THE FUTURE OF URBANISM:

AUTHENTICITY, PRIDE, COMMUNITIES AND WELLBEING

JULIE VILLET
Director of URW Lab and Group CSR

We are the premier global developer and operator of flagship destinations. We are leaders of change. **Our capacity to innovate relies on our understanding of human needs.** Collaborating with TrendWatching provides us with comprehensive snapshots on the evolution of consumerism. Following the first report about Sustainable Consumption we are thrilled to release the second one on The Future of Urbanism.

Preparing it with the team, I discovered and learned a lot. Have you heard about 'Gig Work' or Nomophobia? Well now you do! Today, 1 in 2 Gen Z or Millennials are interested in gig work meaning short-term jobs rather than working for one employer. Talking of, 58% of men and 47% women suffer from Nomophobia: the fear of being without your mobile phone. More to discover in the report.

Societies are more atomized and polarized than ever. **Isolation and loneliness are on the rise: nearly half of US-Americans report feeling lonely or left out.** With rapid urbanization, from housing to transport, a unique set of challenges come with city living. **At URW we reinvent places that contribute to shaping the cities of tomorrow.** By this, we are part of the solution to improve the lives of millions. In an era where more than 53% of consumers believe brands can do more to solve social problems than governments we can be certain: this is a unique moment to raise to our responsibilities, be impactful and express how we reinvent being together.

How can we create shared spaces that have a real impact and benefit for local communities? How can we contribute to alleviate struggles city dwellers face? How can we meet new demands of today's workforce? How can we continue to create inspiring and unforgettable live experiences?

Questions are multiple; so are solutions. This report aims to outline trends to nourish our vision in order to reinforce our impact in creating the cities of tomorrow. We hope it will be an insightful one and spark ideas for our future: let's all get involved and lead the path of change! Move on and share your thoughts!

About TrendWatching

TrendWatching is a leading consumer insight and trend foresight firm, working to empower meaningful, better business and innovation. Powered by a network of 3,000+ trend spotters, their teams in London, New York and Singapore, TrendWatching helps B2C professionals in 180+ countries unlock powerful new answers to the biggest question in business: 'what will my customers want next?'

The world is constantly changing. The pace and variety of that change can be overwhelming. Consumer trends are one way to process it.

People are motivated by a set of unchanging human needs. New consumer trends emerge when change – sometimes technology, but not always – unlocks new ways to serve those needs.

The easiest way to spot that? Look for innovations that serve basic needs in new ways. Those innovations will change what consumers expect of the world around them: including from you.

This report includes innovations from various industries and markets, alongside insights on how these innovations are changing customer expectations. Your challenge? Consider what those expectations mean for URW, and then take action to serve them.

The continued importance of place

What makes a city 'smart'? Is it, as Alphabet-affiliated Sidewalk Toronto is betting, technology and data? Is it a carbon-neutral status, as Copenhagen is working towards? Or is it ambition, as per Neom, Saudi Arabia's USD 500 billion futuristic city?

To cater to the 68% of the world population that will, according to UN predictions, live in urban areas by 2050, it's probably a combination of all the above.

And yet solely focusing on data, sustainability and scale obscures a fundamental truth: **cities are about the people that live in them**.

About citizens' needs for place, community and belonging.

Brands – especially those invested in creating public spaces such as shopping destinations – can play a role in building urban environments that put the needs of those citizens first. That act as a central hub for neighborhoods, prioritize local and celebrate place.

It's hardly revelatory to claim that continued urbanization is an opportunity for brands. But **have you considered it as an opportunity to think beyond the traditional parameters of your operations?** To create a vision for URW that's rooted within the context of place?

TABLE OF CONTENTS

VILLAGE SQUARED

Brands join the battle against isolation with shared spaces

VILLAGE SQUARED

Tech-fueled lifestyles. Polarized societies. Aging populations. A whole host of factors are contributing to an increasing sense of social atomization. Brands are responding by opening innovative, participatory spaces that foster new connections and promote social wellbeing.

Connection to place and everything that comes with it – community, familiarity, belonging – has always been a basic human need. Yet it's a paradox of modern times that **even as consumers become more connected, isolation and loneliness are on the rise.**

Beyond the impact this has on the social fabric, loneliness can have significant health implications. It's been estimated to shorten a person's life by 15 years, equivalent in impact to being obese or smoking 15 cigarettes per day.

Yes, this is a global issue. But also **an opportunity for URW to create shared spaces that can have a real impact and benefit the local community.**

WHY NOW?

> GLOW-FACE EPIDEMIC

Rising numbers of consumers are aware that digital devices are damaging wellbeing and eroding any sense of a shared social space. 52% of parents feel they spend too much time on their phone, up from 29% in 2016. 39% of teens think their parent spends too much time on their device, up from 28% in 2016 (Common Sense Media, May 2019). Scientific studies can't agree on the implications of excessive screen time, but the perception that it's damaging will drive the quest for spaces that foster IRL community.

> CROSS-GENERATIONAL

An aging global population is spurring new efforts to ensure older citizens remain connected to their community and spurring new solutions for at-risk groups – in an attempt to increase hiring rates amongst older workers, McDonald's partnered with AARP, a US-based nonprofit that supports aging Americans to fill around 250,000 roles. **Nearly half of US-Americans report sometimes or always feeling alone (46%) or left out (47%), with Gen Z cited as the loneliest** (Cigna, May 2018).

> SHUT-IN VIA SUBSCRIPTION

On-demand lifestyles mean that trips to the local grocery store and dry-cleaner are drying up. Yes, **consumers can seize freed-up time to go out and see friends but… Netflix.** When on-demand lifestyles are combined with a steadily rising number of single-occupancy households in many markets – from 31% of all households in the EU in 2010 to 34% in 2017 (Eurostat, July 2018) – you have prime conditions for social atomization.

FEATURED INNOVATIONS
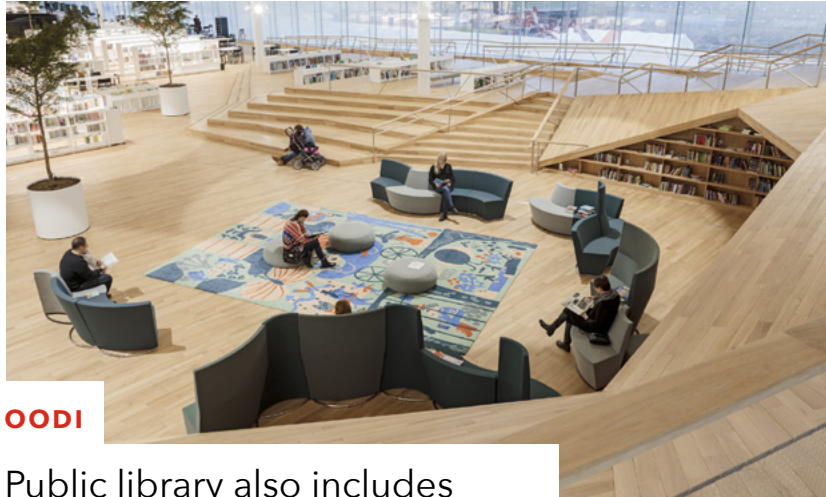
OODI

Public library also includes recording studios and a theater

Opened in December 2018, Oodi is a public library located in Helsinki. To promote lifelong learning, creativity and entrepreneurship, the space includes recording studios, a kitchen, gaming room and an immersive 3D space. Each floor of the three-story building was built to fulfill a different civic purpose: the ground floor (which houses a restaurant and theater) was created to help residents mingle; the second floor (where the recording studios are located) is for creative endeavors; the top floor combines books and workspaces. The library was funded by the Helsinki City Council.

Oodi is a 17,250-square-metre building that contains a relatively small number of books – around 100,000 – the majority of the space is dedicated to public amenities. To further emphasise the 'public' aspect of the library and highlight the link between government and citizens, it faces the Finnish Parliament. The development and consultation phase lasted almost two decades, to ensure that this would be a public space that would meet both current and future population's needs.
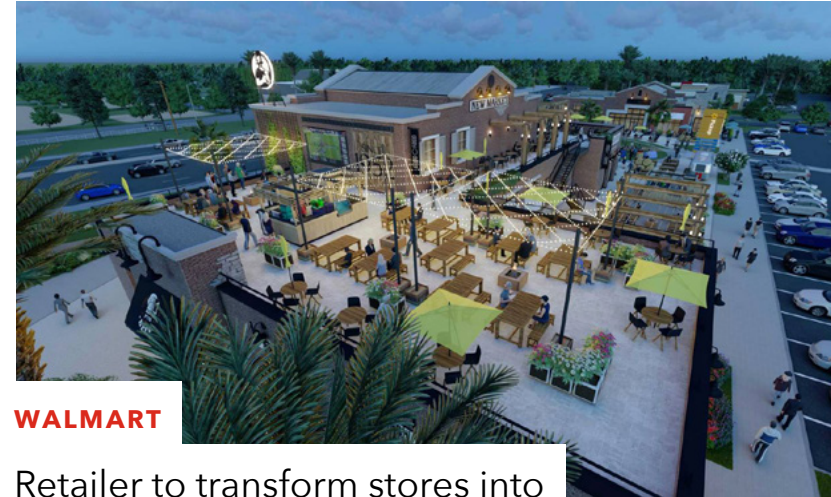
WALMART

Retailer to transform stores into community-focused centers

Walmart is repurposing retail locations across the US into what the brand is calling 'Reimagined Centers'. Built in existing car parks, the new hubs are designed to foster a greater sense of community and provide spaces for entertainment, dining, exercise and other community-related activities. According to the brand, this will be achieved by including restaurants, day care establishments, health clinics, bowling alleys, food trucks, bike rental stations, driving ranges, fuel stations, and more. Work is already in progress at eight locations in Arkansas, California, Colorado, Iowa, Missouri, Oregon, Texas, and Washington.

Walmart's 'Reimagined Centers' are a significant departure from the brand's 'big box' approach, and differ from the smaller urban concepts pioneered by other retailers – including Target. It's an attempt to appeal to city dwellers who are moving to the suburbs but still seek some of their urban comforts: mostly walkable, pedestrian-centric developments. In fact, 51% of US Americans said walkability was important to their quality of life (NAR 2017 Community Preference Survey).

FEATURED INNOVATIONS

IBIS

Global hotel chain repositions around local community and social interaction

In February 2019, global hotel chain **ibis** announced plans to reposition as a lifestyle destination, moving away from the brand's image as a budget hotel. Focus will be on the guest experience, with the hotel promoting increased contact with the local community and greater opportunities for social interaction. Design of the hotels will be towards more flexible 'living spaces for everyone', centring around a hub where guests can sleep and dine. Entertainment will also play a role in the guest experience, with plans to host live music featuring emerging new talent.

