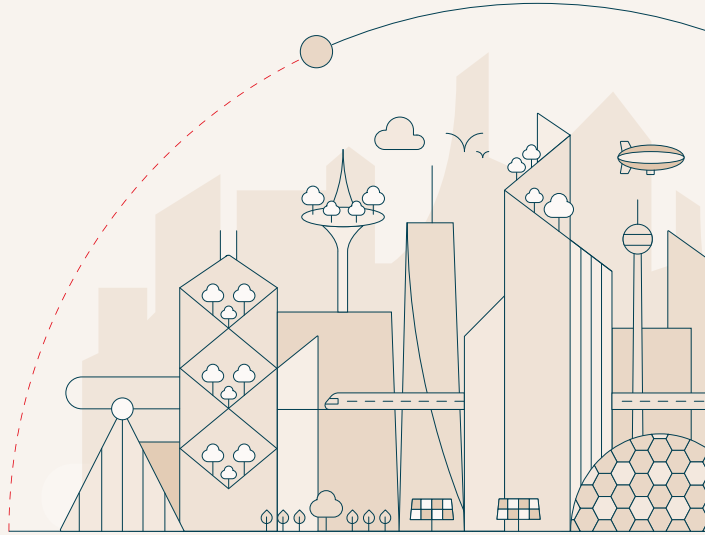
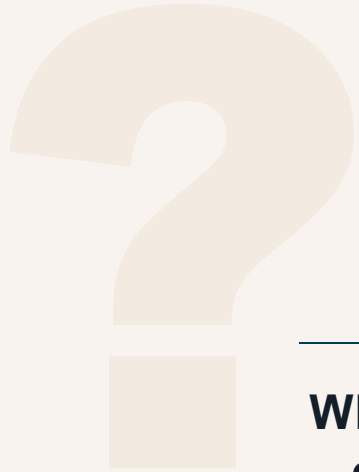


JLL Outlook on Design Trends 2025

APAC Research, February 2025





→
What trends are likely to shape the design of spaces and places in 2025 and beyond?

Introduction

From return to office and workplace transformations, 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 design of workplace, retail, and mixed-use development, while our Future of Work survey highlight 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, there are also more complex requirements for places and spaces, needing new perspectives and innovation in design and construction.

Outlook on Design Trends 2025

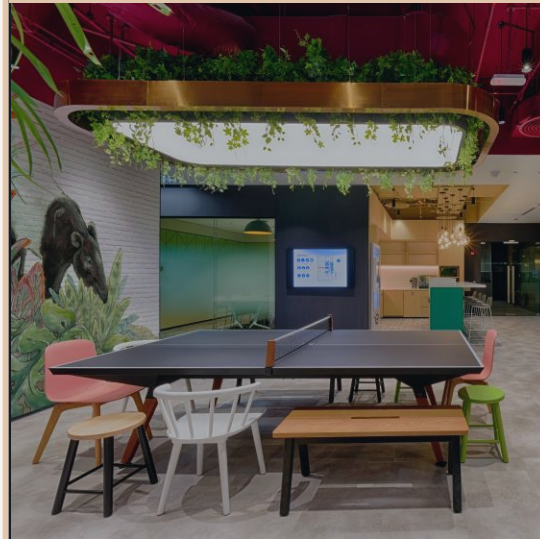
1

Focus on designing for 'street to seat' experience



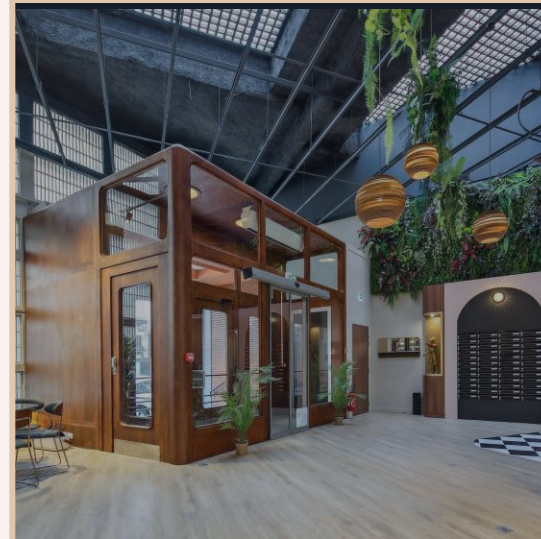
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Reimagine spaces for social connection & community



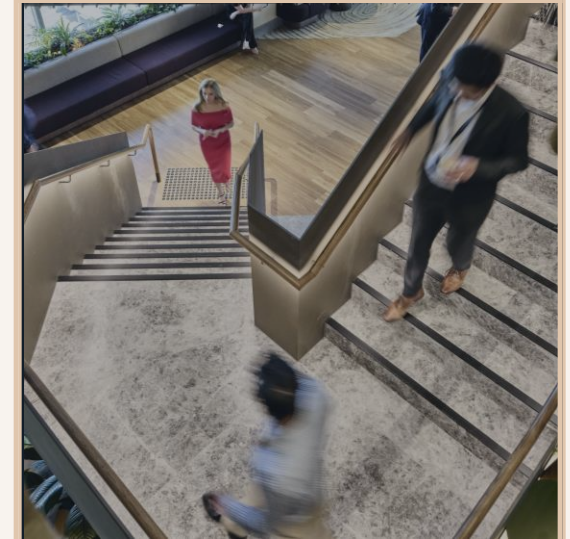
3

Unlock holistic value through adaptive re-use & retrofit



4

Embrace AI tools for 'science-led design'

