

wellness
IN THE
workplace
UNLOCKING
FUTURE PERFORMANCE

CBRE

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EXECUTIVE SUMMARY

All the signs point to a burgeoning workplace wellness trend. The latest CBRE European Occupier Survey¹ supports this, revealing that almost three quarters of the real estate decision makers we polled already have a formal wellness programme in place.

This new report from CBRE Global Workplace Solutions examines the growing wellness phenomenon, discusses the drivers behind it and makes recommendations on how organisations can respond.

TOMORROW'S WORKPLACE

By 2040 the workplace will look very different to now. The lines between home and work will have become blurred and people's working lives will be characterised by much more autonomy and choice. We start by describing a future work environment where digital developments and changing attitudes will help us to be more proactive in managing our health and wellbeing whether at home or at work.

And what's clear is that the workplace of 2040 will – in many ways – be the product of influences that are already in play. We see five far-reaching demographic and social trends which are driving the growing interest in wellness.

TREND 1:

Employees are living longer – people are living and working longer² and workers aged 50+ put a higher value on non-financial factors such as flexible work or working from home than on money or titles.³

TREND 2:

Declining health and rising healthcare costs – worldwide obesity has nearly doubled since 1980, and workplace absenteeism and presenteeism alone represent as much as two percent of GDP in both the UK and US.

TREND 3:

Key skills are hard to find – in many global economies there's a shortage of skills and talent is at a premium. 80 percent of employees agree that a company's wellness offering will be crucial in recruiting and retaining them within the next 10 years.⁴

TREND 4:

A growing awareness of stress and mindfulness – stress costs the UK economy £10.4m in lost working days a year (and over 10 percent of the average affected employee's working year). An EU-funded project has highlighted the cost to the European economy of work-related depression, it estimates it to be €617bn annually.⁵ One major contributor is the 'always on culture'. We habitually reach for our phone over 150 times a day and many of us rarely disconnect for fear of missing out. As a result, there's a growing awareness of mindfulness and mental wellbeing.

80 PERCENT OF EMPLOYEES AGREE THAT A COMPANY'S WELLNESS OFFERING WILL BE CRUCIAL IN RECRUITING AND RETAINING THEM WITHIN THE NEXT 10 YEARS.

TREND 5:

Technology is making it easier for people to monitor and manage their health – in healthcare, the market for wearable technology will reach \$70bn by 2025.⁶

It's these five trends that are helping to move wellness up the corporate agenda. Business knows that from a competitive perspective it can't afford to ignore it.

So how should heads of corporate real estate go about addressing wellness in the workplace? When it comes to designing wellness programmes, there is no universal approach. But taking a holistic view, involving corporate real estate, human resources and senior leaders is essential to create successful wellness programmes. We share some examples of how organisations from different industries – including CBRE – are doing it.

In the short term, there are some quick, low-cost wins, you can make. But for lasting success a long-term, holistic approach to wellness that involves functions working together across the organisation is key.

WELLNESS IS RISING UP THE CORPORATE AGENDA

CBRE HAS IDENTIFIED **FIVE TRENDS** THAT ARE DRIVING INTEREST IN WELLNESS IN THE WORKPLACE

1 EMPLOYEES ARE LIVING LONGER



Average life expectancy for both men and women has increased by 2 years since 2005.

(Source: World Bank, 2016)

2 BUT THEY'RE LESS HEALTHY



Worldwide obesity has nearly doubled since 1980.

(Source: World Health Organisation, 2016)

3 KEY SKILLS ARE HARD TO FIND



80% of employees say wellness programmes would be crucial to attracting and keeping them over the next ten years.

(Source: CoreNet survey: Sustaining talent through wellbeing in the Workplace, 2014)

4 AWARENESS OF STRESS AND MINDFULNESS IS GROWING



79% of people say that balancing private and professional commitments is a cause of stress.

(Source: CoreNet survey: Sustaining talent through wellbeing in the Workplace, 2014)

5 TECHNOLOGY IS MAKING IT EASIER FOR PEOPLE TO MANAGE THEIR HEALTH



\$70bn: the size of the market for wearable health management technology by 2025 will be.



74%

OF EUROPEAN OCCUPIERS HAVE A WELLNESS PROGRAMME IN PLACE.



WHAT WILL THIS MEAN FOR THE FUTURE OF WELLNESS IN THE WORKPLACE?

By 2040 the lines between home and work will have blurred. Medical treatment won't be restricted to the clinic. And the workplace will offer responsive features like mood-adjusted lighting and services such as advice and healthy dietary options. This will boost our health, performance and productivity.



HOW SHOULD ORGANISATIONS RESPOND?

There is an opportunity for organisations to boost their competitiveness, attract talent and manage their employee costs by introducing wellness initiatives.

To achieve lasting, successful wellness programmes they should:

- create a wellness strategy
- carefully consider workplace design
- flex their programmes according to local culture
- use a set of clear measures to demonstrate return on investment
- take a cross-organisational approach

(Source: IDTechEx)

PART 1 TOMORROW'S WORKPLACE

You only have to look back at the past ten years or so to understand how much in life and society has changed and how quickly. And there's more to come with developments which promise to transform how we live and work over the next twenty or so years.

The CBRE Global Workplace Innovation Roadmapping project is a chronological study of emerging consumer, social, market, industry and technology trends influencing us over a timeframe to 2050. By mapping trends and building meaningful trend combinations that support each other, it creates future scenarios that inform us about change at an early stage. The roadmap highlights the fact that the focus on health and wellness will experience a major shift in our society.

CBRE has combined the trends uncovered from its roadmapping project with its 'Smart Workplace 2040' research which looks at how people will work in the year 2040. This has helped create a picture of the workplace of the future.

Through the Smart Workplace 2040 research we predict work will be more flexible. And as a result, people will determine where and when they do their jobs and there'll be no limit to how long or little employees work as long as the work gets done.

Technology will help people do this – it will surround them and be a key enabler, allowing people to merge their private and professional lives and to devote more time to their health than in the past. In short: they'll have greater autonomy and freedom.



According to CBRE's research, the following features will characterise worklife in the future.⁷

CHOICE:

The ability to decide where and how you want to work.

