

2024 Air Quality Survey

Global Insights into Workplace Indoor Air Quality



Fellowes
AIR QUALITY MANAGEMENT



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I. Introduction

The Importance of Indoor Air Quality in the Workplace

The 2024 Fellowes Air Quality Survey explores how indoor air quality (IAQ) impacts office workers’ health, comfort, and productivity across six key developed countries: the USA, Canada, the UK, Germany, Italy, and France. Completed annually since 2021, Fellowes uses this survey to understand macro-trends and year-over-year employee perceptions surrounding indoor air quality, their confidence in workplace IAQ management, and the specific actions they believe employers should take to improve conditions. The survey uncovers global and regional IAQ trends, including how workers from different countries perceive and consider indoor air quality factors and outcomes.

 PURPOSE

The report highlights regional differences in IAQ concerns, how employees perceive air quality needs and desired improvements, and what business leaders should consider when addressing these challenges. Ultimately, this report demonstrates that while IAQ is an important consideration in regard to employee experience, it can be seen as an opportunity to build trust, enhance employee well-being, and drive productivity.



**32% of
USA Workers**

say **workplace cleanliness, including air quality**, is the most important benefit when looking for a new job.



**2 out of 3
USA Workers**

would consider leaving their current employer due to **poor indoor air quality**.



**66% of Hybrid
USA Workers**

say **increased considerations of air quality** would make them more likely to work in office more often.

Fellowes fielded the 2024 Annual International Day of Clean Air survey online between August 6 and August 13, 2024, using the SurveyMonkey Audience panel. The survey included 1,994 respondents from the U.S., Canada, France, UK, Italy, and Germany, with a margin of error of +/- 2.2% at a 95% confidence level. The survey targeted adults 18+ who work indoors at least one full day per week.

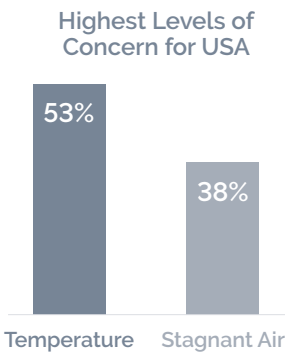
II. High-Level IAQ Concerns

A Global and Regional Snapshot

While most businesses may consider COVID-19 to be a thing of the past, its lingering effects can still be felt in office workers' attitudes and perceptions – particularly concerns about indoor air quality and interest in corporate action to improve workplace health.

Office workers recognize and experience poor or degraded air quality, but temperature, stagnation, and odors are the most perceptible.

Across the globe, the most pressing IAQ concerns are temperature inconsistencies and odors. The **USA** reports the highest levels of concern, with 52.89% of workers noting temperature issues and 38.43% worried about stagnant air as the second highest concern. These concerns are also prevalent in **Canada** (51.23% for temperature), and the **UK** (51.05% for temperature), though at slightly lower levels. Meanwhile, **Germany** (44.79%) and **France** (41.79%) show moderate concerns about temperature and humidity.

