

Outlook on Design Trends 2025

Key Highlights

- **Key trends for 2025 focus on experience, AI and sustainability** in buildings and places, that will influence the design and refurbishment of workplaces, retail stores and mixed-use development.
- **People-centric design will be a critical component of design in 2025**, with focus on the role of environments for experience, wellbeing and social interaction.
- **AI and advanced technology will accelerate opportunities** to integrate data and research in design.

From return to office and workplace transformation to the age of AI and retrofitting for the future, 2025 marks a pivotal moment in real estate with implications for design across all sectors.

Across JLL's research we are seeing emerging trends that will influence approaches to the design of workplace, retail and mixed-use development, while our [Future of Work survey](#) highlights a positive view of real estate with planned increases in investment in space design, building refurbishment and sustainability.

As developers and occupiers look to invest in the design and refurbishment of their buildings, more complex requirements for places and spaces require new perspectives and innovation in design and construction.

This article explores four key trends that are likely to shape the design of spaces and places in 2025 and beyond:

1. Focus on designing for a 'street to seat' experience
2. Reimagine spaces for social connection & community
3. Unlock holistic value through adaptive re-use & retrofit
4. Embrace AI tools for 'science-led design'

Focus on designing for a ‘street to seat’ experience

In 2025, increased in-office attendance and urban footfall is likely to continue to spotlight ‘experience’ as critical with a broader perspective on designing for end-to-end experience journeys. While employee experience has become a key focus in recent years as part of return-to-office incentives, ‘street to seat’ experience will become more crucial for developers and employers in attracting talent attraction, boosting workplace attendance and revitalizing urban centers. ‘Street to seat’ experience considers the touchpoints of employees or consumers journeys through surrounding environments to their destination, whether that’s workplace, retail stores or leisure facilities.

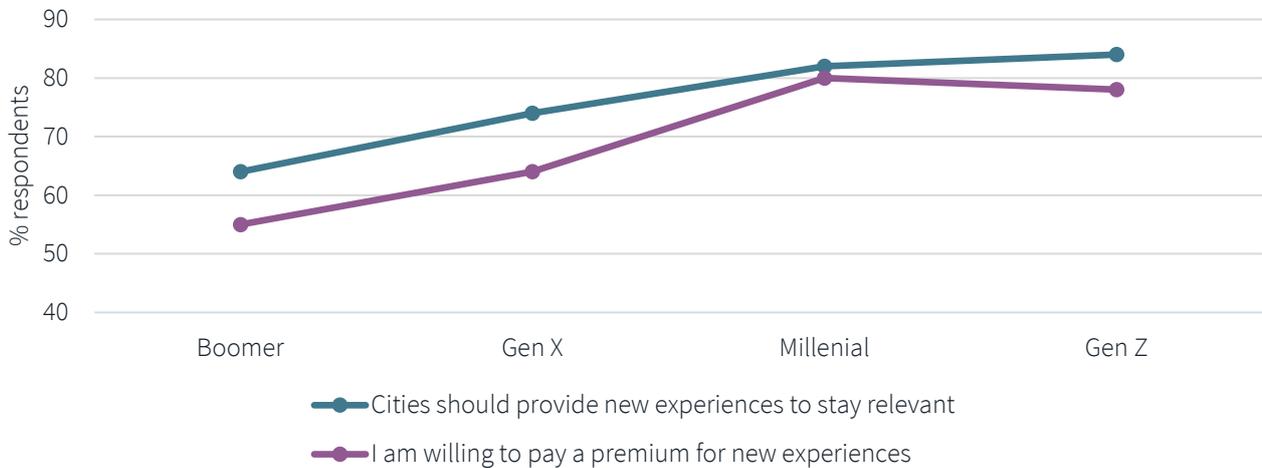
Greater focus on the ‘street to seat’ experience for workplaces will see more investment in high-quality shared amenities in buildings like gyms and outdoor spaces, end-of-commute facilities, and surrounding retail and food options. End-to-end experience design for occupiers will focus on connecting and enhancing experience across touchpoints for seamless arrivals that integrate functional requirements like booking systems food and beverage options, with unique space designs, elevated culture and branding and tailored office perks.