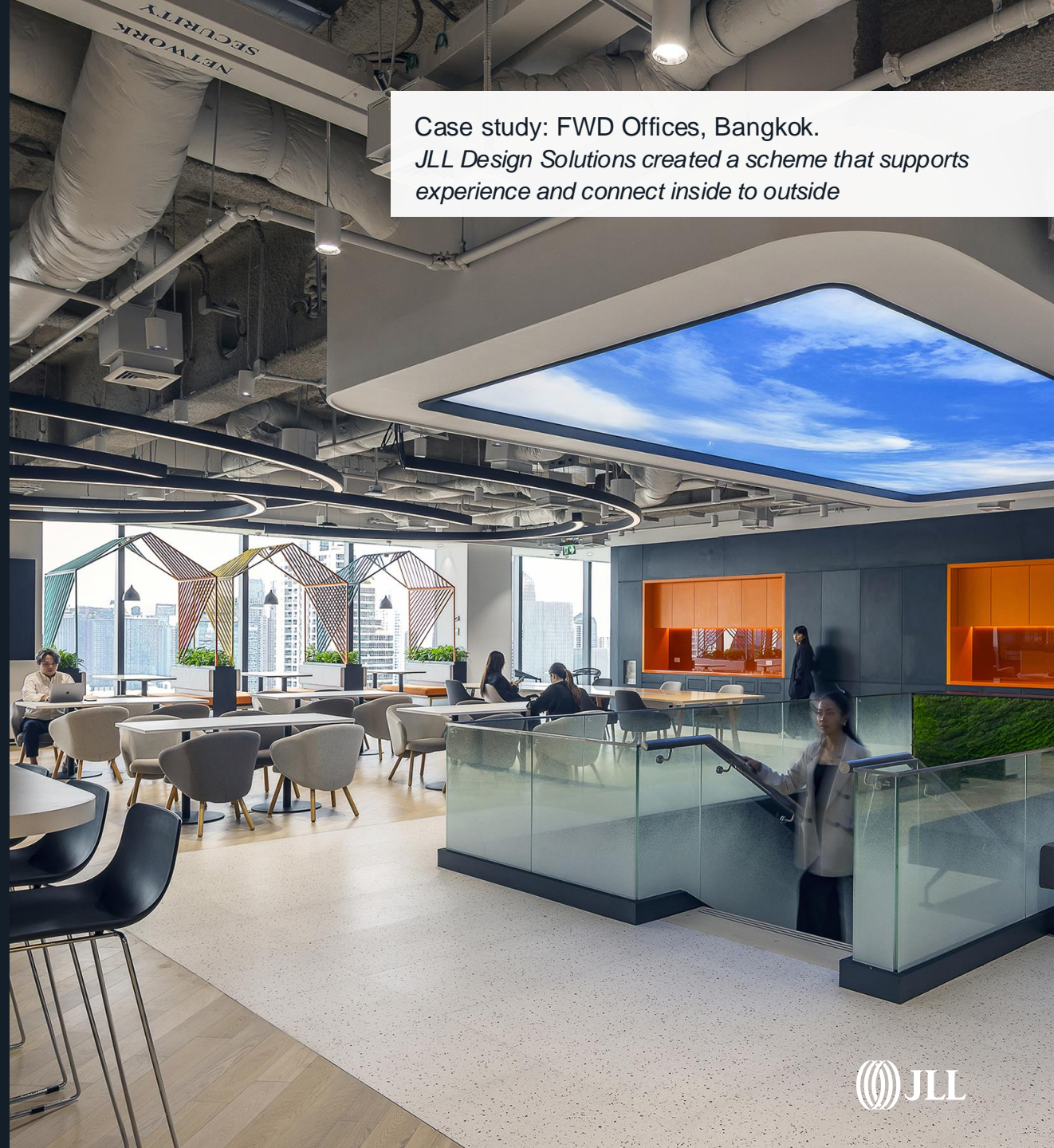


1 Focus on designing for a 'street to seat' experience

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, considering comprehensive "street to seat" journeys will become more crucial for developers and employers aiming to attract talent, boost workplace attendance, and revitalize urban centers.

Case study: FWD Offices, Bangkok.
JLL Design Solutions created a scheme that supports experience and connect inside to outside

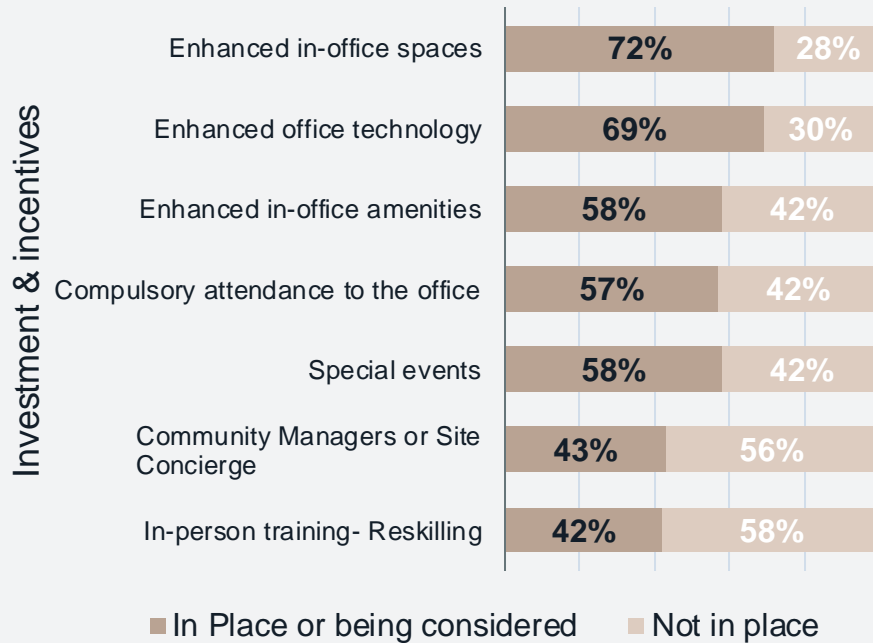


85% of organizations in APAC have a policy of at least 3 days of office attendance per week. (JLL Future of Work Research 2024)

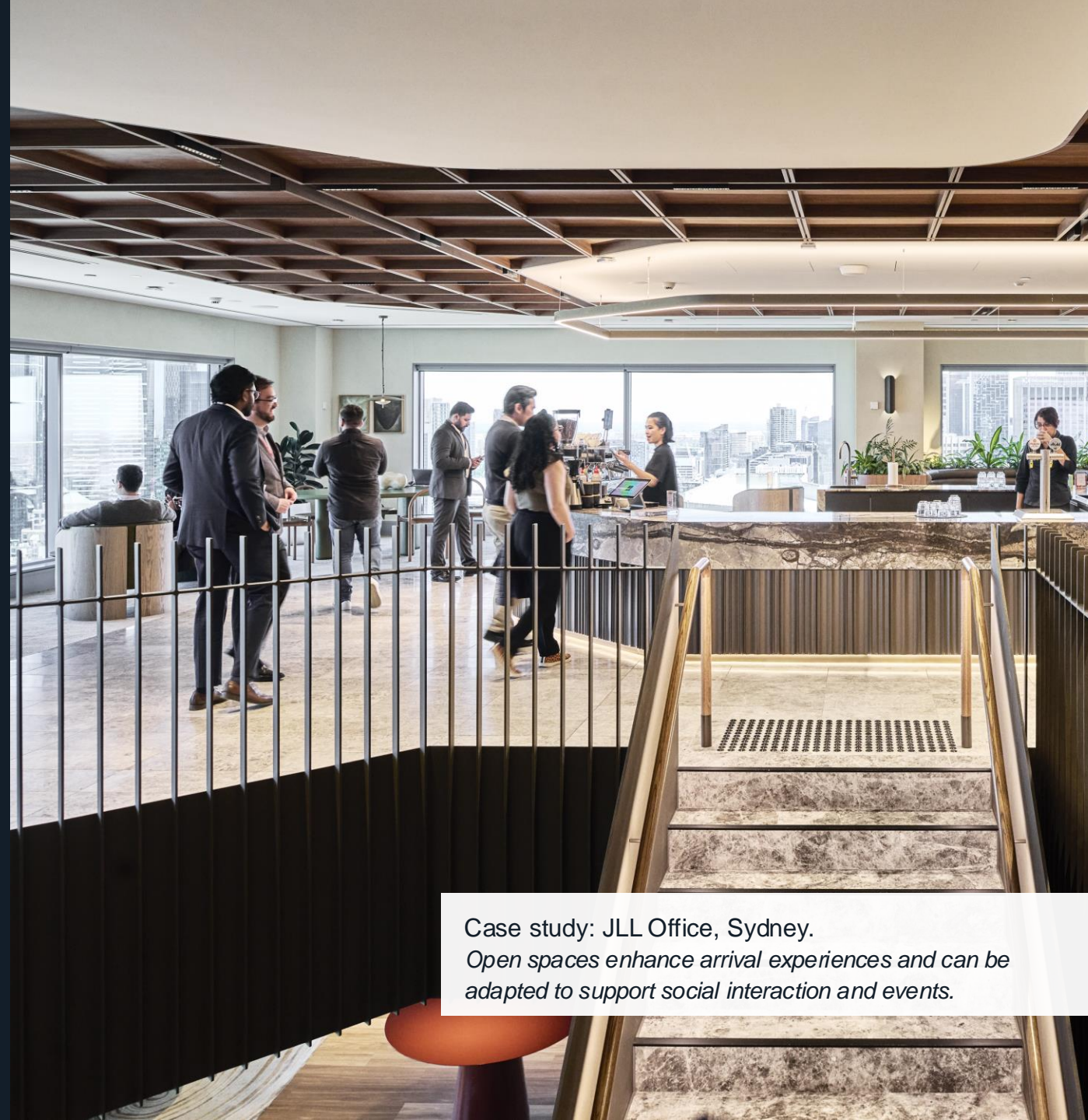
Australia	83 %	India	90 %
Singapore	86 %	Hongkong	90 %

'Street to seat' experience for occupiers will focus on the interplay between workplace design and curation of spaces for employee experiences. 2025 will see increased investment to integrate unique space design, elevate branding and tailor office perks.