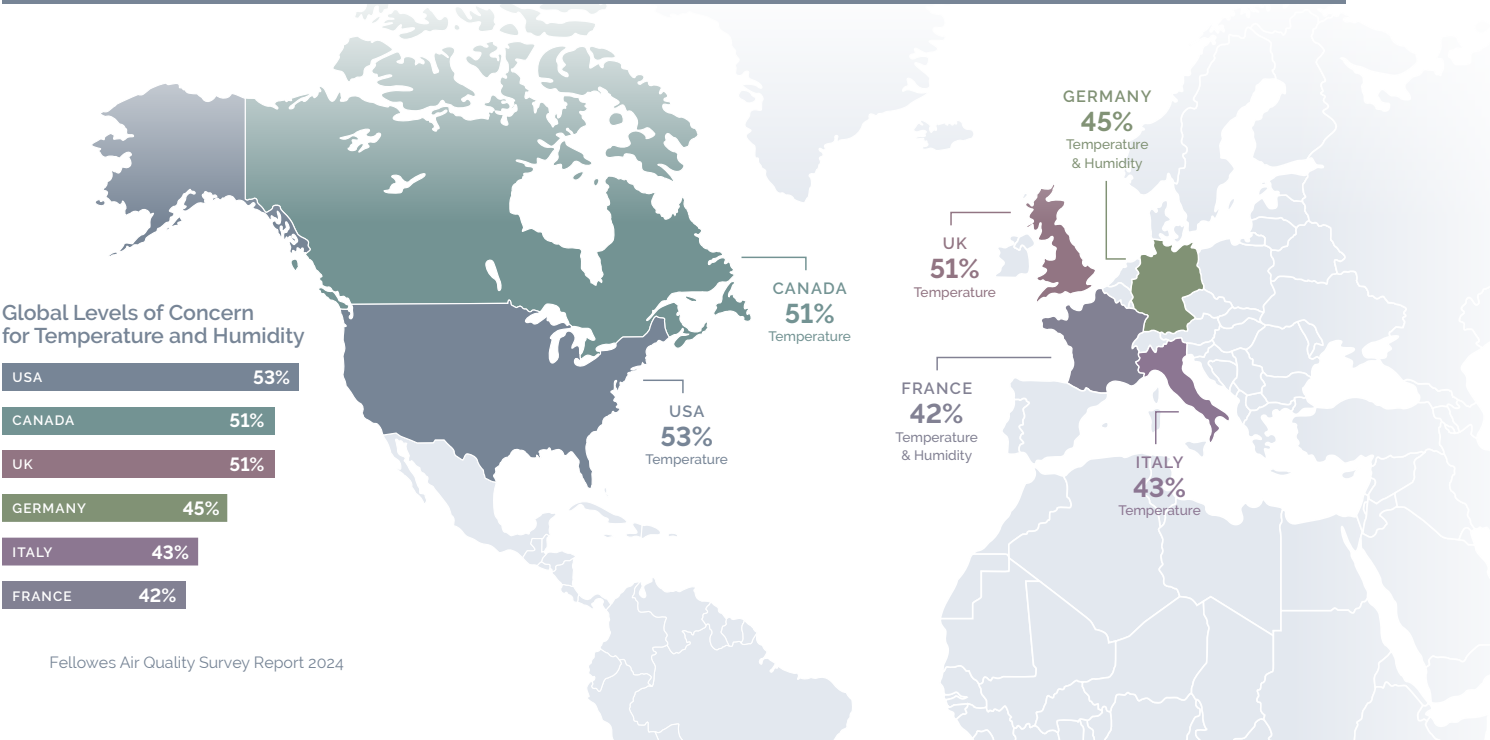


INSIGHT

Temperature regulation and odor control are significant IAQ issues across all regions, but USA and Canada show heightened sensitivity. Businesses in these regions should prioritize effective circulation and purification measures, including solutions that utilize activated carbon filtration, to address these widespread concerns. Despite concern about odors and other perceptible air quality signals, businesses should also understand that the most consequential air quality factors (viruses, bacteria, CO2 levels, etc) are imperceptible and require specific purification solutions.

Regional Variations in IAQ Concerns.

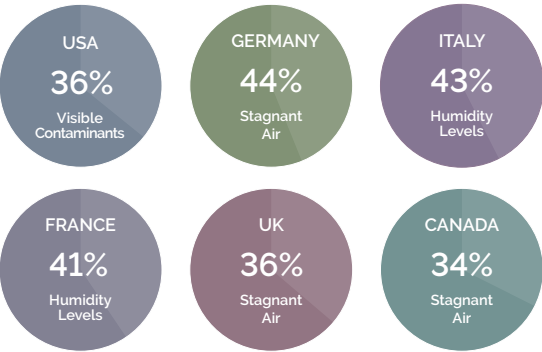
Beyond temperature and odors, there are clear regional differences in IAQ concerns. **USA** workers (35.95%) express the highest concern about visible contamination such as mold and dust, whereas **Germany** (44.17%) is particularly focused on stagnant air, and **Italy** (43.20%) and **France** (41.79%) are more concerned with humidity levels.

