

workthere

Wellbeing within flexible offices

Workthere Research - October 2021



Wellbeing within flexible offices

In our second Wellbeing report, we provide an analysis of the wellbeing offering of flexible offices (serviced offices and coworking spaces) as well as present the top ten ranking spaces in terms of their wellbeing offering, across the countries that Workthere operates in.

Our key findings are:



Use of space

85% of flexible offices have quiet rooms/booths. 61% have outdoor space and 42% include wellbeing space, which is an area where members can tend to their personal health needs (e.g. yoga rooms, meditation rooms, on-site gyms, etc).



Creating communities with social wellbeing

The number of flexible offices offering exercise or meditation classes has increased to 47% in 2021 from 39% in 2019. Additionally, 73% run at least 1 community event per week, with 79% running at least 1 event per month.



Lighting and air quality

The number of flexible offices that are continuously monitoring air quality has significantly increased from 25% to 42% in 2021 from 2019. Natural light is very much valued with 60% of providers reporting that over 80% of their private offices have natural light.



Encouraging Exercise

Just over a third of all flexible offices offer on site gyms and 58% offer gym membership discount of some sort. 75% of flexible offices offer bicycle lock-up facilities and 68% offer shower facilities.



Use of technology to enhance safety and wellbeing within the workplace

54% of flexible offices said that they were using touchless solutions to reduce contamination of surfaces and protect those working in their spaces, and 48% were utilising desk-booking apps to help manage congestion in their offices.



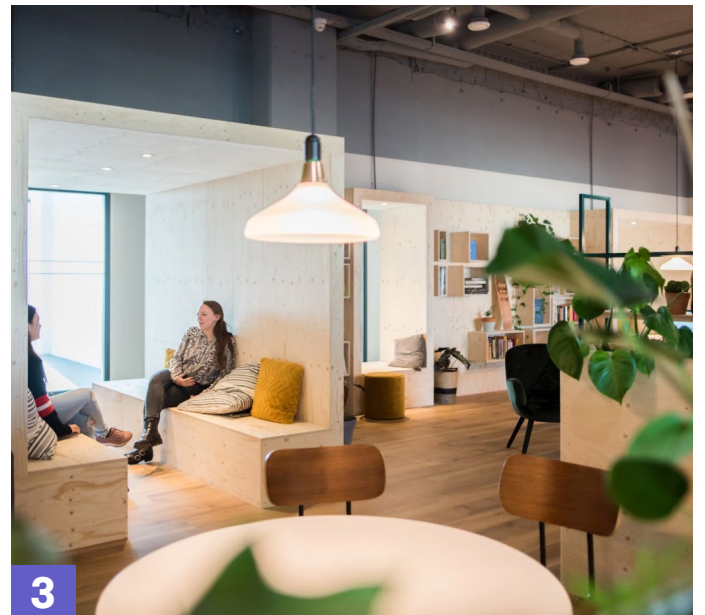
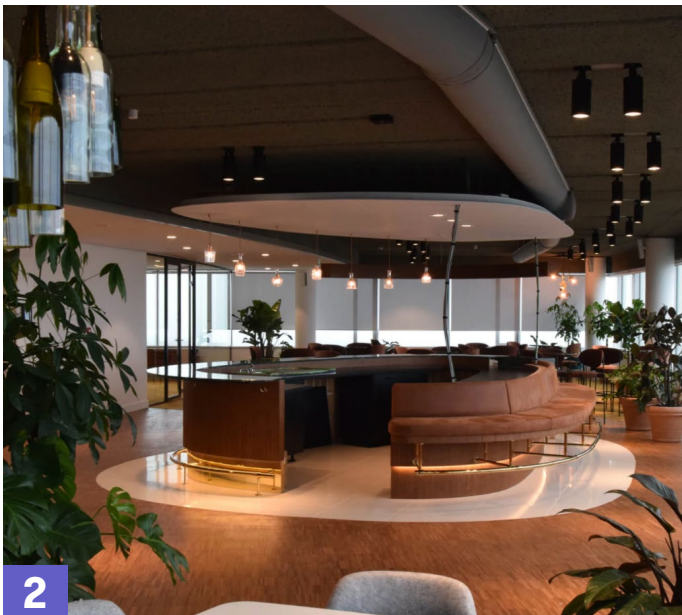
Accessibility

Flexible office providers have been doing more to make their spaces more accessible, with some providers having entirely overhauled their workspaces to make them wheelchair friendly and adjusted the acoustics within their spaces to ensure that they are more accessible for deaf members.