Want to go all out on this trend? Ibis is reimagining the entire vision of the brand around the need for community. The new strategy was **inspired** by an ibis / Ipsos poll conducted across six countries, including Australia, which showed travellers were seeking more of a general social venue from an economy hotel. More than 80% of survey respondents said they were seeking a venue where even 'non-staying' guests felt welcome. How are you creating spaces that are welcoming to every consumer, regardless of their reason for visiting?
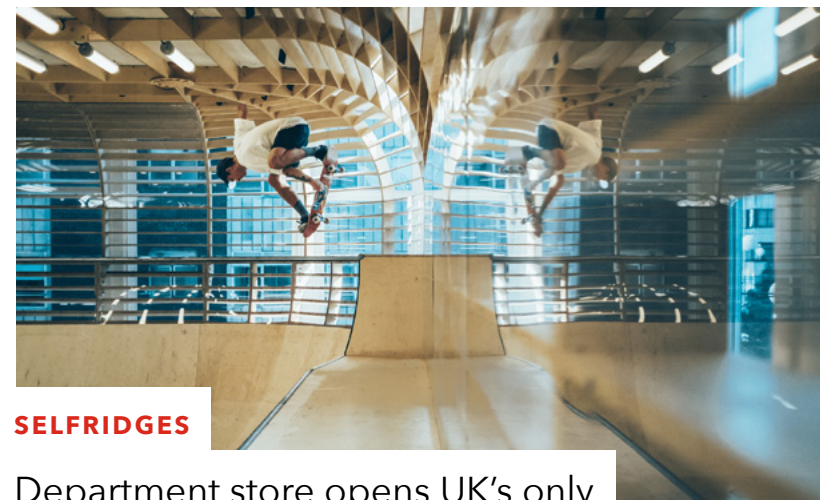
SELFRIDGES

Department store opens UK's only permanent in store stake park

UK-based department store **Selfridges** opened the country's first free, permanent skate bowl inside its flagship London store in October 2018. The project was completed in collaboration with Mighty Mighty, a brand activations agency, in a move designed to strengthen Selfridges' relationship with younger consumers and those involved in skateboarding subculture. Made entirely of wood, the skate bowl on the store's first floor is accessible seven days a week during opening hours.

The skate bowl is part of a host of pop-up activations aiming to drive footfall to the department store (other measures include an **in-store boxing gym**, and an exhibition exploring **radical luxury**) but the skate bowl is permanent. It's also significant because London's historic Undercroft skatepark was only recently saved from property developers following a citizen-led fundraising campaign. How could your VILLAGE SQUARED initiative address a gap in the community whilst strengthening URW's brand values?

IMPLICATIONS FOR URW

There's nothing new about brands creating experiential spaces for the purposes of brand building. VILLAGE SQUARED is an evolution of that trend. The difference here? Spaces that actively promote social bonds and enhance social wellness.

EXISTING URW ACTIONS:

At URW, we aim to reinvent 'being together'. We create places where people can meet up, connect, shop, work and enjoy. From foodhalls to green rooftops and bars, through job fairs and live events, our places promote social bonds. How does URW respond to the creation of experiential spaces with the new re-branding and brand roll out of 'Westfield' brand in continental Europe? How can we help our tenants do their part and convince them to be part of our big red 'W' village?

GET TO WORK

> SPACE FOR THE UNDERSERVED

Start by asking: who in the community is suffering most from social atomization? Who lacks a safe space to get together, meet new people and try new things? Who has been disproportionately impacted by budget cuts or reduced services? The answers to those questions will help you create VILLAGE SQUARES that are truly rooted in community needs.

> CULTURAL CAPITAL

Based on 2014 figures from the [Institute of Museum and Library Services](#), the Finnish government spends more than one and a half times as much per capita on libraries as the United States. Beyond Oodi, other libraries of note include [Dokk1](#), a 'hybrid library' located in Aarhus, Denmark. Whilst much of the Nordics' library culture is rooted in social ideals around education, **what can you learn from public spaces that prioritize learning and community?**

> PUBLIC VS. PRIVATE

As e- and m-commerce continues to battle with bricks-and-mortar, brands are rethinking the definition and purpose of 'stores'. Apple pioneered the [town square](#) retail concept; Starbucks created '[the third place](#)'. But this trend goes far beyond the commercial brand experience to encompass education, IRL community and genuine connection. **How can URW bridge the space between private and public spaces?**

CITY LIGHTS

Ambitious cities light up the world

CITY LIGHTS

As megacities rise and tech reshapes the urban landscape, a wave of innovation will be needed to cater to the swelling numbers of urban dwellers. Public and private institutions will take bold steps to reimagine housing, transport and mobility, to enhance citydwellers' quality of life and wellbeing.

Global urbanization is a far-reaching macro trend. Today around 55% of the world's population lives in urban areas – the UN expects that to rise to 68% by 2050. To cope with the estimated 1.4 million people that move to cities each week, extraordinary solutions are needed: the Hong Kong government is considering an artificial island to address land shortage; other authorities are exploring 'vertical urban villages'.

And yet it's important that the hyperbole around smart cities (Urban air taxis! Drone deliveries! Solar-powered skywalks!) doesn't obscure a fundamental truth: cities are about the people that live in them. How can brands help embed a sense of place into the urban metropolises of the future?

WHY NOW?

> EXPECTATION TRANSFER

Urban infrastructure can take decades to build or improve. But today, news of better urban solutions travels in real-time, driving up the expectations of citizens everywhere. Now, clued-up city-dwellers will increasingly demand that their city learns from and emulates the best from around the world.

> CHANGING WORLD

Worldwide investment in infrastructure is expected to reach USD 79 trillion by 2040. According to the **World Bank**, the actual global investment needed is closer to USD 97 trillion. Enter solutions like China's **Belt and Road** initiative. Overlooking controversies around everything from unsustainable debt to corruption, environmental damage, lack of tnasparency and more, the demand for infrastructure in Asia and the developing world is still too large to be solved by government-led initiatives.

> THE 'NEW' NEW DEAL

In nations where governments fail to invest, repair, and replace infrastructure, private initiatives are taking off. **53% of consumers believe brands can do more to solve social problems than governments, and 54% believe it's easier for people to get brands to address social problems than get government to act** (**Edelman**, Oct 2018). Progressive brands are stepping up – **Domino's Pizza** funded pothole repairs in Texas and Georgia, then expanded the initiative to all 50 US states.

FEATURED INNOVATIONS

JAMES LAW

Low cost, micro-living housing unit designed to ease Hong Kong's housing problem

The first complex of O-Pods, 100-sq-ft homes built within concrete water pipes, were unveiled in July 2018. Developed by Hong Kong-based architect James Law, the O-Pod is designed to be a cheap solution for young people who cannot afford conventional living spaces. The concrete pipes can be stacked on top of one another (in ways that shipping containers cannot) and be placed in under-utilized locations – between buildings, under bridges. Law aims for the O-Pods' rent to be HKD 3,000 (USD 400); tenants will receive two-thirds of their rent back when they leave, so that they can use the money for a home.

In January 2019, Hong Kong was ranked the world's least affordable housing market for the ninth year in a row. Data from Demographia suggests that homes in the city are out of the reach of more residents than ever before. So whilst concrete pipes might not seem like an attractive housing option, for many they might be the only solution. The pricing structure could help citizens get on the property ladder. What disruptive product or service could you offer to help citizens beat a challenging economic environment?

CEPEZED

Energy generating bus station opens in the Netherlands

The Netherlands' first energy self-sufficient bus station opened in Tilburg in March 2019. Designed and built by architectural firm cepezed, the bus station generates its own energy through 2,691 square feet of solar panels atop an awning that also offers waiting passengers shade or shelter from inclement weather. The energy generated powers lighting and digital signage, as well as the staff cafeteria and public transport service point. The bus station was completed as part of a transit hub regeneration program and is easily accessible to the city's train station and bicycle parking.

As vehicles and public transport becomes more sustainable (see Lilium's all-electric air taxi or Karachi's buses that run on cow manure) it makes sense that the surrounding infrastructure becomes more energy efficient too. Once consumers see that a bus station can be an eco-booster, they will start to ask why all infrastructure – including shopping malls – doesn't come with sustainable features as standard. Beyond making eco an asset essential, how can you ensure sustainability efforts are visible to visitors?

FEATURED INNOVATIONS

CITY OF ATLANTA

City tackles food deserts with nation's largest 'food forest'

A section of vacant land inside Atlanta's city limits that was originally allocated for residential development is set to be converted into a **Food Forest**. The city of Atlanta, working in partnership with the Conservation Fund and local nonprofits, purchased the space and in May 2019 approved the transformation into a public park. The 7.1 acre site, part of the city's plan to bring healthy food within half a mile of 85% of Atlanta residents by 2021, will include communal planters, where residents can grow fresh produce, walking trails and restored forest and stream-side areas.

The Lakewood-Browns Mill community, which will house the Urban Food Forest, is a food desert where **more than a third** of the population lives below the poverty line. This project won't solve Atlanta's food desert, but it will go some way to alleviating the issue and encourage the community to get involved with food production (more than 1,000 volunteers have signed up). It's also a low-cost innovation – beyond purchasing the land, other upfront costs were minimal.

SIGNIFY

Bat-friendly street lights unveiled in Holland

The first street lights designed to be friendly to bats were installed in a town in Holland in June 2018. A partnership between UK-based lighting company **Signify**, the University of Wageningen, and the municipality of Nieuwkoop, the scheme uses smart LED lights which emit a red color and use a wavelength that doesn't interfere with a bat's internal compass. Remote management of the lights also allows them to be dimmed through the night.

Zuidhoek-Nieuwkoop is part of the **Natura 2000**, a network of nature protection areas across Europe comprising breeding and nesting sites for rare and threatened species. But habitats that are hospitable for wildlife and humans shouldn't only exist in government-protected areas. Are you thinking about the long-term impact of URW's footprint? It could be as simple as going out into the local area, looking at what's around and asking locals about their concerns.

IMPLICATIONS FOR URW

This trend is underpinned by global urbanization – a shift that will have an impact for generations. So think beyond short-term fixes to lasting, adaptable solutions. After all, Rome wasn't built in a day…

EXISTING URW ACTIONS:
Building greener assets is at the core of our engagement. We commit to 100% green electricity: Westfield Topanga & The Village recently unveiled a 9,000 solar panel array. We also aim to improve our visitors' mobility experience on time, cost and impact. Biodiversity is one new area of focus integrated into our new CSR agenda. Urban farming projects are being investigated throughout our portfolio. URW will multiply the capacity of on-site renewable energy fivefold by 2025 (baseline 2015) to improve eco-efficiency.

GET TO WORK

> AT THE CENTER

From autonomous trams to artificial moons, many governments and local authorities are already ambitiously racing towards the city of the future. The opportunity for you? **Think about how you can put URW at the center of those plans – whether that's as a transport hub or a place to communicate those plans with local communities.**

> OLD CITIES, NEW TRICKS

New cities will set radical standards for urban life, but newer isn't always better! In fact, urban areas that developed rapidly in recent years have some of the highest carbon footprints per capita (GGMCF, June 2018). **Could existing infrastructure or unused assets be repurposed to build a better future?** Atlanta's food forest is just one example of that.

> DAILY STRUGGLES

Physical infrastructure improvements have the potential to help citizens move around a city more easily, breathe cleaner air and enjoy shorter commutes. But beyond day-to-day frustrations, what other struggles do city dwellers face? And how can you help to alleviate them? In Hong Kong it's housing prices, but that's really just the tip of the iceberg…

NEW LABOR

A disrupted workforce
has new demands

NEW LABOR

The proliferation of on-demand services, the appeal of the wantrepreneur lifestyle, and the automation of jobs are transforming expectations around work. Empower these new lifestyles and serve the armies of freelancers and gigpreneurs with flexible work spaces that suit their needs.

The global startup culture was primarily about ambitious digital innovators. But now, the expectations created by that culture – including flexibility, self-dependence, and blurred work/life boundaries – have spread far beyond that silo. Workers in many areas expect the same lifestyles.

Meanwhile, the financial crisis prompted a rise in self-employment, both by choice and necessity.

Put all that together, and it's clear: the ongoing disruption of work is going mainstream, and consumers are looking for brands to play a role.
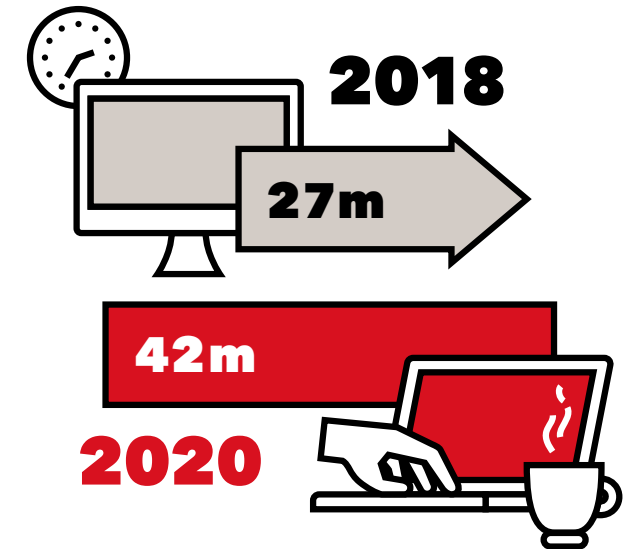
WHY NOW?

