

WELL & PLACES THAT THRIVE

—
ULI BTR Roundtable
London, Jul 2019

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NICE TO MEET YOU

LET'S KEEP IN TOUCH

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THE TEAM BEHIND **WELL**

The International WELL Building Institute (IWBI) is leading the global movement to transform our buildings and communities in ways that help people thrive.



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HEALTH IS A STATE OF COMPLETE PHYSICAL,
MENTAL, AND SOCIAL WELL-BEING, AND NOT
MERELY THE ABSENCE OF DISEASE OR INFIRMITY.



THE WORLD HEALTH ORGANIZATION



BETTER BUILDINGS ARE WELL



OUR STANDARD

The premier global standard
for healthy buildings.



YOUR COMMUNITY

Join the movement with the
WELL AP credential.

A COMPREHENSIVE APPROACH TO WELL-BEING

The WELL Building Standard is made up of features that address ten concepts:



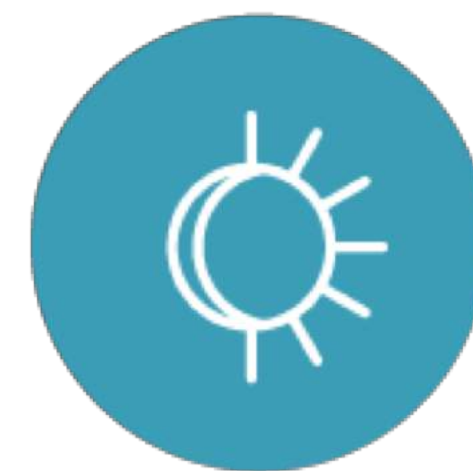
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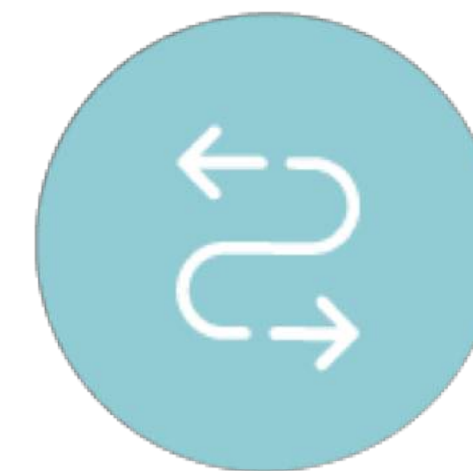
WATER



NOURISHMENT



LIGHT



MOVEMENT



THERMAL
COMFORT



SOUND



MATERIALS



MIND



COMMUNITY

WELL IS HOLISTIC





PERFORMANCE VERIFICATION

PROCESSES
PROTOCOLS
EQUIPMENT

Onsite testing + performance review =
PERFORMANCE VERIFICATION

PROGRAMMES



NEW or EXISTING
BUILDING

WELL v1

WELL v2



CAMPUS / MASTERPLAN
COMMUNITY

WELL Community Standard



MULTIPLE BUILDINGS / ESTATE
PORTFOLIO

WELL Portfolio Pilot

THE GLOBAL **WELL** MOVEMENT



8,466 PEOPLE
of the WELL community in
82 COUNTRIES

4,673 WELL APs /
3,793 WELL AP exam registrants



3,439 WELL PROJECTS with
413 MILLION SQ FT
in 55 countries

195 WELL Certified projects /
3,244 WELL registered projects

WELL IN EUROPE

439

WELL PROJECTS

36 CERTIFIED

77.93 MILLION

SQUARE FEET

25

COUNTRIES

UK, France, Netherlands, Spain, Poland, Italy, Sweden, Ireland, Germany, Hungary, Finland, Slovakia, Czech Republic, Romania, Belgium, Lithuania, Russia, Norway, Switzerland, Luxembourg, Monaco, Greece, Turkey, Serbia, Latvia.

WHO'S PURSUING WELL?

