by occupiers. A recent survey conducted by CoreNet Global unsurprisingly found that corporate real estate executives are interested in enhancing occupant experience within the workspace. More notable are the 72% in EMEA who want to do this by pursuing WELL™ certified buildings. Today, consumer preferences feed through to building creators quickly; 22 Bishopsgate is the first project to register for WELL™ core and shell in Europe. “Office-building strategy needs a radical change” says the building’s developer Sir Stuart Lipton, “office buildings have become stereotyped, built for investors rather than consumers. People must feel they are in spaces that respect their humanity.” As tenant demand accelerates, wellbeing will rise even further up the agenda for architects and developers – especially in Europe.

WELL BUILDING CERTIFICATION STATUS REPORT



FITWEL

Fitwel is the techno-savvy sibling of paper-heavy WELL™. It assesses buildings and workplace features such as the design of outdoor spaces, proximity to public transit, indoor air quality, and healthy food standards. Organisations submit questionnaire answers, with photographic evidence where applicable, to receive a rating. It is possible to do this through the Fitwel app, which allows for certification via smartphone (in development) or on an online portal. Buildings earn zero, one, two, or three stars, and the assessment gives users feedback on changes to their buildings and operations that will create improvements. Straightforward and relatively quick, it is more easily applied to large real estate portfolios.

Global architecture firm Perkins+Will has committed to using Fitwel at all of its North American offices and will start working with clients who are interested in using the standard. “All of our clients are looking at retaining talent and motivating people. All the things that make any organisation thrive or operate in a more high-performance way are rooted in human wellbeing,” says Perkins+Will CEO Phil Harrison. “It seems like more and more of our design projects are starting with that. Not ‘we want 100,000 square feet and we want to spend US\$50 million dollars.’ It starts with ‘we want our people to have these experiences.’” He believes this will help Perkins+Will focus on operational aspects of wellbeing that architects tend to pay less attention to.⁴⁵

UNIVERSALLY NON-STANDARD

While new standards and frameworks help ensure challenging targets and are driving progress in the field of workplace wellbeing

IT IS, OF COURSE, ENTIRELY POSSIBLE TO DESIGN 'WELL' SPACES USING THOUGHTFUL DESIGN CONCEPTS WITHOUT COMPLETING A FORMAL DOCUMENTATION SYSTEM.

THERE ARE MANY ROUTES TO WELLBEING, AND RATHER THAN AN ACCREDITATION FOR THE SAKE OF A NAME AND A BADGE, OR A 'ONE SIZE FITS ALL' SOLUTION IT SHOULD BE PRESENTED AS A UNIVERSALLY ACCOMPLISHABLE GOAL.



A NEW CURRENCY

“

If healthy is the new wealthy, then data is the new currency. This is highly democratising, and will ultimately render obsolete the already outdated question from investors, developers or agents ‘Why should I bother?’

John Alker,
Campaign and Policy Director at the
UK Green Building Council

Occupiers are striving to identify links between work environments and business performance. Google already collect quantitative and qualitative data about employee experience to help measure the impact of office design on staff. The ‘well’ movement is inspiring others to do the same. Toronto-Dominion Bank recently WELL™ certified its downtown Toronto office, prompting them to look into data that had not previously been investigated; metrics – like absenteeism, productivity, and employee happiness – which, when linked back to the indoor environment, expose the impact of the workplace on staff wellbeing.⁴⁶ The delivery of smart buildings will drive this forward. Beacons, chips and sensors will interact with both the office and its users, telling us more about the impact of the workplace on humans than we have ever known. The relationship between ‘where we are’ and ‘how we are’ will be laid bare, and it will redefine how we determine the value of real estate.



05



WELLBEING AND THE INVESTOR

05

WELLBEING AND THE INVESTOR

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Collaboration will be key to success in this area, and this can only happen if a productive dialogue is created between asset owners and their occupiers [...] landlords and owners must get ahead of the game or risk being left behind as occupiers make use of new technologies to question the quality of their environment.⁴⁷

Graham Baxter, Standard Life



INVESTIGATE

For investors, analysis and research is required to inform action plans. This means landlords are investigating approaches to wellbeing prior to rolling out wide-scale programmes. Standard Life are among those participating in the Green Building Council's Wellbeing Lab for offices. This involves undertaking detailed acoustic and air quality monitoring of buildings alongside occupier surveys, and using the results to inform future design. Lendlease and others are partnering with Delos, the founder of the WELL Building Standard™. The purpose is to accelerate the integration of wellbeing into their assets. We will see an increasing number of 'well' projects appear in key global markets as others pursue similar programmes.