> NEW NORMAL

In a world in which consumers are increasingly free to construct the lifestyle that suits them, 'work' has many meanings. Changing lifestyles and mindsets require new ways of working: **1 in 2 Gen Z or Millennials are interested in gig work.** Gig work – which consists of short-term contracts or freelance work - appeals for a variety of reasons: 31% cite a flexible schedule; 29% the ability to work where they want; 22% seek the ability to take on multiple different projects (**MetLife**, March 2019).

> DEMAND & SUPPLY

An empowered workforce requires a new working culture. Cue the rapid rise of co-working spaces – in 2018, an estimated **2,188 spaces** were opened worldwide. The hipster appeal of many coworking spaces is appealing to both startups *and* blue-chip companies, who are embracing 'corpworking' in an attempt to attract and retain talent. And whilst the numbers are impressive, a note of caution: the sustainability of the business model is yet to be proven, with some predicting a co-working 'bubble'.

2018

27m

42m

2020

❯ **Within the next two years, 27 million Americans will leave full-time jobs, bringing the total number of self-employed to 42 million** (FreshBooks, March 2018)

WHY NOW?

❯ WE-CONOMY

When it comes to co-working spaces, one brand stands out. **WeWork started with six floors in a tenement-style building in New York's SoHo district in 2010, and now has 45 million square feet (4.2 milli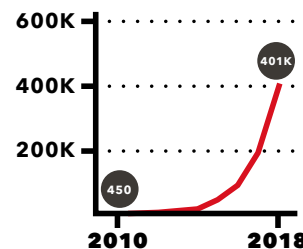on square meters) of office space around the world.** The We Company umbrella also includes **WeLive** (communal living facilities), **WeGrow** (a 'conscious entrepreneurial' school) and **WeWork Labs** (mentorship); the company hasn't ruled out WeBank or WeSail…
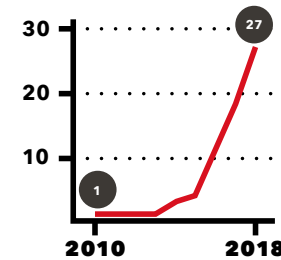
COUNTRIES
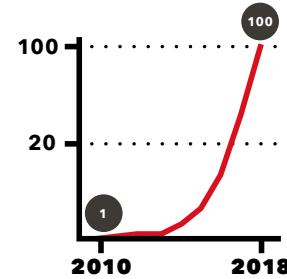
CITIES

MEMBERSHIPS

❯ (WeWork, 2019)

❯ FUTURE PROOFED

Despite improvements in national economic conditions, across the globe many consumers are skeptical about the future. In advanced economies surveyed, just 34% believe that when children grow up they will be better off financially than their parents. The figure was only slightly higher (42%) among emerging markets (**Pew**, September 2018). That anxiety is partly caused by job automation, and worries about the types of work and careers that will be available in the future.

FEATURED INNOVATIONS
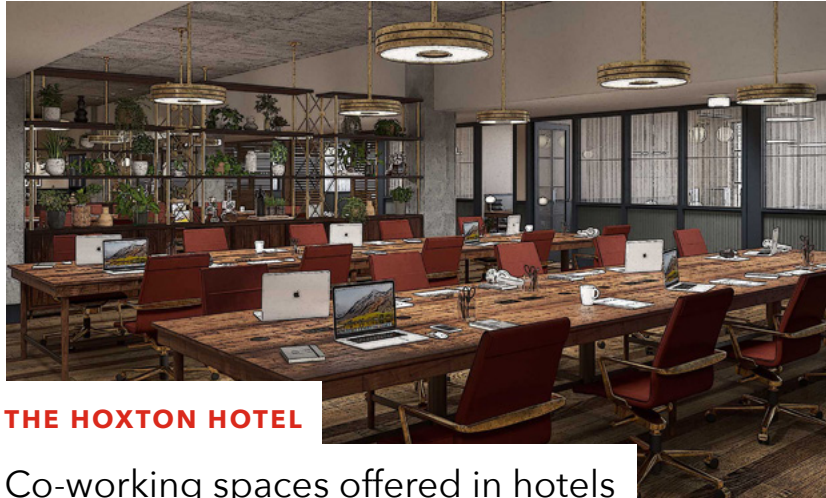
THE HOXTON HOTEL

Co-working spaces offered in hotels

The Hoxton Hotel will introduce co-working spaces in its Chicago and Southwark, London locations. Working From options range from a shared desk to dedicated studio space, along with meeting rooms, pantry, and wellness classes. Prices range from GBP 75 to GBP 700, depending upon the facilities chosen. The Southwark space, set to open in Q4 2019, will host 744 desks across seven floors, interspersed with meeting rooms, kitchens and hotel rooms. Benefits include 'duvet days' (day-use hotel rooms for users who have flown on a red eye or want to work from bed for the day) and a deadline hotline where members working late can get a hotel room for GBP 25.

The first Hoxton hotel opened in Shoreditch, East London, in 2006, quickly becoming an informal co-working space for freelancers and digital nomads who warmed to the brand's speedy wifi and welcoming interiors. The fact that it's taken the brand over 10 years to tap into the commercial potential of this freelance army is testament to why so many embraced it in the first place. So if you're looking to cater to the NEW LABOR workforce, start by asking how you can embed some authenticity into your offering.
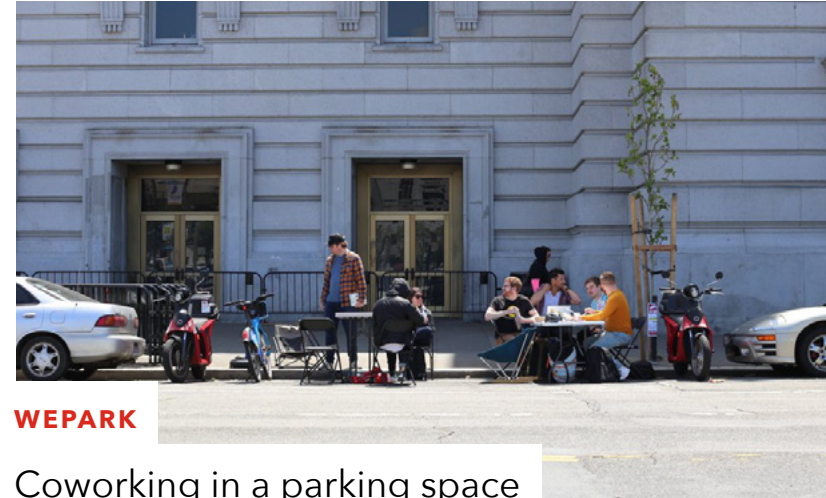
WEPARK

Coworking in a parking space

April 2019 saw the launch of WePark, an initiative encouraging people to create pop-up coworking spaces in public parking spots. Begun in San Francisco as a humorous dig at the high-cost of coworking spaces in the city, workers can collectively pay the on-street parking rate – in San Francisco around USD 2.25 an hour – and set up their desks in an empty parking space. The initiative has quickly gained global attention with parking space coworking events so far held in Santa Monica, California and Toulouse, France. Users can sign up online to learn of future locations.

70% of professionals work remotely at least one day a week, while 53% work remotely for at least half of the week. But with the price of a dedicated desk in a co-working space ranging from USD 200-700 per month, coupled with rising housing costs around the world, a lot of entrepreneurs who'd like to have the community can't afford a coworking setup. WePark is a low-cost, low-perk, outdoor answer to affordable co-working. Bringing people together shouldn't be (but often is) a luxury! How might you democratize shared spaces and community?

FEATURED INNOVATIONS

CLINICUBE

Coworking facility for doctors

Clinicube is a New York-based co-working space for medical professionals, offering a selection of full-time and part-time medical offices and studios. The spaces can be accessed 24-hours a day, and membership also includes billing and digital marketing support. The second Clinicube location opened in Manhattan in February 2019.

Could a democratized workplace setting work for brands beyond the conventional start-up? Starting a private practice often requires heavy financial commitment, but this service eliminates that. As co-working spaces themselves evolve, how could you leverage them to offer a service to the broader public?
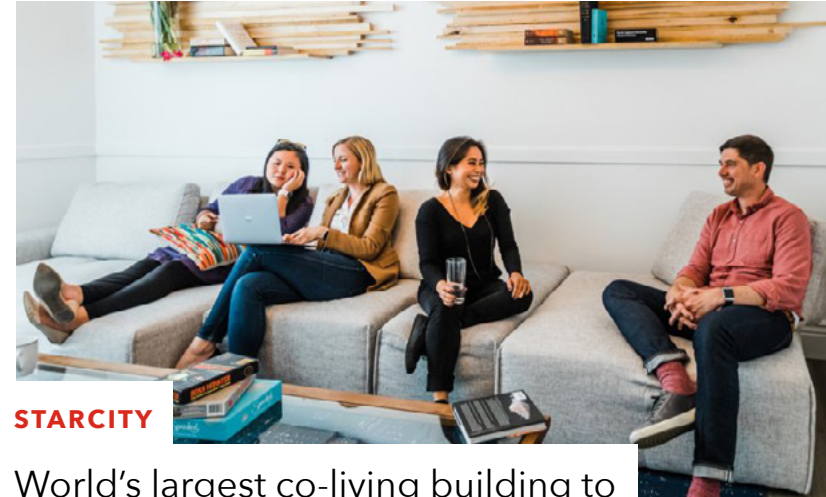
STARCITY

World's largest co-living building to open in response to housing crisis

In 2021, US-based company **Starcity** will open the world's largest co-living complex in San Jose, California. Tenants living in the 800 units will have access to a communal kitchen and living room space, as well as services including laundry and dog walking. Unit rental ranges from USD 800 to USD 2,500 per month. Half of the complex's apartments are reserved for those earning under 80% of the city's median income.

Co-living might not replace conventional rental practices, but it's certainly going to disrupt the market – according to real estate firm **Cushman & Wakefield** the number of units offered by major co-living companies in the US will triple to 10,000 in the next few years. Although co-living is usually aimed at young tech workers, it's certainly not the only demographic that's interested in the practice. Could URW be the brand that brings co-living to a broader market?

IMPLICATIONS FOR URW

This trend is fueled by epic culture shifts that are defining why we work and what 'work' means. Consumers looking for work that aligns with their values will embrace brands that help them navigate this new work-life world. How will you contribute?

EXISTING URW ACTIONS:

With the rise of remote working and digital nomadism, URW believes offices must become a natural meeting point. Our new office building, Trinity, delivered in La Defense in 2020, is taking on a more 'at home' feel with landscaped terraces, panoramic elevators, and services to enhance employees' daily life. Some co-working spaces already exist in select URW assets - Bespoke in Westfield San Francisco or WOJO in Les Ateliers Gaîté in Paris – and discussions are ongoing with other major co-working players.

GET TO WORK

> FIND A TRIBE

The Wing – a female-only co-working space which recently opened its first non-US location in London – has found success by catering to a very specific tribe. Are there any groups that might feel intimidated by or exist beyond the scope of traditional co-working demographics? That same thinking applies to co-living spaces too. Most are aimed at younger demographic – what would a co-living space for seniors look like?

> OFFER A LEG UP

Beyond providing a space to work, there will be endless opportunities in helping people develop the entrepreneurial skills and connections they need to prosper – **over half of Gen Z already see themselves as entrepreneurs.** There could be real value in broadening the scope of co-working spaces too – Clinicube has the potential to bring vital services to a community whilst making it easier for medical professionals to start a private practice.