ADAPTABILITY:

The ability to adapt work patterns to meet private needs and family commitments.

WORK:

Entrepreneurship – moving across jobs, contracts and organisations choosing which to prioritise according to their own personal values and those of the company.

LOCATION:

Deciding where we work.

WORKPLACE:

Access to 'trophy workplaces' that make going to work an easy, comfortable or even luxurious experience.

SERVICES:

Services in real-time that respond to peak demands.

WELLNESS:

Emphasising health and wellbeing over work.

NETWORK:

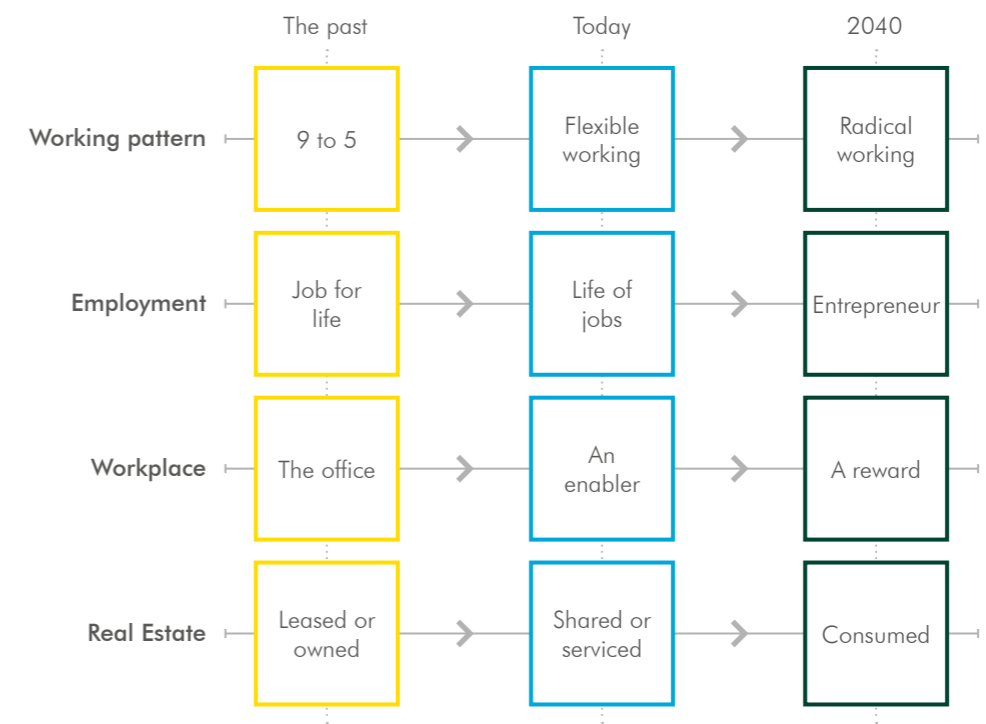
A reliance on an extremely wide network of experts in order to do work.

RETHINKING WHERE AND HOW WE WORK

New ways of working and changing attitudes towards wellness will have a major impact on the workplace and so will the facilities and services it offers. How we interact with our built environment will also change. By 2040 facilities will not be owned anymore but 'consumed.'

The real estate portfolio will more closely resemble a network of workplaces and the office or 'HQ' will become a 'trophy workplace.' Figure 1 describes the changing face of employment and the workplace in the decades to 2040.

FIGURE 1: THE CHANGING FACE OF EMPLOYMENT AND THE WORKPLACE IN THE DECADES TO 2040.



Source: CBRE, 2016

THE TROPHY WORKPLACE

A trophy workplace is a highly experiential working environment designed to help people meet and network with others, but in the future it'll also be a place that allows true offline time. This could involve time spent in a shielded environment with none of the electromagnetic radiation that you get from certain types of lights or communication systems. Or it could be a restaurant or space without wireless or Internet connection that allows people to 'switch off.'

It'll be a responsive environment too with embedded sensors and integrated technologies, which, hidden behind the surface, manage lots of requirements, simultaneously. And with the technological advances that we're already beginning to see in play, such as WiFi enabled thermostats adjustable via smartphones – this scenario is not only easy to imagine, but also not far away.

PEOPLE WILL BE ABLE TO DETERMINE WHERE AND WHEN THEY DO THEIR JOBS

DISRUPTION OF THE DOCTOR-PATIENT RELATIONSHIP

Moving forward, the classic doctor-patient relationship will change. New digital platforms and services will help clinicians to work more closely with their patients. Improved communications through intuitive apps and capabilities, and access to cheaper tablets mean that many families will, and in many cases are already, looking beyond their doctor to a range of other sources for information and advice.

Doctors will support the user (no longer just a patient) to interpret and make the most of complex information and data in order to introduce health improvements. So it doesn't take a leap of imagination to see treatment moving beyond the doctor's practice. It's not unlikely that it could move into the workplace given this is where people spend a lot of their time.

CHANGES IN HEALTHCARE

To understand how wellness will feature in the workplace of the future, you need a clear picture of how healthcare technologies promise to revolutionise health as we understand it today.

TECH GIANTS IN HEALTHCARE: DIY HEALTH AND PATIENT EMPOWERMENT

We're already becoming increasingly empowered to take greater control of our own wellness because technologies are opening up lots of new opportunities. Life sciences and engineering are converging and we're beginning to see embedded or implanted technologies, integrated seamlessly into our environment and even under our own skin.⁸ Implanted technology for example, subcutaneous chips that enable amputees to work prosthetics with their remaining muscle memory are already in the market – as is Google's patented removable contact lens that monitors glucose levels in the wearer's tears.⁹ Other, different uses for chips and lenses are just a matter of time. And what this means is that people will increasingly be able to monitor their bodies and their health and use that data.

GREATER TRANSPARENCY AND PERSONALISED HEALTH

Digital technologies will support the drive for more transparency in individual health, which means that in the future all personal health related data could be combined into one digital platform where doctors, scientists, researchers and physicians can access it. If this happens, it's likely that it will lead to new forms of collaboration between healthcare stakeholders and greater efficiency in patient treatment as well as in research. And it's likely that all the data created, will be used to give personalised treatment based on information relating to the individual. That personalised data, when linked to a 3D printer, could well result in bespoke medication.