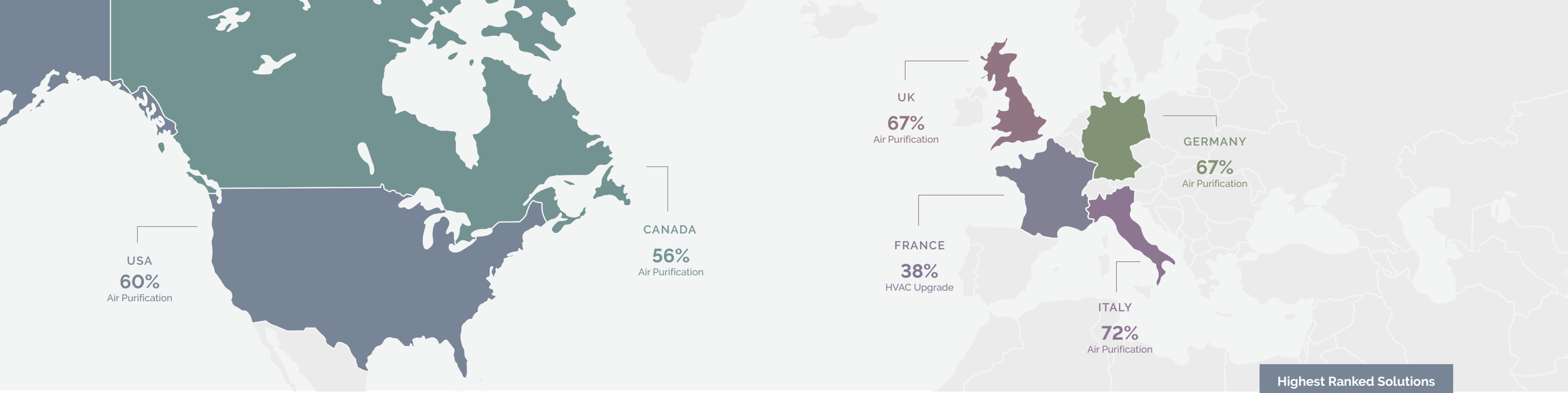


INSIGHT

While all regions share a basic concern for air quality, each country exhibits unique issues: the USA is more sensitive to visible contamination, while Germany places greater emphasis on air circulation and humidity control. These differences highlight the importance of tailored IAQ solutions that reflect the priorities and requirements of office workers, and how organizations should prioritize specific IAQ interventions.

Regional Differences of Concern





III. Employee Confidence in IAQ Management: What Builds Trust?

Organizations face increased scrutiny and higher stakes to build trust and provide clear, verifiable evidence of IAQ improvements. Without them, they risk losing out on quality talent and unfavorable public perception.

Workers want real-time IAQ data and building certifications backed by action.

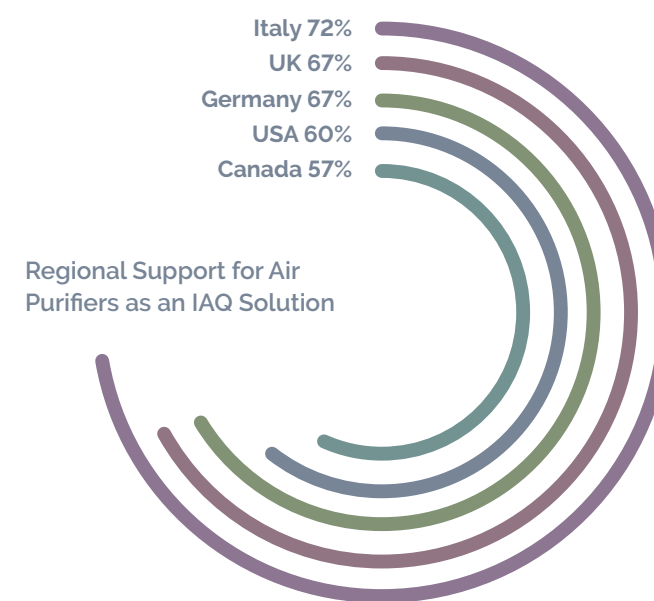
The desire for transparency in IAQ status is most pronounced in the **USA**, where 38.02% of respondents express a strong interest in real-time IAQ data. **France** (30.35%) also shows a significant preference for real-time monitoring. Building Certifications like LEED, Fitwel, and WELL also rank highly, with 37.19% of **USA** workers indicating these certifications would increase their confidence in their workplace's IAQ. However, countries like **Italy** (9.71%) and **France** (15.92%) show much lower interest in these certifications.