The flexible office wellbeing rankings

Ranking	Locations	City	Unique Features
1	Fora, Folgate Street	London	Folgate Street has an oxygen chair, which dispenses pure oxygen alongside guided meditation to help relaxation.
2	Frame Offices, Pharos	Hoofddorp	The Pharos building was designed with a sustainability focus, it has a zero waste policy and exclusively uses sustainable energy.
3	Microlab	Eindhoven	Microlab have an indoor tree with swings for when members need a break.
4	Tribes, Amstel Station	Amsterdam	Tribes have introduced the use of smart mirrors in their fitness rooms enabling use of virtual personal trainer.
5	Kwerk, Haussmann	Paris	Kwerk Haussman was designed as plant retreat in the centre of Paris, with a "bamboo" and "jungle" terrace to provide a haven within the city.
6	The Office Group (TOG), Douglas House	London	Douglas House has an Oxygen Room that is full of plants to give weary workers a brain boost.
7	Myo, Liverpool Street	London	MYO Liverpool Street have curated art collections that are refreshed every 6 months.
8	Iconic Offices, The Lennox Buildings	Dublin	The Lennox Building has an on-site library for members to use when they want to take a break and read.
9	Welkin & Meraki, La Defense	Paris	Welkin & Meraki at La Defense run regular exercise and yoga classes on the 25th floor with views out over Paris.
10	The Fisheries London	London	The Fisheries run weekly lunches for their members to get together and create a sense of community within the space.





Iconic Offices, Dublin

Introduction

Prior to the pandemic, employee wellbeing was a topic that was gaining traction and a factor that was making its way up the agenda for organisations large and small in terms of its importance and relevance to business performance.

However, over the last 18 months, we have seen the focus on employee wellness and wellbeing accelerate at pace as the impacts of movement restrictions, lockdowns and working from home all took their toll. As employees start to return to the workplace, many with a renewed set of work / life priorities, wellbeing continues to be an important topic and one that companies are increasingly focusing on.

Promoting wellbeing in the workplace can help create positive working environments where both individuals and businesses can thrive. The benefits of a happy, motivated workforce on the performance of a business have been well documented, whether that's increased productivity, reduced absenteeism or reduced stress of employees. Not only can looking after employees help improve the general wellbeing and productivity levels of

employees, but also is a way of reducing turnover and attracting top talent.

As a result of COVID-19 and employees working remotely, burnout has become more prevalent, according to Gallup's 2020 report, 76% of employees were likely to experience burnout. While many are now beginning to transition back into the workplace, this brings a host of other issues to the table as evidenced by McKinsey's recent survey which found that 49% of respondents who had not yet returned to work expected going back to have a significant negative impact on their mental health. It's therefore not surprising that employee wellbeing is now so high on every employer's agenda to ensure that they are providing support to staff as they return to the office and acknowledging the important role that the workplace has in this.



In terms of wellbeing, there is already a considerable amount that operators of flexible space are doing, whether this be by offering relaxation pods, incorporating of plants, hosting wellbeing events, providing gym discounts or even having their own distinct scent.

Our survey of flexible office providers explores how employee's wellbeing, whether mental, physical or social, is being supported within flexible offices. We have investigated standardised metrics such as the number of bike racks per 100 desks, the proportion of offices with natural light and the frequency in which high touch points are cleaned. We used these metrics to devise a points system to score participants and establish which

are the best flexible offices in terms of wellbeing. We have collated the results and come up with an overall Top 10 for those spaces which are currently best in class in terms of wellbeing.

This year we have tried to investigate how providers are utilising tech to support employee's. Some of the changes we have seen are the use of occupancy sensors to monitor areas of high traffic and respond accordingly, we have also seen the implementation of touchless solutions to reduce the spread of pathogens. Since our last survey some of the things that we have seen change are; more frequent monitoring of air quality, a higher proportion of plants in communal areas and more exercises classes being offered to members.

Supporting a return to the office – how focus has changed as a result of Covid-19?

As we have already established, the return to work has been filled with anxiety and uncertainty for some employees. We therefore decided to explore what was being done to reassure flexible office occupiers about the safety of their work environment and support them as they come back to work.

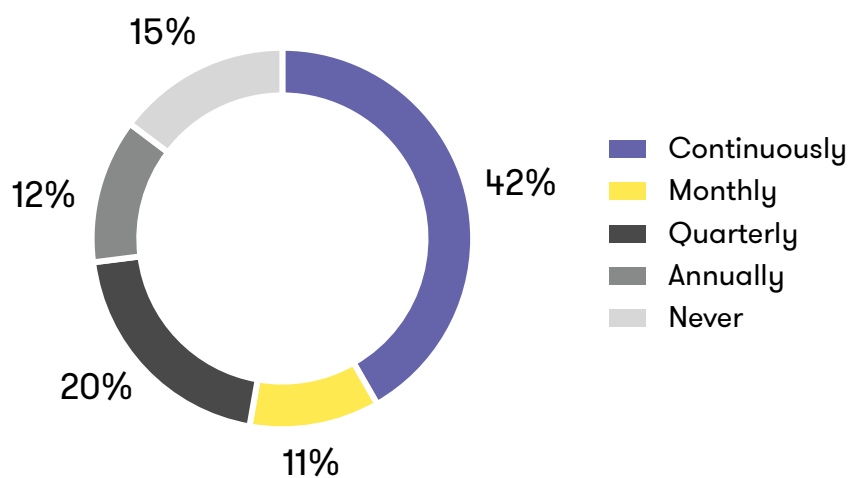
In our 2019 report we found that air quality measuring was conducted continuously by only 25% of respondents. This year we have seen a significant increase in the number continuously monitoring air quality, rising to 42% of flexible offices in 2021. This, combined with 53% of flexible offices implementing air filtration solutions, shows that providers are serious about providing the safest possible environment for their customers.