RISK/RETURN

For real estate investors, the value and pricing of future income streams is critical. Any risks to an asset's income stream which are not anticipated by the investor can result in a different than expected return and impact performance. It is, therefore, critical that investors understand the changing nature of occupier demands around wellbeing preferences to accurately price the potential of future rental levels. Critically from a risk management perspective, buildings that are not 'well' are at risk of heightened vacancy levels, prolonged void periods and loss of income potential. **(See 08 - Predictions - A Well Future).**

Some investors are opting into a new GRESB⁴⁸ module which monitors how real estate companies and funds promote the wellbeing of their tenants and the communities surrounding their real estate assets. GRESB, whose data is used by funds to optimize the risk/return profile of their investments, introduced this module in 2016. An optional supplement for the time being - and by no means a comprehensive assessment - this is a signal that wellbeing will be incorporated into fund and asset strategies.





FUTUREPROOF

For tenants, there are clear financial incentives to occupy 'well' workplaces, which suggests an increase in the demand for real estate assets whose design process adequately takes into account occupant wellbeing. As these expectations become the norm, there is the potential for an erosion of value for those buildings not offering the requisite conditions. But investors who get their offering right could see a tangible premium - three separate research studies by the Canadian Green Building Council⁴⁹, McGraw Hill Construction⁵⁰ and the Urban Land Institute⁵¹ found buildings that demonstrate positive impacts on wellbeing are likely to have a higher market value.



66%

OF BUILT ENVIRONMENT PROFESSIONALS AGREE **WELLBEING FEATURES** IN A REAL ESTATE PROPERTY CAN IMPACT ITS **MARKET SUCCESS AND ECONOMIC VALUE**



38%

OF **OWNERS** WHO REPORT AN INCREASED BUILDING VALUE SEE AN **INCREASE OF 7% OR MORE**



46%

SAID SPACES **LEASE MORE QUICKLY**

28%

SAID THEY ARE ABLE TO **CHARGE PREMIUM RENTS**



A REIT INVESTIGATES

British Land are putting into practice the World GBC's 'Better Places for People' Framework. Before refurbishment of its London HQ began a few years ago, staff were surveyed and sensors were positioned around the office. While the survey established staff perception of the environment, the sensors established baseline data about the physical conditions affecting wellbeing – humidity, lighting, noise, pressure, temperature and Volatile Organic Compounds. British Land can now analyse information collected by human resources and facilities management, exploring the financial impact of the office on aspects such as staff turnover, discomfort, medical costs, and days lost to sickness. The REIT can then create a comparison review of these metrics, and test the approach for wider use across their portfolio.⁵²



06



WELLBEING AND OUR CITIES

06

WELLBEING AND OUR CITIES





SMART AMSTERDAM

Within its southern Zuidas business district, among the mini-Manhattan like skyline lies The Edge. Bursting with smart technology, all of the light fixtures are equipped with their own IP address and 'talk back' to the Building Management System. Each workspace has a chip with sensors that measure humidity, movement, lighting, temperature and CO2. Martin Bell, a senior facilities manager, comments "I'd heard so much buzz and fluff about the internet of things, but seen very little substance, The Edge has been the first instance where someone has really helped me to understand the future

and what is possible". Key for occupants is personalisation – employees can use an app on their smartphones to regulate the climate and light in the vicinity of their individual workspaces, to link up with their colleagues, and to locate free desks. Tenant Deloitte is finding it a draw when recruiting talent. Erik Ubels, formerly Deloitte's Chief Information officer noted "more people are now spontaneously coming to Deloitte because they want to work in this building". A true convergence of 'smart' and 'well', the building's developer OVG has moved its offices from Rotterdam to take up space in the building.

URBAN BEIJING

China's capital Beijing is striving to cope with a population of more than 20 million people. "Urbanisation leads to lifestyle change such as reduced physical activities, added living and working pressure and unhealthy dietary change, all of which contribute to higher risks of having non-communicable diseases," says Dr Winnie Wang from the School of Geographical Sciences at Bristol University. The government has begun tree planting programmes, ordered thousands of cars off the roads, and is investing in green technology. With most work focused on quick construction and quicker sales, 'well' buildings make up a small part of the city's commercial

real estate. In the Chaoyang District is plot Z13, the site of an office tower developed exclusively for premium tenants. Ming Li, CEO and Chairman Sino-Ocean Group, the developer, says "Z13 demonstrates the 'build-healthy' development strategy adopted by our shareholders, and aims to become the first WELL™ certified office tower in China". Not a one-off project, the developer is partnering with Delos to open a WELL™ Living Lab in the city. This will be the first scientific research centre in Asia to integrate building science, behavioural science, and health science to help quantify – and ultimately improve – the impact of indoor environments on wellbeing.