DEVELOPER / OWNER

AXA Investment Managers	IDI Gazeley
British Land	Ivanhoe Cambridge
Brandywine Realty Trust	Landid
Brookfield Properties	Landsec
Castellum	Lendlease
Charter Hall	Mirvac
Crown Estate	Obayashi
EDGE Technologies	Oxford Properties
Fraser Property	Prologis
Gecina	Shimizu
Gmp	Sino-Ocean Land
Grosvenor	Sogéprom
HB Reavis	SL Green
Hines	Vasakronan
HRO	Vinci

REAL ESTATE / DESIGN & CONSTRUCTION

AECOM	Hilson Moran
Arup	HKS
Buro Happold	HOK
CBRE	Jacobs
Colliers	JLL
Cundall	MMoser
Cushman & Wakefield	Skanska
Gensler	Structure Tone
Glumac	WSP

MANUFACTURERS

Allsteel	Kimball	Shaw
Haworth	Milliken	Steelcase
Interface	Mohawk	Teknion

WHO'S PURSUING WELL?

FINANCIAL SERVICES

AEW Capital Management
Barclays
Citibank
DNB
Manulife
National Australia Bank
PayU
Point72
TD Bank
Wells Fargo

CONSULTING/ TECHNOLOGY

Accenture
Deloitte
Ernst & Young
Fandango
Google
Lenovo
LinkedIn
Microsoft
Symantec
Tencent
Verizon

PHARMA/ HEALTHCARE

23andMe
AstraZeneca
Boston Scientific
China Life Health
Cigna
Cleveland Clinic
Eli Lilly
Genentech
Merck, EMD Serono
McKesson
Sanofi
Stryker

OTHER

AXA Equitable Life
Bacardi
Daimler
Hyatt
Schneider Electric
Unilever
WarnerMedia



**WE SPEND ABOUT 90% OF
OUR TIME INDOORS.**



65% OF THIS IS SPENT AT
HOME.¹

1. UKGBC (2016) Health and Wellbeing in Homes.

WELL RESIDENTIAL

190
WELL PROJECTS

16 CERTIFIED
(CHINA & USA)

7 REGISTERED IN EUROPE
(NL, GB, IT, ES, FR)

16
COUNTRIES

Country

China (137)	India (1)
United States (30)	United Arab Emirates (1)
Barbados (6)	Italy (1)
Canada (3)	Mexico (1)
Netherlands (3)	Japan (1)
Malaysia (1)	Spain (1)
Haiti (1)	France (1)
United Kingdom (1)	Thailand (1)

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WELLNESS: THE NEXT TRILLION DOLLAR INDUSTRY

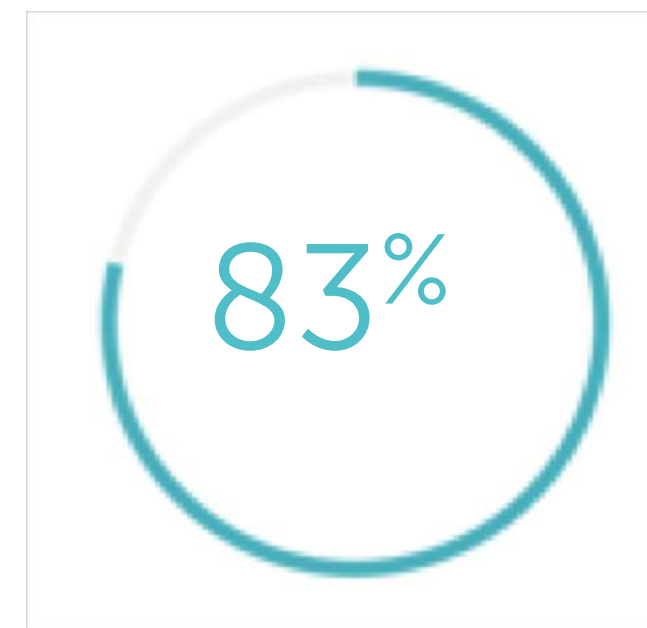
MCKINSEY & COMPANY

Healthy, wealthy and (maybe) wise: The emerging trillion-dollar market for health and wellness. Putney Cloos, Sherina Ebrahim, Tracey Griffin, and Warren Teichner. Consumer and Market Insights, May, 2012. McKinsey and Co.