Besides air filtration, flexible offices have been employing various other technical solutions to reduce congestion of their spaces as well as protecting members from any pathogens that might be on surfaces. 54% of respondents said that they were using touchless solutions to reduce contamination of surfaces and protect those working in their spaces, and 48% were utilising desk-booking apps to help manage congestion in their offices.

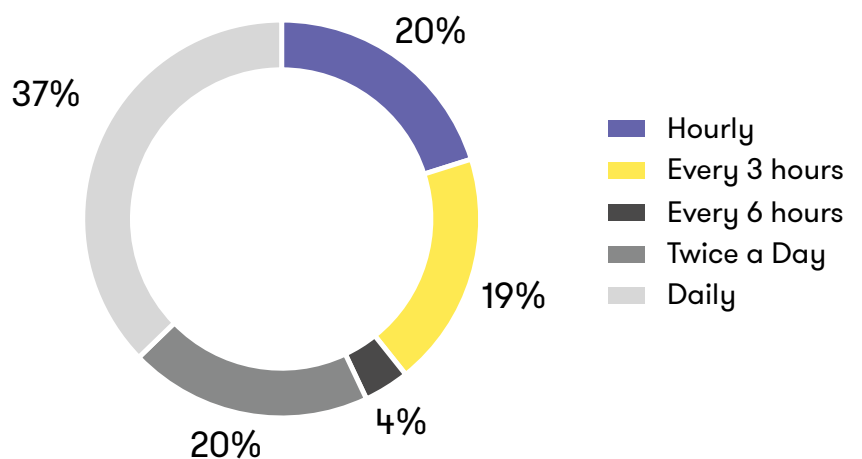
In additions to this, just under a third of respondents reported using occupancy sensors, so they were able to identify areas of high traffic within their building and ensure that these were given the right level of attention. While it's all well and good using high tech solutions, there's nothing like regular cleaning of surface to really keep an office safe.

To this end, providers have been trying to ensure that high touch areas are frequently cleaned, to reduce spreading of bacteria, with 39% reporting that they were cleaning these areas at least every 3 hours. These measures ensure that the workplace is significantly safer and provides a more comfortable environment to be in, and while this is still not quite the same as a controlled home environment, there is something more that the office offers, a sociable, collaborative environment.