> WHITE SPACES

Beyond co-working spaces, empty parking spots have also been converted into parks, and housing spaces. In San Francisco alone, there are 275,000 parking spaces. With the rise of shared transportation alternatives, like bikes, scooters, and traditional public transportation, and cities like London cracking down on cars (see the city's Ultra Low Emission Zone), there may one day be a lot more empty spaces. **How could empty spaces be repurposed for a NEW LABOR workforce?**

CITYSUMERS

Empower citydwellers to make their lives better

CITYSUMERS

From housing to transport, there is a unique set of challenges that come with city living. Now, city dwellers will reward brands that bring them together and empower them to take collective action to make their cities, and their lives, better.

Much of the innovation around cities has focused on connected infrastructure and smarter sensors, using the resulting insights to create increasingly efficient and intelligent processes. That can have very real benefits for citizens – the **SmartSantander** project in Santander, Spain is one example of a connected ecosystem that bridges the gap between data and day-to-day life.

But now, the focus needs to shift to improved civic engagement, to developing more livable cities and improving the quality of life of citydwellers. After all, cities are about the people that live in them *not* the machines that monitor them. The opportunity for URW? **To enable these citizen co-creators and help build cities that prioritize collaboration and participation.**

WHY NOW?

> THE REAL DEAL

The evergreen appeal of city living for young people needs little explanation. And conventional wisdom dictated that, as those adults got married and started families, they moved to the suburbs. But in an era in which many young people are choosing to avoid those life stages or reaching them later in life, research suggests they are living in central urban neighborhoods significantly longer than previous generations did at the same age.

> CROWD POWER

Whether it's backing new projects via crowdfunding sites or getting involved with development pre-launch, **the line between brand and consumer has become increasingly blurry**. Beyond the excitement of participation, tapping into the power of the crowd increases transparency: important in an era when 55% of consumers no longer trust the companies they buy from as much as they used to (HubSpot, 2018). Now, consumers want to get involved in something meaningful.

> ONGOING BACKLASH

The backlash against Sidewalks Labs' hi-tech redevelopment scheme in Toronto shows **consumers remain wary of the promises 'smart' cities have to offer**. The project has been criticized for lack of clarity around data collection and the impact corporations like Alphabet-owned Sidewalk Labs should have in public spaces. Citydwellers seek improvements, but are wary of the price: 65% of consumers are concerned with how smart devices collect data (IPSOS, May 2019).

FEATURED INNOVATIONS

URBZ

Citywide consultations and workshops help reimagine public square

The [City of Lausanne](#) in Switzerland has commissioned urbz, a Mumbai-based 'action and research collective', to assist in the redevelopment of two public squares. The 18-month project, launched in Q4 2018, will see urbz interview local stakeholders and run guided tours led by locals to allow citizens to experience a neighbourhood from the perspective of its users. The tours are followed by 'urban cafés', public workshops and forums, which anyone can attend. Urbz will use the collective input to draw up a brief for an architectural competition to reimagine the area, with the final designs unveiled in 2020.

This is a genuine bottom-up approach to urban planning. And while it's too early to say how the consultation process will affect the final design, the [organizers say](#) it's already highlighted something interesting: while cities and developers tend to focus on design when discussing urban space, the public itself tends to be more preoccupied with issues of identity. What could you learn if you asked for collective input into a new project?

ATHENS

City recognized for commitment to citizen-led innovation

In November 2018, the European Commission named Athens the European Capital of Innovation, awarding a EUR 1 million prize. In awarding the prize, the commission cited the city's commitment to 'helping the local community bring about change and open up to the world' through a raft of projects including [synAthina](#). The online platform, which was initially launched in 2013, allows citizens and groups to submit city-changing ideas and then connects them with the officials, nonprofits, or businesses that can help make them happen.

Following the financial crisis, the city of Athens was left with limited resources and trust issues: as of 2013, just 13% of Greek citizens agreed they trusted public institutions, and 98% considered corruption a major issue (Gallup). So whilst synAthina is a very Athens solution to a very Athens challenge, it's evidence of a wider move towards smarter cities that aren't built on technology, but on the ideas and needs of local people. How could you help foster a movement towards local democracy and meaningful citizen engagement?

FEATURED INNOVATIONS

FORD

Automaker launches a community challenge to improve local mobility

June 2019 saw Ford launch **City:One**, a crowdsourced mobility challenge that's part of the brand's plans to restore Michigan Central Station. The eight-month challenge, run in partnership with the city of Detroit and the state program PlanetM, will invite local citizens to submit ideas to make biking and walking in the neighborhood easier, and ways to bring daily services to residents who do not have easy transportation access. 12 finalists will be selected for pilot tests, backed by a USD 250,000 fund.

Foot Traffic Ahead, a report co-authored by The Center for Real Estate and Urban Analysis and released in June 2019, found that walkable urbanism isn't just sustainable and enjoyable, but more profitable. How can you ensure that the public services that you're championing will have a lasting impact, and long-term benefits beyond simply making citizens' lives easier? That starts with a deep understanding of the issues that matter!
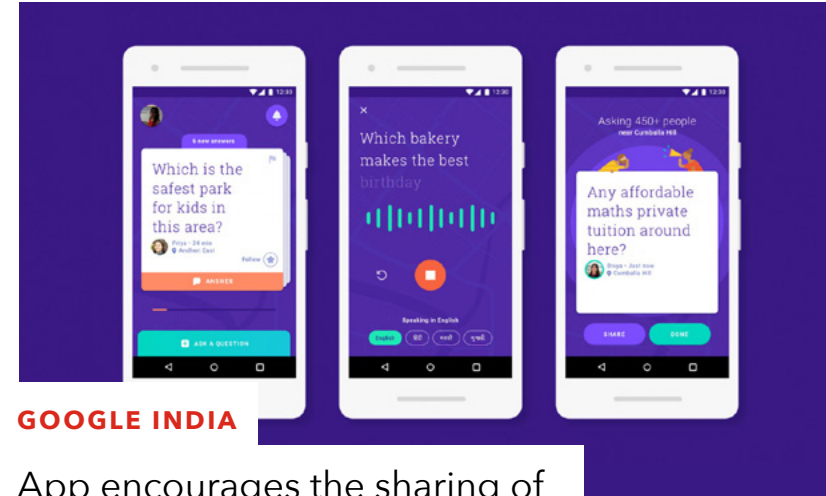
GOOGLE INDIA

App encourages the sharing of local information

May 2018 saw Google India beta launch an app called **Neighbourly**. The app enables users to post questions about their local area as well as answer questions as a local expert – without giving away personal details. The app was initially available to residents in Mumbai, with plans to expand to the rest of India if feedback is positive.

Neighborly is designed to help users learn about their neighborhood, but it could also be an effective tool for combating loneliness amongst city dwellers. Loneliness is a global issue. **Half a million** Japanese people are suffering from social isolation. The UK **recently appointed** a minister for loneliness, the first in the world. The way that cities are built can help or hinder social connections – but what about solutions that don't require infrastructure change to solve one of city dwellers' biggest challenges?

IMPLICATIONS FOR URW

When it comes to helping CITYSUMERS improve their locale, Collaboration can build trust and aid in the cultivation of citizen-centered urban areas. Brands can also provide spaces where local authorities can engage with citizens.

EXISTING URW ACTIONS:
Our social media tools are used to collect inspiration from over 7.9m Facebook fans and 4,1600k Instagram followers. Development teams have been working with locals and sharing information, such as the 3 Pays project, building on local initiatives for new pioneer experiences. Integrating collective input into the design process has great potential. How can URW engage more communities to participate in the creation of local destinations?

GET TO WORK

> MANY VOICES

When it comes to creating shared public spaces, there's space for everyone's voice. But don't take it for granted that it will be easy to hear them all. Venezuelan architect and MIT graduate Ana Vargas developed and implemented Tracing Public Space: a methodology which engages children from low-income neighborhoods in improvement projects, while the City of Lausanne commissioned urbz to bring the town-planning initiative to as many people as possible. What can you learn from them?

> THE POWER OF LIVE

We've already discussed the impact of increasing isolation in an era of subscription services and Netflix. But despite the allure of Netflix's 'continue-watching' button, **consumers are still spending on live entertainment – according to McKinsey, the average annual spend in the US is up 5.9%.** Could you create live events that help citydwellers get in touch with neighbors who share similar interests? See LIVING THE LIVE on page 50 for more.

> ACTIONS ARE LOUDER THAN WORDS

Inviting community feedback necessitates a willingness to incorporate those new viewpoints into initiatives and services. If you're asking citizens to contribute on projects that are not directly related to URW but are instead part of a broader local authority or government-led scheme, make sure you're prepared to help see them through… no matter how long it takes! Citydwellers will have little time for brands that aren't in it for the long haul.

URBAN PRIDE

Celebrate consumers' locale

URBAN PRIDE

For many metropolitan consumers, the city is the defining geographical unit, the place they identify as 'home'. Serve these city-dwellers with products and services that reflect, celebrate and echo their city's culture, brand and heritage, and you'll win attention, love and respect.

On the one hand, the world is becoming smaller and more connected. On the other, the past few years have seen an epic movement of people and the restless power of globalization. Although the meaning of 'local' continues to shift, citizens haven't given up on place and belonging. And in a world where religion is declining in importance for many, those concepts might be more important than ever.

What makes a place special to those who inhabit it? Is it the landscape? The traditions? The connections shared amongst locals? Whilst the answer to those questions will change from place to place, **consumers will welcome brands that champion, celebrate and cater to local needs wants and cultures**.

WHY NOW?

> CITY VS. COUNTRY

As cities – and megacities – grow in size and importance (financial and cultural) they become centers of self-identification for consumers. **That means pride in the city a consumer calls home. In fact, many citizens identify with their city more than their country.** On the flip side, in non-urban areas the need for self-identity remains – a reaction to an ever-changing environment (whether those changes are perceived or real) and the desire for greater control and autonomy over the immediate locale.

> UNIVERSAL FAMILIARITY

As never before, today's consumers move in a global space of shared information, ideas, culture and brand familiarity. Whether you're in Tokyo or Turin, when you sip a Starbucks Frappauccino sitting on an IKEA Klippan sofa while sending a message on an iPhone… things start to feel a little samey. **Consumers will appreciate brands that show some individuality and, in turn, allow them to express their own.**

> DIGITAL TRIBES

In the US, Gen Z is the most racially and ethnically diverse generation yet. One consequence? Gen Z aren't associating themselves with a particular nationality. Instead, this generation is more interested in finding a tribe of like-minded individuals. For many of these young consumers, **the online connected culture – and platforms like Instagram and Spotify – have created a city that exists beyond the physical and provide an opportunity to connect with their preferred tribe**.

FEATURED INNOVATIONS

WEST ELM

Furniture brand hosts artist-led tours

In March 2018, US-based furniture and lifestyle brand West Elm launched a series of short tours led by local artists and craftspeople. Local Experiences offers the chance to meet furniture designers, textile artists, and welders in cities including Detroit, Savannah, Minneapolis and Portland. Trips include an introduction to basic arts or craft techniques, and the chance to have a go, with prices starting at USD 130.

