## Key Strategies for Optimizing Industrial Spaces for Employee Health and Wellness

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The Timely Benefits of Optimizing Our Industrial Workspaces

Attract and retain top talent. Reduce injury and absenteeism. Lower stress levels. Increase overall job satisfaction. Across the industrial sector, insiders agree that a key to improving productivity lies in health and wellness. Yet the sector has lagged behind commercial and residential spaces. Using three overarching guidelines, this report aims to close that gap with a series of practical, evidence-based recommendations.

Even prior to COVID-19, the industrial sector faced challenges brought on by the rapid growth of e-commerce, a tightening labor market and high levels of employee turnover. The pandemic further heightened these challenges. With industrial workers deemed essential to meeting supply chain demands, it wasn’t long before the sector experienced a series of devastating coronavirus outbreaks across warehouse sites and there were calls for workplace improvements, from air ventilation standards to sick leave policies.

The focus on these opportunity areas could not be more urgent and timely. COVID-19 has highlighted the need for enhanced preparedness strategies, especially with e-commerce demands predicted to intensify and the attraction of talent remaining a true challenge. What works when it comes to promoting employee health and wellness, and what makes sense for the industrial sector?

In keeping with the Center for Active Design’s rigorous approach, we surveyed the latest scientific literature, interviewed key industry players, leveraged sector-specific best practices and drew on our direct experience with real-word successes in commercial and residential buildings to prepare this report. We have focused on optimizing light manufacturing sites, storage and distribution centers and flex spaces. And we have organized our recommendations by grouping them into one of three impact areas:

1) Maximize Location and Site Accessibility
2) Design Functional and Supportive Interiors
3) Create Spaces that Promote Productivity and Preparedness

While project needs vary, of course, our hope is that, taken together, the tactics recommended here offer an approachable starting point, giving owners, facility managers and tenants a range of practical, validated ideas to consider.
Meeting the Needs of a Fast-paced, Growing Industry

A comprehensive approach to promoting health and wellness outcomes across industrial sites helps leaders meet the sector’s growing demands.

**Prioritizing Health**
87% of employees consider health and wellness when choosing an employer^1^.

**High Turnover**
60% turnover rate in the industrial sector in 2020^2^ (North American transportation, warehousing and utilities).

**Frequent Injuries**
5% of warehouse workers experience work-related injuries or illness each year^3^.

**Significant Growth in Warehouse and Storage Workforce**

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<thead>
<tr>
<th>Year</th>
<th>Employees (in thousands)</th>
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<tr>
<td>2011</td>
<td>600</td>
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<tr>
<td>2013</td>
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<tr>
<td>2015</td>
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**Healthy-Related Absenteeism**
1 in 3 workers cite health concerns as the leading cause for absences^4^.

“What we are hearing from our warehouse and logistics tenants is that attracting and retaining employees has now become a significant challenge. Warehouse workers are no longer just shipper-receivers, but essential contributors to complex businesses with intense HR demands.”

Rob Lauer, Senior Vice President, Industrial East, QuadReal

The North American warehouse sector annual growth is projected at 2.7% through 2026, to a valuation of more than $87 billion^5^.

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1. Public transit increases site accessibility.

2. Greenery promotes the use of outdoor spaces.

3. Lighting supports perceptions of safety.

4. Bike lanes promote safe, active commuting.

5. Common areas encourage social interaction.
Maximize Location and Site Accessibility

For employees, tenants and asset managers alike, location is key. Particularly for locations focused on distribution, traffic accessibility and market proximity. Being close to population centers has the potential to reduce supply chain costs by 50%. Accessibility is equally important to employees—proximity to transportation and other amenities promotes physical activity, through walking and cycling, social interaction and an overall healthier lifestyle.

As high-tech spaces look to attract a more skilled workforce and maximize efficiency, accessibility has become an essential asset.
STRATEGY
Connect Site to Surrounding Areas

Employees like to be “close to the action.” Buildings and campuses in walkable locations have been shown to foster improved health by increasing opportunities for regular physical activity, social interaction and access to amenities. In logistics specifically, better transport connections give real estate owners a tool to attract, train and retain labor forces. Historically, logistics and warehousing real estate have consisted of isolated campuses, detached from public transit and too far from urban population hubs for employees to walk or bike. Improving site connectivity—either through strategic site choice or by providing services that improve access to nearby destinations—has the potential to improve the health and retention of these employees.

- **Facilitate Public Transit Access**
  Public transit access supports community connectivity and increases use of public transportation, contributing to increased active transit, physical activity and stress reduction.