RETRO MEXICO

Located in a pollutant-trapping valley, Mexico City's industrial growth, population boom, and the more than 3.5 million vehicles plying the streets make it one of the noisiest and busiest cities on the planet. Home to a people struggling with obesity and nutrition, the government is aggressively promoting wellbeing. We are beginning to see the first 'well' buildings in the region. In the Bosques de las Lomas neighbourhood in western Mexico City sits Cushman & Wakefield's newly refurbished HQ. The directive for the retrofit to attain the WELL™ standard came straight from the CEO.

Now, a small library conducive to reading tasks and a 'wellness room' for short naps and breaks help re-centre employees, providing them a reprieve from the busy city. What's more, improved daylighting and air quality mean unprecedented levels of occupier satisfaction. Sustainability Director Africa Rubio says "the process of retrofitting to gain WELL™ has not been difficult so far. We have had one real challenge; it is tricky to provide paperwork proving the organic food we supply on the premises is, in fact, organic". A small stumbling block that will not stop a CEO and city on a mission.





VERTICAL LONDON

London is a cultivated economic cluster and a place where the best international players come to compete. On track to being one of the world's great megacities, developers are creating just what it needs: a 'vertical village'. 22 Bishopsgate is the first project to register for WELL™ core and shell in Europe. It "will include a variety of healthy food bars and restaurants exercise areas, meditation areas, co-working incubator places, a climbing wall, libraries, lecture spaces – and have art everywhere," says workplace design consultant Despina Katsikakis. The amenities create the village square, encouraging people from different

companies to come together, to exchange ideas, get energised and activated, "this will be a building designed for people and for people's needs" adds Despina. Exercise will be a key theme of the development; the stairwells won't be tucked away and difficult to find. Instead, they will be clearly signposted and located near the entrance, while spaces for gyms will be located on floors with access to good daylight and views. A truly humanised space, this epitomises the values of a collaborative and connected London.



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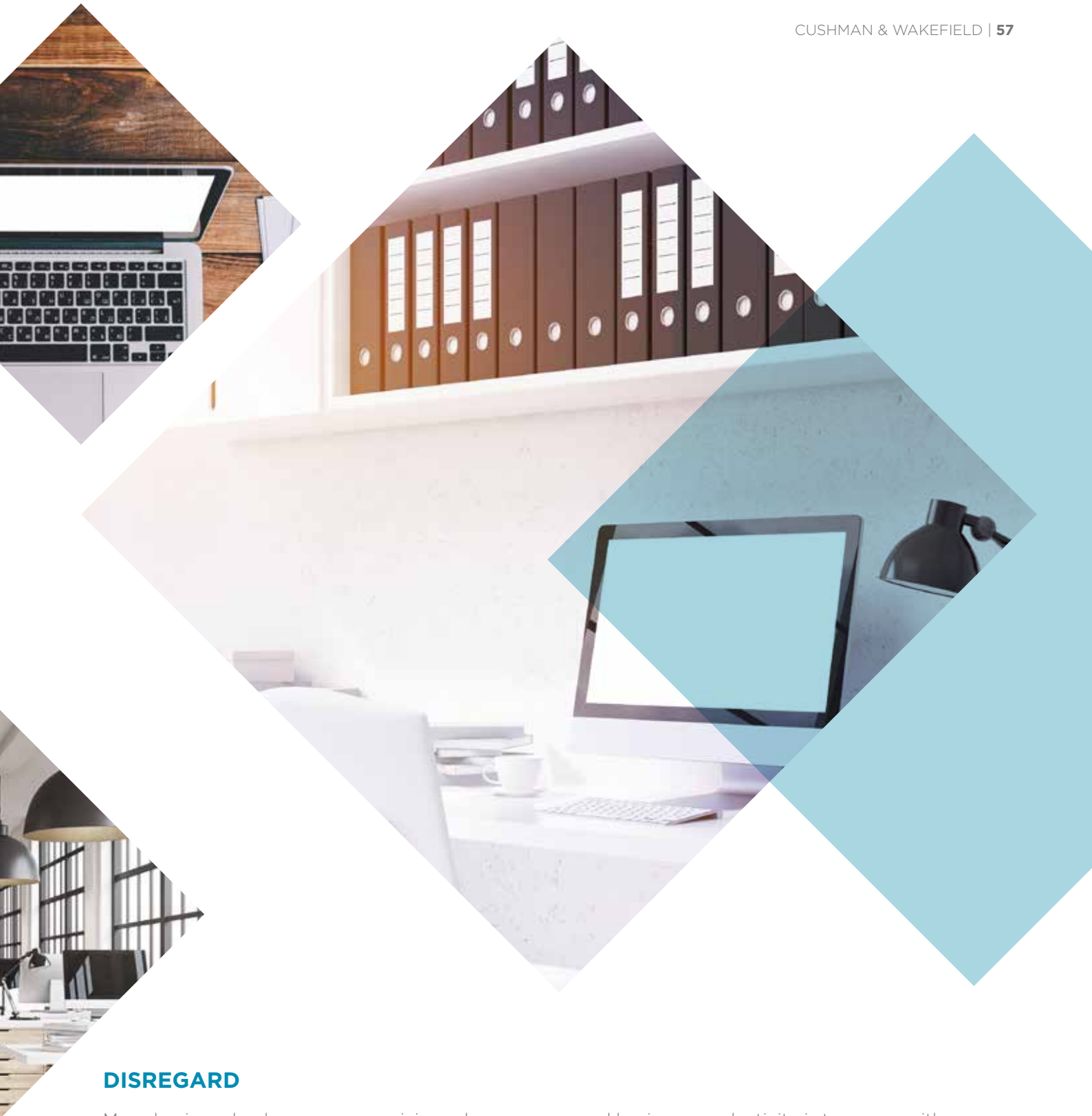
RISKS TO IMPLEMENTATION

