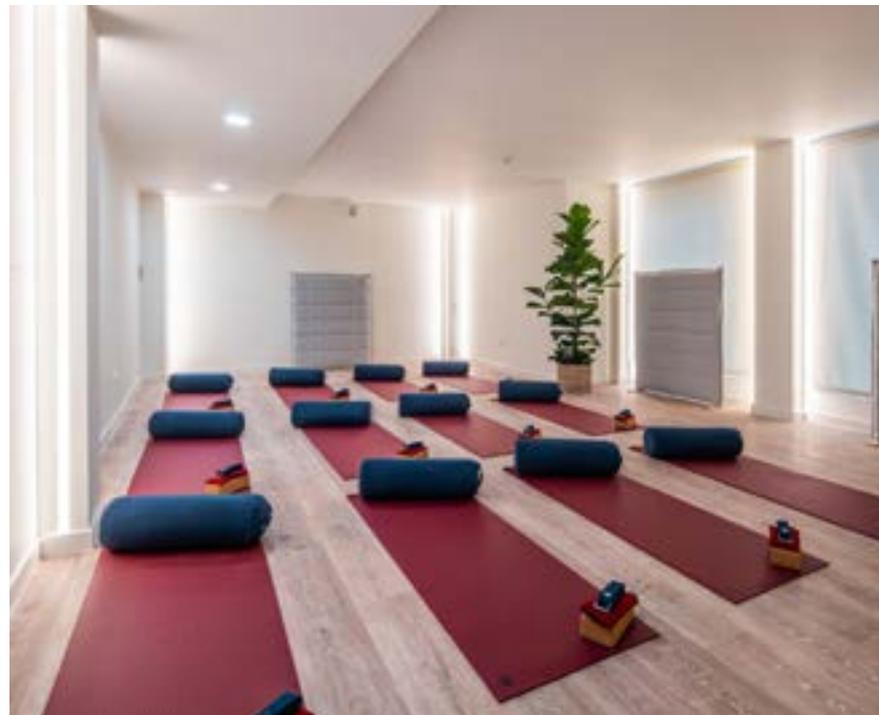


workthere

Wellbeing within flexible offices





Wellbeing within flexible offices

In this report, we provide an analysis of the wellbeing offerings of flexible offices (serviced offices and coworking spaces). We present rankings of the top three wellbeing flexible offices in the UK, The Netherlands, France, Germany, Ireland and the US. In addition, we present an overall global top ten ranking across these countries.

Our key findings are:

- **Use of space:** 88% of flexible offices have quiet rooms/booths. 72% have an outdoor area and 44% now 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.).

- **Lighting and air quality:** 62% of flexible offices measure their air quality at least once a month, but 16% do not measure it at all. 39% of flexible offices have natural light in all of their private offices.

- **Encouraging exercise:** 38% of flexible offices have an on-site gym and 60% offer a gym membership discount of some sort, with an average discount of 15%. 27% provide a towel service and 89% have bicycle lock-up facilities.

- **Wellbeing events and classes:** 86% of flexible offices organise community events at least once per week and 26% host three or more per week. 61% of flexible offices do not offer any exercise/meditation classes, but 14% arrange three or more per week.

Less than half of flexible offices offer wellbeing seminars.

- **Wellbeing amenities:** Half of flexible offices offer free fruit, with an average budget of £2.37 per person per week. 42% of flexible offices have an office scent, 34% have sleep/relaxation pods and 16% offer a wellbeing app. 98% of flexible offices have plants and 21% give free plants with private offices.



