



Future Workplace Studies

What do employees want in a workplace, and what do they consider to most impact their workplace wellness?

Executive Summary

Employee Values Matter

The workplace environment and its role in employer-employee relationships are in the spotlight. Companies are in a fierce competition for talent, and now recognize that their offices are an untapped recruiting tool. Not only must organizations design workplaces with a competitive set of workplace amenities, but perhaps more importantly, the workplace must support health, comfort, and wellness if they want to attract and keep their valued talent.

Key Findings

Two large-scale surveys of employees across North America revealed that:

- Not only do employees **rank natural light and views as the top two amenities** they desire in a workplace,
- They consider these **basic environmental factors**, among others that characterize their physical environment, to be crucial to their workplace **wellbeing**.

Research Methods

Future Workplace, an executive development and research firm, conducted two large-scale surveys of employees who work in a corporate office environment. In the first, over 1,600 full-time employees across a variety of sectors and organizations were surveyed about what workplace amenities they value the most. In the second, separate sample of 1,600 employees were asked about factors they consider to most impact their health and wellbeing.

Results

Employee Experience

When asked what workplace amenity they value the most, employees reported natural light and views of the outdoors at the top of their list, outranking onsite cafeterias, fitness centers, and onsite childcare. Not only are these features

desired, they were also reported to positively impact performance.

Workplace Wellness

Human resource professionals are increasingly promoting employee experience and workplace wellness programs focusing on changing employee behaviors, such as fitness and nutrition. Companies have made substantial investments in these areas, but is this spending making a difference where it matters most to employees? The second survey revealed that employees value the physical workplace environment (daylight and views, air quality, acoustics, and thermal comfort) as more important in creating a healthy workplace than wellness programs that target behaviors such as fitness and nutrition. Despite their importance, the data revealed that these factors are often overlooked, a reality that damages employee satisfaction and organizational productivity.

Conclusions

Understanding what matters most to employees is central to prioritizing workplace factors that help foster an engaged and healthy workforce. Organizations must design workplaces that support comfort and wellness in order to attract and retain talent.



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Research Methods

The Employee Experience Survey

1,614 employees across North America were surveyed about their views regarding the workplace environment, experience with their current employer, and about what workplace amenity they value the most. The study targeted full-time employees who work across different sectors and in organizations of different sizes.

The Workplace Wellness Survey

In a subsequent study, 1,601 employees across North America were surveyed for a variety of questions on workplace environment, workplace wellness, personalization of the work environment, and privacy and security at work.

About Future Workplace

Future Workplace is an executive development firm dedicated to rethinking and re-imagining the workplace. Future Workplace works with heads of talent management, human resources, corporate learning, and diversity to prepare for the changes impacting recruitment, employee development, and engagement.

Future Workplace is host to the Future Workplace Network, an Executive Council that includes 40 heads of Corporate Learning, Talent, and Human Resources who come together to discuss debate and share “next” practices impacting the workplace and workforce of the future.

The Results

The rankings	% surveyed
1 Natural light	53%
2 Views of the outdoors	53%
3 Kitchen	37%
4 Open office space	28%
5 Onsite food	23%
6 Onsite cafeteria	21%
7 Walking/standing desks	17%
8 Outdoor space	15%
9 Onsite fitness center	10%
10 Onsite medical care	10%

The Employee Experience Survey

The top office amenity. The Employee Experience Survey revealed that natural light and views of the outdoors were the top two office perks, outranking onsite cafeterias, fitness centers, medical care, and even premium perks such as onsite childcare.

Impact on performance. Not only are these features desired, they also positively impact performance. Employees reported that natural light and views improve their overall happiness and well-being (78%), work satisfaction (73%), performance (70%), and organizational commitment (54%).

Workplaces fall short. Despite this, they reported that they are often overlooked features in their office space. Over a third of employees reported that they don’t get enough natural light in their workspace, and 47% admit they feel tired and 43% report feeling gloomy due to the lack of light.

They also reported that prolonged technology use makes them desire natural light and views more. Over half of employees say that prolonged screen use leads to eyestrain or headaches at work, and 73% agree that the longer they use their technology devices, the more they desire a visual break such as taking a walk or glancing at a view outside.

“A strategic change to move private spaces from the window line and provide natural light and views to all employees signals the company’s value in them and promotes organizational transparency.”