Employers engaged in RTO Incentives



Source: APAC Pulse Survey, JLL Research 2024

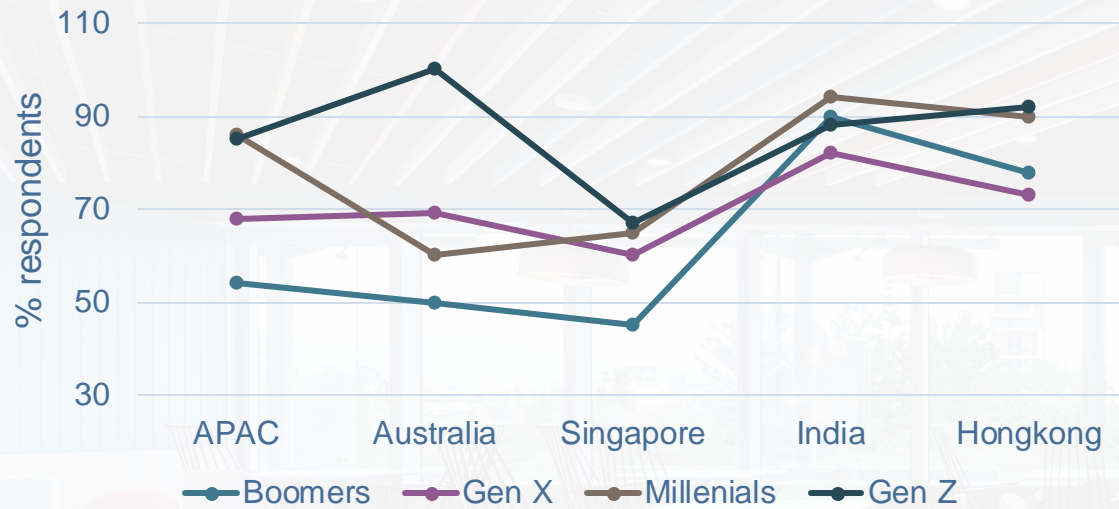


Case study: JLL Office, Sydney.

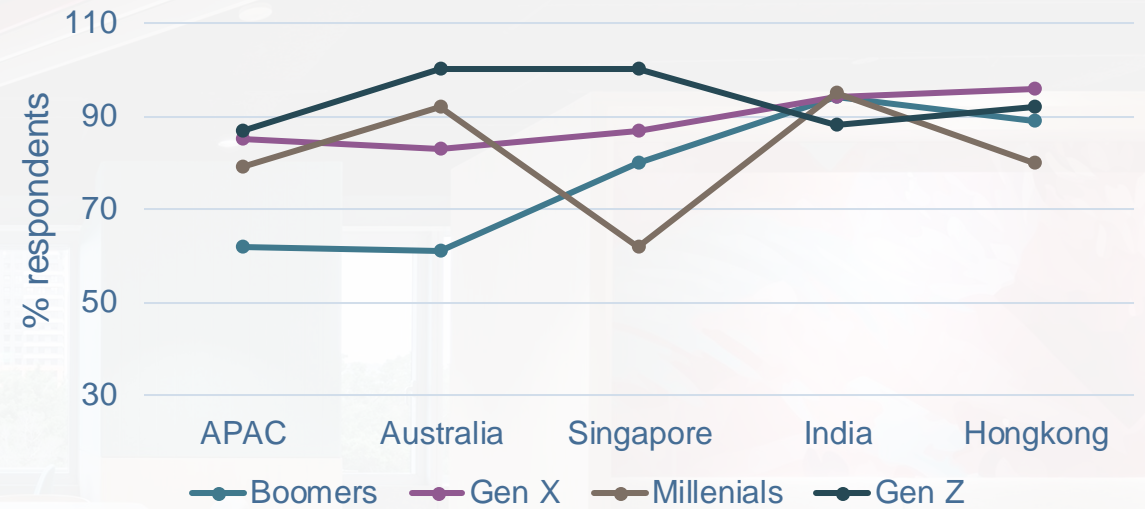
Open spaces enhance arrival experiences and can be adapted to support social interaction and events.

Design and curation of experiences is integral to real estate development and a key tool to attract people back to workplaces, retail districts and urban centers.

Consumer expectations on experience in cities:
I am willing to pay a premium for new experiences



Consumer expectations on experience in cities:
Cities should provide new experiences to stay relevant



Source: Global Consumer Experience Survey (APAC), JLL Research 2024

Client Considerations



People-centric design strategies, utilising people experience data, user journey mapping and design for end-to-end experiences.



Integrating spatial, brand and technology in design strategies, encompassing the breadth of touchpoints that create high quality experiences.



Case study: RWE, Seoul.

JLL Design Solutions seamlessly integrated experience and brand throughout the design of office and reception for high quality street to seat experience.

2

Reimagine spaces for social connection & community

The significance of social connection is emerging as a key driver in design decisions. From individual workplaces to entire neighborhoods, fostering community and building social capital will be paramount in attracting people back to physical spaces.



94% of consumers surveyed in JLL's CityScape Experience research agreed that "strong sense of place and identity in my home city" is important to them when choosing where to live or work.

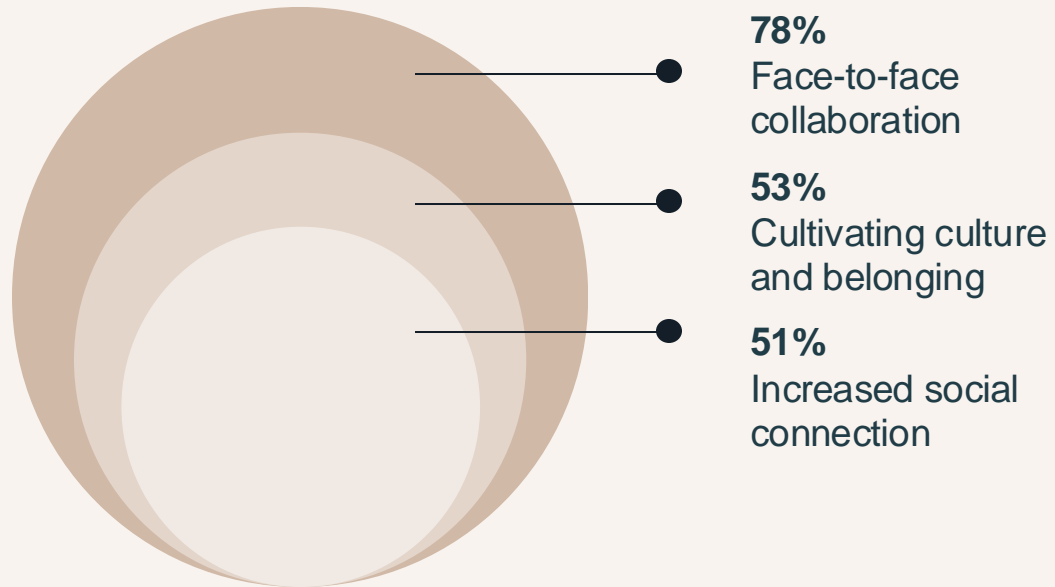
Case study: The Great Room, Bangkok.
Co-working space redesigned by JLL Design Solutions to support interaction and community in short term workspaces.