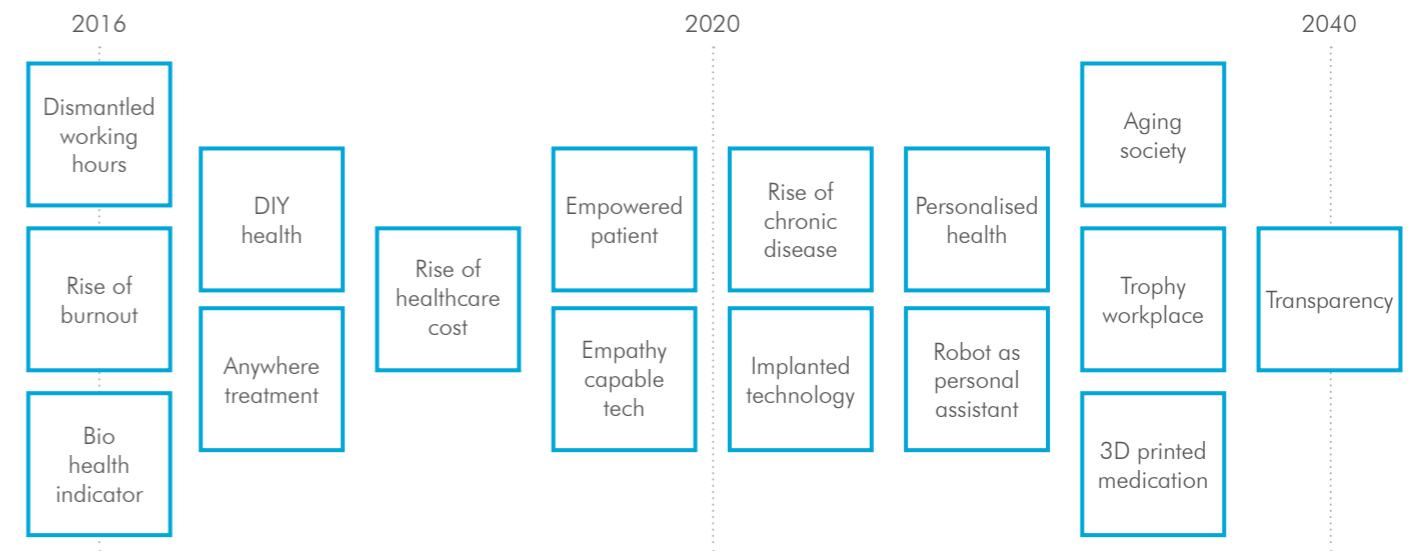
Figure 2 highlights how work, technology and health will transform in the coming decades to 2040.

To get a better idea of how this all comes together and how we'll live and work in 2040 read about a typical day for Nina in our panel: 'Living in a responsive environment.'



PHOTO: CBRE OFFICE, LA

FIGURE 2: WORK, TECHNOLOGY AND HEALTH IN THE COMING DECADES.



Source: CBRE, 2016

LIVING IN A RESPONSIVE WORLD

Nina wakes up slowly as the sensors in her pillow that detect sleep patterns, gradually bring her round. Today's a big day – she has a two-hour meeting with her team to finalise next year's budget. And she's not feeling well.

A SLOW START TO THE DAY

It was Jack her five year old son's first day back at nursery after a bad bout of flu and George her husband has already taken him in. She can see from a quick look at her phone that he's happily playing in nursery he has eaten his breakfast and all of his health indicators, including his temperature, look fine.

She gets up and heads to the kitchen. The chip – an 'epidermal electronic system' (EES) embedded in her arm – feeds a monitor with information about her health indicators including her heart rate, blood pressure, temperature and sugar levels. Her kitchen-aid, a robotic cook, has already prepared her fruit yoghurt and sunflower seeds for breakfast as her health indicators show she needs a boost of vitamin C and vitamin B1. A personalised health drink has also been prepared for her. Her EES system informs her she needs to drink exactly 420ml of water to regain the right hydration levels following her night's sleep.

Her phone beeps to indicate her temperature is slightly above normal, and this could indicate the early stages of Jack's flu. She uses this information to shower at the right temperature and selects the 'aromatic steam' setting to help clear her sinuses.

A MORNING'S WORK AT HOME

Thankfully nowadays companies encourage people to work from anywhere, so she decides to take the first hour of the day to look at the budget in her home office, where her standing desk with built in treadmill, allow her to also get some gentle exercise. By the time she's finished, she's completed 35 percent of her recommended daily activity for the day.

Before leaving for work, Nina brushes her teeth. And this morning her smart toothbrush detects the early stages of tooth decay. It automatically links with her electronic calendar and books her an appointment with the on-site dentist at work. As she still has a lot to prepare for the meeting, she takes the driverless car to the office, so she can continue to work and also uses the journey time to video conference two of her colleagues in Asia for input.

When Nina arrives in the empty meeting room, she feels hot and anxious about the meeting ahead. Her EES registers her cortisol levels, heart rate and temperature with the sensors in the room. And while she's waiting for her colleagues to arrive, the lighting and temperature dip to cool and calm her down.

Once her colleagues arrive, or dial in via video conference, they all get down to business, discussing what they'll present to the board. The purpose of the meeting has been logged in the central room booking system and lighting and temperature revert to pre-set levels to support the team's alertness and productivity.