— **Nina Charnotskaia**, Senior Director of CBRE Workplace

The Workplace Wellness Survey

“While treadmill desks and nap pods sometimes get a lot of hype, the study clearly found that essential things such as optimized natural light and views are the most impactful and valued office perks. Employees say workplaces infused with daylight and views of the outside promote their well-being, engagement, and productivity.”

Jeanne Meister
Founding Partner of Future Workplace

The basics of environmental wellness: air, light, temperature and noise.

Companies have been making great strides environmentally, from reducing emissions and packaging to creating safer products for customers. At the same time, many are not addressing the negative environmental conditions that persist inside their own buildings that are impacting employees.

In the comprehensive research report, The Financial Case for High Performance Buildings¹, researchers found that a high-quality workplace could reduce absenteeism by 4 days annually. “When connected to the environment through generous amounts of daylight and natural materials, and more comfortable due to improved ventilation, thermal systems, and ability to control their environments, employees can realize a reduction in absenteeism through improved health and wellness.”

Future Workplace Survey respondents reported that the quality of air, light, temperature and noise had the biggest impact on their comfort and productivity at work. Nearly 1/2 of employees surveyed want to see their companies improve these environmental wellness factors. In many instances, employees would rather see employers improve the workplace environment than improve organizational policies or perks.

Temperature and air quality matter **4x** more to employees than having gym facilities.

A broad set of factors affect workplace wellness.

Physical Wellness

Physical workplace factors include access to movement, good ergonomics, and healthy activity/behaviors.

Examples:

- Ergonomic workstations
- Healthy food options
- Yoga classes or on-site gym

Emotional wellness

Factors that influence emotional wellness in the workplace include mood, stress, security, and connection to outdoors.

Examples:

- Access to natural light
- Quiet meditation spaces
- Outdoor areas

Environmental wellness

Workplace environmental factors include physical comfort from air, light, temperature, and acoustics.

Examples:

- Comfortable temperature
 - Healthy air
 - Glare free views to the outdoors
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¹ stök. The Financial Case for High Performance Buildings: Quantifying the bottom line of improved productivity, retention, and wellness. 2018.

“A quality workspace design leads to a less stressful and more productive atmosphere. It’s essential that employers take the physical work environment of their employees into consideration. Employees need to feel comfortable and calm in their physical work settings to produce their best work.”

Alan Kohll
Forbes Contributor,
Employee Well-being

Key workplace environmental survey findings

#1 Clean, quality air

- **Only 1 in 4 employees** say the air quality in their office is optimal for them to do their best work.
- **45%** say their companies could improve their wellness by providing fresh and allergen-free quality air.
- **Nearly 1/2** of employees say poor air quality makes them get sleepier throughout their workday.
- **Almost 1/3** experience itchy, watery eyes or throat irritation at work.
- **85%** say the air quality in their home or outdoors is better than at work.

#2 Natural light

- Nearly **40%** think their companies should provide access to views of the outdoors. Often potential views are covered by shades and blinds.
- **1 in 3** call out access to comfortable light (intensity and color) as important for their daily health.

#3 Comfortable temperature

- **Only 1 in 3** employees say their office temperature is ideal for doing their best work.
- **1/3** say it is continuously too hot or too cold in their offices.
- **Nearly 1/2** want their companies to provide an office that’s more comfortable – not too hot, not too cold.

#4 Acoustics and noise levels

- **Nearly half** are distracted by co-workers’ conversations.
- **More than a third** say sounds like phones ringing, typing on keyboards, and heating and cooling systems hurt their concentration at work.
- **37%** want their company to create an environment with low noise levels and sound privacy.

“It’s clear that buildings accommodating essential human needs such as good quality air, access to natural light and comfortable temperatures lead to healthier and more productive employees,” said Dr. Brandon Tinianov, chair of the U.S. Green Building Advisory Council and Vice President of Industry Strategy at View. “These findings are a wake-up call to every executive who wants to maximize the wellness and productivity of their workforce.”

Our survey results are in line with recent research. According to a study by the Harvard T.H. Chan School of Public Health and other leading institutions, the cognitive scores of workers studied were 101% higher in a “green plus” office environment (with lower concentrations of volatile organic compounds (VOCs), lower CO₂, and greater circulation of outdoor air) than in an office with “conventional” air quality². This correlated to an 8% improvement in employee productivity³.