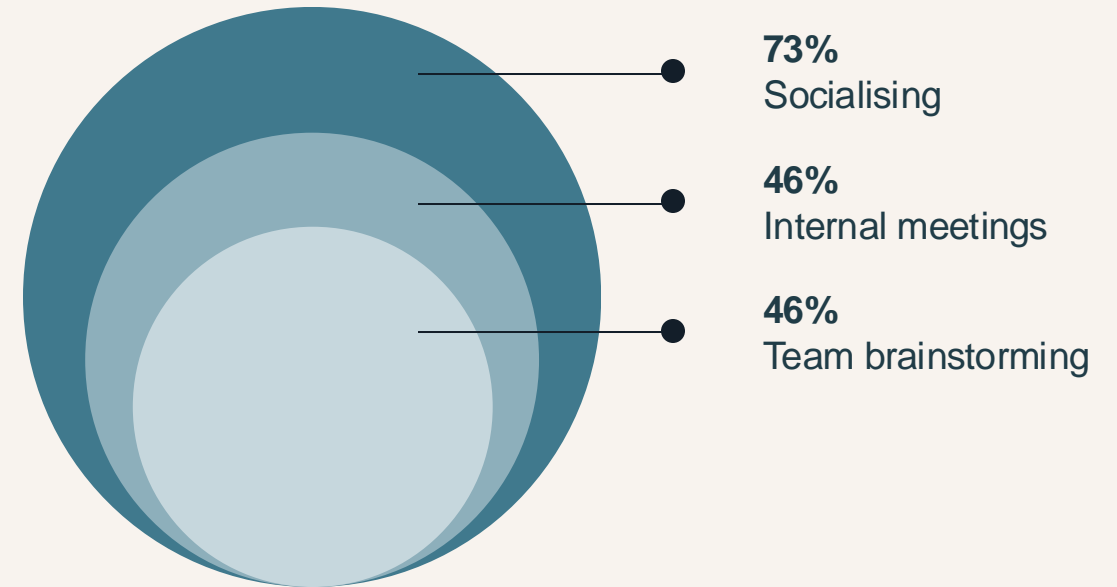


Social purpose of the workplace is emerging as a top priority for employers & employees. Focus on spaces that are designed for different group dynamics, visual connectivity that fosters sense of community, and understanding the spectrum of spaces for different interactions.

Employer drivers for RTO

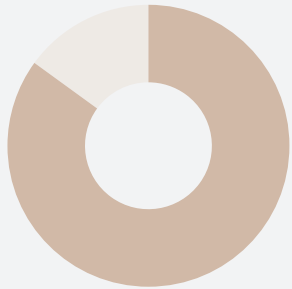


Employee drivers for RTO



Source: JLL APAC HX survey 2024. JLL APAC Pulse Survey 2024. Top three reasons for RTO, out of <10 categories.

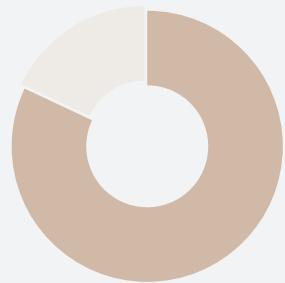
Designs that focus on local identity and socially conscious developments continue to resonate with employees and consumers.



85%

..of consumers would prefer to 'live in a place with a unique sense of identity'

Australia	82%	India	95%
Singapore	87%	Hongkong	85%

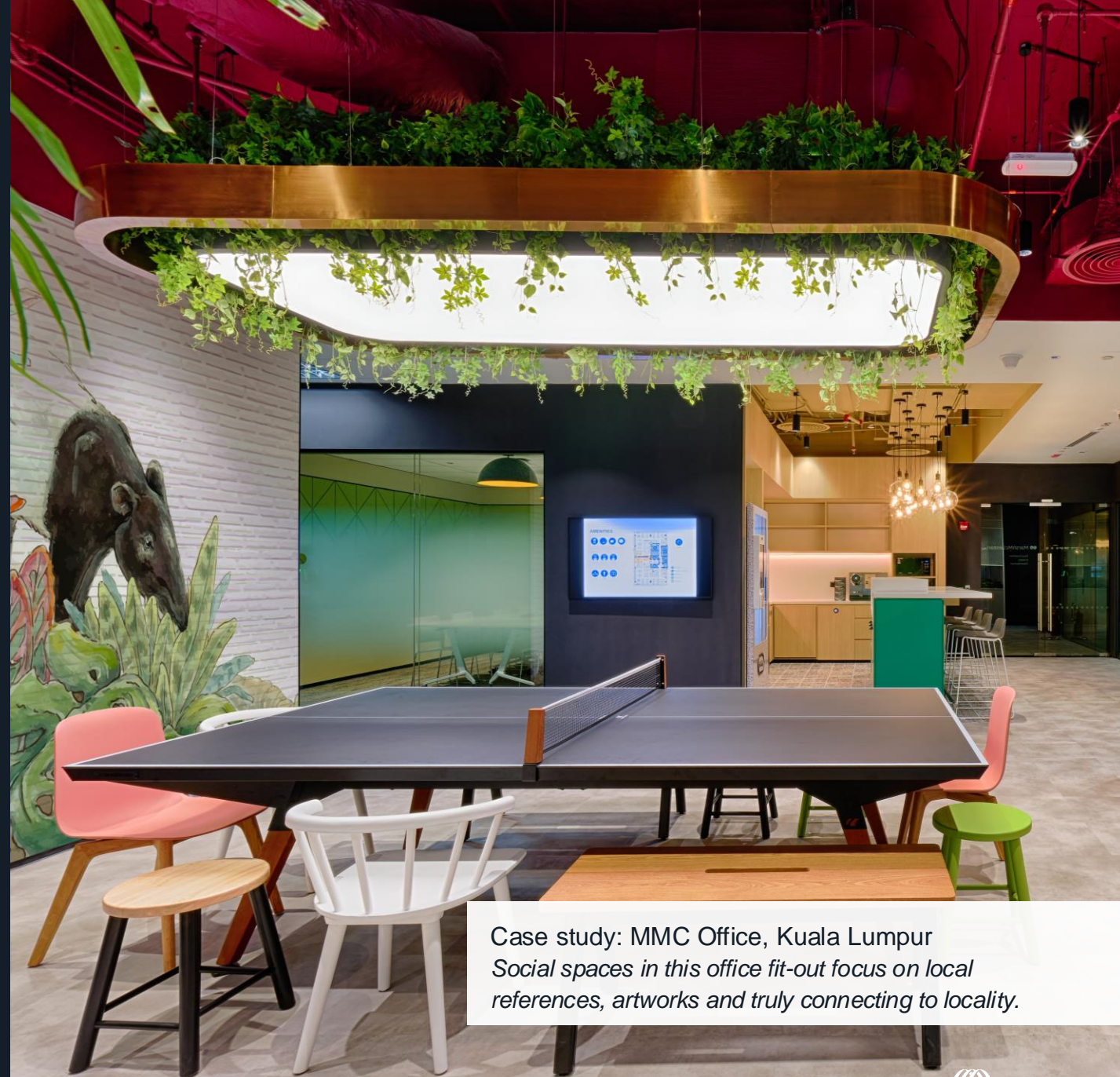


82%

..agree 'it is important for business to make a positive impact in their local community'

Australia	89%	India	92%
Singapore	79%	Hongkong	75%

Source: Global Consumer Experience Survey(APAC), JLL Research 2024



Case study: MMC Office, Kuala Lumpur
Social spaces in this office fit-out focus on local references, artworks and truly connecting to locality.

