

Investing in Health Pays Back:

8 in 10 employees say focus on health and well-being “non-negotiable,” and where they work plays an outsized role.

Matthew Trowbridge MD MPH



Meeting the **moment.**

The American workforce is facing **unprecedented change** from the way they work to where they work.

We're here to help **turn research** on these shifts **into action.**



IWBI's 2023 State of



WORKFORCE

WELL-BEING POLL



Approach

Purpose

Provide IWBI stakeholders with relevant, robust, and timely information to inform and drive our shared efforts to support the health and well-being of our employees and broader workforce.

Methods

Research conducted in the United States by The Harris Poll among 1,001 adults employed full-time. Survey conducted from January 3 to 17, 2023.



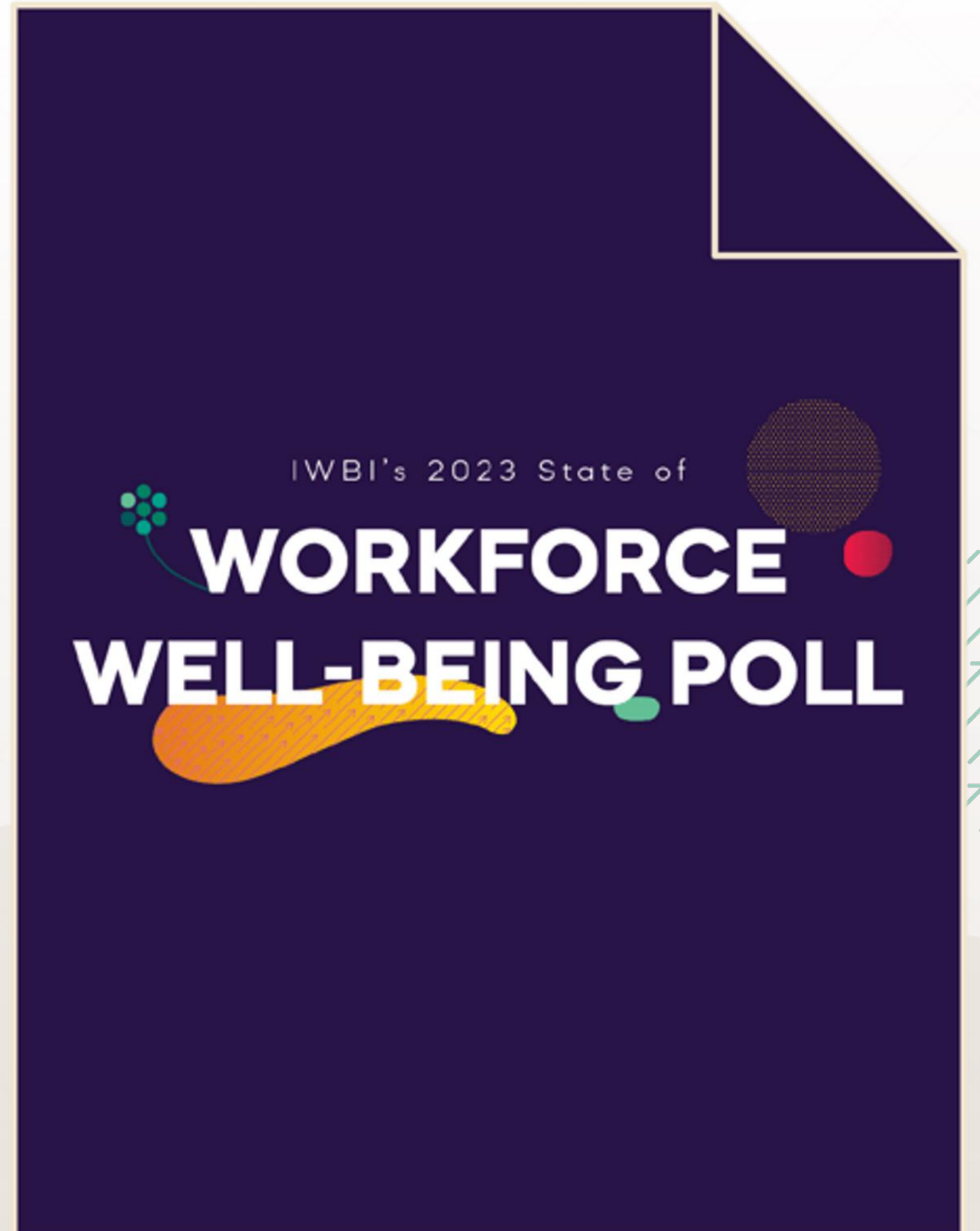
Sub-group Definitions and Sample Sizes

Subgroup	Definition	Sample Size
Minorities	Employees of color, LGBTQ, and/or employees with a disability	<i>N=490</i>
Employees with a disability	Those with a physical, mental, or emotional condition, disability, functional limitation, or health problem	<i>N=176</i>
White collar employees	Those whose job involve work traditionally performed in an office, cubicle, or other administrative setting.	<i>N=582</i>
Blue collar employees	Those whose work that requires manual labor	<i>N=178</i>
Pink collar employees	Those whose work that is related to customer interaction, entertainment, sales, or other service-oriented work	<i>N=195</i>
Hybrid employees	Those who work remotely at least one day a week and works at their company's physical workplace at least one day a week	<i>N=268</i>
Full-time remote employees	Those who work remotely at least five days a week and zero days at their company's physical workplace	<i>N=148</i>
Micro/small company	2-49 employees	<i>N=231</i>
Medium company	50-249 employees	<i>N=210</i>
Large company	250+ employees	<i>N=560</i>
Gen Z/Millennials	Employees aged 25-43	<i>N=423</i>
Gen X	Employees aged 44-57	<i>N=360</i>
Boomers/Seniors	Employees aged 58+	<i>N=218</i>
Management	Employees who are business owners, managers, or senior executives	<i>N=427</i>
Non-management	Employees who are individual contributors	<i>N=489</i>

Key Findings

LEARN MORE AT:

wearewell.com/harris-poll



Workers want well-being.

Dramatic shift in the prioritization at the organizational level.

Supporting worker well-being is now a top concern for stakeholders.

WORKFORCE TRENDS

From the Great Resignation to “quiet quitting,” the American workforce is facing **unprecedented change.**

More than **8 in 10 full-time U.S. employees** agreed that supporting **worker health** is now a ‘must-have’ for companies.

LEARN MORE AT

wearewell.com/harris-poll

80%

Agreed that supporting worker health is a ‘must have’ for organizations.