West Elm's expansion into local tours is part of a broader move into experiences, building on the brand's fledgling hotel business (the first is set to open in Indianapolis in 2020). Of course, experiences are big business: launched in 2016 Airbnb Experiences has seen massive growth: nearly seven times as many experiences were sold in 2018 compared to 2017, and the number of experiences listed on Airbnb increased 295%, year-on-year from early 2018 to early 2019. Can you create 'local' experiences that appeal to residents and tourists alike?
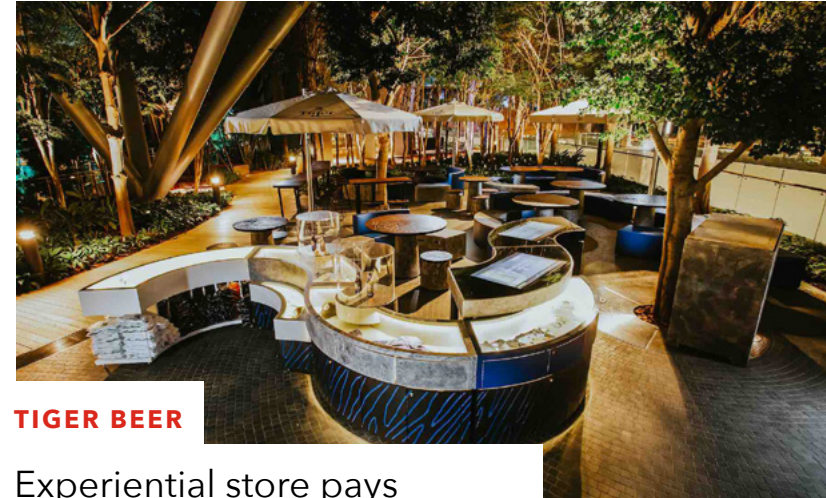

TIGER BEER

Experiential store pays homage to brand's local roots

In April 2019, Tiger Beer unveiled the first Tiger Street Lab at Singapore's recently-opened Jewel Changi airport terminal. The experiential concept store includes an exclusive menu, developed in collaboration with local chefs, and an interactive area where visitors can personalise and print their own beer bottle labels for SGD 15. Limited-edition seasonal brews will also be on offer, with new flavours introduced every quarter. The brand has also branched out into merchandise, developed in collaboration with Singapore-based fashion designer Amos Ananda Yeo.

Similar to West Elm, Tiger Beer are breaking out of their 'expected' vertical to offer an experience in a surprising location. Or is it surprising? For a brand born and brewed in Singapore, Changi airport is the perfect place to remind both Singaporeans and visitors of the brand's local roots and celebrate them through locally-made products and limited location brews. How can you help local brands celebrate and show off their heritage?

FEATURED INNOVATIONS
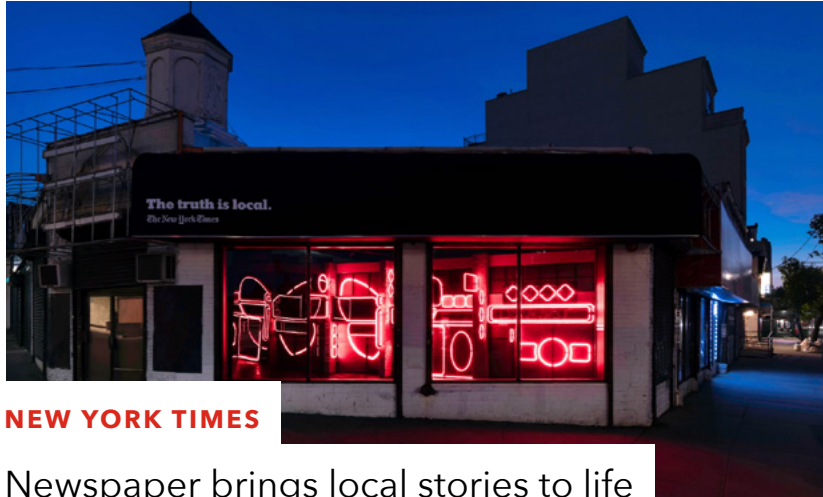
NEW YORK TIMES

Newspaper brings local stories to life

June 2019, saw The New York Times open a series of installations in empty stores across the city's five boroughs. Each store in The Truth is Local campaign brought to life a story that had a major impact on each borough – to experience the content passersby could explore interactive exhibits or scan a QR code to access journalist-narrated audio clips and glimpses into reporters' newsgathering processes. The installations were an attempt to showcase the newspaper's commitment to 'local' issues: educational poverty in the Bronx, corruption in Manhattan and immigration exploitation in Queens.

With these site-specific installations, The New York Times is tapping into consumer's desire for trusted local content and relevant real-world interactions. The installations also highlight how the newspaper – which has reported on city issues for almost 170 years – has helped drive positive change in local communities. Perhaps you don't have the same storied history as the NYT, but you can still engage with local communities on the issues that matter to them!
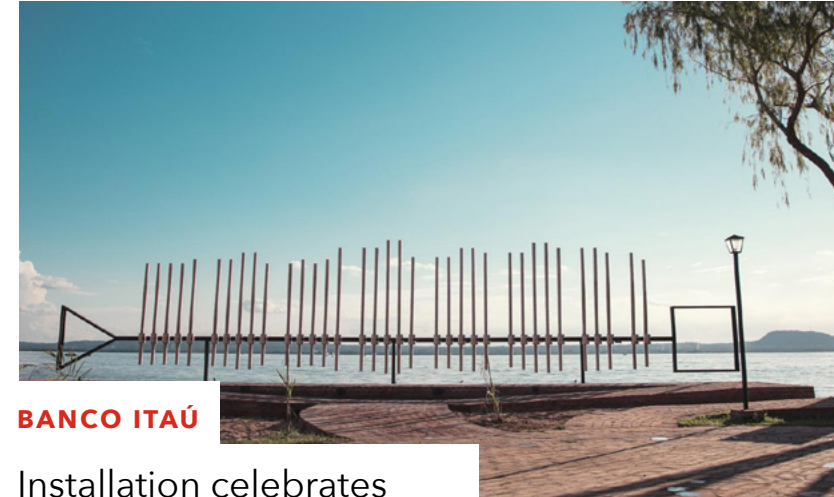
BANCO ITAÚ

Installation celebrates country's musical heritage

January 2019 saw Brazil-based Banco Itaú present el Paseo del Recuerdo, a large-scale installation celebrating the 70th anniversary of Paraguay's most iconic song, 'Recuerdos de Ypacaraí' (Memories of Ypacaraí). Located in the town of San Bernardino, which sits on the shores of Lake Ypacaraí in Paraguay, the musical installation encourages people to manipulate a set of large metal tubes to produce the song's main chords and then share their experience on social media.

This installation sees Itaú tap deep into local culture. But they didn't do it alone! The bank partnered with artist Fernando Amberé Feliciángeli. Want to tap into a local culture yourself? Giving an amazing local artist a platform can be a hugely powerful way to do just that. Also, don't overlook that, although this is a zero-tech experience, it's still very shareable. Proof (if any were needed!) that creating Insta-shareable experiences is really all about tapping and allowing the expression of deep human needs: local pride, creativity, playfulness.

IMPLICATIONS FOR URW

Jaded consumers have little time for 'celebrations' that feel tired or clichéd. And in an increasingly globalized world, 'local' stories will resonate when tied to culture, place and community.

EXISTING URW ACTIONS:

Our assets are part of a broader socio-economic environment that includes visitors, neighbors, cities and other local stakeholders. Committed to this ecosystem, we help shape communities by fostering employment and economic development. Westfield Stratford is a partner in the East London Fashion District project, which aims to create a world-leading hub for fashion education. In our food market Fresh, we host local food tenants, or well-known local chefs in Täby Deli (Fafelle by Joel Ählin, The Fishery by Malin Söderström).

GET TO WORK

❯ COLLABORATE

In a recent survey, 46% of US consumers said they were aware of the need to buy local (Nielsen, June 2019). Beyond local food producers, many consumers also want to support artisans, manufacturers, business-owners… the list is endless. How can you tap those talents to add authenticity and meaning to URW's 'local' initiatives? Banco Itaú's musical installation is just the beginning!

❯ FUSE THE UNEXPECTED

In a world where breweries are launching hotels and hotels are launching breweries, jumping into an entirely new playing field isn't that unexpected. But how does that concept look when you view it through the lens of local? What could you learn from West Elm and Tiger Beer and the way those brands used a new vertical to connect with the local community or explore a connection to a region?

❯ NO SUGARCOATING

Not everything about a location will instill pride. For The New York Times, a 'local' publication, tackling unscrupulous events or practices is a no brainer – but that doesn't mean other brands can't work to inject pride! How could you work with the community to resolve local issues and points of tension and then help celebrate improvements? See CITY LIGHTS (page 13) for more ideas around that!

AMBIENT WELLNESS

Time-pressed consumers – too busy to look after themselves as much as they aspire to – are embracing brands that make wellness easy by embedding physical and mental health boosters into everyday surrounds.

We already discussed how urbanization has improved life for billions of people in vital ways, from education to employment. Yet it's come with a price: including an increased risk of mental health problems, such as anxiety, depression and psychosis.

Beyond the implications on mental health, **consumers are also increasingly concerned about their physical health, including, but not limited to, the impact of air pollution**. Awareness is driven by the proliferation of affordable sensors; a body of research with alarming [headlines](); and, in many cities, unignorable toxic clouds that hang over inhabitants. Beyond reducing the impacts of toxic city living, **consumers will welcome retailers that provide them with spaces that alleviate the negative impacts of the urban environment**.
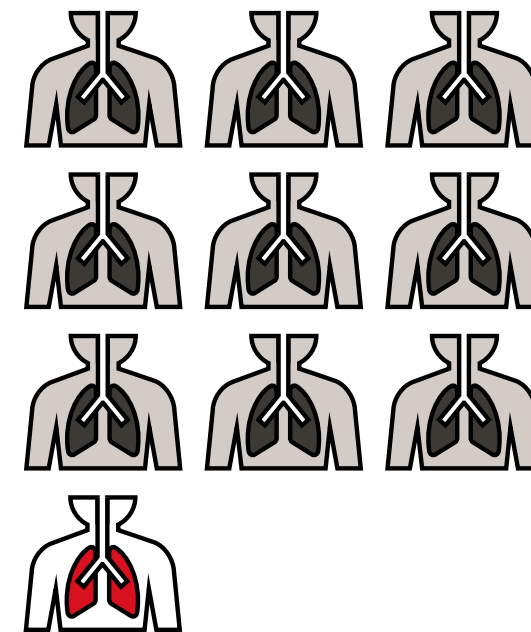
WHY NOW?

> EXTERNAL FACTORS

A World Health Organisation study found that 80-90% of health outcomes are tied to where and how we live (the report included factors like environmental pollution, air quality, and healthy foods). Meanwhile, **awareness of the impact of growing up with limited access to greenery is on the rise** – a study published in January 2019 suggested it was associated with a 15 to 55% higher risk of developing mental health conditions later in life.

> OMNIPRESENT DANGER

Air quality is a global issue. It impacts people wherever they are. Out in the streets or in their homes. In restaurants to hospitals. In theme parks to office parks. Even the 1% can't escape it, although according to the UN, low-income communities are most impacted. And whilst air pollution dominates the conversation, research reveals people spend 90% of their time indoors (YouGov for Velux, May 2018). The market for air purifiers – estimated to reach USD 33 billion by 2023 – is one result of that.

> **9 out of 10 people worldwide breathe polluted air**
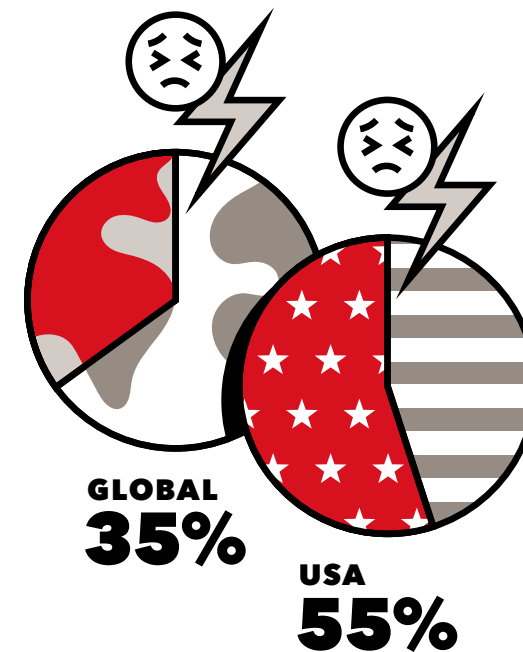> (WHO, April 2019)

WHY NOW?