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OCCUPIER AWARENESS IS RISING

Asked to rank issues in order of impact on their health, Europeans placed **sleeping well at night** and **ventilating their homes** at the top.¹



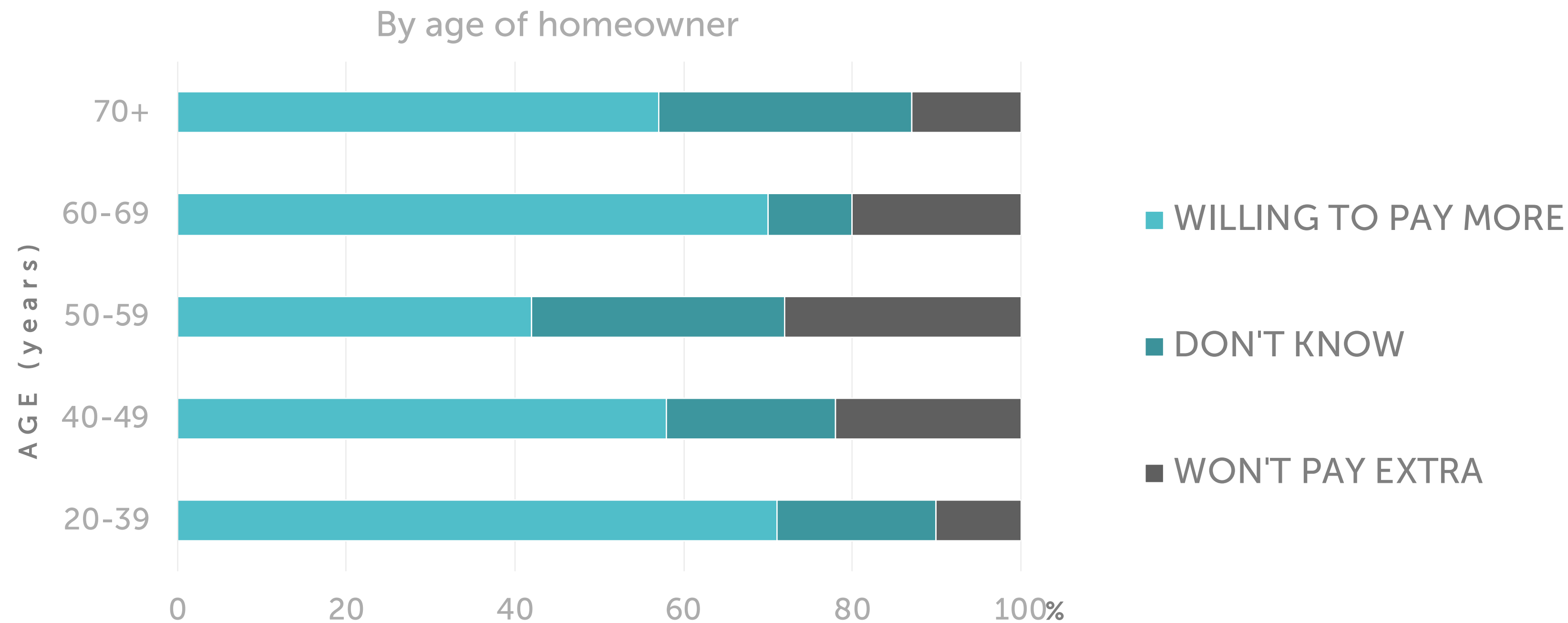
83% of those surveyed were reported as “highly” or “above averagely” **concerned about unhealthy indoor air quality**: remarkably, a similar ranking to financial or job security.¹