WORKFORCE TRENDS

Supporting employees from an overall health and well-being perspective is in **employers' best interests.**

96% of employees agree that a healthy work environment is necessary for employee productivity.

LEARN MORE AT

wearewell.com/harris-poll



WORKFORCE TRENDS

A strong **DEI focus** is critical to a company's health and well-being efforts.

Employees view diversity, equity and inclusion (DEI) efforts as **vital to a company's health commitment**—and their performance.

- **83% of employees agree** that DEI initiatives are an important part of a company's commitment to health and well-being.
- **78% of employees** say that their company's commitment to DEI is an important part of their job satisfaction.
- **83% agree** that companies that actively promote DEI initiatives facilitate a more comfortable workplace.



83%

of employees agree that DEI initiatives are an important part of a company's commitment to health and well-being.

WORKFORCE TRENDS

Historically marginalized groups place higher value on DEI efforts.

- **Black (81%)** and **Hispanic (59%)** employees are more likely than white employees (45%) to say company **DEI commitments** are “**very important**” to their job satisfaction.
- Nearly 2 in 3 Black employees (64%) “strongly agree” that companies actively promoting DEI initiatives facilitate a more comfortable workplace.
- Similarly, **LGBTQ employees** are more likely than non-LGBTQ to “strongly agree” (61% vs. 38%).
- Only 48% of **employees with disabilities** “strongly agreed” that they felt accepted at work compared to those without disabilities (60%).

81%

of Black employees are more likely to say company DEI is “very important.”

59%

of Hispanic employees are more likely to say company DEI is “very important.”

WORKFORCE TRENDS

Employees place strong value on several health-specific strategies.

More than 50% of employees consider the following health strategies “very important” or “absolutely essential”:

84% Work environment free from health and safety threats

82% Health insurance coverage

78% Comfortable temperature for working

67% Quality space to work with comfortable furniture

67% Access to daylight

65% Emergency preparedness programs or protocols

63% Inclusive design for people with disabilities

61% Proper noise management

57% Company policies that prioritize healthy behaviors

51% Movement within workplace

Figure 1. Percent of employees whose company provides benefits vs. percent who consider benefit very important/absolutely essential

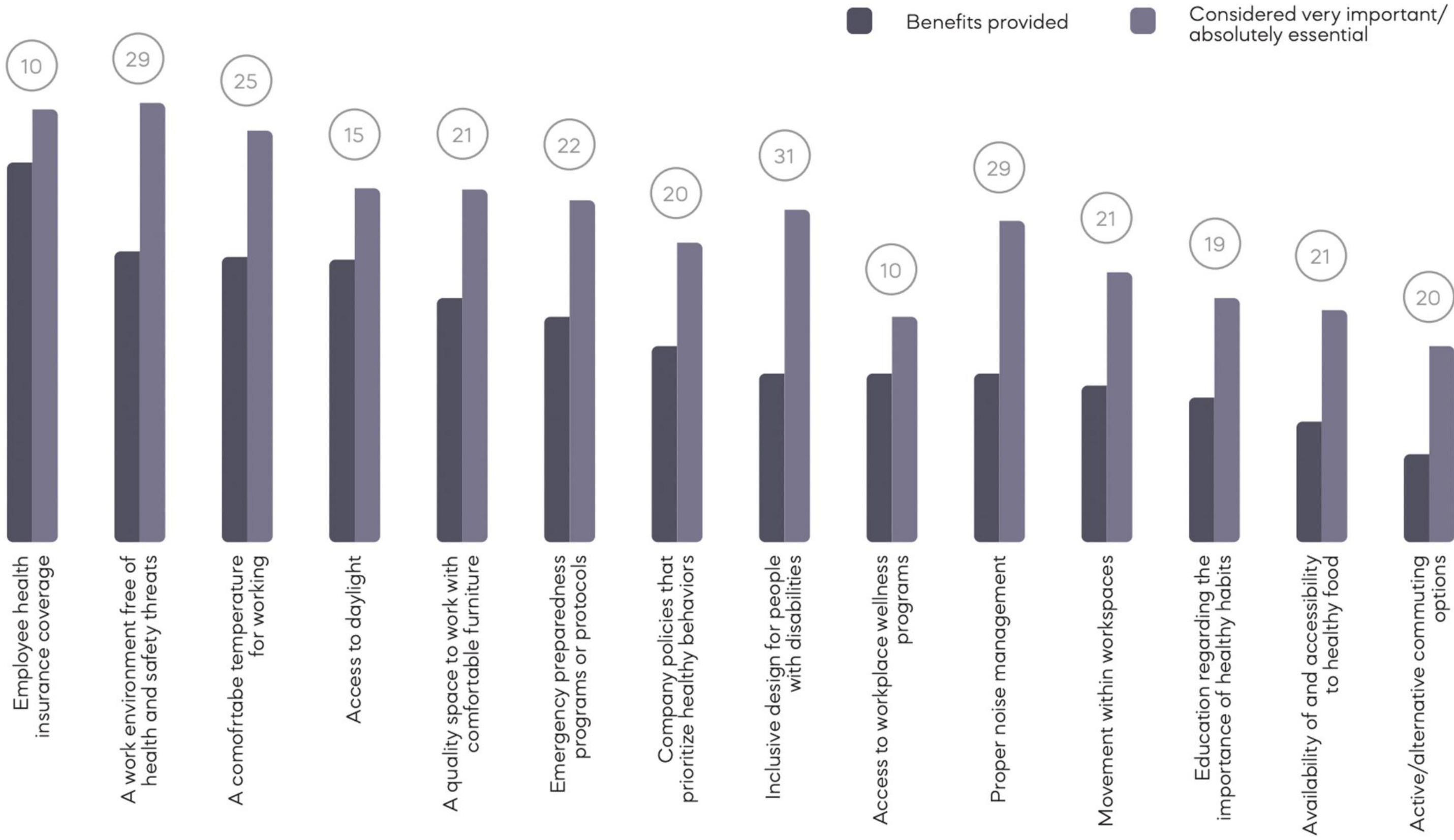


Figure 1. Percent of employees whose company provides benefits vs. percent who consider benefit very important/absolutely essential