Street to seat experiences will also encompass the interplay between workplace design and the curation of spaces for employee experiences. [Employers are investing](#) in ‘special events’ (e.g., external speakers, cooking demonstrations, etc.) to incentivize return to office, with a need for suitable spaces to support these events; 43% of employers have these in place and 17% are considering them for 2025. This will drive creativity in reconfiguring existing spaces to support social activities, maximize experiential value from existing assets and enable greater collaboration with workplace experience programs. The number of organizations reporting they have a dedicated community or workplace experience manager on site has risen from 23% to 35% in the past year.

Beyond the workplace, ‘street to seat’ experience design is a critical factor in mixed-use, retail and urban regenerations. With more options than ever for at-home entertainment, shopping and working, the design and curation of experiences is now integral to real estate development and is seen as a key tool to attract people back to workplaces, retail districts and urban centers. [JLL Consumer Experience Survey](#) shows that younger generations will drive this demand: 84% of Gen Z agree that ‘cities need to offer new experiences to stay relevant’, compared to the all-generations average of 60%.

In mixed-use developments and retail centers we will see flexible retail design that supports brand collaborations and pop-ups, innovative landscape design that can flex for food or arts festivals or community events, and investment in street art or sculpture that activates ‘in-between spaces’.

Generational expectations vary as younger generations expect more emphasis on experiences



Source: Experience Matters, JLL Research 2024

Reimagine spaces for social connection & community

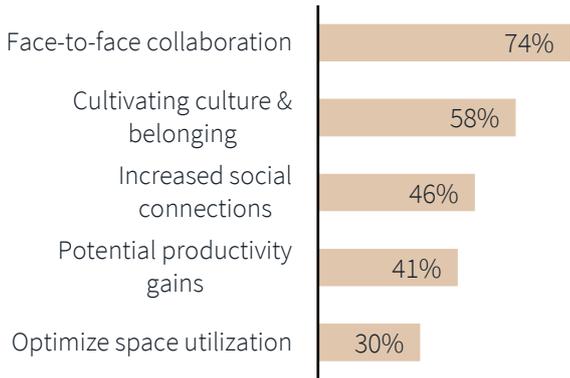
From workplaces to neighborhoods, social interaction, fostering community and building social capital will be paramount in attracting people back to physical spaces in 2025. After years of fluctuating office attendance, JLL Research shows the top reasons for coming into the office for both employers and employees are around social connection and office culture. More broadly across the urban environment, positive consumer scores for Quality-of-Life were found to be significantly connected to social factors – sense of belonging, feeling able to settle down in a place, and access to amenities.

In 2025, design will focus on how real estate can support fundamental social needs and the social wellbeing of people. Thoughtfully designed social spaces that can be reconfigured for various activities will refocus on the foundations of social psychology and the importance of shared experiences in workplaces and neighborhoods.

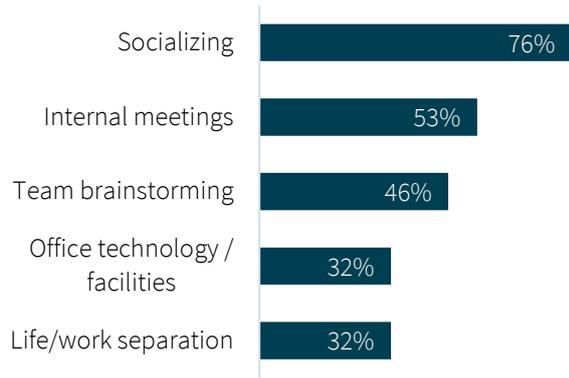
In the workplace, organizations are shifting their focus from attendance-based metrics to outcomes like innovation and talent attraction, recognizing the intrinsic value of physical spaces in building social capital. Increased collaboration between designers and psychologists, social scientists and other specialists will focus on spaces that are designed for different group dynamics, visual connectivity that fosters sense of community, and understanding the spectrum of spaces for different interactions.

There will be an increased emphasis on shared and transition spaces that nurture community and facilitate shared experiences, while group dining spaces, gamification and technology are bringing more innovative design solutions to social spaces in retail and hospitality.