VELUX GROUP (2015) HEALTHY HOMES BAROMETER

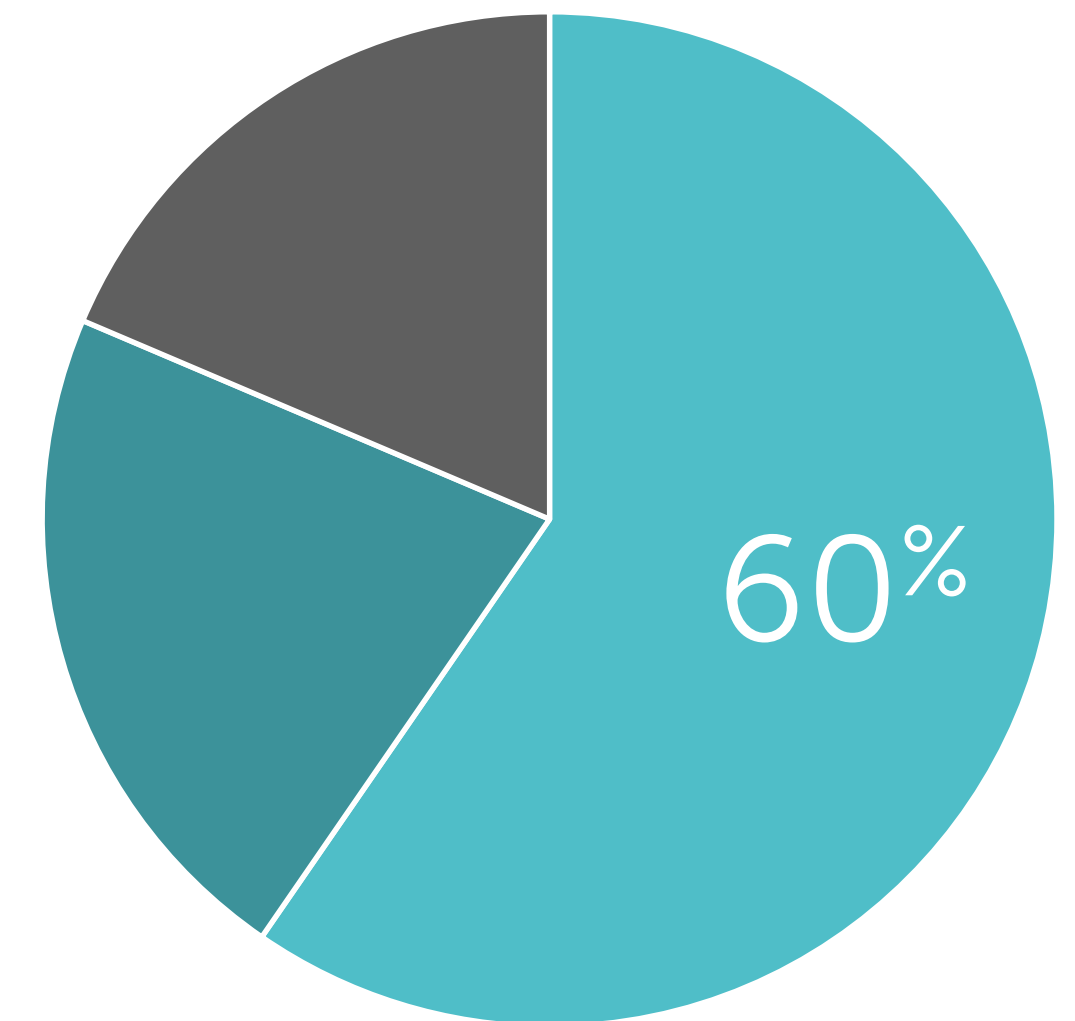
1. Velux Group 2015 Healthy Homes Barometer, quoted in UKGBC (2016) Health and Wellbeing in Homes.