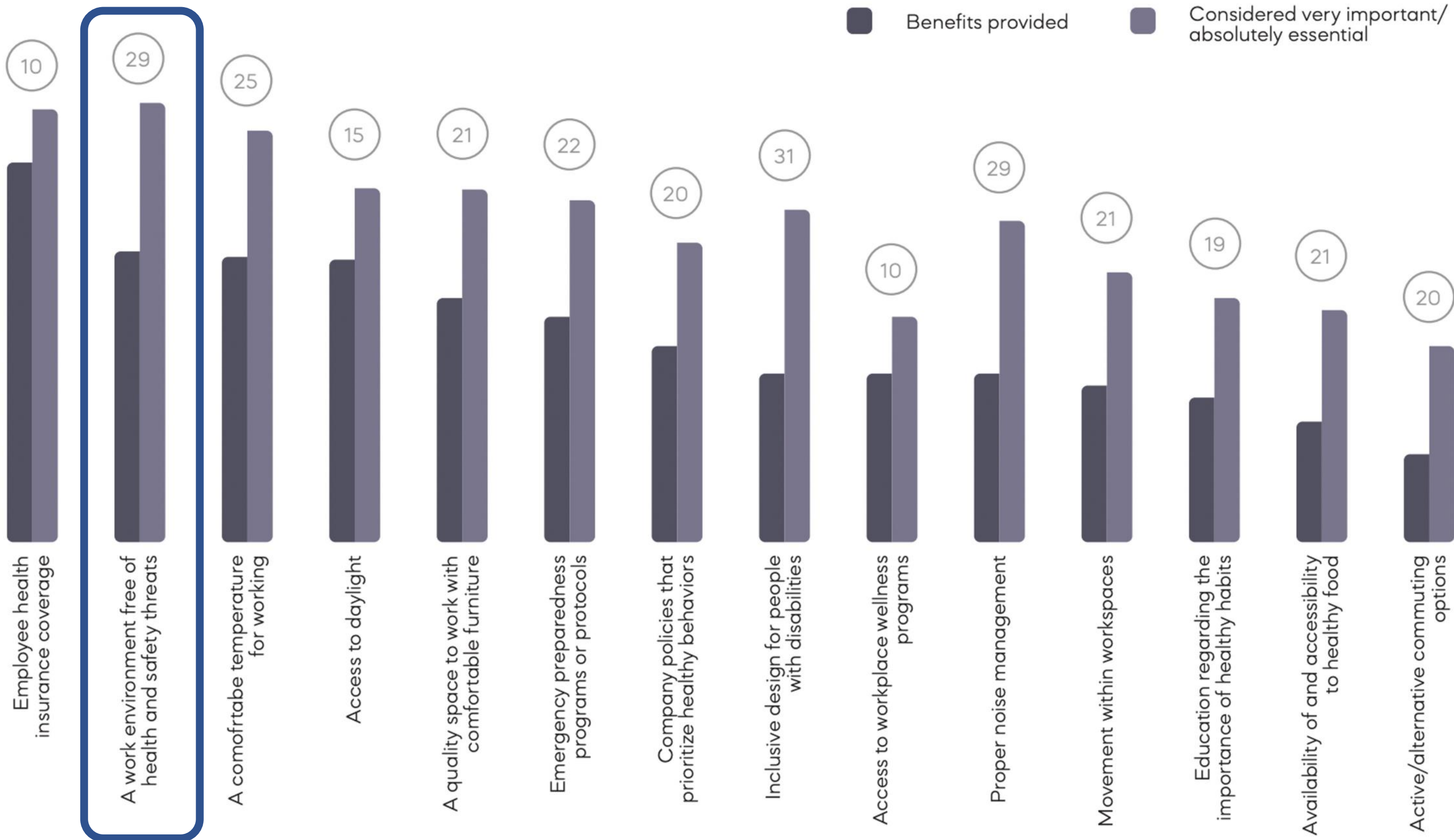


Figure 1. Percent of employees whose company provides benefits vs. percent who consider benefit very important/absolutely essential