Top 5 employer reasons for RTO



Top 5 employee reasons for RTO



Source: JLL Research 2024

Unlock holistic value through adaptive re-use & retrofit

Retrofitting and conversion of existing buildings continues to gain momentum in 2025, as global trends of aging building stock, supply shortages across sectors and in-demand locations, and increased ESG requirements are increasing the risk of a ‘do-nothing’ approach for developers, landlords and occupiers.

In 2025 this continued momentum will accelerate the role of design in unlocking holistic value from investment in sustainability features and building refurbishments. Effective strategies for existing buildings will go beyond improved energy efficiency and functional upgrades, taking a more holistic approach to retrofit design that can support talent and visitor attraction, brand strategy, community impact and improved health and wellbeing.

While JLL Research shows that [60% of employers plan to increase investment](#) in building refurbishments in the next five years and increase investment in sustainability performance of real estate, sustainability demands are driven by both corporate commitments and changing employee expectations. Younger generations choose to work and live in environments that demonstrate sustainability credentials, with

72% of Gen Z and Millennials reporting they ‘always choose the most environmentally friendly option’ as consumers, compared to 55% of those aged 60 years and over.

Sustainable design will become more integrated with organizations branding, and visually demonstrating eco-credentials will be a design focus in 2025. We’ll see increased use of natural and recycled material palettes to create more tangible links between an organizational sustainability journey and visual identity, an important factor in talent attraction.

At an urban scale, sustainability-focused mixed-use regeneration will be key for ‘destination places’ centered around green spaces, community access and ‘science-led design’ that demonstrates sustainability and circular principles and showcases sustainable credentials.

Embrace AI tools for ‘science-led design’

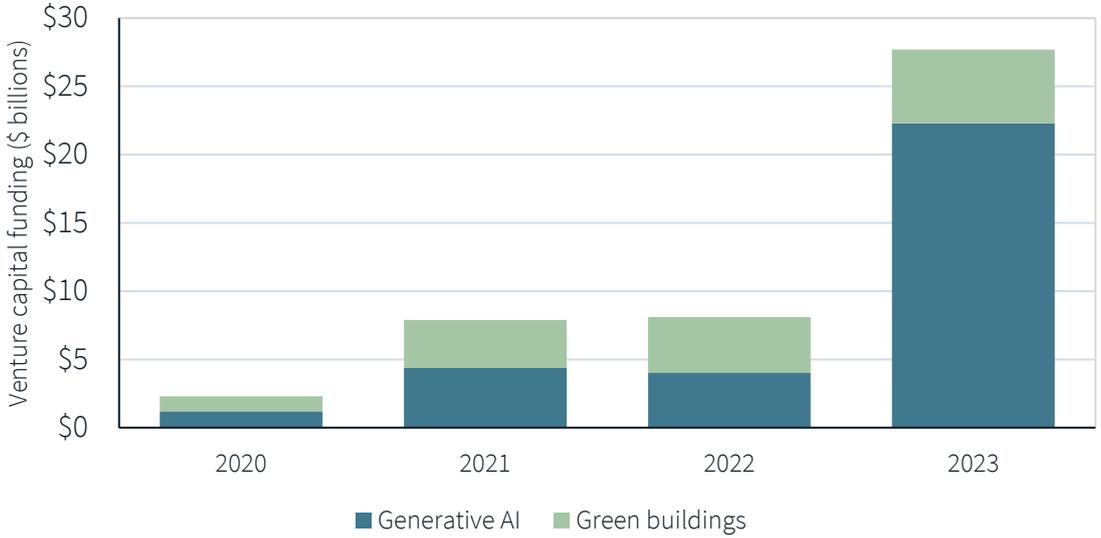
From predictive building analytics to data-driven design tools, AI is emerging as both a driver and enabler of change across design, while the use of data, specialist analytics and predictive tools for ‘science-led design’ has been gaining traction in recent years.

The convergence of AI and ‘science-led design’ brings an exciting opportunity to design fields, not just for efficiency but for increased data integration in creative processes. This will also widen collaboration opportunities between designers and fields such as psychology, bio-medical and robotics.