FUELING DEMAND FOR HEALTHY HOMES

WILLINGNESS OF HOMEOWNERS TO PAY EXTRA FOR A HEALTHY HOME



Average across all age groups



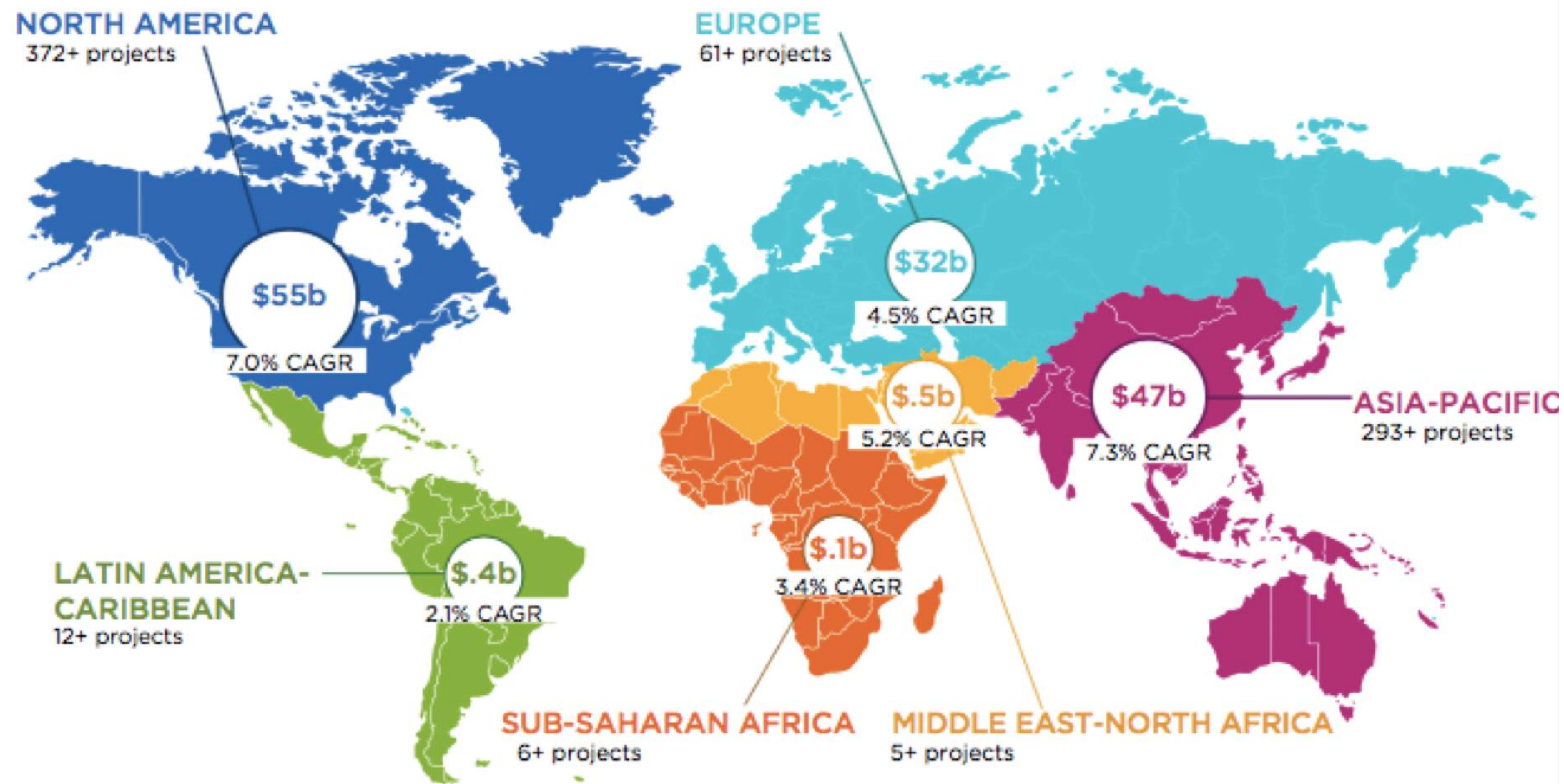
MARKET SET TO GROW

Consumer demand for wellness lifestyle real estate and communities is on the rise globally: in the U.S. alone, there are an astonishing 1.3 million potential buyers each year. In addition, homes designed to improve people's wellness are now commanding 10-25% higher price premiums. And if as recently as the mid-2000s, there were only a dozen projects under development, today there are 600-plus global projects built, partially built, or in the pipeline – each one with a unique “wellness proposition.”¹