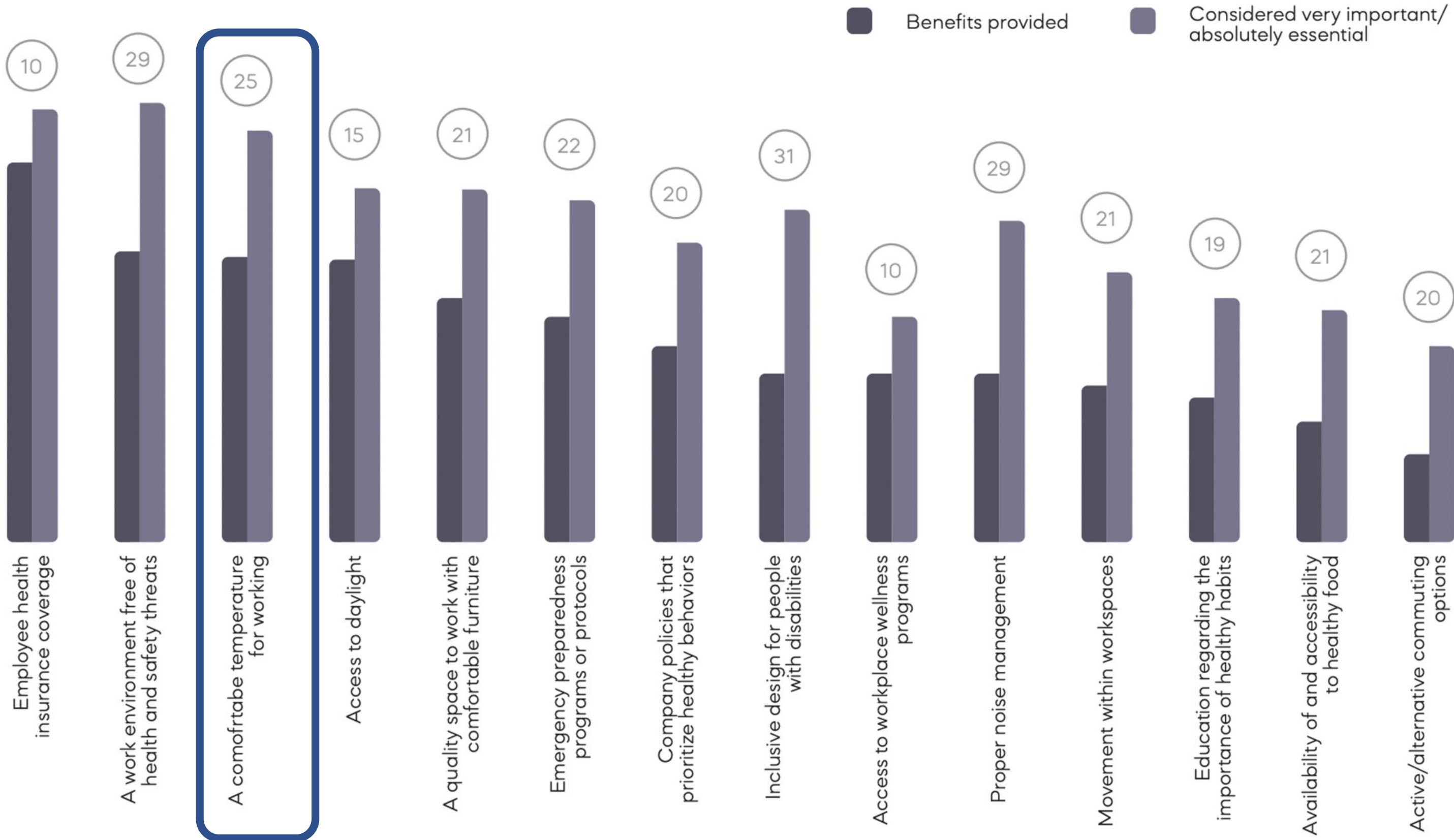


Figure 1. Percent of employees whose company provides benefits vs. percent who consider benefit very important/absolutely essential

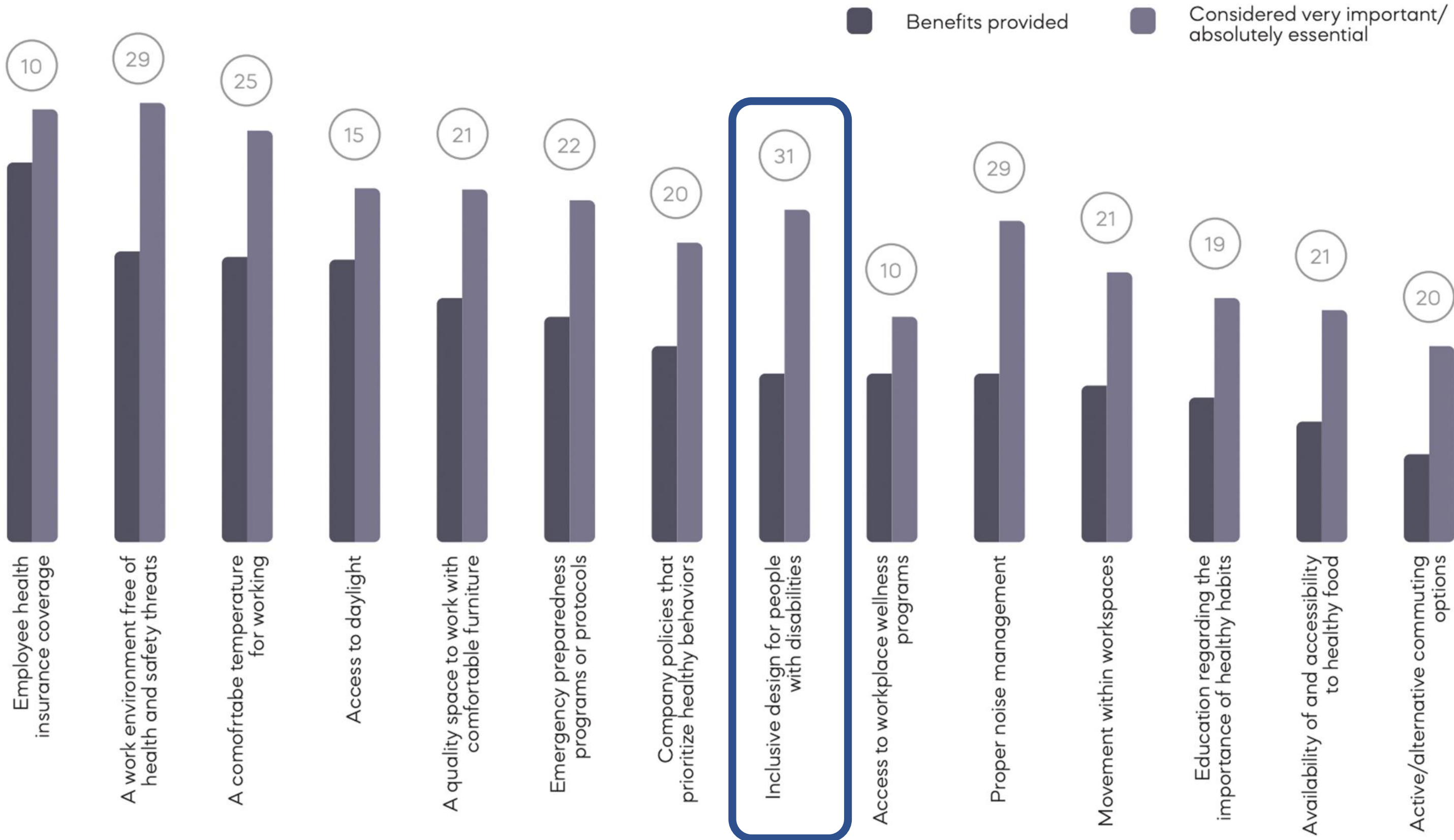


Figure 1. Percent of employees whose company provides benefits vs. percent who consider benefit very important/absolutely essential