A QUICK RE-BOOT

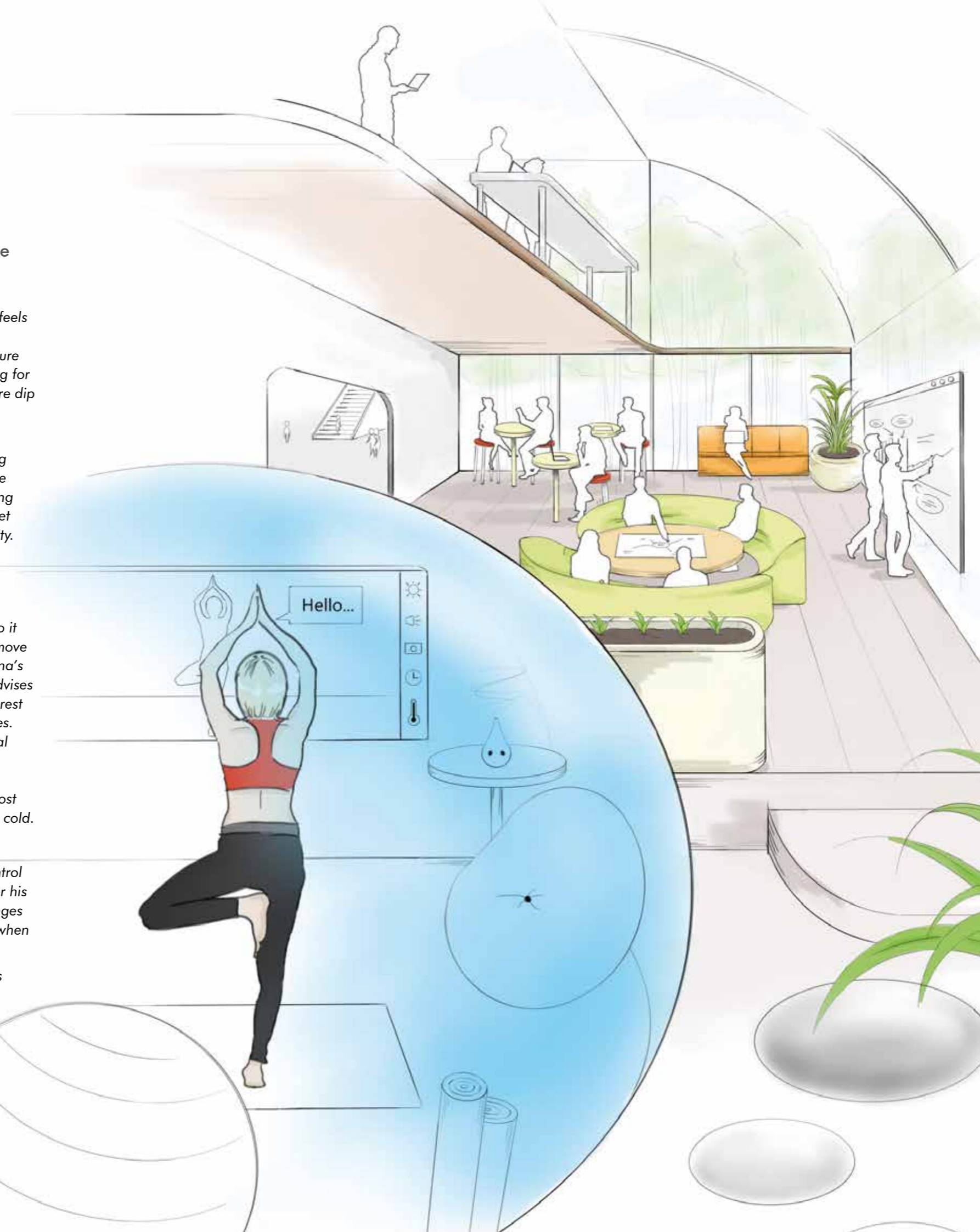
With the budget completed Nina heads out of the meeting room. The office has registered that one of the participants has a slightly raised temperature, so it automatically starts a deep clean programme to remove any potential germs before the next users arrive. Nina's EES notes her temperature and energy levels and advises a quick rest break. Her phone directs her to the nearest free relaxation room and she books in for 30 minutes. The room's high resolution screen adapts to personal sound and visual preferences. Nina selects a beach scenario and soundtrack. The screen suggests some gentle yoga exercises that she should do to help boost her immune system, and help her fight the potential cold.

CHECKING IN ON THE FAMILY

Having rested, Nina checks her phone via voice control to see how Jack's doing. According to his transmitter his temperature has increased slightly and so she arranges a video consultation with the GP and homoeopath when she gets back in the evening.

Nina has a team of trusted health advisers she turns to as she's empowered by technology to interpret complex information and introduce holistic health improvements into her and her family's lifestyle.

Nina then gets a green smoothie from the healthy vending machine and gets on with the rest her day.



PART 2 THE FIVE TRENDS DRIVING THE GROWTH OF WORKPLACE WELLNESS

The CBRE Global Workplace Innovation Roadmapping Project has identified five trends fuelling the demand for wellness programmes now. The successful organisations will be those that respond to them by reviewing their own approach to wellness and taking on board both mental and physical health and wellbeing.

DRIVER 1: EMPLOYEES ARE LIVING AND WORKING LONGER

In many parts of the world, the workforce is aging. Since 2005, the average life expectancy globally for both women and men has improved by nearly two years.¹⁰ More of us are choosing to work past the standard retirement age and many countries are raising the age of retirement in an attempt to slow the escalating costs of pensions and healthcare for retirees.¹¹ People are either working longer or launching supplementary careers because they're ready for a change.

The evidence is that the preferences of older employees are likely to be different to those of other age groups. A 2015 AON/AARP study¹² on workers aged 50+ found they put a higher value on non-financial factors such as flexible work or working from home than on money or titles.

How should business respond? The CBRE 2011 joint survey with CoreNet Global¹³ identified the workplace measures needed to accommodate an ageing workforce. It recommended that employers put in place stay-at-work programmes. These should include greater flexibility to support a range of non-conventional working patterns. Contracts might specify a number of hours per year, but how and where they're delivered is the employee's choice so long as deadlines are met and bottlenecks avoided.

These programmes would benefit business too. Organisations that make the most of the skills and experience of older workers stand to gain a big competitive advantage by developing a pool of highly experienced, flexible retirees as interim or short-term temporary consultants or contractors.¹⁴

This is in line with a wider organisational shift. As sought-after management skills and competencies change, businesses are starting to focus on running dispersed project teams which work in different time zones – and in different locations. What team members have in common are objectives, priorities and deadlines. Individual members can manage their own time as long as they accommodate other members of the team.