> WELLNESS ARCHITECTURE

As the definition of 'health' expands beyond physical health to encompass mental wellbeing, **consumers are increasingly focused on the benefits of the spaces in which they work, shop and live**. According to the the Global Wellness Institute, the wellness real estate market (which includes homes designed and built to support the holistic health of their residents and wellness communities) was a USD 134 billion industry in 2017; that's expected to grow to USD 180 billion by 2022.

> GOOD INTENTIONS

Although consumers want – and are aware of the need – to lead healthier lives, good intentions are often thwarted by a lack of willpower. Research suggests that 80% of new year resolutions fail by February. **Consumers will welcome retailers that can help them overcome inertia (or laziness!) and make living a 'better' life as easily as possible.**

GLOBAL
35%

USA
55%

> **Americans are among the most stressed in the world – 55% said they had experienced stress daily compared to the global average of 35%.**
(Gallup, April 2019)

FEATURED INNOVATIONS

APOTEK HJÄRTAT

Light-emitting window combats low levels of vitamin D

In February 2018, Swedish pharmacy chain Apotek Hjärtat installed a light-radiating window at its Stockholm store to support people experiencing low levels of vitamin D. The 2 x 3 meter unit features a microwave sensor, and uses specially adapted fluorescent lamps in which color, temperature and brightness emulate a natural daylight. The window responds to motion to dim the brightness when someone approaches.

This innovation repurposes a space that's normally used for commercial purposes. It also highlights a health issue in the Nordic countries – the lack of light in winter, which can have very real effects. The irony here? By removing all commercial messages from the store window, Apotek Hjärtat grabs consumers' attention *and* communicates its understanding of their pain points in a powerful way. What would *your* marketing look like if you reimagined it as a channel to deliver improved public health outcomes?

BOMPAS & PARR

Pop-up installation offers an outdoor spa experience

Bompas & Parr's Paradise Now installation promised the experience of an outdoor spa, allowing visitors to completely relax in just 30 minutes. Unveiled in September 2018, the London pop-up featured an infrared sun installation, a waterfall enriched with natural energizing minerals and a haptic meditation zone where guests could absorb nutrients from aromatherapeutic pebbles. Free to visit, the installation was also painted in Baker Miller pink which is scientifically proven to relax and reduce anxiety.

Bompas & Parr are masters of the Insta experience. But look beyond the pastel pink backdrop, and the sun installation and you'll see that it's all designed to help participants relax and recharge… a 30 minute mini-break in the centre of London. How can you create experiences and retail destinations that prioritize health and wellbeing and are tuned into visitors' needs?

FEATURED INNOVATIONS

WATER STREET TAMPA

New community awarded first-ever WELL neighborhood certification

In May 2019, the Water Street Tampa project in Florida became the first neighborhood in the world to be certified by the International WELL Building Institute as a healthy community for walking, working and living. A USD 3 billion, 53-acre waterfront community project, Water Street Tampa will promote healthy living via large sidewalks, outdoor community activity programs, reduced light pollution and extensive recycling facilities. Other wellness features include a community wellness center, farmers markets and a public kitchen with classes.

WELL certification measures the ways buildings can promote good health and positively impact the wellbeing of people, with a broader aim of creating 'buildings and communities that help people thrive'. But buildings are only as good as the spaces between them. The WELL Design & Operations designation looks for features that improve the lives of residents through concepts including air, water, light, fitness, sound and community. How can you ensure that the spaces you are creating enhance the health and quality of the broader community?
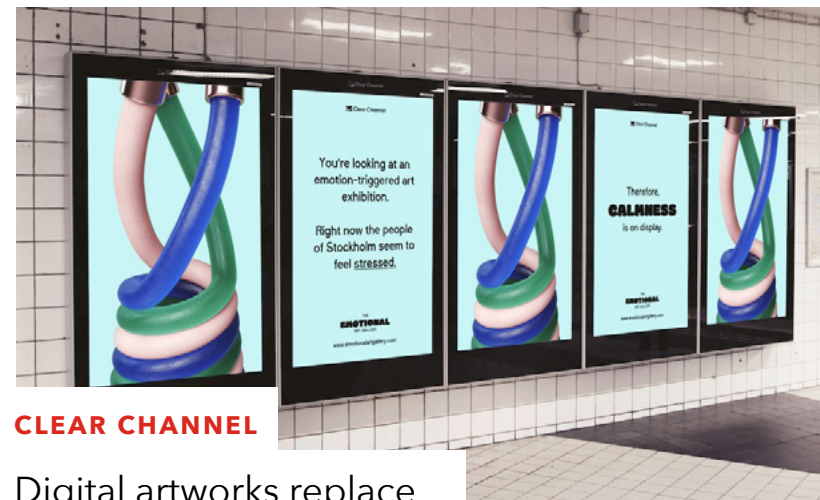
CLEAR CHANNEL

Digital artworks replace ads in city's metro system

In March 2019, outdoor media company Clear Channel put digital art on display instead of advertising on over 250 Stockholm billboards, including many in the city's metro system, in an effort to combat stress. An algorithm extrapolated the public's mood from data gleaned from Google search, social media, news articles and traffic to decide which artwork to show. The Emotional Art Gallery featured work specifically designed by six international artists to tackle tiredness, stress and fear. The exhibition ran for two weeks.

You don't need us to tell you that commuting can be stressful. But did you ever connect that insight to the USD 4.2 trillion global wellness industry? Clear Channel's right-time, right-place solution made wellness easy and, in the process, raised commuter expectations about how, when and where brands can enhance their wellbeing. When in the customer journey could you embed some wellness-promotion into your offering?

IMPLICATIONS FOR URW

Consumers will be delighted by zero-effort AMBIENT WELLNESS initiatives. This goes far beyond living walls and circadian lighting. Think about new tech and new delivery systems – from light to aroma to haptics – that don't ask anything of consumers.

EXISTING URW ACTIONS:

At URW, wellness represents 14% of Continental Europe GLA, including sport general stores, fitness centers, spas, beauty products and perfumeries. We are also considering new experiences that will help consumers live better, with new clusters dedicated to health. At Westfield Century City, 10% of the total GLA is dedicated to Health & Wellness (including micro-fitness boutiques, food offer units or premium fitness operator with Equinox...)!

GET TO WORK

> PROBLEM SOLVERS

Beyond abstract ideas of 'community' and 'connection', public spaces can have a positive impact on consumer's health and wellbeing. What if URW made that central to the brand vision? The first step would be identifying the negative health impacts that might be associated with an activity or location (Apotek Hjärtat zeroed in on Vitamin D deficiency caused by lack of sunlight) and then embedding a lasting solution into the physical surrounds.

> WELLBEING FOCUS

Consumers' definition of health has expanded beyond physical health – 75% now associate 'mental health' with health, 58% and 43% associate it with quality of sleep and mindfulness too (JWT, April 2017). **Are you taking care of consumers' mental wellbeing?** Bompas & Parr's pop-up spa was designed to help workers relax during their lunch hour, but consumers of all sorts will appreciate brands that give them space to unplug (see page 57 for more on digital detoxing).

> NEW STANDARDS

Water Street Tampa is the first neighborhood to land WELL certification, but soon wellness-enhanced public spaces will become the norm. Take 'air', one of the factors the certification considers. Stella McCartney's flagship store promises the 'cleanest air in London', raising the bar for all businesses. As **wellbeing standards like air quality become a competitive benchmark and leap from luxury to basic amenity**, will you play catch-up or lead the way?

LIVING THE LIVE

The enduring appeal of in-person events

LIVING THE LIVE

Consumers are embracing the immediacy, authenticity, exclusivity and spontaneity of anything that's 'live'. Experiences and events tied to a place and time hold greater value than ever.

We've been talking about the Experience Economy for more than 20 years. In that time, expectations around experiences have reached dizzying heights.

What else has changed? The choice a constantly connected world provides. In an era where there are thousands of shows to stream, endless music options available on-demand and almost 250 million people playing Fortnite, what will offer the status hit that was the Experience Economy's original promise?

Live experiences are part of that answer. Consumers are flocking to IRL events: according to the Broadway League,14.7 million people spent USD 1.82 billion on tickets in 2018, up 7.8% from 2017. That's good news for brands looking to attract people to retail spaces!

WHY NOW?

> STATUS DIVERSIFICATION

The quest for status is a fundamental human need, driving much of consumer behavior. You hardly need us to tell you that, over the past decade, consumer status has diversified beyond having, owning or buying 'more'. Experiences are a big part of the way consumers accrue status and tell stories about who they are: **73% of Gen Z and Millennials value experiences over products** (Savvy, May 2019).

> EPHEMERAL SHARING

Social media is the perfect platform to share and show off experiences in pursuit of likes. The shift towards ephemeral 'stories' – as of January 2019, Instagram Stories had 500 million active daily users – means exploits, or *status sandcastles*, must be rebuilt daily. That offers an opportunity for more experiences than ever before. And as livestreaming is more widely adopted, the rawness and reality of shared experiences will further intensify.

> EXPECTATIONS: RAISED

Immersive cinema events. Underwater restaurants. Alpaca yoga. VR theme parks. A live virtual concert within Fortnite. **The variety and volume of experiences available to consumers becomes more outlandish by the day.** From a retail perspective, the pop-up is one way to satisfy shopper's experience cravings. Whilst the term might feel outdated, the concept isn't: the UK's pop-up industry is worth GBP 2.3 billion, accounting for about 0.76% of total retail turnover.

FEATURED INNOVATIONS
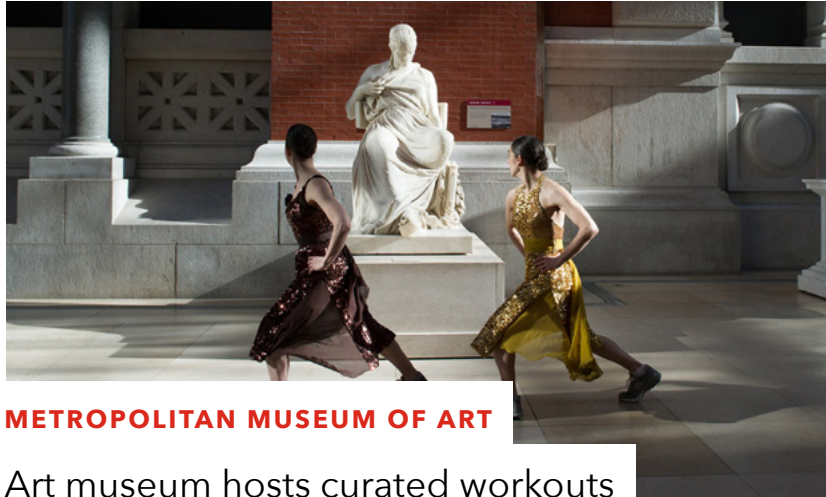
METROPOLITAN MUSEUM OF ART

Art museum hosts curated workouts

The Museum Workout is a 45-minute exercised-based tour hosted in New York's **Metropolitan Museum of Art**. Taking place before regular gallery opening hours, the workout features a route around the museum curated and narrated by writer/illustrator Maira Kalman. The routine's playlist features pop-rock music, and after their workout, participants can enjoy drinks and snacks. Tickets were priced at USD 40 per person.