88%

of flexible offices have quiet rooms/booths



60% offer a gym membership discount of some sort

98%

of flexible offices have quiet rooms/booths

National flexible office wellbeing rankings



US			
	Top 3	Provider	Global ranking
1	530 Fifth Avenue, New York	Convane	=5
2	4470 Chamblee Dunwoody Rd #510, Atlanta	Shared Space	14
3	26 Broadway, New York	Primary	35



Europe				
		Top 3	Provider	Global ranking
UK	1	180 Borough High St, London	Fora	2
	2	20-30 Whitechapel Rd, London	x+why	11
	3	Queen Elizabeth Olympic Park, London	Plexal	12
IE	1	11-15 Tara St, Dublin	The Tara Building	3
	2	Claremont Ave, Dublin	Talent Garden	21
	3	2 Leeson Close, Dublin	Fitzwilliam Court	82
NL	1	Olympisch Stadion 24-28, Amsterdam	Offices For You	1
	2	Overhoeksplein 1, Amsterdam	A'DAM&Co.work	4
	3	Hogehilweg 8, Amsterdam	Merin	=5
FR	1	29-31 Rue de Courcelles, Paris	Kwerk Haussmann	7
	2	121 Avenue de Malakoff, Paris	Welkin & Meraki	8
	=3	48 Rue du Château d'Eau, Paris	Deskopolitan	=9
	=3	19 Avenue de Toulouse, Montpellier	The Islands	=9
DE	1	Deutsche-Med-Platz 1, Rostock	@Work Office Spaces GmbH	15
	2	Essener St 100, 04357 Leipzig	Die Villa Leipzig	16
	3	Rosenheimer St 143C, Munich	Design Offices Atlas	25

The global flexible office wellbeing ranking



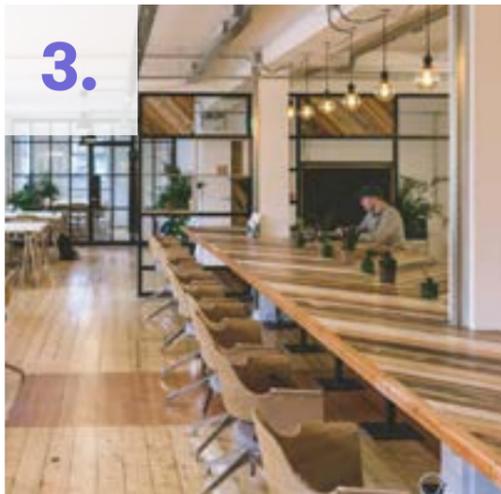
1.



2.



3.



Ranking	Location	City	Unique wellbeing feature
1	Offices For You, Olympisch Stadion 24-28	Amsterdam	86 square metres of outdoor space per desk in an Olympic stadium
2	Fora, 180 Borough High St	London	Breakout areas make up nearly 40% of space
3	The Tara Building, 11-15 Tara St	Dublin	Convert workspaces into a yoga/mindfulness hub in the evenings
4	A'DAM&Co.work, Overhoeksplein 1	Amsterdam	9 community events per week
=5	Convène, 530 Fifth Avenue	New York	Yoga studio, gym and stream room included in membership
=5	Merin, Hogehilweg 8	Amsterdam	On-site gym
7	Kwerk Haussmann, 29-31 Rue de Courcelles	Paris	In-house wellness programme
8	Welkin & Meraki, 121 Avenue de Malakoff	Paris	Free plants for private offices
=9	Deskopolitan, 48 Rue du Château d'Eau	Paris	2 square metres of wellness space per desk
=9	The Islands, 19 Avenue de Toulouse	Montpellier	Wellbeing features incorporated into mobile app



Introduction

Employee wellbeing is a phrase that is used abundantly within companies and the media, and not without good reason. Optimum physical and mental health is key to productivity, and bring a multitude of benefits on many levels. From a personal perspective, you feel more energetic and happier. On a company basis, more productive employees usually result in a higher return on investment and increased profits. In terms of a country-level, economic growth is boosted. In addition to improving productivity, taking care of workers' wellbeing can mean reduced staff turnover and is a way of attracting top talent.

So it is clear why it is important, but what actually is employee wellbeing? It is reported as being the experience of health and happiness, usually brought about by favourable physical, environmental, psychological and social factors.