DRIVER 2: DECLINING HEALTH

While we're living longer, we're not necessarily living healthier lives. Worldwide obesity has nearly doubled since 1980¹⁵ and non-communicable diseases such as heart disease, cancer and diabetes now account for more than 60 percent of all deaths worldwide.¹⁶

The World Health Organization estimates that if the known risk factors of chronic diseases were eliminated, at least 80 percent of all heart disease, strokes and type-2 diabetes and over 40 percent of cancers, would be prevented.¹⁷ The World Economic Forum identifies such non-communicable diseases as a leading threat to global economic growth.¹⁸

A key consequence of declining health is rising healthcare costs. A 2013 study from MetLife and the Sloan Center on aging and work reported that the double whammy of declining health and increasing healthcare costs will effect businesses in different ways and change perspectives on wellness provision and outcomes.

For example US companies tend to pay a large portion of employee healthcare costs and the US spends lots more per capita than any other country. They're increasingly keen to learn about employee wellbeing and its potential to reduce these costs.

Outside the US, where governments provide much more healthcare funding and medical costs are lower, employers are focusing on reducing employee absenteeism as well as improving productivity and staff engagement.¹⁹ The cost of doing nothing is too high: absenteeism and presenteeism alone represent as much as two percent of GDP in both the UK and US.²⁰

So there is a growing financial incentive for organisations to support and promote a healthy lifestyle with schemes that encourage exercise and healthy lifestyle choices through to, for example, onsite medical facilities, lunchtime exercise classes and healthy options in vending machines.

TABLE 1: CHANGE IN RETIREMENT AGE 2004 VERSUS 2014 FOR AVERAGE OR MALE EMPLOYEES

COUNTRY	2004 RETIREMENT AGE	2014 RETIREMENT AGE
Japan	60 years	65 years
Lebanon	60 years	64 years
Italy	62 years	66 years, 3 months
Malaysia	55 years	60 years
Poland	65 years	65-67 years
Greece	65 years	67 years
Spain	65 years	67 years
Portugal	65 years	66 years
Australia	65 years	65-67 years
Germany	65 years	65-67 years
United States	65 years, 4 months	65-67 years

Source: Mercer's 2014 Worldwide Benefit and Employment Guidelines

DRIVER 3: KEY SKILLS ARE HARD TO FIND

With high levels of employment in key global markets, and an aging workforce in many Western countries, one consequence is the well-documented 'War for Talent'. Recruiting employees with the right skills and then keeping them is a costly and highly competitive business.

CBRE research shows that wellness can make a difference to an employer brand. In a 2014 study from CBRE Global Workplace Solutions and CoreNet Global, 80 percent of employees agree that the wellness offering of an organisation will be crucial in attracting them to, or keeping them in, an organisation within the next 10 years.²¹

And there are clear benefits for organisations that fine tune their wellness offer to match what their employees both clearly need and say that they want.

SMART EMPLOYERS ARE STARTING TO THINK ABOUT WELLNESS NOW, WHEN EXPECTATIONS AND DELIVERY COSTS ARE RELATIVELY LOW.

A PwC report found that:

- a nine percent drop in staff turnover saved one financial services organisation \$2.7m in the first phase of its wellness programme
- a 10 percent reduction in staff turnover saved one professional services organisation \$770,000 in one year.²²

So developing a focus on wellness makes sense from a talent perspective. And perhaps surprisingly, employees are not seeking radical new benefits, but the standard ones that you'd find in any good workplace.

As programmes become more common employee expectations will rise. Today's priorities will become tomorrow's minimum baseline. So smart employers are starting to think about wellness now, when expectations and delivery costs are relatively low.

TABLE 2: TOP 10 EMPLOYEE WELLNESS PRIORITIES.²³

POLICY AND CULTURE FEATURES
Flexible working to improve work-life balance
Private health insurance
Sense of community
Reduced extra hours
PHYSICAL ENVIRONMENT
Opportunity to exercise
Availability of healthy food options
Adjustable desks
On-site amenities (eg. child care, dry cleaning, banking)
HEALTH SERVICES
Medical advice from doctors, check-ups from nurses
Health advice on matters including diet and ergonomics





PHOTO: CBRE OFFICE, MADRID

DRIVER 4: A GROWING AWARENESS OF STRESS AND MINDFULNESS

Stress is experienced by most people during a normal working week and is a major cause of burnout and depression. According to a CBRE survey 79 percent of respondents stated that balancing private and professional commitments was a cause of stress. Some 72 percent also mentioned high expectations of themselves.²⁴ And as with most of the trends that we've mentioned the result can mean more cost to employers.

- Some 10.4 million working days are lost due to stress in the UK in one year; affected employees miss an average of 24 working days per annum (over 10 percent of their working year).²⁵
- As long ago as 2002, the European Commission calculated the costs of work-related stress in the EU at €20bn a year. This figure was based on a survey that found that the total cost to the EU countries of work-related illness was between €185bn and €289bn a year, indicating that 10 percent of work-related illness was stress related. This percentage was applied to a conservative estimate of the total cost of work-related illness (€200bn) to get the figure of €20bn for the cost of work-related stress.²⁶
- In an EU-funded project carried out by Matrix (2013), the cost to Europe of work-related depression was estimated to be €617bn annually. The total was made up of costs to employers resulting from absenteeism and presenteeism (€272bn), loss of productivity (€242bn), health care costs of €63bn and social welfare costs in the form of disability benefit payments (€39bn).²⁷
- Up to \$227bn is lost in the US every year due to employee absenteeism or presenteeism.²⁸

These costs can be managed and even reduced. One way organisations can do this is through offering employees the flexibility to balance their professional and personal lives in terms of when and where they work.

And this can give employers the opportunity to consolidate space and save energy. A recent desk sharing and working-from-home programme enabled one London-based CBRE client to make annual real estate savings of approximately \$1m and reduce energy use and staff churn costs by 73 percent and 80 percent respectively.²⁹

10.4 MILLION WORKING DAYS ARE LOST DUE TO STRESS IN THE UK IN ONE YEAR

Another source of stress is the 'always on' culture. This was highlighted in a recent survey of CoreNet members – 53 percent said it was a source of stress.³⁰

The downside of digital technologies is the relentless pressure to communicate and respond instantly. People reach for their phone over 150 times a day³¹ and many of us rarely disconnect for fear of missing out. This can leave people unable to re-charge which in turn causes stress. One consequence of the 'always on' society is a growing focus on mindfulness and the need to be aware of the state of people's mental wellbeing – positive or otherwise.