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RISKS TO IMPLEMENTATION

There are three major risks when it comes to the implementation of wellbeing. If left unchallenged, they have the potential to compound one another and slow progress.





DISREGARD

Many business leaders express cynicism when it comes to the relationship between wellbeing and business performance, leaving it lower on the agenda than other priorities. Since undertaking our research, we have heard comments including “I’ve been in schools that tend to overheat in summer, yet academic performance is outstanding – human beings are known for being adaptable”, “Much of our happiness seems genetically predetermined”, and “The link between wellbeing

and business productivity is tenuous, neither factor can be measured accurately”. These comments underpin the need for both occupiers and investors to see evidence, precedents and proven financial benefits, and these benefits must be indubitably linked to aspects of the building in isolation from other contributing factors. Only a strong set of metrics will compel occupiers to demand ‘well’ buildings and developers to create them.

LACK OF METRICS

If we are to optimise space for wellbeing we must be able to map financial metrics and worker perceptions against physical space. Only by this means can occupiers and investors begin to understand the case for well buildings. But we are only at the beginning of this phase (**see 05 Wellbeing and the Investor**), and the World GBC highlight significant methodological challenges in collecting, measuring and utilising the requisite metrics⁵³. Financial measures, such as revenue, are almost never considered on a building-by-building basis and – even if they are

– it is still difficult to attribute them directly to staff wellbeing. For the few occupiers who track absenteeism and medical complaints in detail, metrics are seldom considered in the context of the physical environment. And while information about workers' perceptions of the office is vital, it is as yet under-recorded and under-utilised. There is also very little flow from occupier to landlord when it comes to these metrics. Without advancements in this area, occupiers and developers will lack the information they need to design truly well buildings.

VALUE & TRUST

“The history of the office is a case study in how to make a hell of heaven, including but not limited to transforming Robert Propst's liberating Action Office into the soul-destroying cubicle. It's not difficult to see how those in charge might try to build a better surveillance state just to cut real-estate costs by another ten per cent, regardless of what it does for performance”⁵⁴. Collecting and analysing metrics is the key to creating buildings that enhance occupier wellbeing, improve employee performance and in turn create positive financial outcomes. But suspicion about employer and building owner intentions – and concerns about data security – could create resistance. Because full user engagement is imperative for the ‘well’ movement's success, this is a real stumbling block. The solution? Both investors and occupiers must be committed to the concept of ‘workspace as a value creator’ over ‘workspace as a cost centre’.



SPACE AND COST

According to World Bank research, small and medium enterprises form 95% of businesses globally and employ approximately 60% of private-sector workers. Paris is Europe's biggest office market, but almost 80% of offices taken up in the city are second-hand, and the average transaction size is just 500 square metres. Hedge funds in London's Mayfair regularly pay rents of £1200 per square metre. But across other central submarkets of the city are businesses who can afford just £400 per square metre. Even in New York City – the 'Big Apple' – the average business takes just 1,000 square metres. Spatial and budgetary constraints could limit occupiers' ability to create comprehensively 'well' workplaces.