Frequency of air quality monitoring



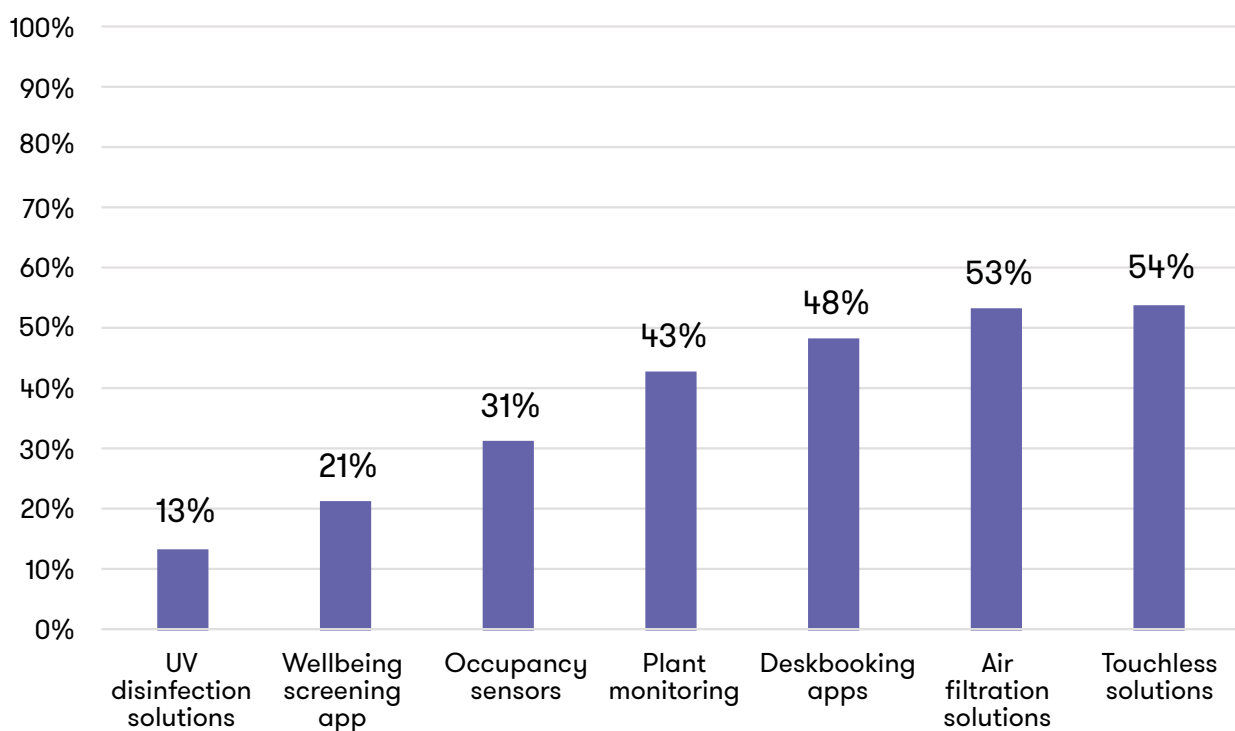
Frequency of high touch point cleaning





Kwerk, Paris

Use of Tech within flexible offices



Promoting healthy office environments

The office environment is something that has been discussed at length recently. Instead of just saying offices offer a more sociable and collaborative environment, we decided to research the various settings that one might use throughout a working week to accommodate varying types of work. By their very nature, coworking and serviced offices provide flexibility across a variety of areas including the actual lease length or, in this case, the flexibility of different work settings.

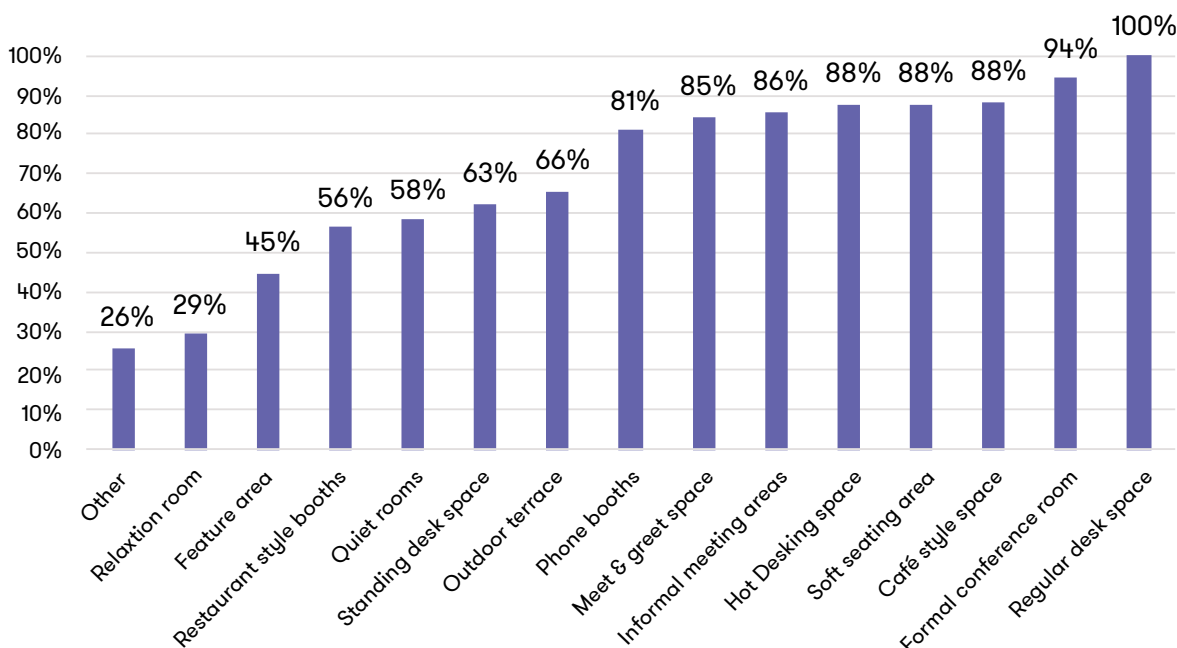
Whether it's regular desk space, phone booths, soft seating areas, standing desk space, outdoor terraces or even quiet rooms, you're more than likely to find it in a flexible office. Some of the spaces that responded to our survey even offered inhouse recording studios and cinema space! Our results found that all sorts of space is on offer for members to decide how they would like to work at any given point in the day (see different flexible office work settings). This choice of setting hands control back to members and by doing so has been shown to increase job satisfaction, creativity as well as the perceived team cohesiveness. By making this move away from purely offering desks, providers have been able to create more inclusive and collaborative work environments that promote a sense of community through amenity and variety. This in turn makes the workplace a more motivating and productive environment for all.

Another space that can benefit wellbeing is quiet rooms, which 85% of flexible offices reported having. These give workers the ability to concentrate and take advantage of doing deep work when needed without any distractions. We have also seen similar levels of flexible offices including wellbeing space with 42% reporting including some sort of space for yoga, meditation or even on-site gyms that are part of the membership.