Harvard University professor Leslie Perlow studied the impact of disconnecting on a global consulting team that unplugged for a scheduled period of time each week.³² His work demonstrated that those who did manage to switch off showed significantly lower stress levels and their job satisfaction jumped by half (from 49 percent to 72 percent).

This chimes with CBRE Digital Native research which found that one in three (33 percent) experience a sense of liberation and relief when they do not have their technologies with them, since those technologies add pressure to their lives.³³

France and Germany are working on new laws that will mandate 'down time' for employees. How effective those laws will be in changing behaviour remains to be seen.

But some companies are already taking steps to combat the pressure to remain connected. Volkswagen's email amnesty³⁴ which limits access to work devices after core business hours for most of its staff is one example of this. Daimler is another employer that is looking to help reduce stress. It has introduced an email auto-delete option for employees on holiday, to avoid the stress of being confronted by a full inbox and losing any benefit of that week on the beach.³⁵

And increasingly employers are looking at measures like providing advice services for employees and training managers to recognise it and to take action to alleviate it.³⁶ This involves acknowledging that issues exist – for example excessive workloads – and showing a commitment to address or alleviate them. It could also involve making resources like advice services available and training managers to spot when people are under stress and to take action.

DRIVER 5: TECHNOLOGY IS MAKING IT EASIER FOR PEOPLE TO MONITOR AND MANAGE THEIR HEALTH

Brands like Apple, Nike and Garmin already offer a huge array of gadgets and apps to help us get fitter, faster and stronger. Biometric sensors and wearable technologies capture real time data on our sweat levels, pulse, heart rate, body temperature and movement so that we can detect stress, tiredness or illness. This technology will act as an enabler to the increasing number of people who want to proactively manage their health.

It's quite possible that we'll see these tracking technologies introduced and blended into the workplace as progressive employers use the data they produce to create supportive and desirable working environments, increasing productivity and reducing presenteeism.

The challenge for technology providers and employers alike will be to persuade employees to overcome their concerns about privacy and security and persuade them that they'll benefit from adopting these technologies rather than end up being punished by them.



PHOTO: CBRE OFFICE, MADRID

PART 3 HOW ARE COMPANIES ADDRESSING WELLNESS TODAY?

Three-quarters of respondents to this year's CBRE European Occupier Survey revealed that they're running formal wellness programmes for employees.³⁷ The form those programmes take, very much depends on the organisation and its culture.

VIRGIN PULSE CONNECTING AND INCENTIVISING PEOPLE

Virgin Pulse's stock in trade is to help organisations like BP provide wellness programmes to their employees. Offering a combination of mobile apps, online portals and rewards, it creates wellness schemes tailored to individual company conditions and culture. One client, Houston-based global manufacturer of chemicals, polymers and fibres, Ascend, is a case in point. It used Virgin Pulse's online platform and social networking tools to connect its dispersed workforce. And a system of rewards encourages people to – amongst other things – complete biometric screenings and hit activity goals. By making healthy changes and boosting their exercise, 73 percent of Ascend's participating employees are now getting enough physical activity to meet recommended levels for good health.³⁹



Virgin Pulse programmes encourage employees to – amongst other things – hit activity goals like completing their first 5K run.

M&S 'KEEPING THE HEALTHY, HEALTHY'

Retailer Marks & Spencer saw a seven percent reduction in sickness absence in the UK and Republic of Ireland in the opening month of its wellness programme. The programme's stated goal is 'keeping the healthy, healthy' and since its inception more than 652,000 individuals – M&S employees plus other workers from across the company's supply chain – have been trained in their own health and wellbeing, including healthy eating, exercise and mental health awareness.³⁸

CBRE A STATE OF THE ART WELL BUILDING

CBRE's offices in LA, Amsterdam, Warsaw and Madrid are inspired by the principles of the WELL Building Standard⁴⁰ for air, water, nourishment, light, fitness, comfort and mind. The certification was conceived by US-based real estate developer, Delos who has pioneered 'wellness real estate'. It includes features that help sustain both the environment and enhance people's health and wellbeing.

By using evidence-based wellness designs and technologies we want to create a place where people are encouraged to make healthy choices and feel energised. The idea is to give people an environment where they want to be every day, can focus and where they can be productive.

A mix of features and services.

These buildings offer a range of health and wellness features as well as services, designed to promote mental and physical wellbeing.

- **Advanced lighting** is designed to avoid disrupting people's natural 24 hour: circadian rhythms – while also helping them see as clearly as possible. The lighting is dimmable and has sensors which mean it can be triggered by movement.
- **Biophilic air treatment** cleans the air using plants that filter harmful volatile organic compounds and CO². And it provides fresh oxygen.
- **Advanced water purification** reduces disinfectant by-products, chlorine, pesticides and some pharmaceutical and personal care products for the cleanest, most purified tap and sink water.
- **Hydration stations** placed every 100 feet with highly filtered cold water encourage employees to hydrate.
- **Stretching and relaxation** areas can be found on each floor.
- **Cardiovascular equipment** like treadmill desks, encourages employees to be less sedentary.
- **Dietary and nutritional info on display** provides nutrition awareness and promotes healthy eating habits.
- **Stairways with enticing artwork** as well as enhanced lighting and design encourage people to use the stairs rather than the lifts.
- **A wellness concierge** gives health and wellness guidance to employees on request.
- **A juice station** allows people to extract and blend juice from fruits and vegetables.

BROOKLYN BOULDERS SOMERVILLE

Brooklyn Boulders Somerville is an interesting example of community space that inverts the wellness trend, whilst emphasising the power of body and mind. Created for the climbing community, the centre offers a climbing hall with yoga classes, personal trainer and various fitness classes. But this community which is also highly physically active and inclusive also offers a work environment with collaboration spaces, WiFi and lounge spaces. The founders see the community as something that fosters creativity and entrepreneurial thinking by stimulating body and mind.



PART 4 HOW TO BUILD A WELLNESS PROGRAMME IN YOUR ORGANISATION

Changing attitudes towards wellness and the rise of technology will have a major impact on the workplace, on the facilities and services it provides, and on how people will interact with their built environment.

But opportunities to promote workplace wellness already exist in any organisation. And in the short-term there are some simple, low-cost ways to encourage it in your organisation.

