JLL Consumer Experience Survey 2025

Evolving Expectations in Real Estate

JLL SEE A BRIGHTER WAY



Research

Global

October 2025

jll.com

© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Executive summary

Experience expectations in the built environment continue to evolve as a central value driver for investments. Experience factors in real estate are interconnected and multifaceted, encompassing not just quality and atmosphere of spaces, but how well interactions and events take place within them. JLL's 2025 Experience Matters Research draws from data collected from 12,000 respondents, over 19 markets and 64 cities to provide insights into priorities and opportunities for the real estate sector.

01

Balancing competing demands in experience delivery

The top ranked experience drivers are safety and convenience, together with uniqueness and fun, highlighting the growing challenges of delivering often competing demands.

02

Personalization focusses on welcoming environments, human interaction and lifestyle factors

Growing demand for personalization in real estate requires developers and occupiers to integrate lifestyle factors, branding, technology and interactions for hospitality inspired spaces with more personal and memorable experiences.

03

Wellness and ethical sourcing are leading sustainability preferences

Sustainability is of growing importance, but people value tangible sustainability factors the most, prioritizing health and wellness, green spaces, and ethical sourcing.

04

People seek AI and technology that enhances, rather than distracts, from experience

AI (artificial intelligence) and technology integration are seen as enablers for improved urban living and day-to-day activity, but consumers still prioritize in-person interactions.

© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Experience demand on real estate remains high

Experience factors play a key component in development strategies to achieve premium rental values and enhance return on investments. For corporate occupiers and tenants, experience-led design can support talent attraction, increased footfall and spend, and consumer and employee satisfaction. As experience led-developments become more commonplace, the expectations on existing assets is also rising and experience is emerging as a key factor in obsolescence risks.

Globally, expectations on experience are high and the majority of people expect their cities, workplaces and social spaces to deliver high quality experiences. Assessing combined responses to 'experience seeking' indicators shows that over two thirds of people globally expect experience to be integrated into the places and spaces where they live, work and play. Consumer willingness to pay premiums for high-quality experiences has also grown from 65% in 2024 to 69% in 2025, with income and generational factors indicating this will continue.