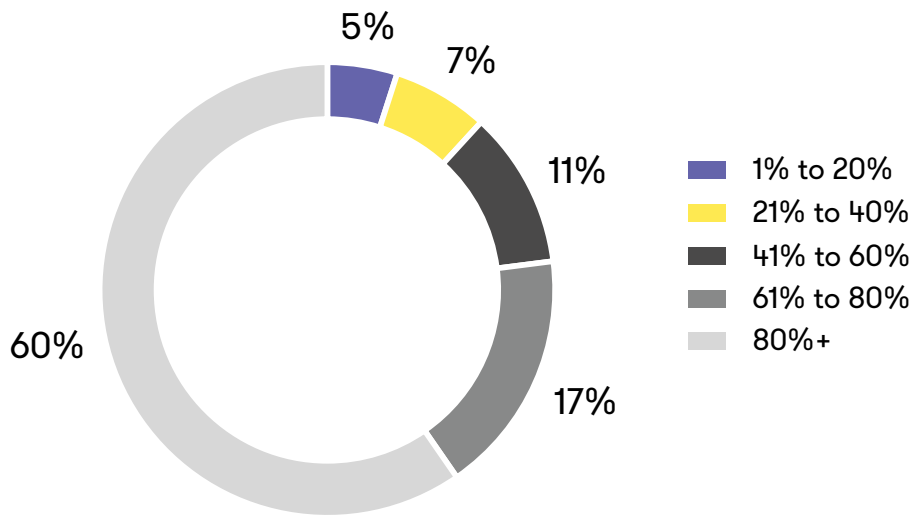
Another thing that is a given in flexible offices, alongside a varied environment, is the prevalence of plants. 95% of respondents have plants in communal areas, the presence of indoor plants as well as looking nice has also been shown to relieve stress, boost creative productivity and even have health benefits. When compared with our 2019 survey, we have seen no large changes, the prevalence of communal plants has increased from 93%, while the number of flexible offices containing decorative plants has decreased from 61% to 40%. Finally, the allocation of free plants for private offices is something that has seen a slight increase from 21% to 23%. Aside from plants, another factor that can improve wellbeing and is conducive with a healthy office environment is the level of natural light. From our results it's clear the flexible office providers also value natural light in their work environments with 60% reporting that over 80% of their private offices have natural light.

Whilst having natural light in the office has clear benefits, nothing can quite beat the actual feel of being outside. Operators have recognised this with 61% offering the provision of outdoor space, which gives members the opportunity to soak up some vitamin D, by either working outside or by providing them space to take a break outside easily.