WORKPLACE WELLNESS IN THE SHORT TERM

There are a number of short-term and low cost solutions which employers can take to boost wellness.

- Make sure that managers are aware of the resources that are already available, like employee assistance programmes.
- Use a meeting room to run lunchtime yoga or low impact pilates classes.
- Offer healthy options only in the cafeteria and from vending machines, put the onus on suppliers to make this happen.
- Offer subsidised gym membership.
- Open window blinds and flood the work space with natural light.
- Base location decisions on hours spent in the office rather than seniority. Give people who are deskbound the workstations by the window.
- Make sure employees take regular screen breaks.
- Promote simple stretching exercises after sitting for an extended period (sitting is the new smoking) or walks around the building for a few minutes to get some fresh air.
- Offer lunchtime seminars on healthy habits, and encourage senior leaders to take part.
- Make sure that if you offer flexible and remote working, you promote these options and encourage managers and employees to trial them.



OPPORTUNITIES TO PROMOTE
WORKPLACE WELLNESS EXIST IN
ANY ORGANISATION

WORKPLACE WELLNESS IN THE MID TO LONG-TERM:

Mid to long-term workplace wellness programmes demand a more holistic approach. It's important to create a strategy rather than just adopting a series of individual initiatives. That strategy should have some defined objectives which are measured and regularly reviewed.

What your approach looks like depends on the strategic goals of your business as well as things like culture, the number of employees you have, demographics, where your workforce is and the buildings they currently work in. Organisations that want to get lasting value from workplace wellness should consider the following factors.

1. WORKPLACE DESIGN

Almost half the wellness features employees look for relate to physical workspace. The right workplace design will optimise the quality, quantity and type of working and recreation spaces, and offer a variety of catering options and on-site amenities. Underpinning this, the building management system should focus on local control of the environment, technologies and facilities. In the future, traditional workplace success measures such as number of workstations, use of space and occupancy-per-square-foot may be replaced more widely by other measures such as staff turnover, employee satisfaction and productivity.

For companies who don't currently have a policy on allowing flexible and remote working, introducing these arrangements can help employees in a number of ways.

- It's ideal for work that needs individual focus and minimal interruptions.
- It gives people a choice of where to work, and some control over how they structure their work.
- It saves a long commute for many.
- And it contributes to a better work-life balance, allowing people to take deliveries and helping them to be at home in time for children's bath and bedtimes.

2. DIFFERING AUDIENCES AND CULTURES

A global workplace wellness program needs to be adaptable to be relevant to different cultures and demographics. The wellness expectations of a 24-year-old man who plays football twice a week are likely to be different to the expectations of a 58-year-old woman preparing for retirement. The approach to exercise in Germany may be radically different to exercise routines in China.

Whoever and wherever the workforce might be, incentives can be used to increase participation and reward achievements.

3. RETURN ON INVESTMENT

Workplace wellness programmes must demonstrate value or they risk being seen as expendable. It's difficult to directly measure return on investment (RoI) from wellness programmes but it's clear that they do deliver softer benefits which have an indirect impact on the bottom line and which can be important like an improved corporate profile and increased engagement from healthier employees.

The more data gathered to establish a baseline, the more robust the business case will be. Even basic information gathering, such as age, gender and absence profiling will enable a more tailored programme to be developed. With employees' consent, data can also be gathered on health status (prevalence of illness and disease, weight) and lifestyle factors (smoking, alcohol consumption, exercise levels) to create a detailed view of employee wellness and how a global programme can support and improve it.

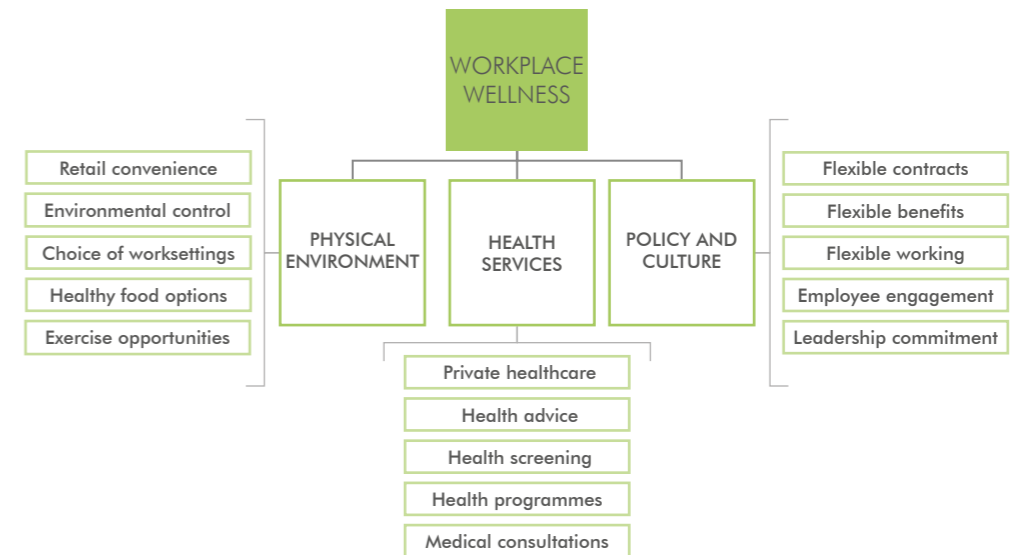
4. THE IMPORTANCE OF AN HOLISTIC APPROACH

For wellness programmes to really work, they can't be applied by just one team in an organisation. Key functions across the organisation have to work together to make sure it's an authentic lasting approach and that the programme will succeed.

To take workplace wellness to the next level, the goal should be to create a tailored service offer, from healthy food options to physical and mental relaxation spaces, ergonomic work stations to exercise opportunities: in short a workspace which promotes health and wellness. For that to happen, facilities management, human resources, IT and the real estate team have to work together.

Figure 3 shows the three components that make up the concept of wellness. As you can see, there is a key role for real estate and facilities management to play in delivering workplace wellness with for example the 'physical environment' as well as in wider areas such as offering healthy food options.

FIGURE 3: THE THREE DIMENSIONS THAT INFLUENCE WELLNESS PROGRAMMES



Source CBRE Global Workplace Solutions

DELIVERY: THE KEY TEAMS AND RESPONSIBILITIES.