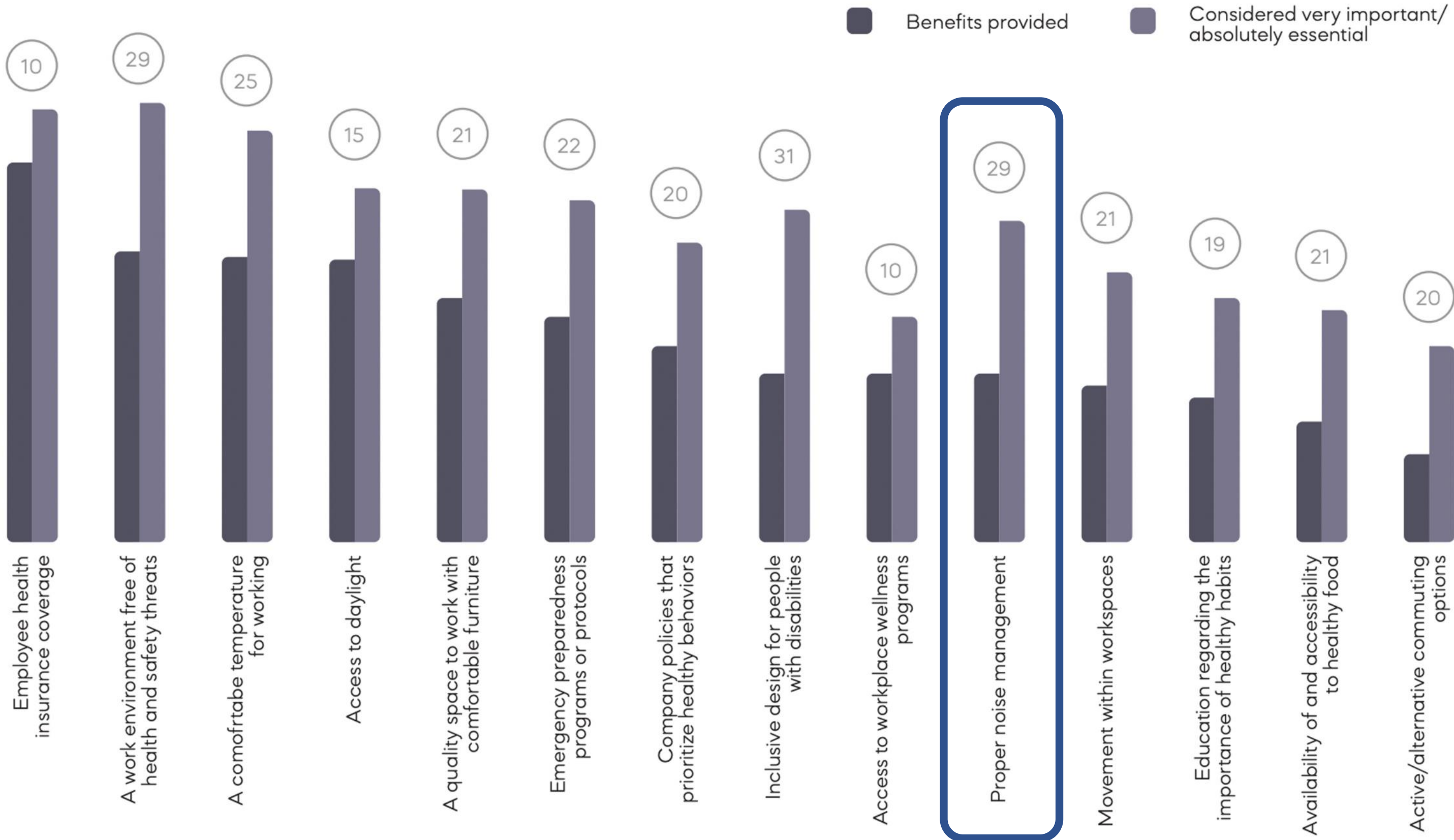
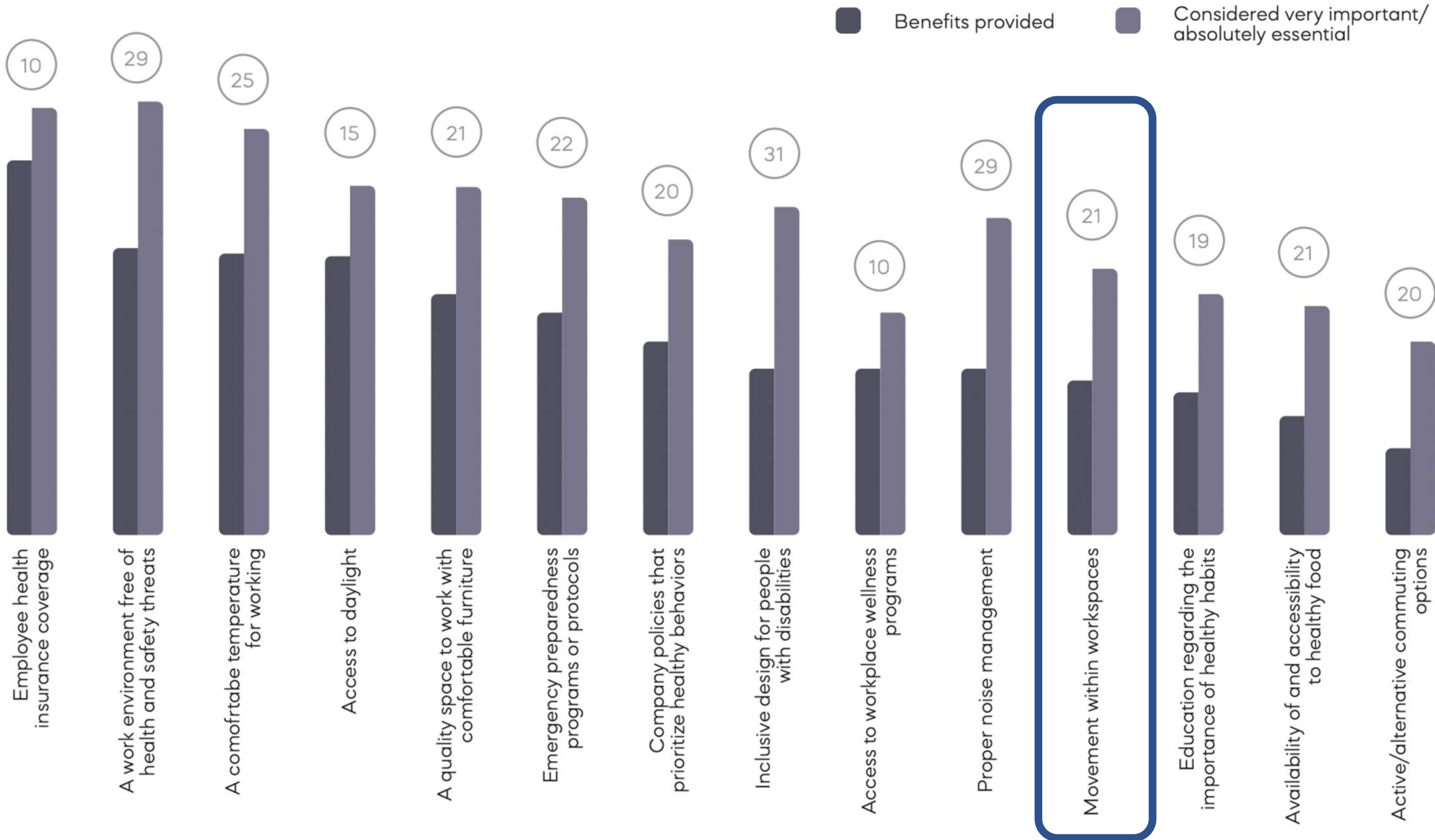


Figure 1. Percent of employees whose company provides benefits vs. percent who consider benefit very important/absolutely essential



WORKFORCE TRENDS

Are companies doing enough to make well-being a top priority?