With this experience, the Met is subverting conventional expectations around museum visits. Maria Kalman is encouraging more playful interactions in a space typically reserved for contemplation and learning. What assumptions do shoppers have about your space? Who might feel excluded and why? And finally, how can you subvert or challenge what's typically associated with 'retail' spaces?
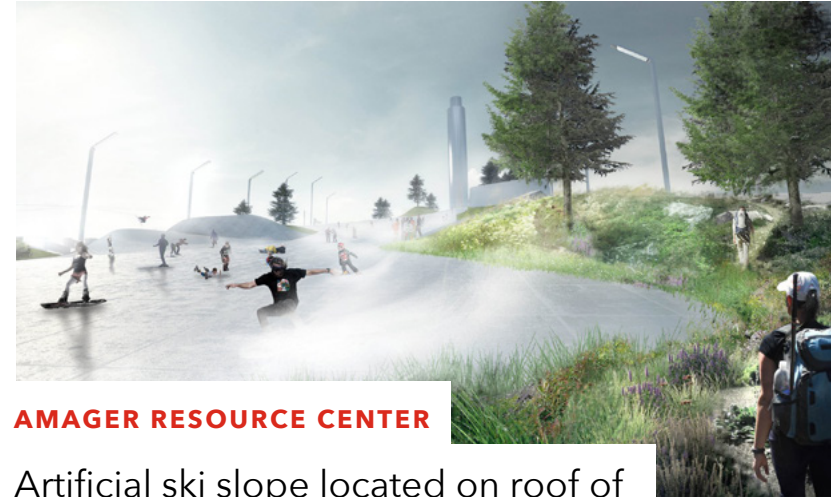

AMAGER RESOURCE CENTER

Artificial ski slope located on roof of waste disposal site

Located in Copenhagen, the **Amager Resource Center** includes a ski slope on the roof. Opened to the public for two days in February 2019, the concept is the brainchild of Danish architecture firm Bjarke Ingels Group (BIG). The 400-metre slope runs from the top of the waste-to-energy plant to the bottom, with a 180-degree turn halfway down the piste. Alongside the slope, the Copenhill complex includes hiking trails and viewpoints and an 85-metre high climbing wall on the outside of the structure. BIG expect the slope to be fully open in Q3 2019.

Architect Bjarke Ingels champions the concept of '**Hedonistic Sustainability**', defined as 'sustainability that improves the quality of life and human enjoyment'. It would be easy to dismiss the concept as just another buzzword, but thanks to Ingels' passion for the concept, it's a tangible reality. Going green doesn't have to mean going without. What would it look like if you were to approach an experience with this mindset? Engaging public experiences that are directly enabled by climate conscious design are just the beginning!

FEATURED INNOVATIONS
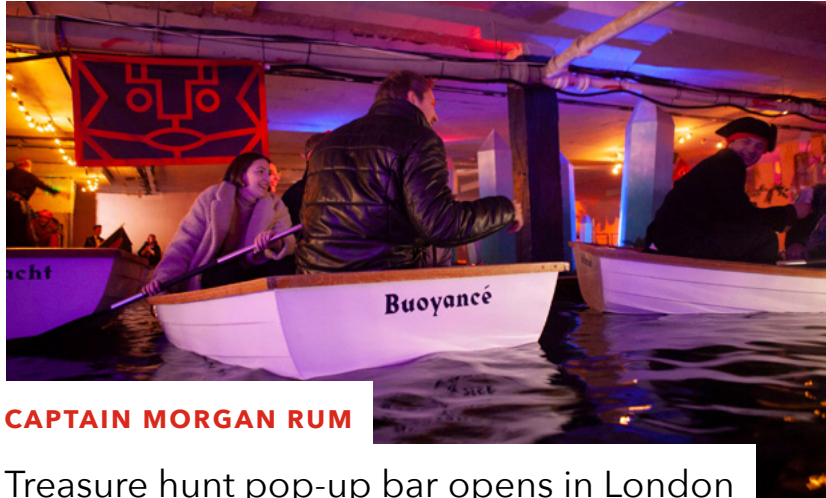
CAPTAIN MORGAN RUM

Treasure hunt pop-up bar opens in London

February 2019 saw Diageo's Captain Morgan Rum partner with Bompas & Parr and Scout cocktail bar on The Lost Lagoon. During the experience, guests were formed into crews, blindfolded and taken to an actor who gives them a treasure map. After removing their blindfold, they were split into boats to paddle through a watery lagoon where characters posed challenges to get the ingredients for up to three cocktails. Held in London, tickets cost between GBP 25 and GBP 45. The pop-up ran until April 2019.

Hosted at the West 12 Centre in London's Shepherd's Bush, the Lost Lagoon included a 4,000 square-foot man-made lake – 'the world's biggest underground boating lake', according to the organisers. Beyond some good ol' escapism, Bompas & Parr also encouraged participants to work together and complete challenges. What experiences can you bring to consumers that combine creativity and community?

RIOT GAMES

Esports stadium opens in South Korea

The LoL PARK esports stadium, focusing on famed video game League of Legends, is opening in South Korea. The stadium, developed by Riot Games (the company behind League of Legends) includes a 500-seat stadium, a fan meeting zone, a 24-hour PC bang (the South Korean term for internet cafe) and a hall of fame featuring jerseys and 3D-printed miniatures of accomplished League of Legends pros. The stadium was officially opened in January 2019.

Esports are surging in popularity, with the global audience growing to an estimated 453 million in 2019 (NewZoo, February 2019). The implications? Millions are being primed to see esports as redolent with significance and meaning – and as with 'real world' sports they are looking to connect with other fans IRL. One other example? Walmart's tie-up with Esports Arena, which will bring competitive gaming into five stores in the US.

IMPLICATIONS FOR URW

When consumers choose an experience, they're making a statement about who they are: 'I'm smart, connected, cultured, creative…'. And in a connected world, every experience is an ultra-shareable status token. How are your experiences evolving with the demands of experience-hungry consumers?

EXISTING URW ACTIONS:
The introduction of Westfield will make URW a backdrop for spectacular events. Entertainment has always been at the heart of URW strategy: with Pokémon GO, URW reimagined entertainment in shopping centers, see also the live events starring Lady Gaga, Rihanna and others. It's also about incorporating VR or AR: next, we will welcome The VOID spaces in some of our assets to offer the most immersive VR destination to our visitors.

GET TO WORK

> SELF-IMPROVEMENT STORIES

The perpetual pursuit for new experiences is – and will *always* be – driven by a set of age-old, fundamental human needs. The nature of those experiences will constantly evolve, but the underlying needs will remain stable. Think connection, recognition, self-improvement… What happens when they collide with the Experience Economy? See how the Met Museum's curated workouts offer a hit of self-actualization *and* a colorful story to share with peers.

> SHOCK AND AWE

What would it take to *really* surpass customer's expectations when it comes to experiences? In the pursuit of 'hedonistic sustainability' BIG put a ski slope on the roof of a waste-to-energy plant. In London, art collective **The Waldorf Project** held an immersive theater event that exposed participants to a range of terrifying experiences (including suffocation, isolation and degradation). **Brave brands will continually push the boundaries of participatory experiences.**

> LOOK AHEAD

You've read the headlines: esports is no longer a fringe behavior. **When thinking about the types of experiences consumers will rush towards in the future are you taking a broad look at new forms of entertainment?** Identify them, and then develop live experiences that will allow consumers to collaborate, compete and create together!

UNPLUGGED

**Consumers seek to escape
the real and virtual noise**
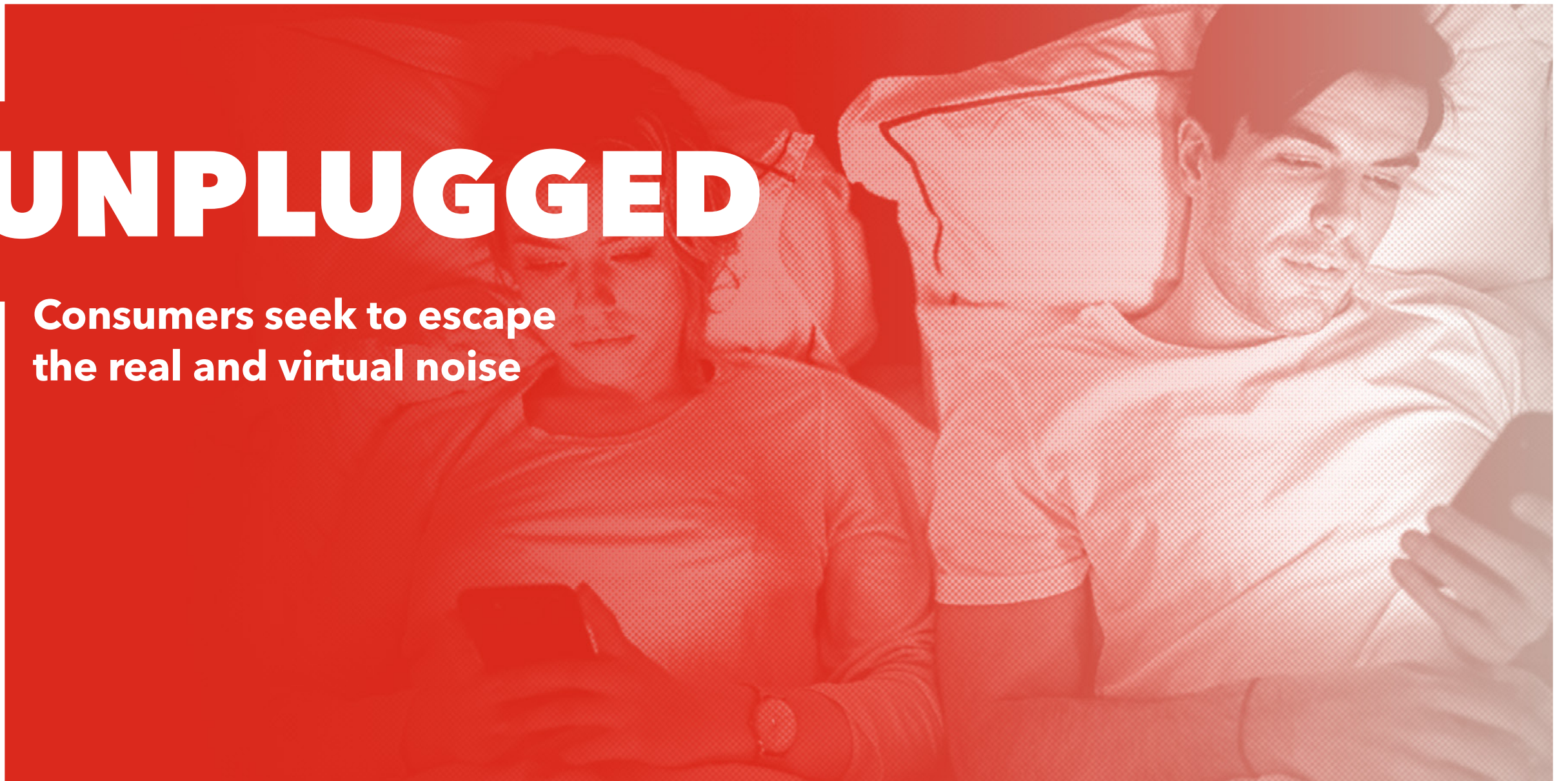
UNPLUGGED

Increasingly exhausted by constant connectivity and an 'always on' mentality, consumers are looking for brands to help them escape the real and virtual noise. This could be by forcing them to turn off digital devices, providing an urban oasis or reminding them of the joy of missing out.