- **Provide Bike Infrastructure**
  Bike lanes, a formal bike share program, on-site showers and locker rooms, and secure bicycle parking improve safety and the employee’s overall travel experience. Such features also encourage cycling for transportation and recreation, contributing to increased physical activity, along with reduced congestion and air pollution.

- **Create a Pedestrian-Oriented Environment**
  A pedestrian-oriented environment, created through adequate wayfinding and lighting infrastructure, supports pedestrian navigation of the site and promotes safety by reducing conflicts between vehicles and pedestrians. Lighting up outdoor spaces also increases visibility, contributing to increased safety and pedestrian street use after dark.
SPOTLIGHT

Interview with Carl Lam
General Manager
QuadReal

How does QuadReal strive to promote health and wellness within the industrial sector?

As a company, we’re emphasizing overall sustainability, which includes prioritizing health. And as we’re developing new industrial buildings, we’re taking into account having more daylighting, better internal lighting systems, and we’re looking at air source heat pumps as opposed to gas-fired units for improved efficiency, air quality and tenant comfort.

We’re also looking at creating more amenity areas; for example, it’s becoming a common request to have trees and landscaped areas on site. We’re starting to integrate spatial provisions for bike storage and showers in industrial spaces, allowing for internal bike storage in some sites and external bike storage where the space is not feasible, so that employees have the option to bike in if they live close enough. We’re trying to be as proactive as we can, offering things up before tenants even ask for it.

What if you don’t have space to create outdoor amenities?

We get creative. In some cases, we’ve done things like a community garden. We parsed out spaces, installed irrigation, put in plant materials—tenants can come out and adopt a plot, till, weed and help with the harvest, even take home the food themselves. They find it therapeutic, and they feel encouraged to leave their desks, walk around, be outside. In some locations we even partner with a local food bank to deliver some of our garden’s produce to them.

How does a healthy building certification play a role in supporting your efforts?

Being able to go through and certify buildings on an annual basis has really allowed us to keep that awareness on health and wellness. Before, HVAC was just a rooftop unit that goes on and off. Now we are looking at ways to innovate that service and building infrastructure to modulate airflow for tenants, which increases productivity and ensures workers are feeling their best. Every year, we come up with a new tenant engagement program to feature various sustainability, health and wellness initiatives. We roll out a new theme every two months. It’s really helping to drive engagement.

Are these efforts adding value to the topline? How do you think about ROI?

Absolutely. When our buildings have invested in green or health-promoting initiatives, we’ve seen higher lease rates and overall property valuations. So we know it adds value. We also find that tenants in healthy buildings tend to be more engaged and more apt to renew, staying with us for longer periods. Putting ROI aside, it’s just the right thing to do.
STRATEGY
Make Space for Health-Promoting Services and Facilities

Workplace health initiatives and facilities can contribute to improved workforce health, employee retention and overall productivity. Opportunities for physical activity, social interaction and improved eating habits support lower incidence of cardiovascular disease and mortality, as well as reduced stress and mental fatigue. Employees at industrial spaces often work irregular hours, which can be disruptive to their health, as it has been linked to insomnia, depression and chronic illness, making the provision of on-site health-promoting amenities essential.

- **Provide Fitness Opportunities**
  Free or discounted access to gym facilities helps support workers trying to make lifestyle improvements. In addition, providing outdoor exercise equipment or regularly occurring fitness and wellness classes can encourage physical exercise among employees, contributing to prevention of chronic conditions such as cardiovascular disease and diabetes.

- **Construct Communal Spaces**
  Free and accessible open spaces, such as indoor or outdoor break areas, invite workers to connect and decompress, supporting community engagement and social interaction.

- **Design Flexible Outdoor Spaces**
  Outdoor space amenities—such as walking paths, flexible seating and water features—encourage workers to get outside during their breaks, promoting increased interaction and physical activity while supporting increased exposure to daylight.

- **Promote Healthy Food Access**
  Access to healthy foods promotes nutritious eating and improved dietary habits. It can also encourage workers to take a break during their day to enjoy a meal or healthy snack with coworkers, enhancing social interaction.
STRATEGY

Prioritize Access to Nature

Access to nature contributes to reduced stress and enhanced mental health. Views of greenery or trees from workspaces allow employees to connect with nature. Employee survey results indicate that as contact with nature increases during the workday, perceived stress and generalized health complaints decrease. For female employees specifically, there is a significant relationship between physical and visual access to greenery and a positive workplace experience. Installing windows and skylights and promoting easy access to green spaces during breaks have the potential to improve employee productivity and health and reduce on-site energy costs.