‘Science-led design’ approaches bring research and data into creative processes to enhance decision-making with greater information about how a building or place might perform, or to assess the impact it will have on people or the planet.

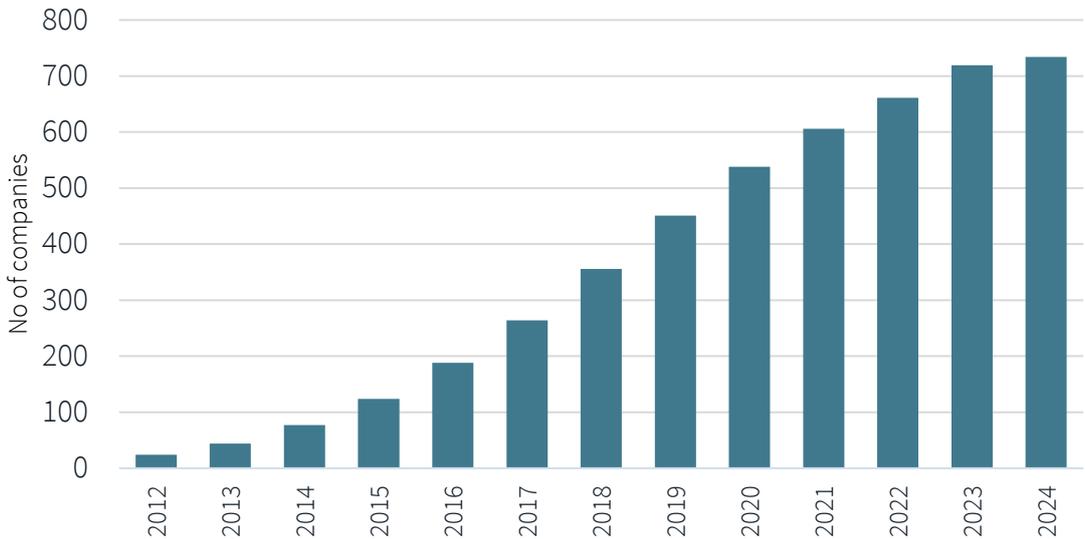
A key driver behind this is the exponential growth of AI companies that are generating data and tools which could be leveraged in design. With global venture capital investment in Generative AI increasing from \$2.3 billion in 2020 to \$22.3 billion in 2023 and green building technology investment growing from \$1.1 billion to \$5.4 billion in the same period, we can expect AI to accelerate its influence on design in 2025.

AI is emerging as both a driver and enabler of change for building design



Source: Innovation Geographies, JLL Research 2024

AI powered PropTech companies are increasing alongside technology advancement & investment



Source: PropTech Trends, JLL Research 2024

While 'science-led design' has been limited by the ability to bring complex datasets from the built environment together or integrate research and data from other sectors, AI is now advancing and accelerating this capacity in areas such as evolving work patterns, health impacts and neuroscience.

For example, the emerging field of neuro-architecture brings research from neuroscience and psychology to the design of buildings, providing a greater understanding of the success factors of productive and healthy spaces. JLL research has already shown how the design of high-performance workplaces could be enhanced by insights from neuroscience or cognitive psychology on optimum working environments, with further opportunities emerging with AI tools.

AI will change our expectations of the built environment, and future design teams may include computer programmers or AI technologists who can facilitate deeper collaboration between disciplines - such as biomedical or psychology fields - and building engineers and designers.

Considerations for real estate leaders

As developers and occupiers look to future-proof investments in buildings, these trends indicate the importance of considering the following principles:

- People-centric design is evolving to consider the impact of buildings on individuals and groups. Developers and occupiers should consider engaging with non-traditional design fields, such as psychology or sociology, as part of developing the definitions of design teams.
- The use of data & research embedded in design strategies will become central to navigate complex design requirements. AI tools and 'science-led design' approaches will provide greater opportunities to enhance sustainable and human-centric design.
- New partnerships will be needed to connect design investment to broader outcomes including talent attraction and operational efficiency. Early integration of interior design, brand strategy and experience design can achieve greater return on investment.

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