Employees generally have favorable views about company health commitments, but many from varying demographics note companies could be doing more.

- **34%** of employees **don't know what their employer is doing** to support their health and well-being.
- **44%** of employees agree that their **company puts profits over people**.
- **Pink-collar (25%)** and **blue-collar employees (23%)** are **more likely** than white-collar employees (12%) to agree their **company doesn't care about worker health and well-being**.



Research shows
strategic investments in
health and well-being
have a positive impact
on **people** and **profit**.



Strengthen real estate returns.

Healthy building strategies are connected to:

- Higher rent premiums
- Increased occupancy rates
- Longer lease terms
- Improved tenant satisfaction



MIT Center for Real Estate Research found that **certified healthy buildings** see a rent premium in the range of **4.4 and 7.7% per square foot** in the commercial sector, when compared to nearby non-certified and non-registered peers.

Up to

7.7%

rent premium

Research published in the [Indoor Air Quality Handbook](#) (Berkeley Lab) found that a **20-50% reduction in SBS symptoms for office workers in the U.S. could correspond to an annual productivity gain of up to \$200 billion.**

According to the [Rocky Mountain Institute](#) (RMI), a study led by Knoll and DYG Inc., “Employees planning to leave an organization were **25% less satisfied with their physical workplace than those who planned to stay.**”

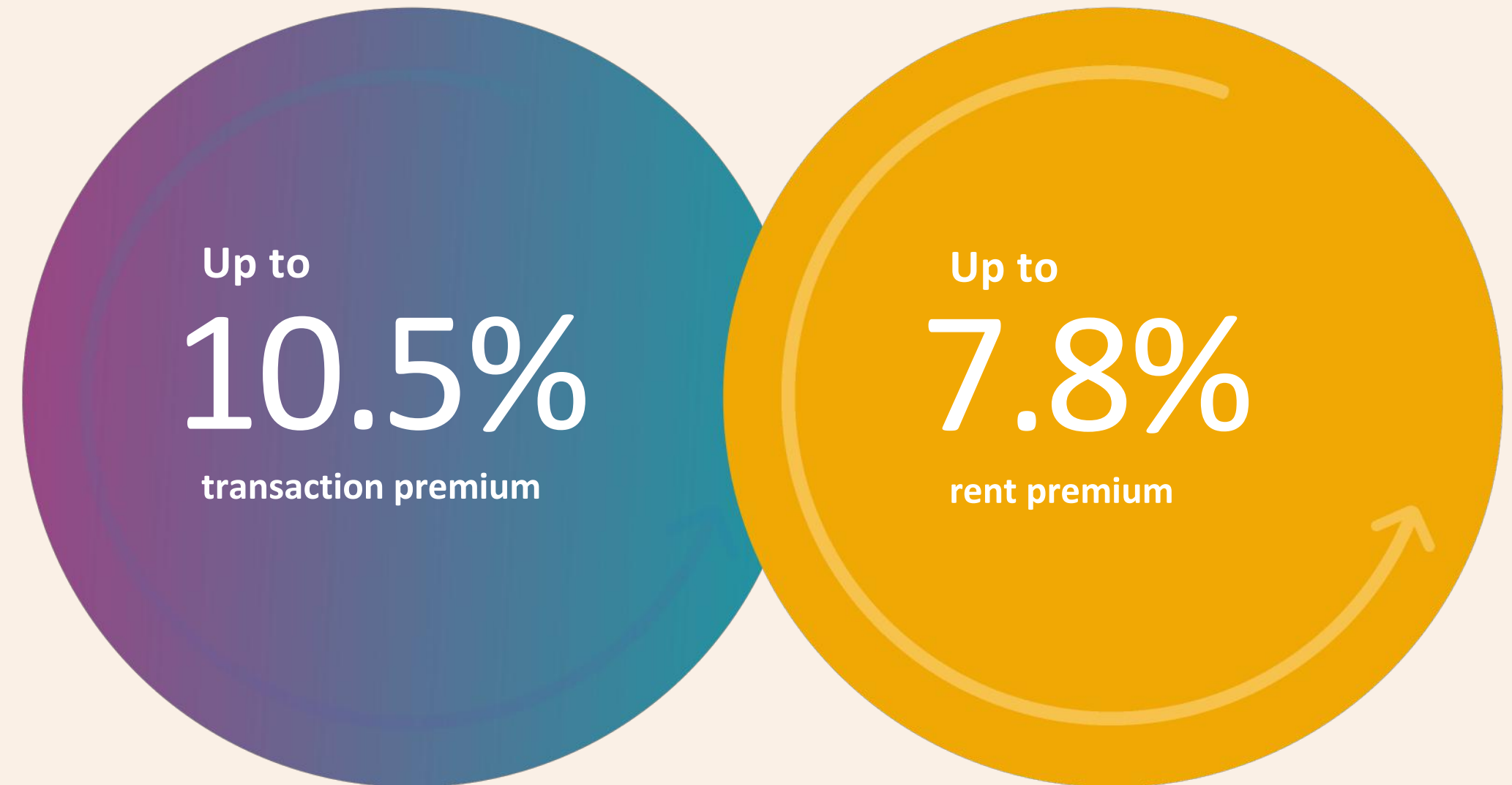
Up to

\$200 bn.

annual productivity gain

A case study that focused on a building on [Pacific Northwest National Laboratory's](#) campus showed that the estimated 10-year **NPV for energy was \$44,000**, whereas the estimated 10-year **NPV for health and productivity was over \$2 million**, a near **50 times multiplier**.

A 2021 study in [Landscape and Urban Planning](#) found offices with higher green index scores **yielded rent premiums up to 7.8%**.





How
investing in
health
pays back.

THE WAY FORWARD

WELL enhances tenant satisfaction.

A 2022 study found that WELL Certification improved overall **occupant satisfaction by nearly 30%**, as well as **occupant perceived well-being scores by 26%**, reported mental health by 10% and productivity by 10 median points.

A study [Journal of Building and Environment](#) study found that offices with high levels of daylight saw a **5-6% rent premium**.



30%

Improvement in occupant
satisfaction



26%

Occupant well-being score

THE WAY FORWARD

Healthier spaces can **boost productivity** and **foster innovation**.

Organizations see returns on their health investments through improved employee productivity in environments that foster creativity and innovation.

Remote and hybrid work increases demand for flexibility.