Over a quarter of office space in APAC was redesigned to support collaboration in a dynamic workforce

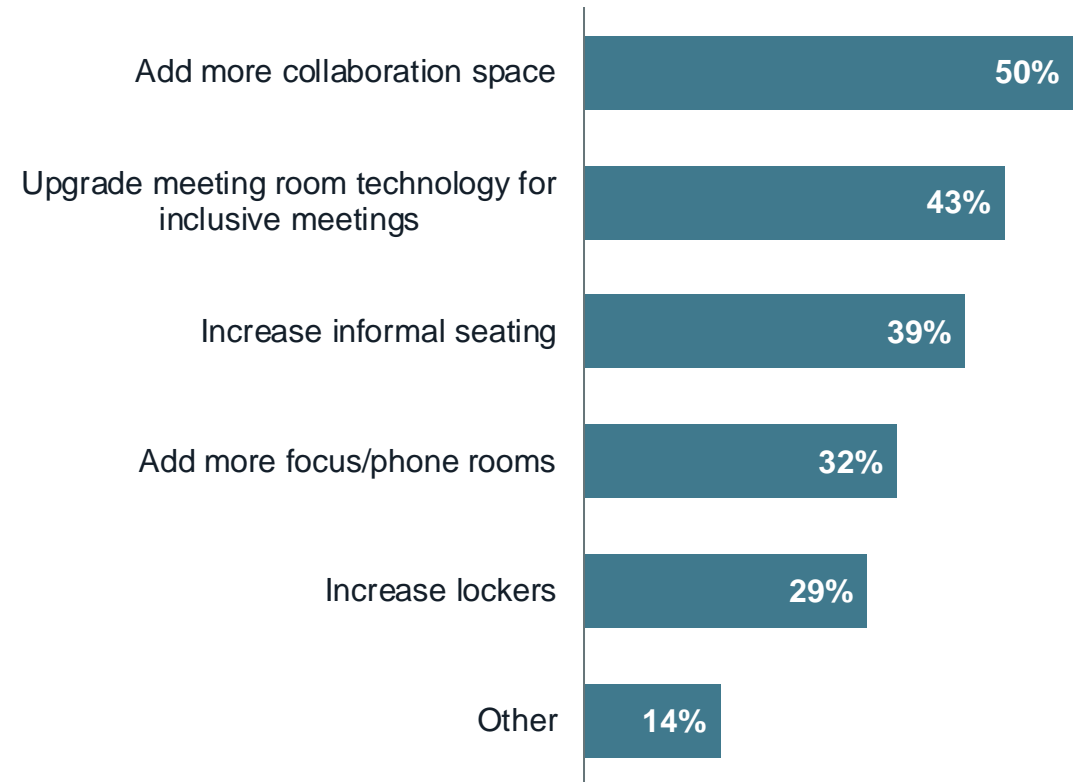
58% employers anticipate spending more on space design and fit out.

Source: JLL APAC Future of Work Survey 2024

66% Employees report that collaboration space are the most important spaces for them

Source: JLL APAC HX Survey 2024

Space redesign elements to support hybrid work



Client Considerations



Integrating psychology and sociology in design strategies, to reconnect fundamental social needs with physical environments and wellbeing.



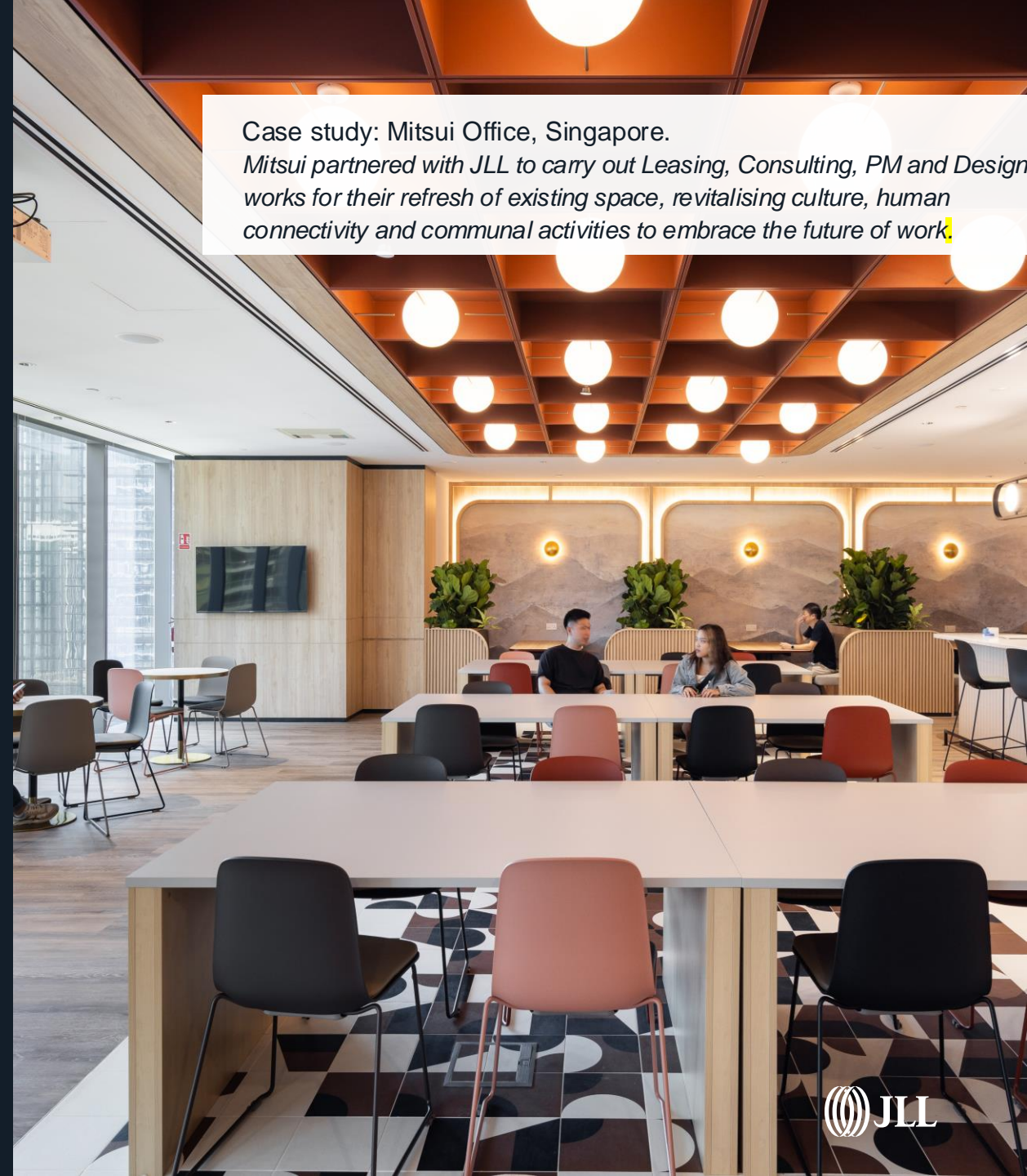
Increased focus on designing 'in-between' spaces to foster community, nudge interaction and engage people.



Greater focus on curating social experiences, with earlier integration of activation and management plans in strategic design stages.

Case study: Mitsui Office, Singapore.