'Wellbeing' is sometimes written-off as a fluffy term, with few hard numbers to support its importance. However, a study published in the US journal Health Affairs found that for every \$1 spent on wellbeing programmes,

medical costs fall by \$3.27 and absenteeism costs fall by \$2.73, which is an exceptional return on investment by almost anyone's standards. An Australian study by Medibank Private found that healthy employees are nearly three times more productive than unhealthy employees and that workers in poor health took nine times more sick days. According to our research, 12% of office workers think that their workplace has a negative impact on their mental health. This figure is 18% for Irish workers and 17% for British.

In a world where more and more jobs are being automated as a result of artificial intelligence, the relative value of different skills is shifting. However, there is one skill that is more difficult to replicate with technology: creativity. And wellbeing is even related to this, as workplace environments play a significant role in inspiring creativity.

The power of choice and autonomy is linked to happiness, so giving workers a sense of control can improve overall wellbeing. Flexible offices appear to be doing this well, with only 20% of workers based in this type of office feeling as if they have no control over their office environment compared to 38% for those based in conventional offices.

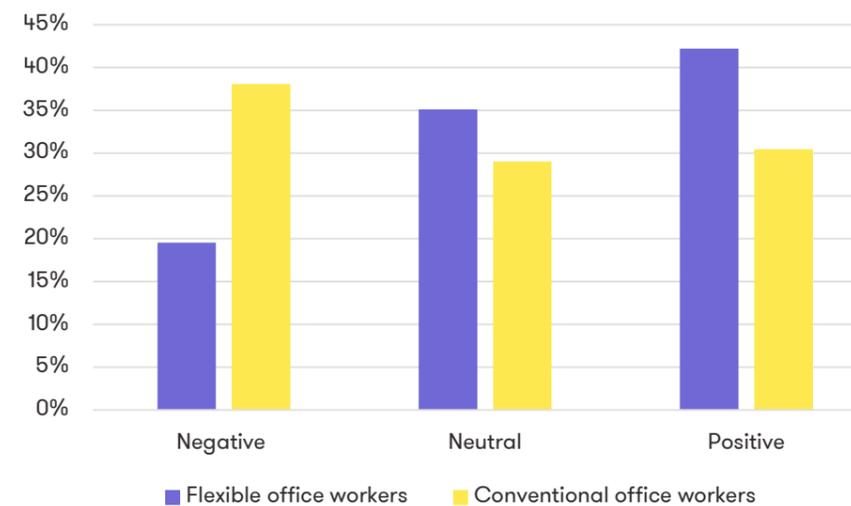
This report looks at what flexible offices are doing to support the wellbeing of their members. We look at standardised metrics, such as the number of showers per hundred desks, fruit budget per person and outdoor space per desk. We used these metrics to assign a points system to flexible offices around the world in order to come up with the top three wellbeing flexible offices in The Netherlands, the UK, France, Germany, Ireland and the United States.

In terms of wellbeing, there are areas that flexible offices are already doing a lot around: offering quiet rooms, measuring air quality, lacing buildings with plants and providing bicycle lock-up spaces. On the other hand, there are areas that fewer flexible offices are delving into, such as providing wellbeing areas, hosting exercise/meditation classes and providing free fruit.

The trend towards wellbeing in the workplace is here to stay and in a similar fashion to other modern workplace adaptations, flexible offices are at the forefront of this sea change.



Portion of workers that feel in control of their working environment



Source: Workthere

17%

of British office workers think their workplace has a negative impact on their mental health

3X

Healthy workers are 3 times more productive than unhealthy employees

38%

of workers in conventional offices feel they have no control over their office environment



Lighting and air quality

Lighting and air quality are two of the most important factors to get right in an office. Studies have consistently shown that natural light has positive effects on workers' wellbeing and that most employees prefer to work near windows.

62% of flexible offices measure the air quality of their workspace at least monthly, although 16% do not measure it at all. Despite this, flexible office workers tend to be unsatisfied with the air quality in their building. Measuring air quality is only the first part of the equation. Flexible office providers need to spend more time on the next step: actually ensuring that the air in building is clean.

There are numerous ways in which natural light impacts workers. It effects eye strain, cognitive performance, mood and interpersonal relationships. Fortunately, flexible office providers appear to appreciate the importance of natural light, with 39% of flexible offices having natural light in all of their private offices.