74% of employees agree that their workplace is a space they look forward to going or would look forward to going.

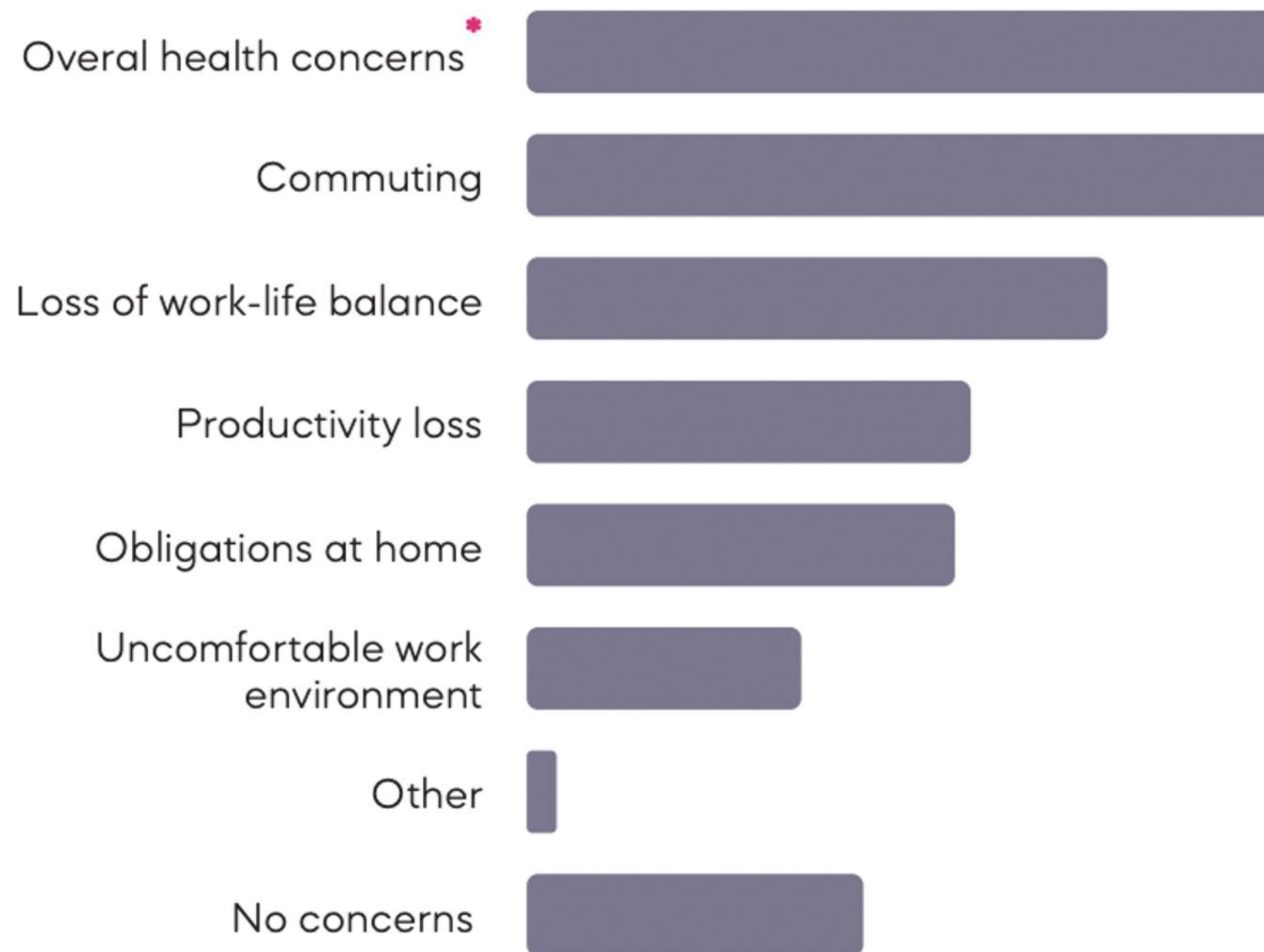
Employees look forward to going to the workplace, but health is among their top return-to-workplace concerns.



74%

of employees agree that their workplace is a space they look forward to going.

Figure 2. Concerns about returning to company's physical work location full-time or part-time (among employees who work remotely at least one day per week)



* Overall health concerns include:
Health and safety concerns – 37% (e.g., physical disability, COVID-19, exposure to other illness)
Mental health concerns – 23%
Question allowed for multiple responses

LEARN MORE AT

wearewell.com/harris-poll

THE WAY FORWARD

Improved employee satisfaction **pays dividends.**

In a new [project profile](#), Interface showed a vast improvement in employee satisfaction at its WELL Certified Gold Atlanta headquarters.

- Interface needed its world headquarters to support the health and well-being of employees. They looked to WELL first.
- Employees have workplace choices that make coming to the office a beneficial and supportive experience.



THE WAY FORWARD

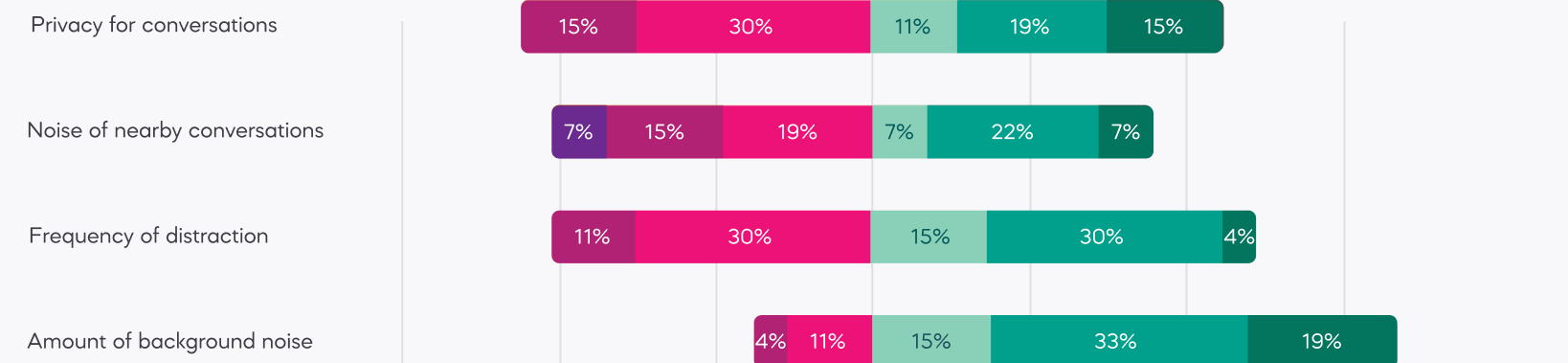
Creating space designed for their best work.