Organizations have the power to make improvements in these areas, but environmental wellness in the workplace involves interconnected factors that cross multiple groups and functions. For example, to deliver the light and views that lower stress and improve productivity, companies should consider managing the heat and glare in a space designed with more windows with smart glass technology.

Understanding what matters most to employees can help companies prioritize and create a more comprehensive plan that encompasses a broad set of interconnected wellness influencers.

² Allen JG, et al. Associations of Cognitive Function Scores with Carbon Dioxide, Ventilation, and Volatile Organic Compound Exposures in Office Workers: A Controlled Exposure Study of Green and Conventional Office Environments. *Environmental Health Perspectives*. 2016. 124(6).

³ MacNaughton P, et al. Economic, Environmental, and Health Implications of Enhanced Ventilation in Office Buildings. *International Journal of Environmental Research and Public Health*. 2015. 12(11): 14709-14722.

Research has shown an 11% increase in employee productivity as a result of increased fresh air to the workstation and a reduction in pollutants.

33%
lose more than
60 minutes of work per day
due to physical and
environmental factors.

50%
of those surveyed said
poor air quality makes them
get sleepier throughout
their workday.

Only
1 in 3
say the temperature is ideal
for doing their best work.

Unhealthy work environments diminish productivity.

Ultimately, employee wellbeing in the workplace—or the lack of it—affects a company’s bottom line. More than a third of our survey respondents reported that environmental discomfort and poor wellness factors had a significant negative impact on their work, across these three factors of workplace wellness:

- **Physical Wellness:** includes healthy activity and behaviors in the workplace, such as access to movement and ergonomics.
- **Environmental Wellness:** includes providing for physical comfort from air, light, temperature and acoustics in the workplace.
- **Emotional Wellness:** includes the factors that create a stress-free workplace environment, including culture, a connection to the outdoors and more.

Lost work time due to employee discomfort is a major company cost that remains largely unmeasured and unaddressed today. Extrapolating from the survey findings, an organization with 10,000 knowledge workers could lose more than \$34 million / year in productivity from poor wellness in the physical workplace alone. Identifying the main issues and correcting them should be a top priority for businesses.

Employer health and wellness efforts fall short despite office gyms, healthy snacks and wellness incentives.

In an effort to support a healthier and more productive workforce, employers across the country are expected to spend an average of \$3.6 million on wellness programs in 2019⁴. Yet, the positive impact of all this spending hasn’t materialized. The results of a recent Harvard study suggest that these interventions— offered by 80% of large U.S. employers—yield unimpressive results.

Supporting this alarming finding, the results from the Illinois Workplace Wellness Study⁵ tell a similar story. This large, multi-year trial of a comprehensive wellness program at the University of Illinois at Urbana-Champaign has been examining the impact of wellness programs on employee behavior and healthcare cost across tens of thousands of employees. After one year, workplace wellness incentives didn’t change employees’ measured behaviors or annual healthcare costs.

Why aren’t there better results associated with investments in workplace wellness? Our study sought to investigate a broad array of wellness factors and to identify which ones have the greatest impact on workers so organizations can make more meaningful improvements to their employee’s work experience.

⁴ National Business Group on Health (NBGH) and Fidelity Investments. 10th Annual Health and Well-Being Survey. 2019.

⁵ Jones D, Molitor D, Reif J. What do Workplace Wellness Programs Do? Evidence from the Illinois Workplace Wellness Study. *Quarterly Journal of Economics*. 2019. 134(4):1747-1791.

A workplace that enhances employee health and wellbeing would...

Encourage
7 in 10

to stay in their current job.

Make
7 in 10

more likely to accept a job offer.

Top 5 wellness factors employees want organizations to improve

Wellness Factors	% surveyed
1 Provide an environment that's not too hot or too cold	45%
2 Provide good quality and allergen free air	45%
3 Paid time off	43%
4 Offering the option to adjust workspace conditions	42%
5 Provide access to view of the outdoors and create a connection to nature	39%

Employees would rather see employers improve these 5 factors than create policies for unlimited vacation or a pet-friendly workplace.

Healthy workplaces help companies attract and keep talent.

In the battle for top talent, the environment influences not only our personal wellness, but also a company's ability to recruit and retain employees. Research from Gartner⁶ found, "employees who are satisfied with their workplace are 16% more productive, 18% more likely to stay, and 30% more attracted to the company over competitors."

