



Asset managers have an interest in the outcomes of occupier surveys, which can inform future health and wellbeing investment decisions. Usually, property managers are responsible for co-ordinating the survey process, with input and support from facilities managers.

Incorporating health and wellbeing into occupier satisfaction surveys involves consideration of the following steps.



## STEP 1: DESIGNING THE SURVEY

When designing an occupier satisfaction survey, it is important to decide how it will be framed:

- Frame as a general survey, covering range of topics.
- Frame as a dedicated health and wellbeing survey.

While both options can be useful, property managers should consider which approach will best align with the survey objectives. For example, a dedicated health and wellbeing survey may be a pre-cursor to a planned health and wellbeing campaign.

Questions included in an occupier satisfaction survey can include:

- Binary 'yes/no' questions – providing quantitative data.
- Open, exploratory questions - providing qualitative data based on the respondent's free-hand information

In reality, most surveys will be a mixture of quantitative and qualitative questions, with the balance being influenced by considerations which may include, for example:

- The number of occupiers expected to complete the survey.
- The occupier profile, for example single tenant or multiple tenant property.
- Whether the survey is property specific or portfolio-wide.
- The familiarity of occupiers with the survey process and the subject of health and wellbeing.
- The granularity of detail of information required.
- The method for collating results.
- The available resources.

There are a wide range of health and wellbeing issues that could be included within an occupier satisfaction survey. Some of the component parts of health and wellbeing are set out below, alongside examples of survey questions that could be considered within an occupier satisfaction survey.

Assessment area	Question area
Building location, pedestrian access and commuting	How easily accessible is the building? How can accessibility be improved?
Active opportunities, use of stairs	Would occupiers be willing to use the stairs more if incentivised to do so? Are there any barriers to this?
Internal air quality	How do occupiers view the importance of internal air quality in terms? Do they have any views on this in the context of the specific building?
Access to natural daylight and views of nature	How important is this to occupiers? How do they feel the building performs on this?
Health and wellbeing rating and certifications	Are occupiers aware of certification schemes such as Fitwel, The Well Standard, BREEAM In-Use, GRESB? To what extent have occupiers previously actively engaged in these schemes?

## STEP 2: ISSUING THE SURVEY AND COLLATING RESPONSES

### Survey timing

Surveys should be run at least once a year. Traditionally, surveys are conducted at the start of the calendar year. However, each property's individual context and circumstance should be considered.

For example, it may be beneficial to align a survey with an occupiers' financial year, or alternatively with that of the asset manager. Likewise, it may be important to consider or how the workload commitments for particular sectors, at specific times in the annual cycle, may affect the response rate.

### Engaging new occupiers

It is important to provide new occupiers with sufficient time to settle into a building and become familiar with the facilities and workplace initiatives. Ideally, a six to twelve months occupation period will enable an occupier to experience the full cycle of health and wellbeing activities available at a property.

### Incentivising participation

Property managers should encourage incentivising participation to encourage responses. This could involve, for example, making a donation to a health and wellbeing charity for each response received, or entering participants into draw for health and wellbeing related prizes.

### Collecting and collating responses

The design of a survey should consider the preferred method for collecting and collating responses. This can involve either quantitative or qualitative assessment.

**Quantitative.** This could involve issuing the survey via installed or mobile monitoring devices for self-completion. Automated data collection software could be used to collate responses and present data accordingly.

**Qualitative.** This could involve supporting participants to complete questionnaires, or interviews. Free-hand responses could be manually reviewed and collated into similar types with summarised outcomes presented accordingly.

## STEP 3: REVIEWING THE SURVEY FINDINGS

It is important that property managers engage with both asset and facilities managers to review survey findings and consider appropriate responses.

Asset managers will have an interest in the overall health and wellbeing performance of the building, and how occupiers view the support and quality of service provided by property and facilities managers. Asset managers will also have an interest in occupier feedback relating to a property's health and wellbeing features which may require investment.

Facilities managers will have an interest in how their performance in delivering health and wellbeing services and initiatives is viewed by occupiers, and where there may be opportunity for improvement.

Following the initial review of survey responses, a property manager should put in place mechanisms to engage occupiers to feedback survey outcomes and discuss intended actions. This engagement may involve occupier engagement forums, for example.

The output of the review of survey findings should be the development of a set of health and wellbeing improvement actions which can be included in a health and wellbeing improvement plan. This plan should include budgeted actions, responsibilities and timeframes.

Undertaking an assessment against a specific health & wellbeing certification tool is another good way of identifying current performance and where improvement measures are required.