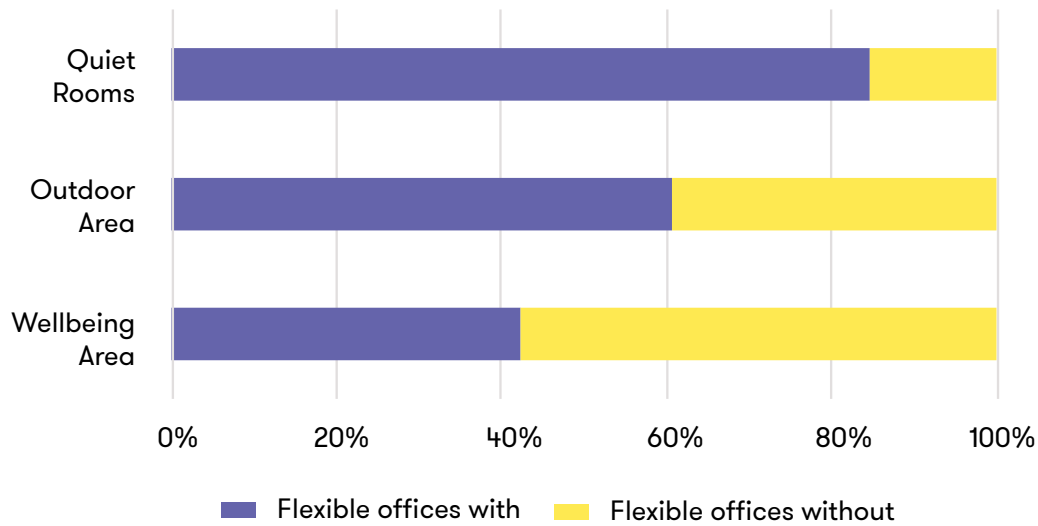
Different flexible office work settings



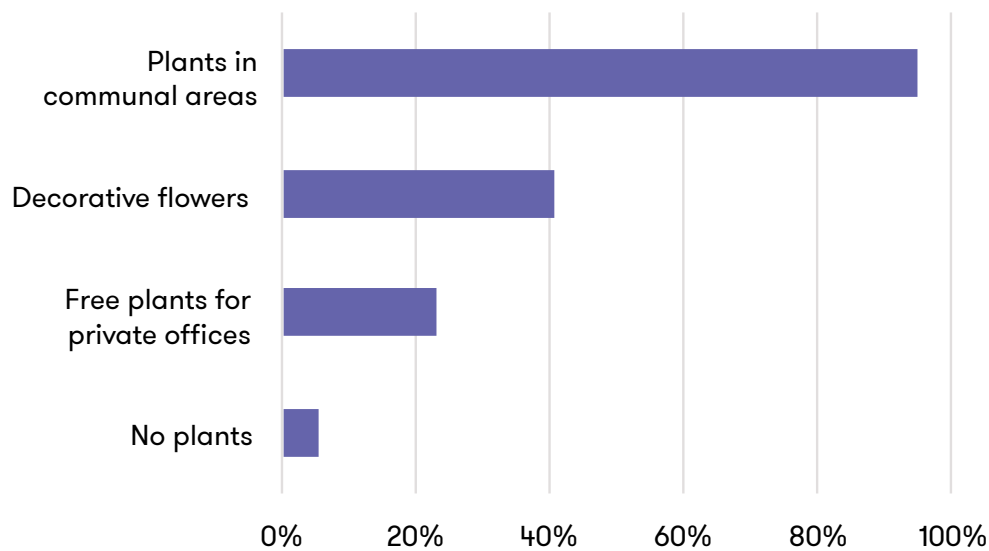
Natural light in private offices



Use of workspace area



Plants in flexible offices



Promoting physical wellbeing

Wellbeing should be approached on a holistic level and exercise is essential to this. Exercise has the ability to release endorphins in the body and stimulating a euphoric feeling, it also has been shown to help with depression, reduce anxiety levels and improve sleep. All of which serve to improve an employee's performance both at work and throughout their lives.

The use of exercise while benefiting physical health can also be used to encourage social wellbeing as well through exercise or meditation classes and this helps to create a sense of community within the workplace.

While exercise is an individual choice, flexible offices can help support a healthy lifestyle and work / life balance through offering various fitness and wellness amenities. Within flexible offices there is something for everyone, whether this is onsite gyms or discounts to local gyms, bike racks to make cycling to work easier, showers and towel services to make the whole process better or even exercise classes such as Zumba or yoga to cater to all audiences.

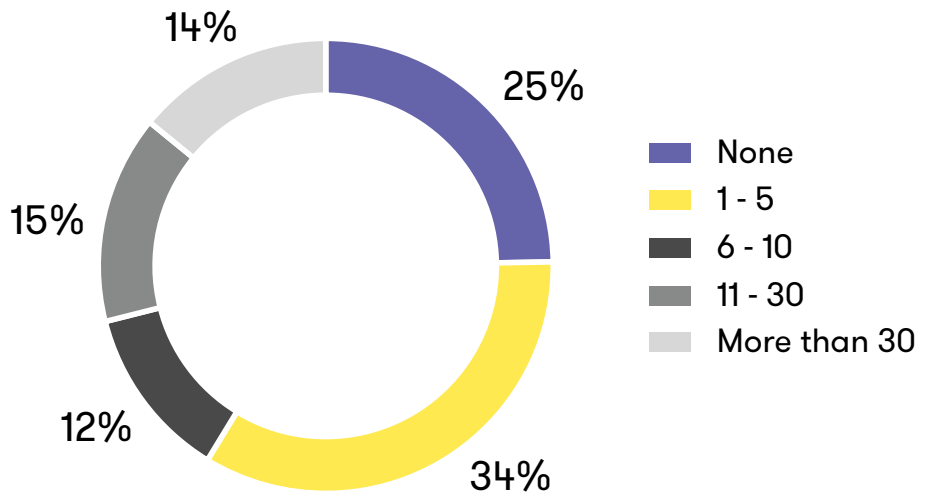
Of those surveyed, nearly a third offered on site gyms and of those that didn't, 58% offered gym discounts of varying degrees. Since our last wellbeing survey, it seems that provision of showers has been something that providers have added to facilitated varied exercise, whether exercise classes at lunch time, getting a quick gym session in during the day, or simply running, walking or cycling to work. In 2019 we reported that nearly 40% of providers did not provide showers, whereas our recent findings show that now it is only 32% of providers that don't have showers. The average number of showers per 100 desks is 1.5, while this is relatively low, it is not clear whether this accounts for showers in onsite gym changing rooms.

Bicycle lock-up facilities are very popular with 75% of flexible offices offering these facilities to members, the 25% not offering facilities is made up of a large number of Singaporean and North American providers where the culture of cycling to work is less prevalent. However, this is changing in Singapore in particular with the governments scheme to provide 700km of cycling paths by 2030, and we would expect the number of flexible offices with shower facilities to increase in the meantime.