Through strategies in the WELL Comfort concept, Interface reduced internal noises causing disruptions and decreased speech privacy.

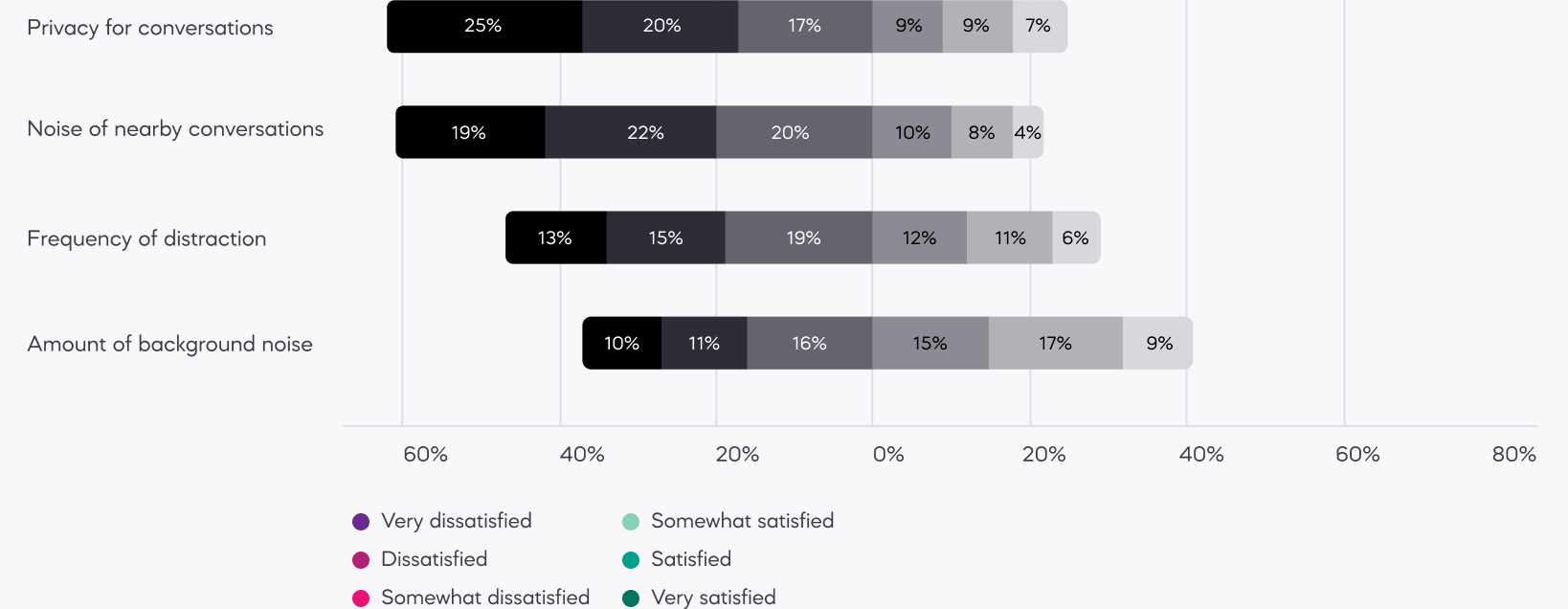
- Installed a quieter HVAC system
- Created an acoustic plan to map loud and quiet areas of the building
- Employees reported 15-20% higher satisfaction with conversation privacy, noise from nearby workstations and frequency of distraction.
- 30% higher satisfaction with background noise compared to a benchmark of 30 sample U.S. offices.

SATISFACTION WITH ACOUSTICS

INTERFACE (N=27)

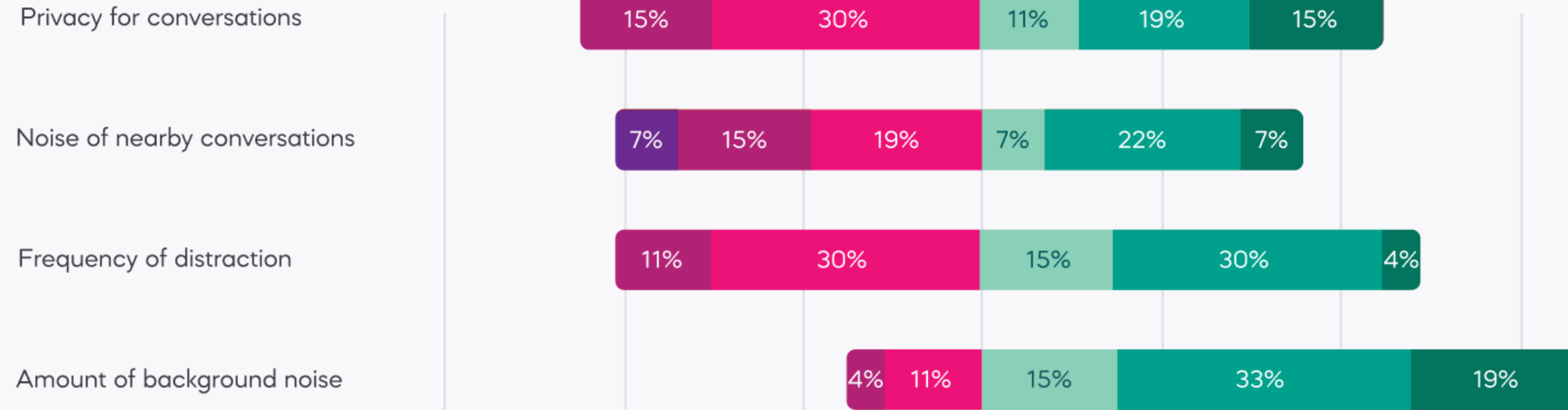


50 U.S. BUILDINGS (N=572)

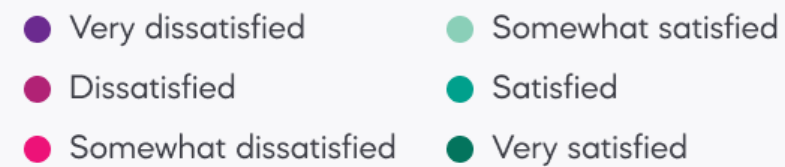


SATISFACTION WITH ACOUSTICS

INTERFACE (N=27)



50 U.S. BUILDINGS (N=572)





WE ARE WELL

wearewell.com