GLOBAL WELLNESS INSTITUTE (2017)

1. Global Wellness Institute (2017) New Research on the Booming Wellness Lifestyle Real Estate & Communities Market

Wellness Real Estate is a **\$134 billion global industry in 2017**
Over **740** residential projects in the pipeline, across **34** countries



Top 10 for
Market Size

United States	\$52.5b	India	\$6.1b
China	\$19.9b	France	\$5.8b
Australia	\$9.5b	South Korea	\$4.2b
United Kingdom	\$9.0b	Canada	\$2.4b
Germany	\$6.4b	Japan	\$2.2b

Top 10 for
Pipeline

United States	355	Canada	17
Australia	189	Malaysia	12
United Kingdom	42	Singapore	9
China	39	Vietnam	6
India	17	Indonesia	6

Source: Global Wellness Institute

Notes: Market size figures include the construction of residential and commercial/institutional properties that incorporate intentional wellness elements. Growth rates reflect the compound annual growth rate from 2015-2017. Numbers do not sum to total due to rounding. Pipeline figures include only residential projects with intentional wellness elements (built, partially built, or in development), estimated as of November 2017.



2018 RESEARCH REPORT

Build Well to Live Well

WELLNESS LIFESTYLE REAL ESTATE
AND COMMUNITIES



WWW.GLOBALWELLNESSINSTITUTE.ORG

WORLD GREEN BUILDING COUNCIL REPORT: DOING RIGHT BY PLANET AND PEOPLE



ASID, WELL PLATINUM CERTIFIED (WASHINGTON, DC)

"ASID's new office headquarters was designed for environmental sustainability, and health and wellness, with a focus on indoor air quality, employee satisfaction, and productivity. In their new office, [employee absenteeism has decreased by 19% and presenteeism by 16%.](#)"

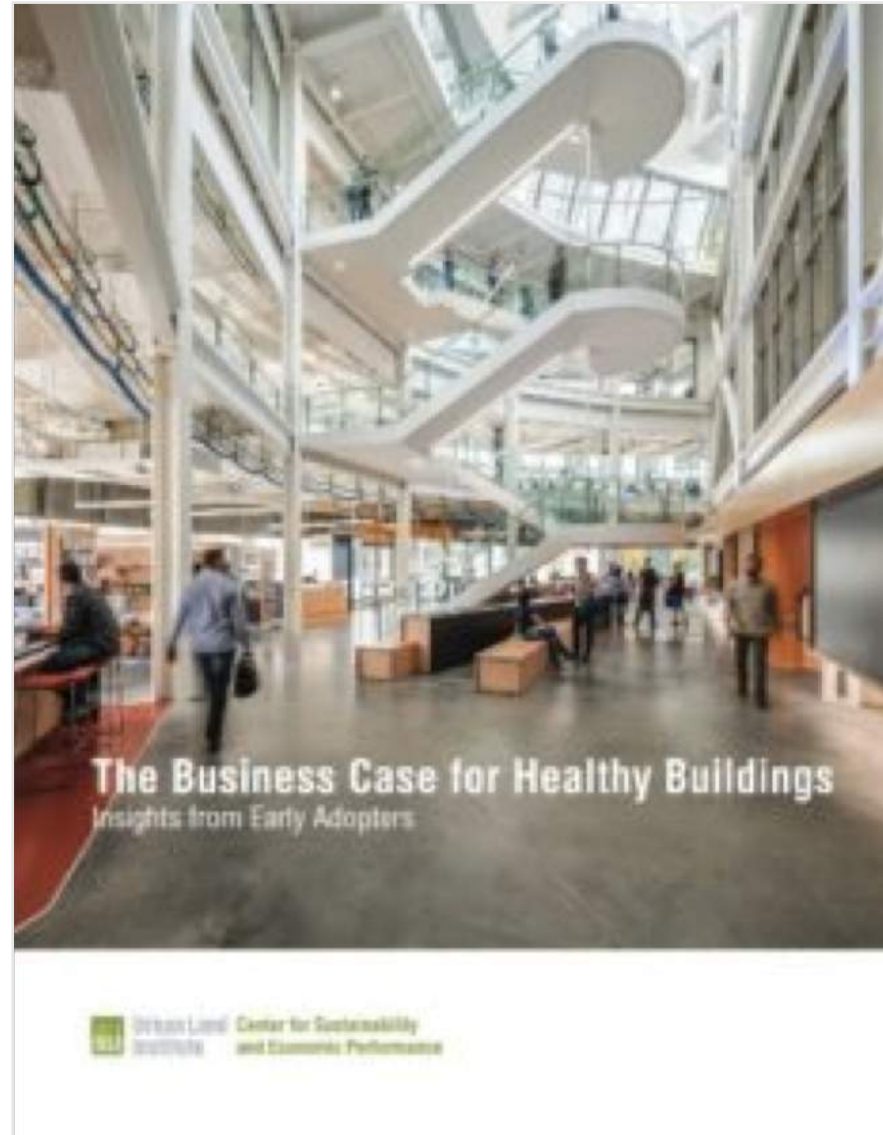
CUNDALL, WELL GOLD CERTIFIED (LONDON, UK)