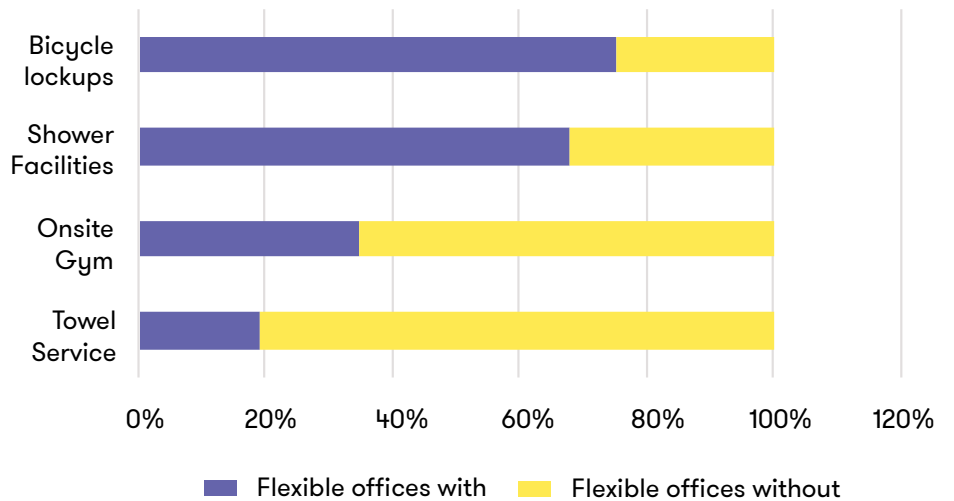




Number of bicycle lock-up spaces per 100 desks



Facilities supporting exercise





The Fisheries, London

Creating communities with social wellbeing

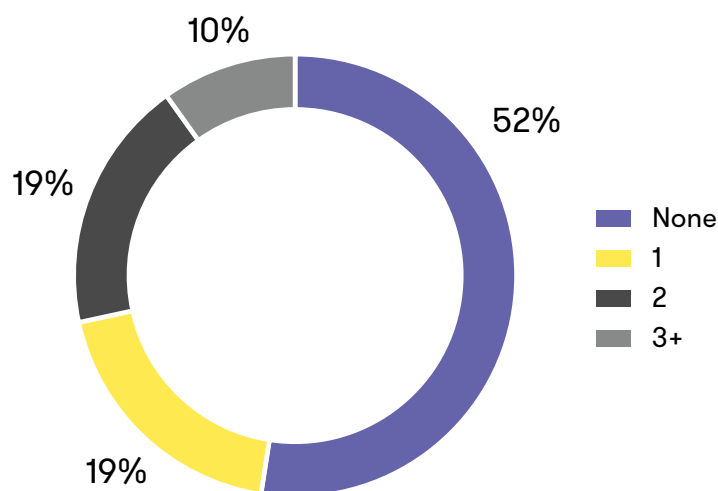
As already mentioned, exercise or meditation classes can be used to create a sense of community and support social wellbeing.

This is another thing that has been developed since our last report where only 39% were offering these on a weekly basis, the proportion has now increased to 47%. This is extremely encouraging, and reflects the constant improvements being made by providers and the emphasis put on the wellbeing of their members.

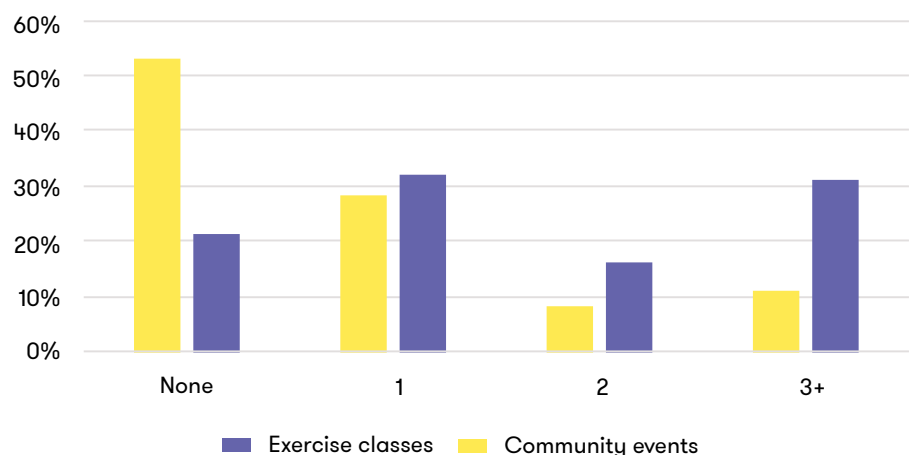
Besides offering exercise and meditation classes, flexible offices run wellbeing seminars on topics ranging from nutrition to the benefits of sleep. In our survey we found 48% offer these on a monthly basis, this again shows the importance placed on member wellbeing within spaces.

As well as providing these other events, flexible offices run community events on a regular basis to encourage community building within them and engage all members. This helps to support their members social wellbeing and is clearly something that is important to cohesion in flexible offices as 79% said that they run at least 1 community event per month and 72% run at least 1 event per week.