- **Incorporate Tree Canopies**
  Natural elements such as trees and plantings in public spaces increase use of outdoor spaces, support a connection with nature and decrease stress and exposure to air pollution.

- **Provide Walking Paths**
  Walking paths offer increased exposure to the outdoors and can encourage physical activity while also providing a unique opportunity to connect with nature, supporting reduced stress and anxiety.

- **Institute Efficient Parking Practices**
  Landscaping, well-marked and well-lit pedestrian pathways, and priority parking for car or van pools can improve the outdoor experience and also encourage more sustainable transit choices.

“We are making much more conscious choices about things such as tree coverage, soil usage and low-decibel landscaping, all to support occupant health and our overall sustainability goals.”

Gus Tsoraklidis, Vice President, Investment Management, QuadReal
Design Functional and Supportive Interiors

More than just a space to store boxes

Manufacturing floors, warehouses and other storage and distribution facilities are vital assets within the industrial sector, and their value continues to increase with the growth of the e-commerce sector. With mounting pressure on manufacturing and warehousing, it is important to protect the safety and health of the hundreds of employees that occupy these spaces daily. From providing storage and facilitating packaging to promoting new technologies, these properties have become so much more than simple sheds.

By thinking holistically about building design, landlords and owners are able to optimize industrial interiors for occupant health, which in turn translates into employee productivity.

1. Hand hygiene promotes employee health.
2. Clear wayfinding supports workplace safety.
3. “Golden Zone” lifting reduces workplace injuries.
4. More daylight contributes to better sleep and higher productivity.
5. Access to water supports proper hydration.
6. Emergency notification systems and first aid supplies support rapid response.
STRATEGY
Provide Access to Essential Facilities

Maximizing workplace efficiency requires meeting the basic needs of employees and preventing over exhaustion and discomfort. Some industrial workers have expressed an inability to keep up with their human needs during the workday, with some going so far as to refrain from drinking water or avoid taking bathroom breaks, due to concerns about meeting quotas. Prioritizing accessibility of essential facilities—such as restrooms, water fountains, handwashing stations and lactation rooms—will prevent these unhealthy situations.

- **Ensure Easy Access to Restrooms**
  A clean and centrally located restroom helps prevent dehydration, urinary tract infections and other health concerns caused when unable to take regular bathroom breaks.

- **Support Widespread Access to Water**
  Easily accessible hydration stations can help ensure all workers have easy access to fresh, filtered water to keep energy levels high and improve mood.

- **Integrate Hand Hygiene Stations**
  Regular placement of both handwashing and hand-sanitizing stations supports proper hand hygiene, which is essential when it comes to preventing the spread of infectious diseases.

- **Provide Access to Lactation Rooms and Stations**
  Workplaces that provide private rooms for new mothers allow women to safely breastfeed even after they return to work, enhancing employee retention, lowering absenteeism and supporting the health of new mothers and babies.
SPOTLIGHT

Interview with Natali Cooper

Head of Portfolio and Asset Management and ESG, GLP Europe

How does GLP work to promote health and wellness within its logistics spaces?

We are looking at how buildings are going to be used and optimizing them from the user perspective. From indoor air quality and lighting to different ways to promote movement (e.g., hiding the elevators behind stairwells), we work to integrate little tricks into the design to promote a positive environment. We are also looking at bringing in plants, creating break rooms and advising better placement of water fountains.

Does GLP also consider health and wellness outside and around the building?

Yes, we have created aromatic gardens on some sites to promote the fauna and natural biodiversity, but also so the workers have a place on-site that is green and relaxing. In one of our new projects in the Czech Republic, we are introducing the concept of a relaxation garden, which has shade tree and benches, where people can go and take their breaks or eat outside. We are also working to increase healthier food options by providing better access to mobile food trucks. And transport accessibility is taking greater importance—creating ways for employees to access their work sites by bike or public transit.

What do you see as the major motivation for moving toward health and wellness?

Investors no longer want to support businesses that are not committed to ESG and health. The institutions view both as being important to the financial outcomes of the business, as well as enhancing the reputations and credibility of management. I strongly believe that these health-promoting elements will translate into increased capital value and return performance. The global economy faces considerable risks in the short-, medium- and long-term. That’s why investors are focusing more closely on climate risks and governance. Managers needs to prepare for a broad range of potential outcomes. Quality buildings with active asset management reduce the risk to income streams. The investment world is saying, “If you aren’t with us, you will be left behind.” And we’ve heard that message.

“We are looking at elements such as bringing in plants and creating break rooms, so customers have a place where their workers can relax a little bit.”