If we do not focus on wellbeing-enhancing improvements that can be made incrementally over time, or with modest investments and as retrofit, we risk stifling the wellbeing movement through millions of square feet of office space. For small and medium businesses who desire the incorporation of wellbeing within existing offices, keeping the movement simple and accessible is imperative. Fortunately, standards such as WELL™, Fitwel and The World GBC's Better Places for People framework—still in their nascent stages—are ever-evolving. The more they are practiced and fine-tuned, the more accessible they will become.



A modern office interior with a whiteboard and a green sticky note. The background is a light blue wall with a whiteboard and a green sticky note. A large white number '08' is centered in the lower half of the image, enclosed in a white rectangular border. A blue diamond shape is positioned in the upper left quadrant.

08



A WELL FUTURE

08

PREDICTIONS - A WELL FUTURE



WELL CAREERS

WELLNESS OFFICERS WILL PROLIFERATE

In the future, office developers will need to know office consumers better than ever before. Offices will be developed through early and deep collaboration with occupants. During residence, the entire office environment will be managed, monitored and fine-tuned by one team – this team will come into being when traditional human resources and facilities management roles are superseded (or enhanced) with the addition of Wellness Departments. We are already seeing the emergence of Community Managers, Wellbeing and Future Proofing specialists; but, on a select basis. We expect these roles to evolve and develop, including leadership positions within the C-Suite – for example, a Chief Wellness Officer (CWO).

For multi-let buildings, it will no longer be the case that a building manager maintains the fabric and common parts and each occupier looks after their own demise. This arrangement makes it impossible for buildings to really 'know' their occupants, limiting opportunities to gauge and enhance wellbeing and performance. The office as 'one-space-for-one-organisation' will be replaced by permeable workplaces with multiple, overlapping communities and a shared level of trust. These workplaces will command a premium for their functionality and their contribution to both occupant wellbeing, and business performance.

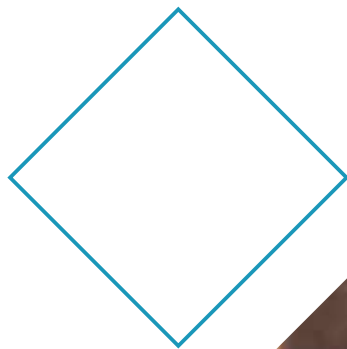
WELL PREMIUM

WELLBEING WILL BE CRITICAL TO ATTRACT THE HIGHEST QUALITY TENANTS

As technology advances, the essentially human parts of work will become more important. The driver of growth will be the Knowledge sector, which includes both business services and service sector industries. In the United Kingdom and the United States, investment in knowledge-based capital (KBC), i.e. non-tangible assets, significantly exceeds investment in physical capital. Both China and Brazil are also making concerted efforts to develop KBC. This allows countries and firms to position themselves in higher value-added industries. As they continue to do so, Knowledge industry corporations will be at the forefront globally as both employers, and office tenants. We have already seen a disproportionate take up of WELL™ and Fitwel in Knowledge sector companies, and this will intensify as they compete for the best talent. The need to offer ‘well’ workspaces will be compounded as the culture of work changes. In the future, a continuum of gig employees will replace full time employees as the main source of talent. Employee-employer relationships will be akin to business-to-business partnerships, and ‘careers’ will be replaced by ‘portfolios of experience’. High calibre Knowledge employees will choose where they want to be and how they want to work. As ‘well’ offices become a top priority for top talent, the ‘well’ factor will be critical to the leasing decisions of Knowledge corporations.

LEFT BRAIN, RIGHT BRAIN

Imagine a personable, multilingual graduate of The University of Hong Kong with a PhD in data science from MIT and a side-line in computer game design and fine art. She sounds like precisely the kind of “left brain, right brain” candidate you’re chasing. But everyone else is chasing her too. This is the future. Disruptions such as robotics, big data and machine learning will automate jobs that are repetitive, highly structured and can be expressed in logical rules and workflows. But existing occupations won’t be completely replaced: those tasks drawing on cognitive abilities, social skills and specialist knowledge, which machines cannot easily replicate, will be even more important^{57, 58}. Economic growth will be concentrated in these ‘knowledge intensive’ industries, and Knowledge sector companies will compete fiercely and globally for talent that can differentiate their offering. Inviting candidates into a ‘well’ workplace will be a big draw.