No. of wellbeing seminars per month



No. of community events or exercises per week







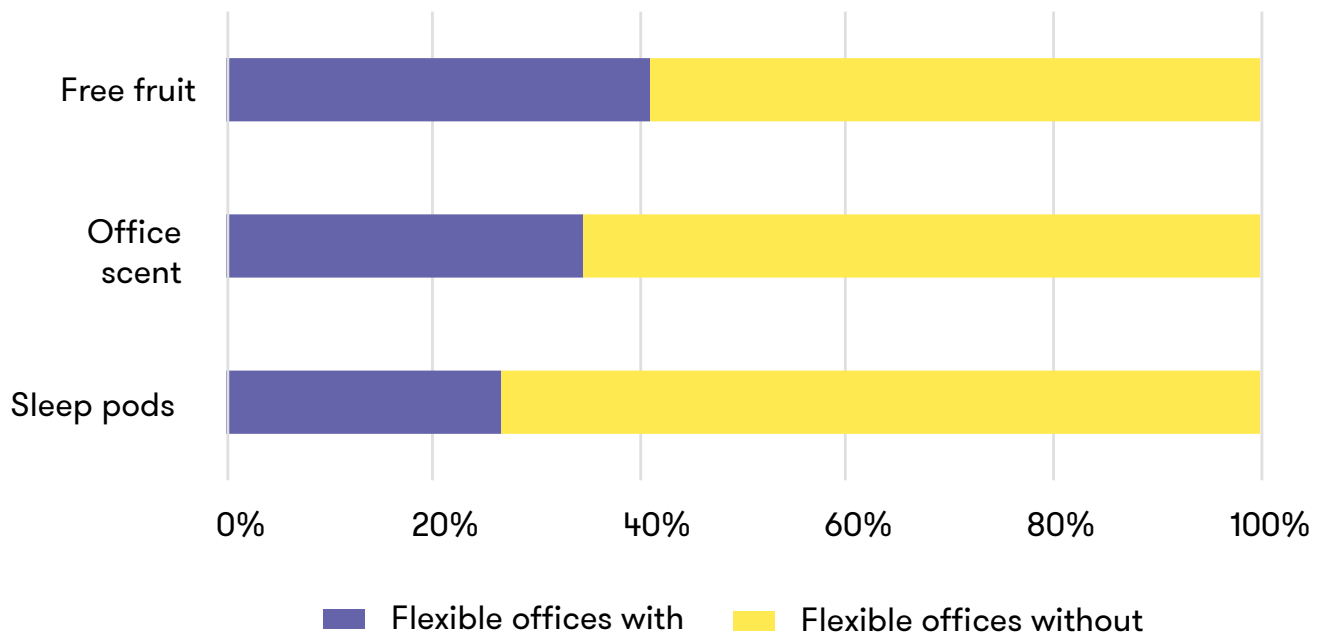
Other wellbeing amenities

There are all sorts of other amenity available to flexible office members to help support their wellbeing and promote overall community wellness such as fruit and veg budgets to encourage healthy eating, office scents to provide a pleasant sensory experience, offering healthy food from in house independent cafes, massages or even oxygen chairs.

Approximately 41% of flexible offices offered free fruit and veg to members, and a third of providers had their

own office scents that are used to promote mental wellbeing with nice scents throughout the day. Besides supporting wellbeing flexible office providers have been doing more to create more accessible workspaces, which has meant some providers have entirely overhauled their workspaces to make them wheelchair friendly, or adjusted the acoustics within their spaces to ensure that they are more accessible for deaf members. There are also providers that are engaging their wider communities and creating opportunities for local people through initiatives such as employing young people with learning difficulties to work in cafes.

Wellbeing amenities



Methodology

The analysis in this report includes survey results from 163 flexible offices (including both serviced offices and coworking spaces) across the UK, the Netherlands, France, Germany, Ireland and the US.

Our wellbeing ranking system takes into account the following metrics in various weightings: indoor area per desk, outdoor area per desk, showers per desk,

availability of a towel service, provision of an office scent, number of bicycle lockup spaces per desk, quiet rooms/booths per desk, number of community events per week, fruit budget per person per week, gym membership discount, availability of an on-site gym, frequency of air quality measurements, availability of plants, number of exercise/meditation classes per week, number of wellbeing events/seminars per month, use of technology solutions and frequency of high touch point cleaning.

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Workthere is a business by Savills focused solely on helping businesses find flexible office space, whether that's a serviced office, co-working or shared space.

Get in touch for further information



Cal Lee
Global Head of Workthere
+44 (0) 20 7409 8807
cal.lee@workthere.com



Daniel Jones
Research and Data Analyst
+44 (0) 20 7409 9909
daniel.jones@workthere.com



Liz Williams Bew
PR Director
+44 (0) 20 7409 8140
lwbew@savills.com



Ed Bouterse
Head of Europe
+31 20 3012079
ed.bouterse@workthere.nl



Courtney Guthridge
Director, Workthere US
(310) 444-1045
courtney.guthridge@workthere.com