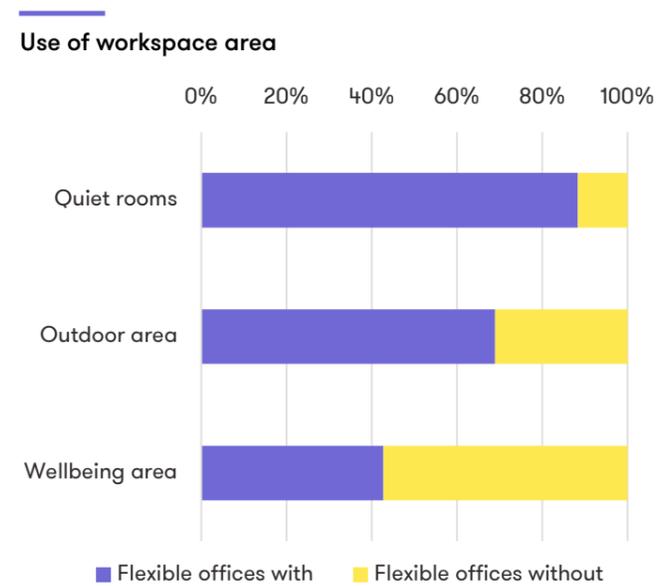
It can be challenging to keep indoor air clean in cities, as air quality is often poorer outside the building than inside, so opening windows can lead to an inflow of polluted air. So what can flexible offices do? Ensuring that air filters are replaced regularly is key. In addition, inspecting air ducts, maintaining a healthy level of humidity, keeping the space clean and adding plants can all make a difference.

Using space to promote wellbeing

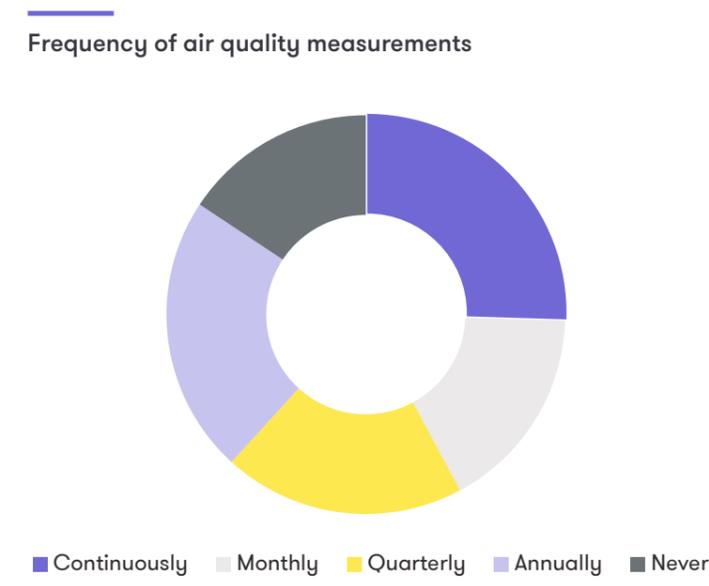
Optimising area use is key for flexible office providers, given rent is nearly always their most significant outgoing and space design hugely impacts the occupier experience. With wellbeing becoming increasingly important, it adds a whole extra dimension to an already complicated topic: how to optimise the use of flexible office space. Space design can support wellbeing in numerous ways.

72% of flexible offices have an outdoor area, which gives members the opportunity to boost their vitamin D levels by either working outside or simply using the space for a break or networking. Offering workers a variety of places to work, from breakout areas to quiet rooms, is also beneficial. 88% of flexible offices have quiet rooms/booths.