So given that an holistic, pan organisational approach is important, who should be responsible for what?

Leadership: the key to lasting success.

Every wellness programme will demand a degree of change. Senior management support is essential for driving change and embedding new cultures. Also consider employing local wellness champions to role model and encourage new behaviours.

Workplace and real estate: creating the workplace of tomorrow.

The focus for these functions will be to locate, design and build social, cohesive and adaptive working environments which will empower and energise people. The right types of workspace help teams to collaborate and deliver, whatever the context. And it will be down to real estate and facilities management to monitor and improve people's work experiences by integrating unobtrusive technologies into buildings and spaces to track and record usage.

Facilities management: supporting the one and the many.

Facilities managers will have to be both proactive in seeking out and providing new wellness services and responsive to people's needs as they evolve. So they'll need to work across the business and partner with other divisions and departments to provide a unified service offer which can be tailored to the individual through things like healthy food options, physical and mental relaxation spaces, ergonomic work stations and exercise opportunities.

Human resources: driving mobility and agility.

HR departments will start to unbundle the 'fixed office hours' model in the near future. When they do, they'll support the drive towards more flexible working contracts, increasing employee mobility and entrepreneurial behaviours. The result? A range of unconventional working patterns based on output rather than attendance.

Incidentally, this will mean that the gap between HR services and facilities management services will close as the workplace becomes more closely shaped to workforce needs and different working styles.

IT: enabling change.

Technology solutions will continue to evolve. 'Empathy-capable' technology that is responsive to individual needs – such as mood or temperature – will improve employee empowerment and enhance personal wellbeing. Once empowered, employees will see the value of sharing personal data with employers. Project managers will see how employees are actively managing their wellness and seek out the best wearable or implanted technology solutions for them to provide personalised, preventative healthcare solutions.

PART 5 WELLNESS IS COMING OF AGE

The concept of workplace wellness is not new. We've long recognised that employee health and efficiency have a clear connection. Healthy employees take fewer sick days and are more productive at work.

Wellness programmes offer companies tremendous opportunities to build more successful, sustainable businesses with sites and workplaces that support both the corporate agendas of employers and the personal agendas of employees.

By improving the health and wellbeing of its workforce, an organisation can create a distinct competitive advantage through reduced healthcare costs, less absenteeism, increased productivity, as well as improved staff retention levels and space utilisation. Wellness programmes are a win-win and, quite simply, make good business sense.

WELLNESS PROGRAMMES ARE A WIN-WIN AND, QUITE SIMPLY, MAKE GOOD BUSINESS SENSE.

The big difference now is that due to long-term demographic and social changes, wellness in the workplace is now coming of age.

Employees are no longer being left to their own devices, to compartmentalise health and exercise into their personal time. If they're not already, employers will soon get involved and companies will see the advantages of supporting and investing in a workforce and workplace fit for the future.

SO WHAT DOES THAT MEAN FOR CORPORATE REAL ESTATE?

In future landlords, and global heads of real estate, as well as other key functions like HR will have to work together to deliver a very different workplace and different work experience. It's this kind of holistic method which will make the difference between a short-term approach and more fundamental change with a lasting impact on the bottom line.

There is no single off-the-shelf wellness programme. How organisations approach and design wellness programmes will depend on lots of things, not least the culture of the organisation.

Other important considerations will include the design of the workplace. Almost half the wellness features employees look for relate to physical workspace. The right workplace design will be important for delivering the right type of working and recreation and wellness related-services.

As with most corporate programmes, building a business case for wellness and demonstrating RoI will probably determine the extent to which it's adopted and therefore succeeds. Establishing a good baseline of measures and tracking progress will help with this.

There are still challenges ahead when it comes to creating wellness programmes that have a lasting and positive impact. But those organisations that rise to the challenge will improve their workplaces, their peoples' performance and that of their organisation too.



ABOUT GLOBAL WORKPLACE SOLUTIONS

Global Workplace Solutions is a division of CBRE which supports occupiers of real estate, helping them to turn their real estate into real advantage.

It supports mainly corporate clients who buy services on a contracted basis across Europe, the Middle East and Africa and globally depending on their portfolio. Our 14,000 employees serve clients in 77 countries, helping them plan, acquire, design and construct, operate, adapt and then dispose of their property.

GLOBAL WORKPLACE INNOVATION

Companies must innovate to succeed in a rapidly changing world. That's why CBRE Global Workplace Solutions has created Global Workspace Innovation (GWi), an extensive workplace research and innovation programme for the corporate real estate industry.

GWi identifies and investigates workplace trends to understand their impact on the world of work. We apply our findings to drive innovation across our customers' facilities – introducing smarter ways of working, improving the end user customer experience, and making the workplace fit for the future.

GWi customer-focused programmes include:

- **global studies and analysis of workplace trends** – driving innovation through our customers' workplace.
- **roadmapping** – a chronological study highlighting developing and disruptive macro and micro trends that influence our customers' business and the industries they operate in.
- **research projects** – Digital Natives, Generation Y and the Digitization of FM — helping our customers to create workspaces that deliver a stellar, fit-for-purpose customer experience and attract and retain talent.

THIS REPORT

The predictions and recommendations discussed in this report are the culmination of several years of CBRE research and insight.

CBRE's Global Workplace Innovation Roadmap is the foundation. For over eight years we've worked with a range of trendspotting experts to help us establish a view of emerging trends and disruptors. Then, using the knowledge of CBRE consultants in markets around the world, we identify when those trends will start, peak and fall off. We code those trend as either 'micro trends' – just affecting one country or industry or market, 'macro trends' – influencing several sectors or countries or 'disruptors' – game changers that have broad and fundamental impact like for example sustainability.

In 2015 we built a picture of what the workplace of the future will look like based on scenarios that we'd created from our Roadmap. We set up workshops in Asia, Europe and the US comprising real estate experts, social commentators and corporate occupiers who challenged tested and validated those scenarios. And we published this work in our 'Smart Workplace 2040' report.

From these two pieces of work – where we've developed our understanding of the future of health, medicine and technology and our vision of the future of the workplace we've created 'Wellness in the Workplace – Unlocking Future Performance.'

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