Mitsui partnered with JLL to carry out Leasing, Consulting, PM and Design works for their refresh of existing space, revitalising culture, human connectivity and communal activities to embrace the future of work.



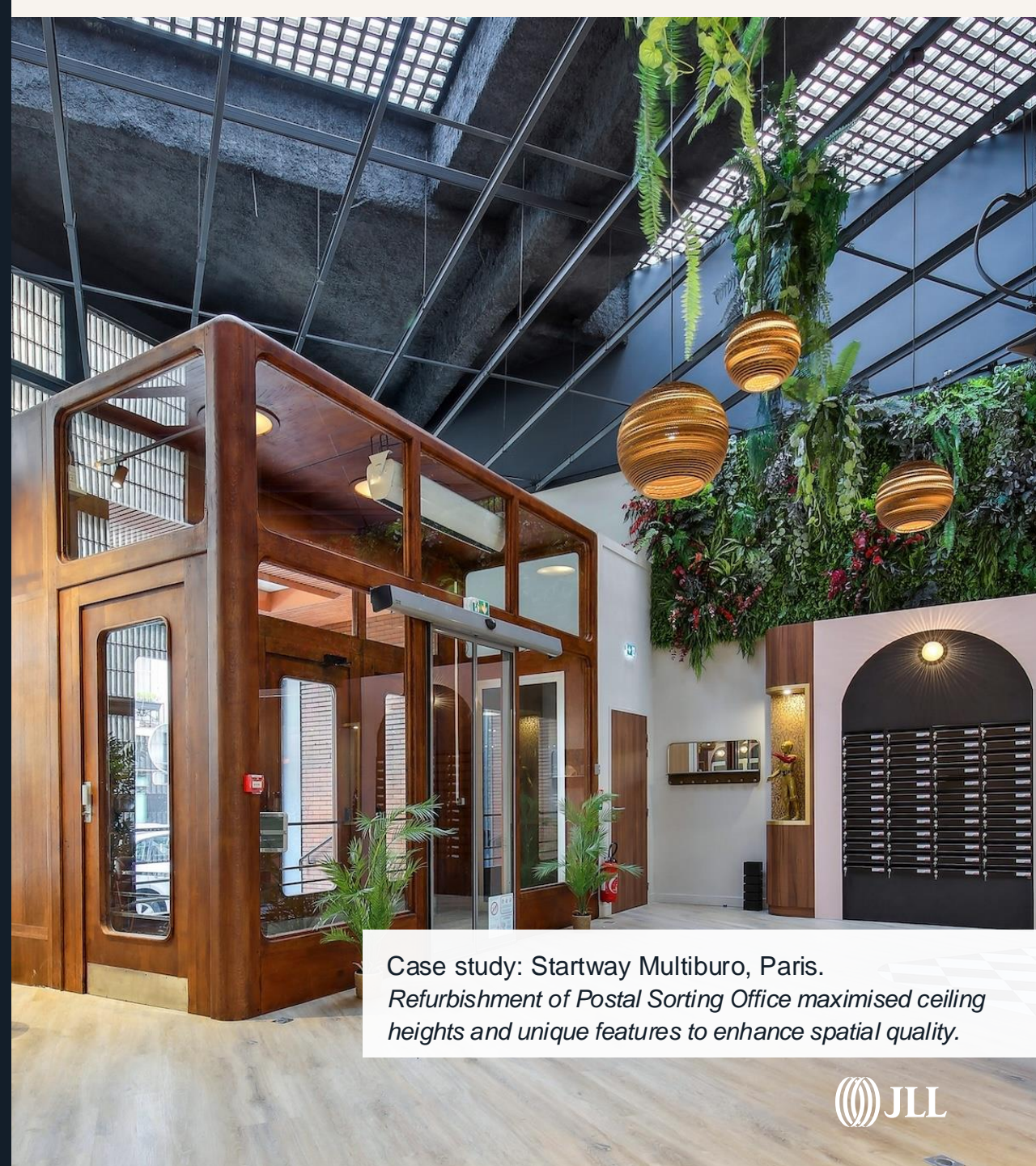
3 Unlocking holistic value in retrofit through design

Retrofitting and conversion of existing buildings continue to gain momentum in 2025, in response to global trends of aging building stock, supply shortages across sectors and in-demand locations, and increased ESG requirements. 2025 will see the role of design accelerated in unlocking holistic value from investment in existing buildings. Effective design strategies go beyond energy efficiency and functional upgrades, but a more holistic approach to retrofit designs that integrate local identity and culture, brand strategy, and community connection.



JLL's Future of Work Survey shows that 54% of employers in APAC plan to increase investment in existing building refurbishment over the next five years.

Australia	63 %	India	70 %
Singapore	45 %	Hongkong	39 %



Case study: Startway Multiburo, Paris.
Refurbishment of Postal Sorting Office maximised ceiling heights and unique features to enhance spatial quality.



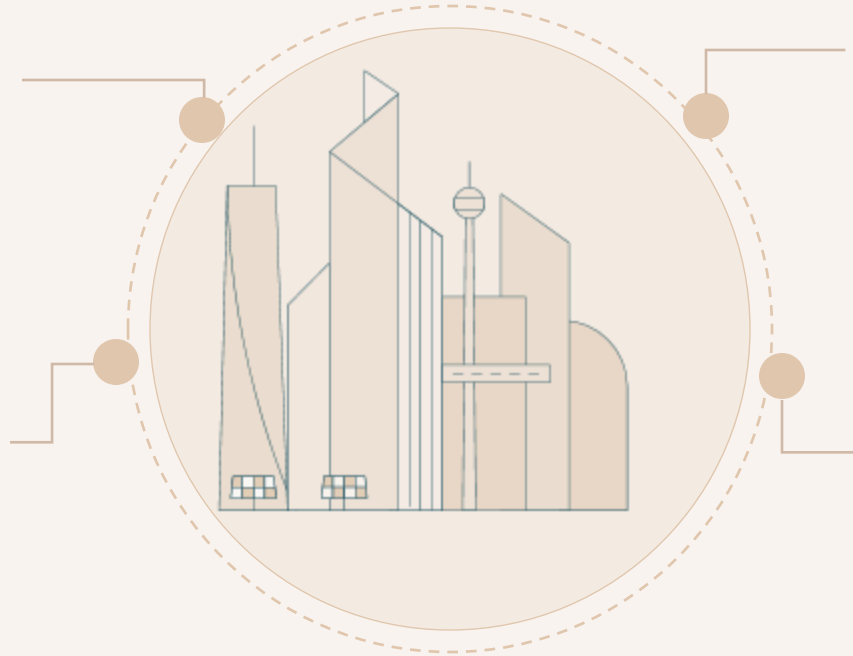
Connecting retrofit design strategies to holistic value, through enhancing building character, connecting to local contexts, and embracing circular principles.

Building performance efficiency

Light to medium energy retrofits can unlock between 10% and 40% in energy savings.

Community impact

In APAC, 65% of organisations will consider opening their office amenities for use by the local community in the next five years to ensure they are used 24/7.



Circular principles and character

In APAC, 69% of organisations will select recyclable furniture and materials by 2030.

Talent attraction

In APAC, 78% of Gen Z and Millennials always seek most-environmentally option as consumers.