INSIGHT

Transparency through real-time data and third-party certifications is crucial in USA and France. Employers in these regions should consider implementing real-time IAQ monitoring, tools to make IAQ status visible to employees, and pursue certifications to build employee trust and ensure confidence in their air quality initiatives. Fundamentally, workers seek assurance not only that optimum infrastructure is in place (HVAC, air purification systems, monitoring) but that it's creating verifiably better IAQ.

Air Purification: A Universal Priority

Air purification units are consistently the most favored solution for IAQ improvement across all regions, with the **USA** (60.33%), **Italy** (72.33%) and **Germany** (66.87%) showing the strongest preference. The **UK** (67.13%) and **Canada** (56.84%) also demonstrate significant support for air purifiers, reflecting a broad global consensus on the need for visible, effective solutions to air quality problems.



INSIGHT

Localized air purifiers are universally recognized as a key solution, underscoring their importance as a practical, accessible response to IAQ concerns. Organizations around the world should explore investing in air purifiers as a primary means of enhancing air quality and recognize them as valuable, tangible signals to employees that IAQ is prioritized.

IV. Regional Expectations For IAQ Responsibility

The vast majority of workers surveyed agree that employers are obligated to provide clean air in the workplace, suggesting that air quality is becoming "table stakes" for employees considering employers.

Consensus on Responsibility: Who is Accountable?

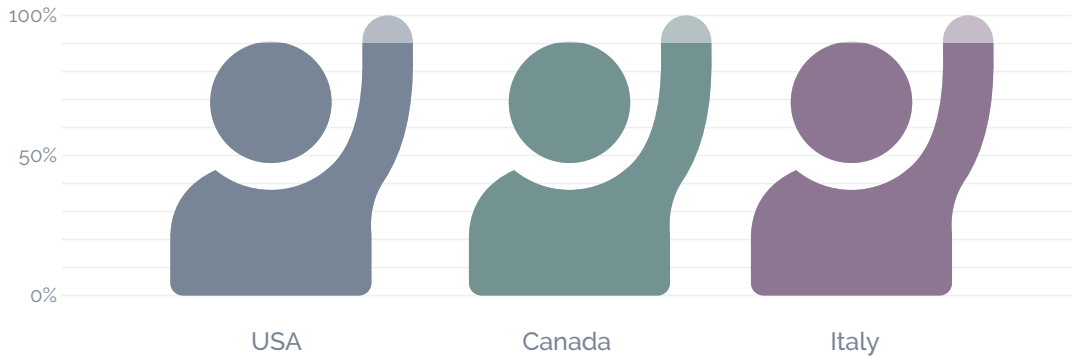
Most employees in developed countries agree that employers should provide clean air in the workplace, with **American workers** (92.61%) showing overwhelming agreement that IAQ responsibility lies on their employer.

 INSIGHT

While improved indoor air quality was once considered a "nice to have" in the workplace, it is quickly becoming a critical decision filter for workers across developed nations. Organizations must recognize that these changing expectations are impacting their ability (or inability) to secure and retain talent.

 ACTION

Businesses should consider how they are communicating and acting on their commitments to IAQ internally and externally, with the understanding that current and future employees are seeking, listening, and considering employment options based on these factors.



90%+ Agreement

USA, Canada, and Italy show a strong alignment in the belief that employers are responsible for IAQ, with 90%+ agreement.

V. Health Concerns: IAQ's Impact on Worker Health and Productivity

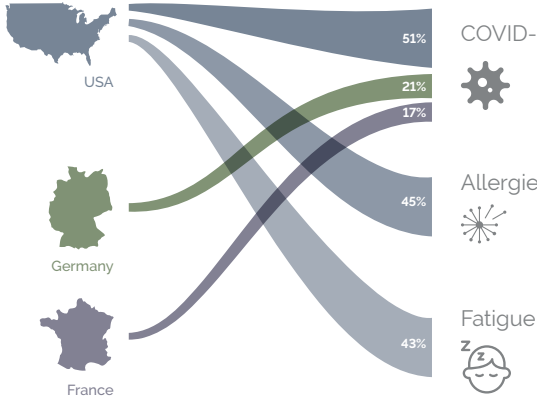
Office workers see a clear link between indoor air quality and their exposure to harmful contaminants, whether viruses, bacteria, allergens, or other particles. Exposure to poor air quality carries with it a range of negative physical and mental effects, which quickly impact employee health, performance and the business's bottom line.