In our survey, more than two-thirds of employees said that a workplace that supported and enhanced their health and wellbeing would encourage them to accept a job offer (67%) – or to stay at their current job (69%).

"People used to work for companies, but now they expect companies to work for them – to provide dynamic office settings that help them to be more productive and creative," reports the Gensler U.S. Workplace Survey⁷. The turnover costs associated with recruiting, training, lowered productivity, and lost expertise are significant. How sizable? The Center for American Progress estimates that replacing a single employee costs approximately 20% of that employee's annual salary.

Prioritizing workplace wellness factors

When asked which environmental aspects in the workspace most affect their performance, happiness, and workplace wellbeing, here's how many employees rated each aspect as their top three factors (of nine).

Wellness Factors	% surveyed
1 Air quality	58%
2 Comfortable light	50%
3 Water quality	41%
4 Comfortable temperatures	34%
5 Office acoustics	30%
6 Connection to nature	30%
7 Access to healthy food choices	26%
8 Fitness facilities	16%
9 Technology-based health tools	13%

"The research shows that employer health and wellness efforts fall short despite company investments in on-site gyms, ergonomics and healthy food choices," says Jeanne Meister, Founding Partner, Future Workplace. It's the invisible factors such as air quality and access to natural light that are often overlooked yet provide the greatest influence on workplace wellness, employee productivity and the overall quality of the employee experience."

⁶ Gartner. Make Your Digital Workplace Employee-Friendly With These Six IoT Best Practices, Achint Aggarwal, Carol Rozwell, 20 August 2018.

⁷ Gensler. The U.S. Workplace Survey. 2006.

What employees want to personalize

What aspects of your office would you like to be able to personalize from an app?

- Workplace temperature
 - Masking noise and soundscaping
 - Conference room booking
 - Natural light levels from windows
 - Starting conference calls
 - Overhead and desk lighting
 - Air quality control (allergens or pollutant alerts and action)
 - Help desk resolutions
 - Personal activity levels and prompts to move more
 - Frequently asked questions of new hires
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Employees expect a personalized work environment.

Employees expect their workplace environment and experience to be as good as their consumer experience. From thermostats controlled by apps to integrated home entertainment controls to virtual assistants like Alexa and Google, people experience an increasing level of technology and personalization in their home every day. U.S. smart speaker ownership rose 40% in 2018 to 66.4 Million (voicebot.ai).

Unfortunately, few companies offer this level of personalization in the office. When it comes to actions employees want to see from their companies around wellness, workspace personalization is a high priority.

More employees want the option to adjust their personal workspace conditions (42%) than wish for a pet-friendly (29%) or unlimited vacation (28%) policy.

Office personalization is the highest rated workplace wellness factor (including lighting, acoustics and air quality). It is far more desirable to employees than current productivity tools aimed at everyday tasks like booking conference rooms or starting conference calls.

48%

of those surveyed want to be able to personalize the temperature in their workspace with an app.

33%

would like to personalize their overhead lighting, desk lighting, and the levels of natural light coming in.

33%

want the option to control masking noise or soundscaping from an app, for greater focus at work.

Protecting personal data

Privacy has been raised as a major concern when talking about apps that collect personal health information and behaviors. Our research results show that this is still a concern. Employees want more personalization, but the data they need to share to allow customization makes many uneasy. 8 in 10 have some concerns about the health and wellness data their employer can collect about them, and nearly a third are highly concerned.

Organizations should be transparent and clear about what data they are collecting, why it's needed and how it will be protected, analyzed and used. With careful management, personalization can help enhance the employee experience while being respectful of privacy concerns.

Conclusions

Understanding what matters most to employees is central to prioritizing workplace factors that help foster an engaged and healthy workforce. The research conducted by Future Workplace on a large sample of employees, across a variety of sectors and organizations of various sizes, revealed that what matters most to their employee experience and workplace wellness is their physical workplace environment, and in particular, such factors as the amount of natural light at their desk and their view of the outdoors. The research also revealed that despite the value placed on these factors by employees, they are often overlooked by organizations, a reality that negatively affects their satisfaction, engagement, and performance.

Employees are a company's greatest asset, so organizations must design workplaces that support comfort and wellness in order to attract new talent, keep valued talent, and help their employees perform at their best.