Sources: Global Consumer Experience Survey, JLL Research 2024; JLL Future of Work Survey 2024; Retrofitting for the Future, JLL Research 2022

Client Considerations



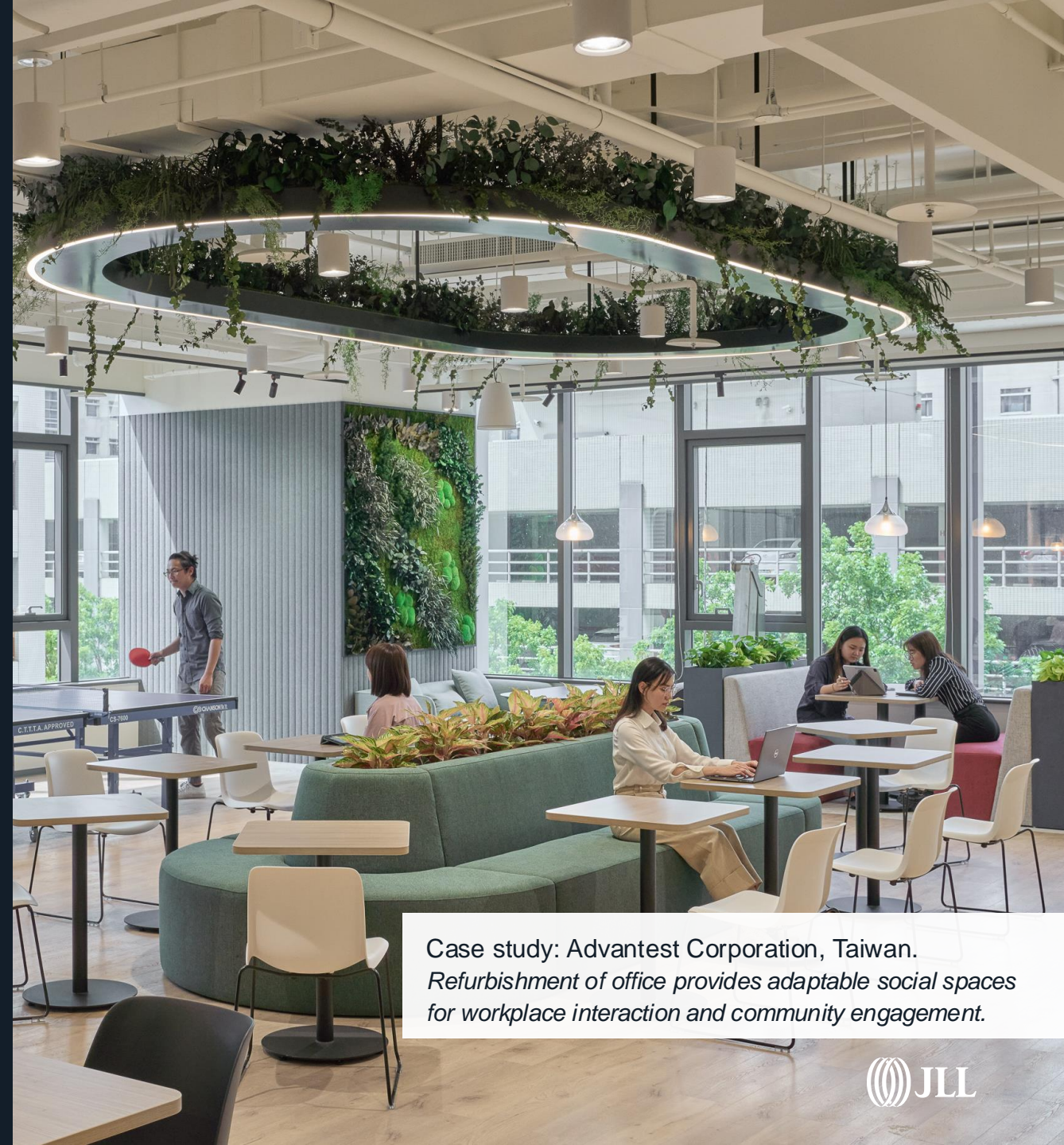
Circular principles in design support lower embodied carbon and enhance an innovative visual identity.



Explore alternative metrics for sustainability interventions to assess holistic value, such as social impact, talent attraction or brand value.



'Science-led' sustainability credentials, such as ILFI or SBTi, will become commonplace and increase need for data & research in design



Case study: Advantest Corporation, Taiwan.
Refurbishment of office provides adaptable social spaces for workplace interaction and community engagement.

4

Embrace AI tools for 'science-led design'

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



90% of organizations surveyed in JLL Future of Work APAC research will accelerate investment in AI over the next five years.

Australia	94 %	India	95 %
Singapore	89 %	Hongkong	83 %

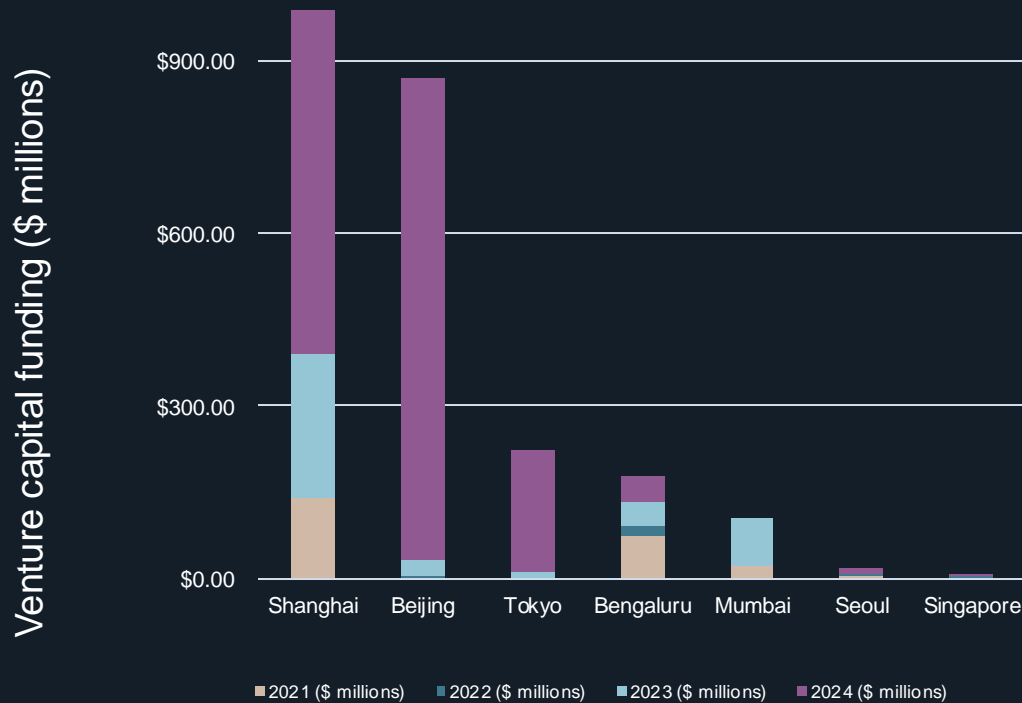


Case study: JLL Melbourne, Collins Street.
Refurbishment of office provides adaptable social spaces for workplace interaction and community engagement.