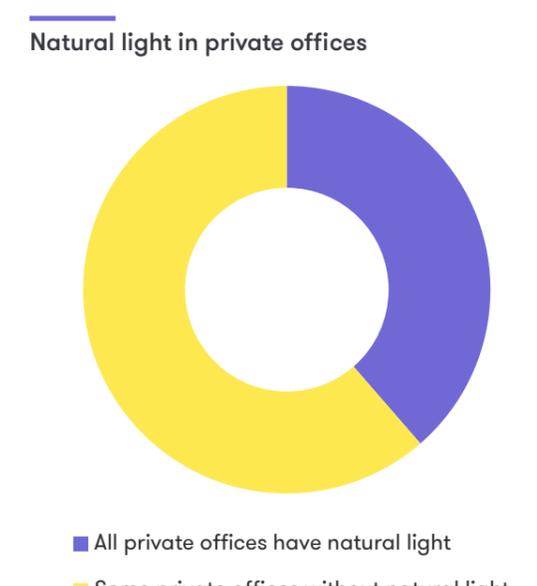
Outdoor areas and quiet rooms are nothing new, but in terms of more novel space use, 44% of coworking spaces now include a wellbeing area of some sort. This is defined as an area where members can tend to their personal health needs with examples including yoga rooms, meditation rooms and on-site gyms.



Source: Workthere



Source: Workthere



Source: Workthere



72% of flexible offices have an outdoor area

88%

of flexible offices have quiet rooms/booths



44% of co-working spaces include a wellbeing area of some sort.

62%

of flexible offices measure the air quality of their workspace at least monthly



39% of flexible offices have natural light in all of their private offices

16%

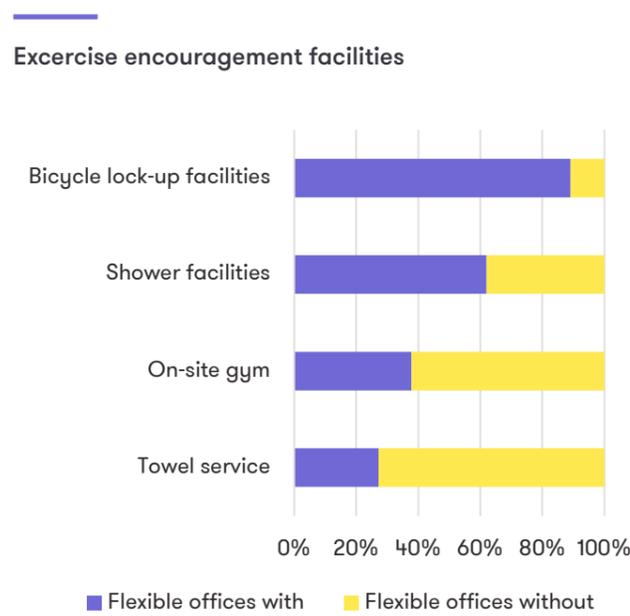
Don't measure air quality in their office

Encouraging Exercise

Exercise is a core pillar to wellbeing. It releases chemicals called endorphins, which interact with receptors in our brains that reduce the perception of pain and trigger a positive feeling that is often described as 'euphoric'. Multiple studies have shown that the benefits of exercise include decreasing depression, reducing anxiety, improving sleep quality and better performance at work.

Of course, you cannot force workers to exercise, but there are numerous steps that can be taken to at least encourage it, such as having an on-site gym, offering gym memberships discounts, providing showers, offering a towel service, providing bicycle lock-up facilities and organising on-site exercise classes.

Offering showers is a particularly adaptable way of encouraging exercise, in the sense that it gives workers the option to exercise in many different ways, like running or cycling to work, or doing an exercise class at lunchtime. However, 38% of flexible offices do not have any showers at all. The average number of showers per 100 desks is 1.8. On a more positive note, 89% of flexible offices have bicycle lock-up facilities, and this number is 97% in The Netherlands.