WELL TECH

WELLBEING METRICS WILL BE TRANSFORMED BY TECHNOLOGY

Technology and health are colliding to radically shift the wellbeing metrics paradigm. While the majority of wellness programmes are currently 'metric-driven' which is positive, they typically report on historically reported data, or lagging indicators. As innovation in medical technology accelerates, courtesy of big data platforms, predictive analysis will be possible. Data will encourage prevention rather than cure through improved self-awareness of both human beings, and the space they occupy. We are already seeing a wave of consumer health data measurement in real time. Over the next decade, expect to see workplace wellness programmes predicting sick leave to manage gaps in resourcing, as well as future employee healthcare costs. Also expect analysis of employee health and its attribution to the physical space. Traditional metrics will need to adapt to incorporate advanced insights into patterns of data. Of course, while having individual health data in real time is empowering it also sparks concerns about privacy. If companies have technology to monitor employees' biometric data and personal health information there are serious, mounting data breaches. In the end, it will be about value exchange - how much will employees be willing to give up to work in better places.

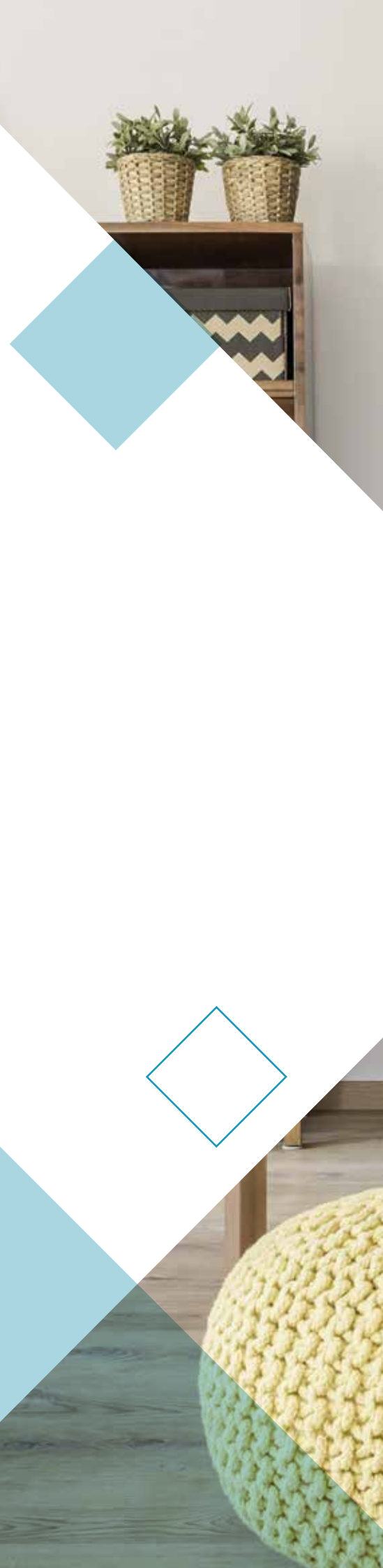




CONCLUSION

Wellness in the workplace has emerged as a critical issue because it is simply too fundamental to be ignored. And the call to action for the real estate industry – and broader built environment – is loud and clear. The design and building of workplaces must change to meet a flexible future. Evidence points to the return on investment (ROI) available to investors and tenants from differentiation, value creation and risk management. We must now encourage the concept of a broader perspective focused on the total value of the investment and where a workplace culture of work-health balance is the norm.

It can be easy to get distracted by negative noise and spin. We cite disregard as one of the key risks. And so we end with our final call to action: ignore the critics who say the evidence isn't scientific enough and look to impose a standard of evidence not required for other workplace investment. Bodies of evidence from all parts of the globe prove that well designed workplaces are critical for the health and wellbeing of society. The message to the real estate and built environment sector is clear: prioritise health and wellbeing by making spaces human again.





PRACTICE & PREACH

Our Atlanta, Chicago, St. Louis, Downtown Los Angeles and Mexico City offices are pursuing WELL™ certification, and we are piloting the Fitwel certification on more than five Cushman & Wakefield projects. We have plans to expand this to other offices. A number of clients are working towards WELL™ certification with us, and we are offering Fitwel certification services to those in the US. We have eight Cushman & Wakefield WELL™ accredited professionals, and five Fitwel Ambassadors at the company – something we will accelerate in the future.



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