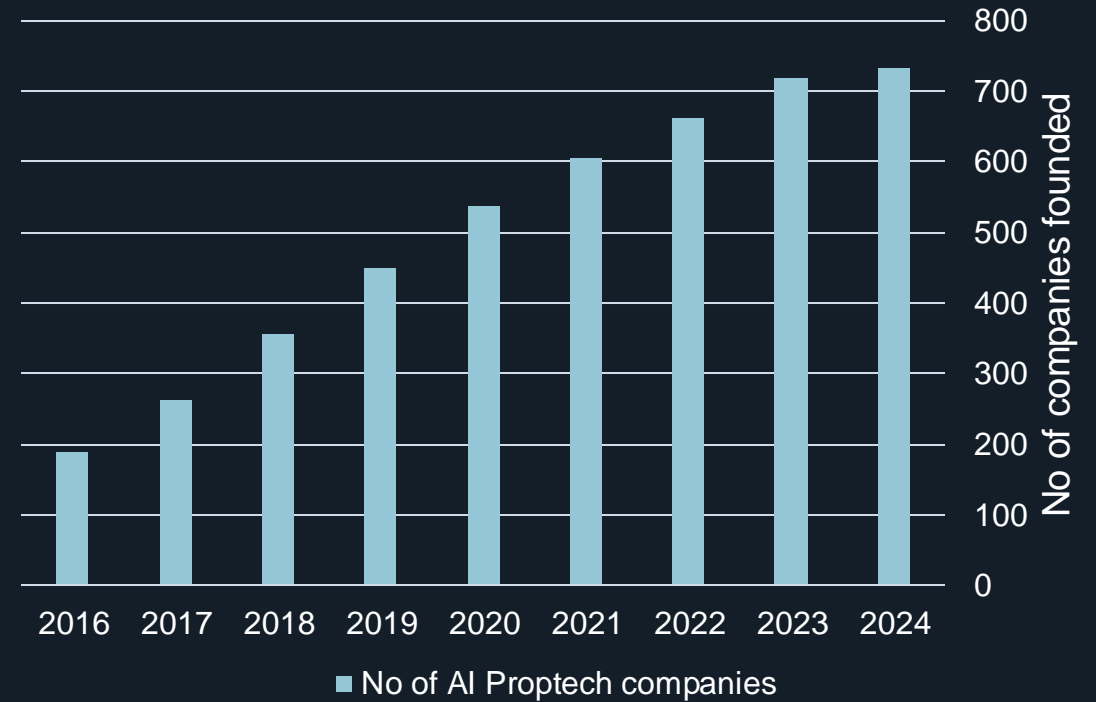
Significant growth in capital funding in Gen AI indicates a growing sector and its profound influence on future design of spaces. Beijing and Shanghai leading the way with \$840 M USD and \$600 M USD funds in 2024, respectively.

Growing Investment in Gen AI in APAC



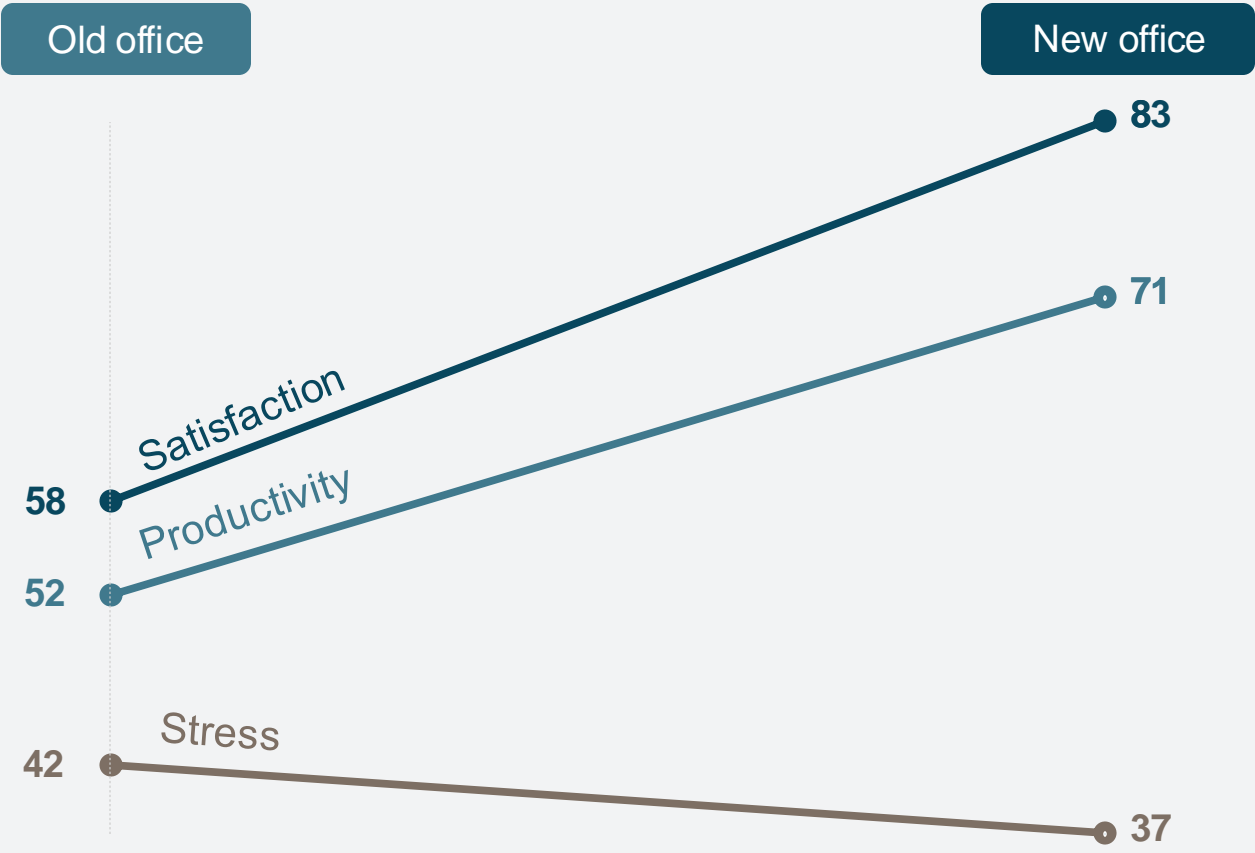
Source: Innovation Geographies, JLL Research 2024

AI powered PropTech companies are increasing



Source: AI in PropTech, JLLT Research 2024

A science-led design assessment of the cognitive experience of JLL employees in Tokyo before and after office relocation using a combination of employee surveys and EEG tests.



Source: JLL Research, 2024

*Based on employee surveys and EEG tests before and after JLL office relocation in Tokyo, Japan. 17-23 respondents.



Case study: JLL office, Tokyo
Relocation project included elements to inspire wellbeing and productivity in the office design.

Considerations for real estate leaders

1

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 evolving definitions of design teams.



2

The use of data & research embedded in design strategies will become central to navigate complex design requirements.

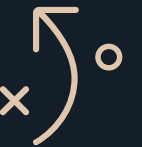
AI tools and science-led design approaches will provide greater opportunities to enhance sustainable and human-centric design.



3

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 of investment.



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A skilled and diverse community of over **1,500** professionals across our design studios, globally connected and integrated in our JLL organization.



Design Solutions (APAC + Americas)

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Is a wholly owned subsidiary of JLL. It is JLL's design and build service in EMEA and Brazil.

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200+

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- Colombia
- Argentina
- Mexico
- Brazil
- Peru
- Canada
- Puerto Rico
- Chile

EMEA

800+

- Belgium
- Poland
- France
- Portugal
- Germany
- South Africa CDT*
- Italy
- Spain
- Luxembourg
- Switzerland
- Netherlands
- United Arab Emirates
- Dubai
- United Kingdom

APAC

500

**Including 350 in design alliances*

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- Malaysia
- China
- Philippines
- Hong Kong
- Singapore
- India JBS**
- Sri Lanka
- Indonesia
- Taiwan
- Japan
- Thailand RCS***
- Korea
- Vietnam
- Macau
- New Zealand

📍 * CDT = Central Design Team
📍 ** JBS = Global JLL Business Services
📍 *** RCS = Regional Creative Studio

Thank you

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