"Cundall's new office, which focused on improved indoor air quality, including continuous monitoring of carbon dioxide (CO₂) and volatile organic compounds (VOCs), has [saved the company £200,000 due to a reduction of four sick days per year per employee and a 27% reduction in staff turnover.](#) WELL Certification increased the project cost by 3.6%. Based on the above noted savings, these costs had a [return on investment of less than two months.](#)"

LANDSEC, WELL SILVER CERTIFIED (LONDON, UK)

"Landsec's new London workplace prioritises in-person collaboration, health and wellbeing, and indoor environmental quality within a green building. The percentage of employees feeling that the space allows them [to work productively rose by 30%](#) after occupying the new space. This high level of project and employee performance was realised with a less than 3% increase in project cost."

URBAN LAND INSTITUTE REPORT: THE BUSINESS CASE FOR HEALTHY BUILDINGS



CBRE'S OFFICES (TORONTO & VANCOUVER)

Key features include daylight/circadian lighting, ventilation/air quality, collaborative space, active staircase, sit/stand desks. Value added: [greater employee satisfaction, recruitment and retention](#); and enhanced landlord/tenant partnerships. In these WELL-certified offices, [the total employee turnover rate has fallen by almost a third and the hiring rate for new talent has doubled](#).

ARUP'S OFFICE (BOSTON)

Key features include daylight/circadian lighting, ventilation/air quality, collaborative space, sit/stand desks. Value added: [improved productivity, attitude, collaboration and social cohesion among employees](#).

HOLLYWOOD PROPER RESIDENCES (HOLLYWOOD, CA)

Key features include daylight/extensive glazing, ventilation/air quality, noise abatement, biophilic design, and natural materials. Value added: [80 percent leased six months after opening, top-of-market rents](#)

GENENTECH BUILDING 34, THE HUB (SAN FRANCISCO, CA)

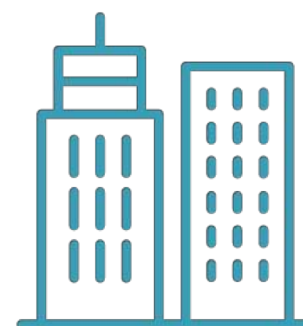
Key features include daylight/extensive glazing, ventilation/air quality, primary health care center, active staircase, marketplace services, and a Zen garden. Value added: Growing use of healthy building services, [improved recruitment and retention, higher employee engagement and satisfaction](#).