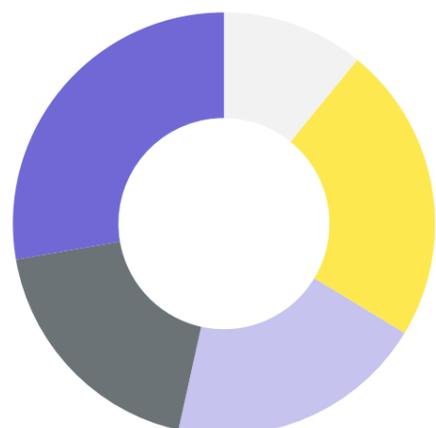
Source: Workthere

Gym membership discounts



Source: Workthere

Number of bicycle lock-up spaces per 100 desks



Source: Workthere



89% of flexible offices have bicycle lock-up facilities



89% of flexible offices have bicycle lock-up facilities



The average number of showers per 100 desks is 1.8



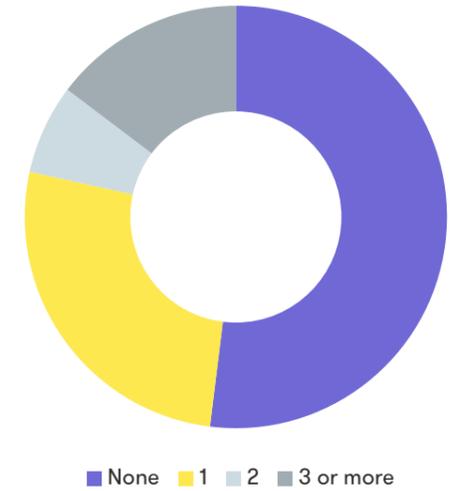
Wellbeing events and classes

Offering wellbeing events and classes in a flexible office can have a two-fold effect: it can enhance the community atmosphere and it can also encourage more integration; two of the key reasons why individuals choose to work in a flexible office.

Flexible office providers appear to recognise the importance of a sense of community, with 86% organising community events (such as community breakfasts, running clubs, etc.) at least once per week and a quarter hosting three or more per week. The number of exercise/meditation classes per week varies, with 61% of flexible offices not hosting any at all, but 14% arranging three or more per week.

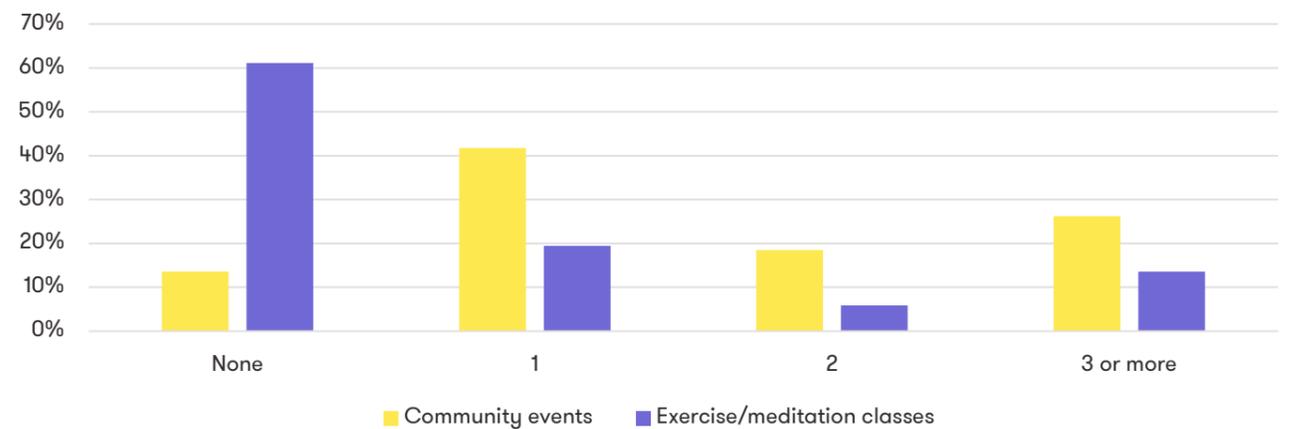
Wellbeing seminars and events are becoming more popular, covering topics like nutrition, the benefits of quality sleep and life coaching. However, less than half of flexible offices offer wellbeing talks. A small portion of flexible offices are paving the way though, with 15% of flexible offices hosting three or more wellbeing seminars every month.