The average US adult spends 6.3 hours each day with digital media, over half of which is spent on their mobiles. 26% of US adults consider themselves online 'almost constantly'. That constant connection brings many benefits, but consumers across the globe are increasingly aware of the detrimental effects of too much screen time: anxiety, sleep, cyberbullying, shorter attention spans and eye strain…

Although consumers are taking steps to reduce their dependence, many don't want to give up the tech tools that allow them to work, pay bills, hail taxis and watch cute cat videos. **That's why they'll welcome retailers that provide spaces that facilitate moments of quiet and a chance to connect IRL.**
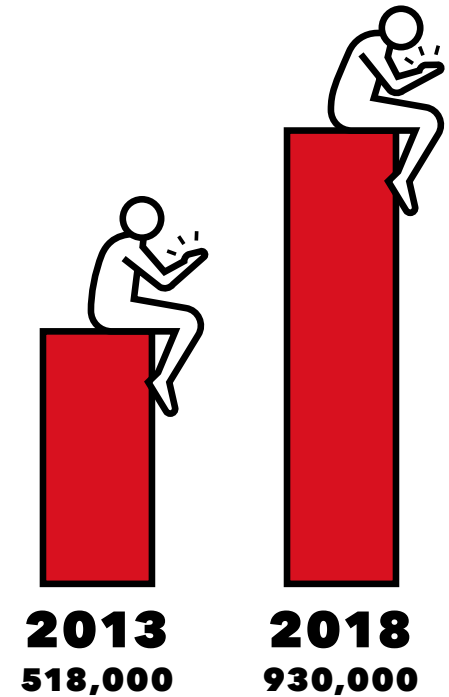
WHY NOW?

> 'NOMOPHOBIA' IS A THING

Globally, **Cambridge Dictionary's People's Word of the Year for 2018 was 'Nomophobia'** – an acronym for No Mobile Phone Phobia – defined as fear or worry at the idea of being without your mobile phone. Researchers have developed surveys to help people determine if they suffer from nomophobia: one study conducted by Iowa State University found that 42% of Turkish college students suffered from nomophobia. So whilst the name might not be familiar, the feeling certainly is!

> EXTREME MEASURES

From Apple's Screen Time app to Google's Digital Wellbeing initiative and Instagram's Time Spent feature, tech companies are helping consumers to manage their addiction. Aware of the paradox of tech companies encouraging consumers to use their products less, governments are taking action: the French government passed a law banning phones in schools; London is becoming the world's first National Park City, asking residents to convert 'grey space' into green space and spend time outdoors.

2013
518,000

2018
930,000

> In Japan alone, an estimated 930,000 teens are addicted to the internet, double the estimate from 2013
(Japan Health Ministry, August 2018)

WHY NOW?

> NO RESPITE

Expectations from the on-demand economy have trickled down to consumers themselves. Employers celebrate employees who are available on-demand, ready to 'deliver' at any moment. Entrepreneurship porn glorifies the #hustle and makes slowing down shameful. CEOs like Jack Ma and Elon Musk are leading the charge: for Ma, working **996** (9am to 9pm, six days per week) is 'bliss'; according to Musk, nobody 'changed the world on 40 hours a week.'

> YOUTH IN CRISIS

Beyond the workplace, consumers compare their peers' lives to their own via social media and feel pressurized to measure up and 'live their best life', too. The feeling is particularly acute amongst young people: **57% of 16-25 year-olds in the UK think social media creates an overwhelming pressure on young people**; a similar amount agree that social media makes them feel 'inadequate' (**YouGov**, February 2019).

> **64% of global workers claim to be in an 'always on' working environment, where there is a constant need to access work emails, attend calls or check mobile phones** (Cigna, March 2019)

FEATURED INNOVATIONS
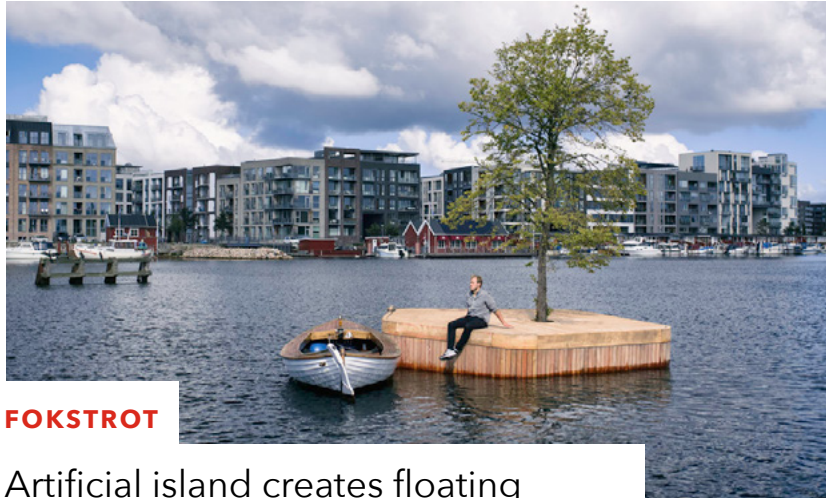
FOKSTROT

Artificial island creates floating events space in Copenhagen harbor

Denmark-based design studio Fokstrot have unveiled a prototype for artificial 'islands' to be placed in the Copenhagen harbor as a public space. The Copenhagen Islands project will see the wooden platforms function as a resting spot and park for swimmers and kayakers; the islands will be connected to one another, forming a 'parkipelago', for special events. The project's islands are set to include a stage, mussel farm, sauna and diving board. The first prototype was completed in Q2 2018.

In VILLAGE SQUARED, we discussed the benefits of participatory spaces that foster new connections – by prioritizing wellbeing and promoting a 'back to nature' mindset, this floating 'square' goes a step further. Could URW provide spaces that help people connect and disconnect? Don't overlook the very real impact of such locations.

GREENERY NYC

World's first biophilic plant store opens in New York

US-based Greenery NYC opened what it is calling the world's first biophilic design store in Brooklyn, New York, in February 2019. The space sells plants, gardening accessories and, with chairs and benches located throughout, encourages customers to linger and enjoy the greenery. The store finds its inspiration from the theory of biophilia, which suggests that contact with nature is beneficial to humans.

Scientists at Aarhus University found that growing up deprived of green space is associated with an up to 55% higher risk of mental illness. And whilst outdoor green space clearly offers more physical benefits, citydwellers aware of the benefits of connecting will be happy to connect with nature wherever and whenever possible. In this case, encouraging visitors to take some plants home with them could potentially extend the benefits of the experience.

FEATURED INNOVATIONS

BE TIME

Mobile meditation studio offers sessions to busy New Yorkers

Launched in New York in January 2018, BE TIME is a mobile meditation bus offering 30-minute 'mind breaks' to busy professionals. Sessions are lead by experienced instructors, with aromatherapy, light and chromo therapy and weighted blankets also provided. The interior of the BE TIME bus, designed by architects Rolando Rodriguez Leal and Natalia Wrzask of AIDIA STUDIO, includes reflective metal panels to make the space feel larger than it is. Classes can be scheduled through the zingFit app and start at USD 22 for 30 minutes.

This innovation combines consumers' desire to unplug with the expectation for enlightening experiences (see LIVING THE LIVE for more on that!). So keeping that in mind, start by asking: how might you create a surprising non-social-media-saturated status play for your customers? Bonus points if it also includes a self-improvement element!

WYNDHAM GRAND

Hotels offer perks to guests that hand over their cellphone

In October 2018, Wyndham Grand resorts across the US began offering free snacks, prime spots by the pool and the chance to win return trips in exchange for guests relinquishing their smartphone. Guests put their phone in a locked pouch with can only be unlocked by hotel staff. According to the hotel, as of December 2018, 250 guests had used the pouches at resorts in Florida and Texas. Other resorts are limiting where guests can use their phone: at the Ayana Resort and Spa in Bali, guests are banned from using digital devices around the resort's River Pool.

A vacation is a time to recharge… right? And yet many consumers find themselves checking their emails at the beach or scrolling through Instagram poolside (clearly FOMO works both ways). It's clear that some tough love might be needed. If you think the Wyndham Grand's approach is too soft, take inspiration from London's City Airport who offered travelers 'Light Phones' which can only make and receive calls.

IMPLICATIONS FOR URW

Time-tracking apps. Social media browser throttles. There's no shortage of tech solutions for digital addictions for the 7 in 10 US and UK consumers that have tried to moderate their digital consumption in some way (GWI, Sept 2018). But many consumers are resistant to solving their tech addiction with more tech.

EXISTING URW ACTIONS:
Digitalization is a priority for URW as it develops new services for brands and sets new standards for visitors. But we also create spaces for visitors to escape: the Westfield Garden State Plaza project will create a mixed-use city center experience with three acres of restored parks and green spaces. The inclusion of public plazas and neighborhood gardens will further integrate the center into the local community.

GET TO WORK

> UNPLUGGED & REWARDED

The phrase might be old but the concept is still relevant: how can you help consumers in the quest for a 'digital detox'? Start by identifying who would truly benefit from a break. To enforce digital detachment, perhaps you could offer incentives for compliance – see how the Wyndham Hotel is helping guests overcome their lack of willpower! How could you reward 'good' behavior with discounts, deals and perks?

> WORK: REWORKED

Not-so-fun fact: 48% of employees in the US alone have cried at work (Ginger, April 2019). Meaning the workplace (your own *and* your customers') is a key setting for innovations that tackle stress and overload. How can you embed brief moments of respite into day-to-day life? BE TIME's mobile meditation bus is one solution!

> HOLISTIC WELLBEING

Beyond tech addiction, consumers' digital concern of wellbeing also hangs on other issues that arise from living more connected lives – think data security, fake news, and more. Exercise and meditation will not improve consumers' wellbeing if they are constantly battling a polarized world, hateful sentiments and threats of privacy infringement. What can you do to tackle the broader challenges associated with consumers' increasingly digital lives?

KEY TAKEAWAYS FOR URW

VILLAGE SQUARED

Tech-fueled lifestyles. Polarized societies. Aging populations. In an era of increasing social atomization, could URW create participatory spaces that foster new connections, promote social bonds and enhance community wellbeing?

CITY LIGHTS

As megacities rise and tech reshapes the urban landscape, a wave of innovation will be needed to cater to the swelling numbers of urban dwellers. How can URW put itself at the center of bold plans to reimagine housing, transport and mobility and more?

NEW LABOR

The line between work and life will continue to blur, creating a workforce with new demands. Consumers looking for work that aligns with their values will embrace brands that help them navigate this new work-life world. What will you contribute?

CITYSUMERS

Citydwellers will appreciate brands that bring them together and empower them to take collective action to make both their cities and their lives better. The opportunity? Enable citizen co-creators and help build cities that prioritize collaboration and participation.

URBAN PRIDE

Although the world is becoming smaller and more connected, for many metropolitan consumers, the city is the defining geographical unit, the place they call 'home'. How will you create experiences that reflect and celebrate their city's culture, brand and heritage?

AMBIENT WELLNESS

Seeking to alleviate the negative health consequences of toxic city living, consumers will embrace brands that make wellness easy by embedding health boosters into everyday surrounds. What if URW made health and wellbeing central to the brand's vision?

LIVING THE LIVE

Live events – and the immediacy, exclusivity and spontaneity they offer – are still a fundamental component of the Experience Economy. Can you create experiences that allow consumers to tell the world something about *who* they are?

UNPLUGGED

Increasingly exhausted by near constant connectivity – and aware of the detrimental effects of too much screen time – consumers seek to escape the noise. How can you create IRL spaces that aid consumers in their quest for a 'digital detox'?

GET GOING!

You've read the trends and you're feeling inspired by the innovations. Great! But this is just the beginning of the journey…

Each trend in this report represents an *opportunity* for URW. An opportunity to create urban spaces that are rooted in authenticity, pride, community and wellbeing.

The first step? Take these trends and innovations back to your team. Challenge them to answer this simple question: when consumers see this, what will they start to expect from us?

That question encapsulates what's important about Trend-Driven Innovation: that game-changing innovations – such as those featured in this report – create new customer expectations. Once created, those expectations will spread and eventually find you. If you can anticipate those expectations and innovate to meet them, you can win.

It might not be easy, but it will be rewarding… So get started today!

HAPPY INNOVATING!