Natali Cooper,
Head of Portfolio and Asset Management and ESG, GLP Europe
STRATEGY
Support Safe Use of Spaces

Warehouse jobs are often physically demanding and often in cramped spaces, near sharp equipment and heavy materials. Many of the tasks, such as heavy lifting, operating complex machinery and fast-paced work, can result in musculoskeletal disorders, acute injuries and chronic stress. Industrial labor is one of the leading professions associated with work-related injuries, which are linked to absenteeism, reduced ability to work and early retirement—all adding up to long-term risk for employees and employers. But these risks can be mitigated, and increasingly employers are creating safer work environments. Rethinking the design of interior spaces and equipment used to complete necessary tasks can help the logistics sector reduce risk of injury, ultimately reducing sick leave and promoting employee retention.

- **Implement Clear Wayfinding**
  Strategically placed signage and other wayfinding tactics can help encourage safe use and navigation of industrial spaces.

- **Create Safe Storage Practices**
  Stable, well-spaced racking helps ensure machinery can safely maneuver throughout the industrial space and is critical to avoiding disastrous and sometimes fatal accidents.

- **Support Optimal Ergonomics**
  Ergonomic design within industrial settings can help reduce the risk of one of the leading causes of worker injury—musculoskeletal disorders (MSDs), which negatively affect muscles, tendons and joints.  

Musculoskeletal disorders cost U.S. employers between $15 billion to $20 billion in compensation costs. In Europe, three out of every five workers in the EU-28 report MSD complaints, contributing to major economic losses.
Having windows in a workplace environment can contribute to employees getting up to 46 minutes of additional sleep each night.\(^\text{24}\)
Mitigate Exposure to Noise
Reducing exposure to interior noise by placing acoustic curtains around loud equipment, maintaining machinery correctly, using gearless conveyors rather than conventional ones, replacing conventional high-speed fans with high-volume/low-speed fans, and providing noise protection equipment to workers all reduce the risk of job-induced hearing loss.

Promote High-Quality Indoor Air
Improving indoor air quality through ventilation and filtration can reduce the risk of contagious disease transmission as well as chronic conditions such as asthma.

Practice Responsible Cleaning
Cleaning regularly mitigates the risk of pest infestation, reduces disease transmission and improves overall perception of the work environment. It is also important to use products identified as safer choices, as this can help promote higher quality indoor air.
Establish Resilient Spaces to Support Productivity and Preparedness
Establish Resilient Spaces to Support Productivity and Preparedness

Constructing a sector ready for the unexpected

Futureproofing the workplace will help ensure longevity and success for real estate owners, tenants and employees. The continuous growth of e-commerce has heightened awareness about the importance of industrial work, leading to increased demand for more sustainable and resilient manufacturing and logistics buildings. Beyond employee retention and health, various studies reveal a positive correlation between sustainability practices and productivity within industrial sites. Unexpected events, such as the COVID-19 pandemic, can disrupt global supply chains and shed light on areas where preparedness could be improved. Adaptability and responding to unexpected challenges while maintaining functionality can determine whether organizations survive or collapse. Emergency planning, stakeholder transparency and employee retention contribute to this adaptability and promote the sustained long-term growth that the sector is currently experiencing.

GUIDELINE 3

1 An accessible AED supports rapid response to cardiac events.
2 Relevant training sessions cut down on injuries and foster retention.
3 Indoor greenery promotes mental restoration.
4 Regular breaks foster mental health and improved job satisfaction.
STRATEGY

Prevent and Prepare for Emergencies

While the industrial sector was largely well protected against the downturn that many sectors experienced in recent years, unexpected events, ranging from wildfires and floods to pandemics, have highlighted the value of emergency preparedness. Safe and prepared environments have the potential to put employees and supply chain partners at ease and can be a “real differentiator” in real estate portfolios. As it did in many spheres, disease-spread spiked in the industrial sector during the COVID-19 pandemic, leading to losses in employee health, productivity and reputation. While supply chain disruptions are largely inevitable during crises, anticipatory planning to ensure workplace safety has the potential to reduce losses, making emergency preparedness good for both health and business.

- **Install an Emergency Notification System**
  An emergency address notification system that reaches employees directly on their phones, through visual cues or auditory messages, decreases emergency response time, contributing to improved preparedness and enhanced safety.

- **Establish and Implement an Emergency Preparedness Plan**
  A comprehensive emergency response plan can help prepare industrial sites and also ensures employees are able to respond to situations quickly, limiting casualties and diminishing the negative impacts of a disaster.