Number of wellbeing seminars per month



Source: Workthere

Number of events of classes per week



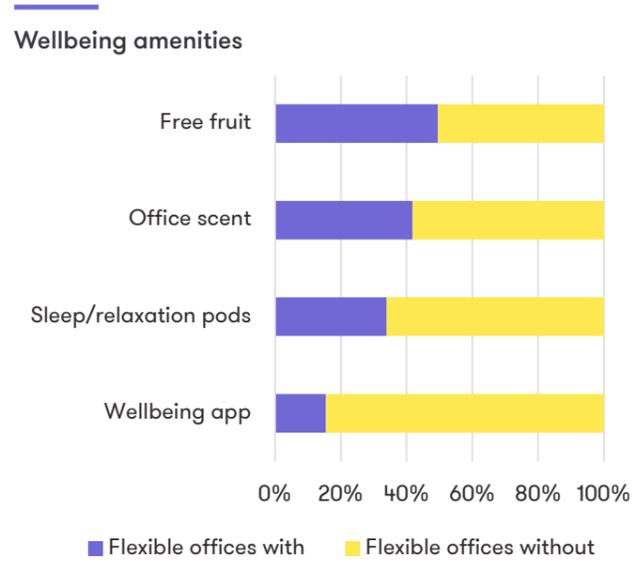
Source: Workthere

Wellbeing amenities

Wellbeing does not stop at meditation classes and gym membership discounts. There are all kinds of additional extras that flexible offices are embracing to help promote the wellbeing of their members. Healthy cafes, quirky fitness classes, discounted health checks, standing desks and monthly massages are starting to pop up more frequently.

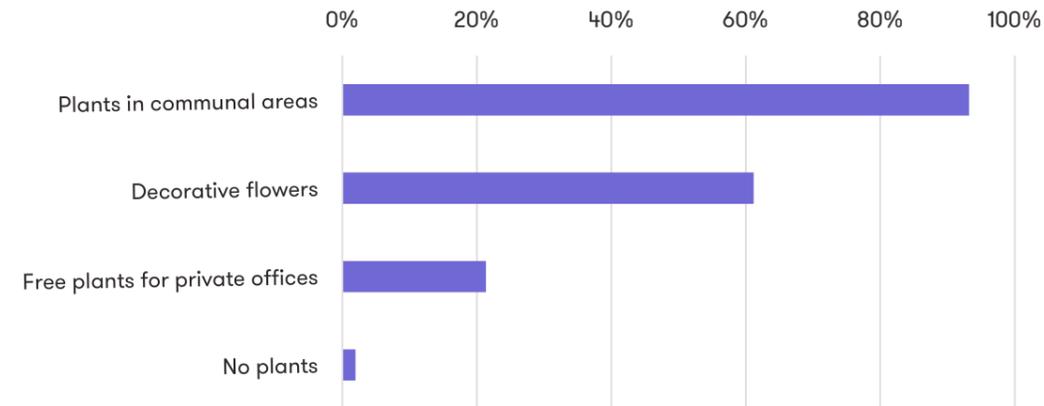
Flexible office workers are particularly dissatisfied with free food/snacks. Only half of all flexible offices offer free fruit. For those that do, £2.37 is the average budget per person per week. Smell is an important criteria for attracting and retaining members, with 42% of flexible workplaces having an office scent. A third of flexible offices have sleep/relaxation pods and 16% offer a wellbeing app.

Plants are a relatively cost-effective way of incorporating a more natural element into an office. They can reduce stress and improve productivity, and flexible offices have fully embraced them, with 98% of flexible offices having plants of some sort. The vast majority of flexible offices provide plants in communal areas and 61% display decorative flowers. Offering free plants for private offices is less common, with only 21% offering this services.



Source: Workthere

Wellbeing amenities



Source: Workthere



Flexible office workers are particularly dissatisfied with free food/snacks.

98%

of flexible offices have plants of some sort



Survey results from 103 flexible offices

Methodology

The analysis in this report includes survey results from 103 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 lock-up 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 and availability of a wellbeing app.





Workthere.com

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.

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