USA Leads in Health-Related IAQ Concerns

Health-related concerns are most pronounced in the **USA**, where 50.90% of respondents report being very concerned about the potential of contracting COVID-19 due to poor IAQ. Other health issues, such as allergies (45.11%) and fatigue (43.11%), also rank highly. In contrast, **Germany** (20.80%) and **France** (16.67%) show much lower levels of concern regarding COVID-19.

 INSIGHT

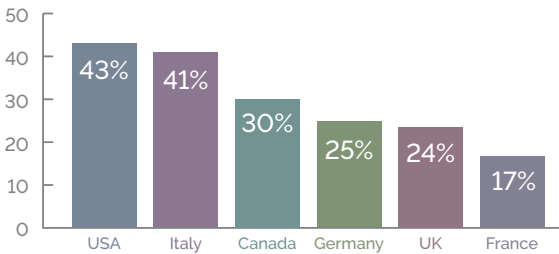
The USA shows heightened sensitivity to the health impacts of poor IAQ, particularly in the context of viral infections and allergies. This demonstrates the need for True HEPA-air purification within commercial office setting which are proven to remove microscopic particles.



Country	COVID-19 (%)	Allergies (%)	Fatigue (%)
USA	51%	21%	17%
Germany	45%	25%	24%
France	43%	17%	17%

Fatigue and Mental Health

Fatigue due to poor IAQ is a major concern in the **USA** (43.11%) and **Italy** (40.96%), and both regions also report high concern about the mental health impacts of poor IAQ (**USA**: 43.71%, **Italy**: 31.73%). Conversely, **Germany** (24.78%) and **France** (17.48%) show lower concern about fatigue and mental health.



The survey demonstrates that air quality is not only a physical challenge, but one that quickly translates to cognitive abilities.

 INSIGHT

IAQ's impact on fatigue and mental health is a significant concern in the USA and Italy, pointing to the importance of improving workplace air quality to reduce these negative effects on employee well-being and productivity.



VI. Hybrid Work and Business Travel: The Role of IAQ

As organizations continue to shift to in-person work and regular business travel, indoor air quality becomes a significant factor in health and hotel decisions. IAQ can become an important lever or incentive for companies that want to implement return-to-office policies.

USA: IAQ as a Motivator to Return to the Office

In the **USA**, 66.87% of workers report they would be more likely to work in the office more often if IAQ were improved. This is the highest percentage across all countries, indicating that IAQ plays a significant role in office attendance decisions in the U.S. Employers should use IAQ improvements as part of their strategy to encourage hybrid or fully remote workers to return to the office.

 INSIGHT

The USA shows a strong link between IAQ and office attendance, with improved air quality serving as a clear motivator for employees to return to the office. If US-based organizations want to encourage a return to the office, providing evidence of and visibility to safe IAQ will be a necessary part of that effort.

VII. IAQ Solutions: Actions Employers Are Taking

Employers are making changes to improve IAQ and build trust with employees, but their efforts have opportunities for greater effectiveness. For example, upgrading HVAC equipment is a helpful step for air circulation, but it rarely provides localized IAQ monitoring or True HEPA-filtration. Smart, strategic equipment upgrades, such as Fellowes Array, can help organizations make significant improvements while providing necessary transparency for occupants and workers.

HVAC System Upgrades: A North American Priority

37.19% of **U.S.** workers report their employers have made HVAC upgrades over the last year, and 33.70% of **French** workers note similar improvements. In contrast, countries like **Germany** (12.64%) and **Italy** (12.94%) report much lower adoption rates for HVAC improvements.