- **Identify and Train Certified First Responders**
  A regularly updated schedule for certified first responders ensures trained individuals are on-site at all times and aware of their role during a variety of emergencies. This can help decrease response times during a crisis, contributing to diminished casualties and—less critical but also important—decreased employee absenteeism.

- **Practice Safe Siting Practices**
  Safe siting practices ensure projects are located away from noxious sources, such as landfills, power plants, contaminated sites and other environmental hazards. These practices cut exposure to pollution, contributing to enhanced respiratory health and a reduction in stress, anxiety and depressive symptoms.
STRAIGHT

Promote Two-way Communication and Transparency

Engaging and prioritizing communication with employees contributes to improved holistic health, enhances workforce equity and boosts workplace loyalty and productivity. A supportive supervisor relationship and management fairness are major predictors of workplace wellness. As automation increases in the industrial sector, it becomes increasingly important for employers and tenants to communicate with workers in purposeful ways, so as to promote meaningful work in an environment that can be isolating.

- **Establish and Implement a Communication Plan**
  A communications plan helps increase awareness of new policies and improves compliance, enhances transparency, builds trust and strengthens the relationship between operators and occupants.

- **Collaborate with Key Stakeholders**
  Collaborating with employees when considering workplace practices and policies—break-room layouts, employee benefits policies and on-site amenities—helps them feel valued and therefore increases employee retention.

- **Survey Occupants**
  Using occupant and tenant satisfaction surveys to develop features and design programs that support physical, mental and social health helps everyone feel heard and part of the process.
Support Employee Retention

Consumer expectations for fast delivery, along with the introduction of new technologies, require employers and tenants to institute policies and practices that help avoid employee stress and burnout. Providing sufficient sick leave and training on new technologies supports long-term employment and career building at all levels of an organization.

- **Provide Access to Paid Sick Leave**
  A paid sick leave policy ensures all employees are able to stay home when sick without fear of retribution, increasing the likelihood that sick individuals do not go into work when contagious.\(^\text{37}\)

- **Offer Relevant Training Sessions**
  Training employees on new equipment and technology, as well as rewarding strong performance with opportunities for career advancement, help validate employee efforts and support long-term employee retention.

- **Establish and Implement a Comprehensive Onboarding Program**
  Employee onboarding helps to reduce uncertainty and fear and promotes socialization amongst new employees, creating healthy and engaging environments within organizations.\(^\text{38}\)

Paid sick leave has been shown to reduce risk of worker injury, with one study finding that workers with paid sick leave were 28% less likely than those without it to experience workplace injuries.\(^\text{39}\)
In their pursuit of creating a stronger and more prepared industrial sector, company leaders have begun integrating the strategies recommended here, discovering in the process that supporting worker health enhances the bottom line. Many of these interventions are low-cost and will pay for themselves in the long run through higher retention and higher resale values, increasing an asset’s attractiveness to investors.

The global supply chain depends on those working at industrial sites, and by optimizing these workplaces, the industrial sector can better support its workers and ultimately strengthen global infrastructure. A growing population has come to expect next-day delivery of everything from groceries to clothing, placing new pressures on the industrial sector and its workers. Meeting these growing demands with smart, strategic support is the best way to retain employees and optimize output.

Each stakeholder—owners, facility managers, tenants—has a role to play. Our hope is that this report serves as a playbook, providing actionable guidance that can help develop a “new normal” for industrial spaces, where worker health and workplace preparedness are prioritized through innovative design and operational interventions.
“Companies adopting the smart, doable recommendations contained in this report will not only differentiate themselves, they will join a vanguard helping to drive transformation of the built environment.”

Joanna Frank,
President and CEO
Center for Active Design
The Center for Active Design is the leading non-profit organization using design to foster healthy and engaged communities. We apply our multi-disciplinary expertise to empower decision makers with research and technical assistance that lead to measurable outcomes.

The Center for Active Design also maintains the evidence-based standard for Fitwel, the world’s leading platform for certifying healthy buildings, and conducts the objective third-party assessments that lead to certified Fitwel projects.

QuadReal Property Group is a global real estate investment, operating and development company headquartered in Vancouver, British Columbia. Its assets under management total $61.2 billion. From its foundation in Canada as a full-service real estate operating company, QuadReal has expanded its capabilities to invest in equity and debt in both the public and private markets. QuadReal invests directly, via programmatic partnerships and through operating companies in which it holds an ownership interest.

QuadReal seeks to deliver strong investment returns while creating sustainable environments that bring value to the people and communities it serves. Now and for generations to come.

*QuadReal: Excellence lives here.*

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