THE VALUE



ENHANCE YOUR COMPANY'S VALUE

Identify and apply valuable design, operations and policy-based strategies that can **add value to your buildings and your organization** through the 10 health-focused concepts that anchor the WELL Building Standard.



IMPROVE FINANCIALS

Increase revenue by **attracting and retaining employees and tenants** through organizational and building improvements, and **reduce costs** by applying health and wellness strategies at scale.

WELL Buildings contribute to environmental, societal and governance (ESG) criteria – which can help you attract investors.



Evaluates how property companies and funds are promoting health and well-being in their internal operations and through the real estate products and services they offer to customers.





MATTHEW CLIFFORD
HEAD OF ENERGY AND
SUSTAINABILITY SERVICES,
JLL ASIA PACIFIC



"This new tool offers great potential to further unlock health and wellness opportunities in the built environment, delivering tremendous benefits to the lives of our staff, clients and the public."

"JLL Asia Pacific is thrilled to be involved in the WELL Portfolio pilot, which we are using to focus on JLL's own property footprint, and to assist our clients in their own journey towards better health and well-being"



JOSH MCHUTCHISON

MANAGING DIRECTOR, LENDLEASE INVESTMENT
MANAGEMENT AUSTRALIA



"Globally, we are seeing investors apply environmental and social performance, not only to be a good corporate citizen but as an indicator of delivering long-term risk adjusted returns."

"Well-being is one of the driving factors for creating the best precincts where people want to work, and our tenants see wellness as a way to attract and retain the very best people."

PEOPLE + PLANET

WELL works in conjunction with global green building rating systems to enhance building performance for human health and our environment.



LIVING
BUILDING
CHALLENGE™



SUSTAINABLE DEVELOPMENT GOALS



Advancing the United Nations Sustainable Development Goals through WELL V2

At IWBI, we recognize that human health is inextricably linked to both the health of our planet and the strength of socioeconomic institutions that support everyday life. The environment can support health by providing fresh air, clean water, healthy food and green spaces for physical activity and social connection. Similarly, systems that promote equal access to education, resources, and economic opportunity can reinforce mental, emotional and social well-being. Thus, strategies that support human health must go hand-in-hand with actions that improve education, reduce inequality, catalyze economic growth, confront climate change and protect our environment.

The WELL Building Standard recognizes these connections by offering a balanced, integrated framework of strategies that, while supporting the health of individuals within buildings, also seek to enable the wider community and surrounding environment to thrive. WELL features that promote clean air and water, daylight and safe materials are side-by-side with those that require organizational transparency, civic engagement, and equal access to health services and education. But to truly establish a world in which people and planet can thrive, we need to join hands with global, cross-sector partners committed to similar goals. That's why we're thrilled to align with the [United Nations Sustainable Development Goals](#).

<https://www.wellcertified.com/sdgs>

ARTICLE • Jun 24, 2019

IWBI Joins the United Nations Global Compact

Commits to global corporate citizenship initiative and highlights its work in advancing UN Sustainable Development Goals

(New York – June 24, 2019) – The International WELL Building Institute (IWBI) today announced that it has signed on to the [United Nations Global Compact](#), a voluntary leadership platform for the development, implementation and disclosure of responsible business practices.

<https://resources.wellcertified.com/articles/iwbi-joins-the-united-nations-global-compact/>



DAVID SPROUL

**SENIOR PARTNER AND CEO OF DELOITTE NORTH
WEST EUROPE**

Deloitte.

“We are very proud to have delivered a workplace that has moved the dial on ‘green buildings’. *We have led the way in showing there are real business benefits to blending wellbeing and environmental sustainability* – from increased employee satisfaction to lower operating costs – and we hope our efforts will inspire the industry to continue to innovate in pursuit of a more sustainable future.”

WE ARE
WELL