INSIGHT

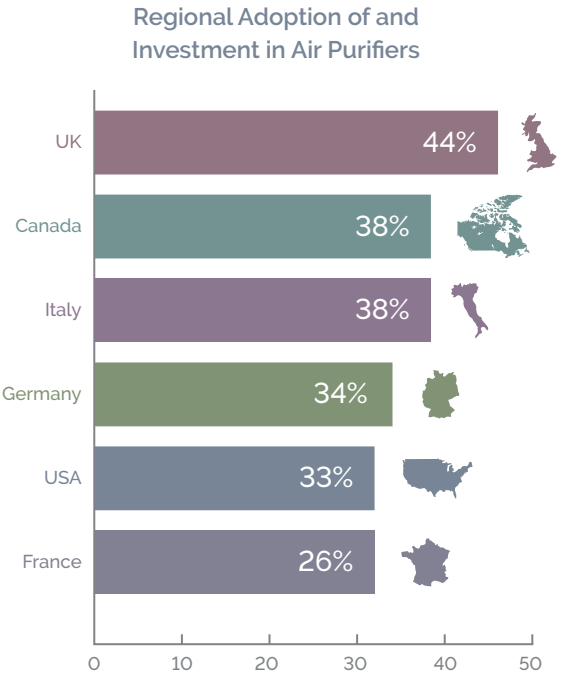
HVAC upgrades are a priority in USA and France, likely driven by the need for improved temperature and air circulation control. In contrast, other countries, particularly in Europe, may not have the same level of investment in HVAC upgrades, indicating a need for complementary air purification solutions to provide clean indoor air.

Air Purifiers: Universally Adopted

Across all regions, air purifiers are the most commonly reported IAQ improvement. The **UK** (43.53%) and **Canada** (38.46%) show high levels of adoption, while **Germany** (34.48%) and **USA** (32.50%) also invest in air purifiers.

 INSIGHT

Air purifiers are a universally supported IAQ solution, widely recognized for their effectiveness as a visible and practical method to enhance air quality in offices around the world. In large commercial buildings with diverse layouts and airflow patterns, organizations can further strengthen their air quality strategies by exploring solutions that offer localized monitoring, seamless integration with existing infrastructure, and comprehensive purification capabilities.





VIII. Fellowes® Array®: A Solution Designed to Address Global IAQ Concerns

As businesses look to address the evolving challenges of air quality and its impact on employees, it's important to consider solutions that integrate multiple insights into a cohesive approach, rather than relying on fragmented tools and disconnected strategies.

Fellowes Array empowers businesses to solve the most pressing and high-priority employee needs related to IAQ, while also making financial and operational sense. Array stands apart by providing:

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Seamless & Scalable Integration
Array air purification system is designed to fit seamlessly into any space and can provide localized air quality management throughout your building. With no connection to duct work, Array is ideal for retrofit implementation
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Automatic Sense & React Technology with EnviroSmart+™
Our patented EnviroSmart+™ Technology continuously monitors the environment for changes in occupancy density and conditions of the space and automatically adjusts units to ramp up or down as needed, cleaning air faster than stand-alone units.
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Effective & Efficient Filtration
Our 3-in-1 filter is 99.95% effective in capturing particles as small as 0.1 microns including viruses, allergens and germs. Featuring H13 True HEPA filtration, two times more effective than MERV13.
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Monitoring & Real-Time Data with Viewpoint
Array provides you with smart air purification. With intuitive monitoring and display technologies, you can view the exact air quality status of your space in real-time through the Viewpoint dashboard. Additionally, real-time data can also be integrated into a Building Management System (BMS) through BACnet/IP, allowing seamless communication and centralized control of indoor air quality alongside other building systems.





IX. Conclusion

Global Trends in IAQ Concerns

Air contaminants, temperature, odors, and visible contamination are global IAQ concerns that have a significant impact on employee experience. But with the right IAQ strategy and solutions in place, these challenges can be seen as opportunities to improve employee trust, health, and performance.

Fellowes as a Global, Trusted Partner for Your IAQ Goals

Fellowes provides a comprehensive suite of IAQ solutions, from air purifiers to real-time monitoring. These solutions are designed to meet the diverse needs of businesses globally, improving employee health, satisfaction, and productivity.

**For Whatever Stage You're In,
Fellowes Air Quality Experts Are Here To Help:**

Making your indoor air quality strategy simple starts here. Get expert answers, assess your space, or explore solutions that put you in control. Let's find the right starting point for your needs.

Fellowes.com/air