People seek more from their built environments

74%

Expect their cities to offer new experiences to stay relevant

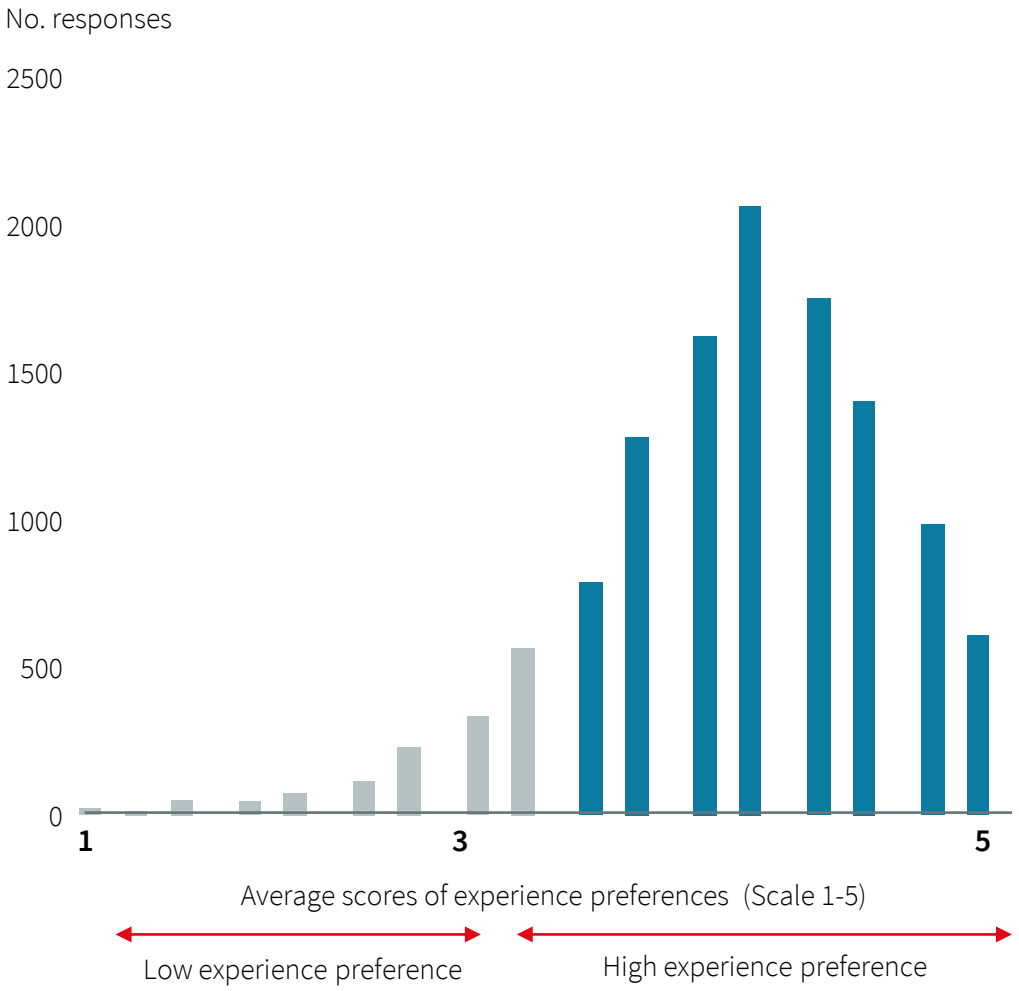
69%

Willingly pay premiums for high-quality experiences

64%

Choose high-quality experiences over proximity for spaces for socializing

Combined experience indicators



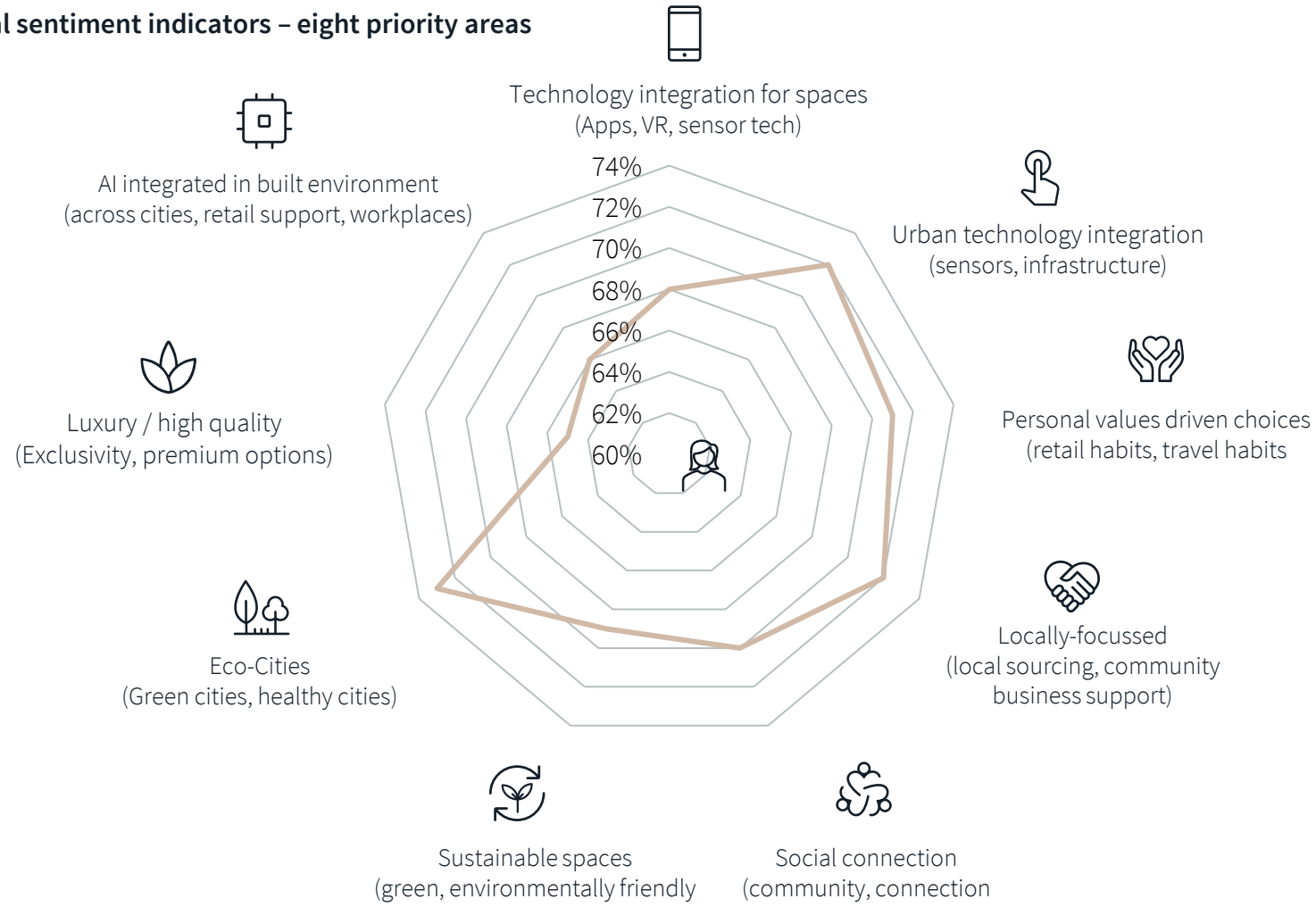
© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Global experience sentiment

As with the broader experience economy, experience in the built environment is multi-dimensional and interconnected. While many factors of experience are now accepted baseline requirements, such as environmental performance or quality of design, others shift or evolve in response to wider economic or social factors.

In 2025, eight priorities areas were identified that reflect underlying sentiment in experience expectations globally. A nuanced understanding of technology experience is emerging from end-users with high preference for urban technology. Eco-consciousness is a growing driver in emerging economies and younger generations, with strong sentiment for eco-cities. Luxury and high-quality experiences remain somewhat a priority, but more important is the increased personalization of products and services in recent years has shifted expectations for personal values such as eco-consciousness, wellness, and local culture or community to be reflected in buildings and places.

Global sentiment indicators – eight priority areas

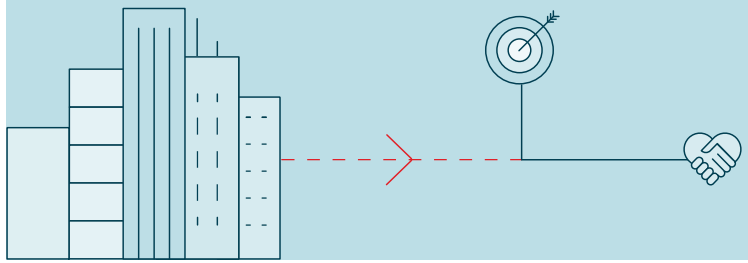


Note: Individual respondent averages were calculated for each question set within the eight priority areas. The chart displays global averages across all participants.

© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

01

Balancing consistency & dynamism in experience delivery



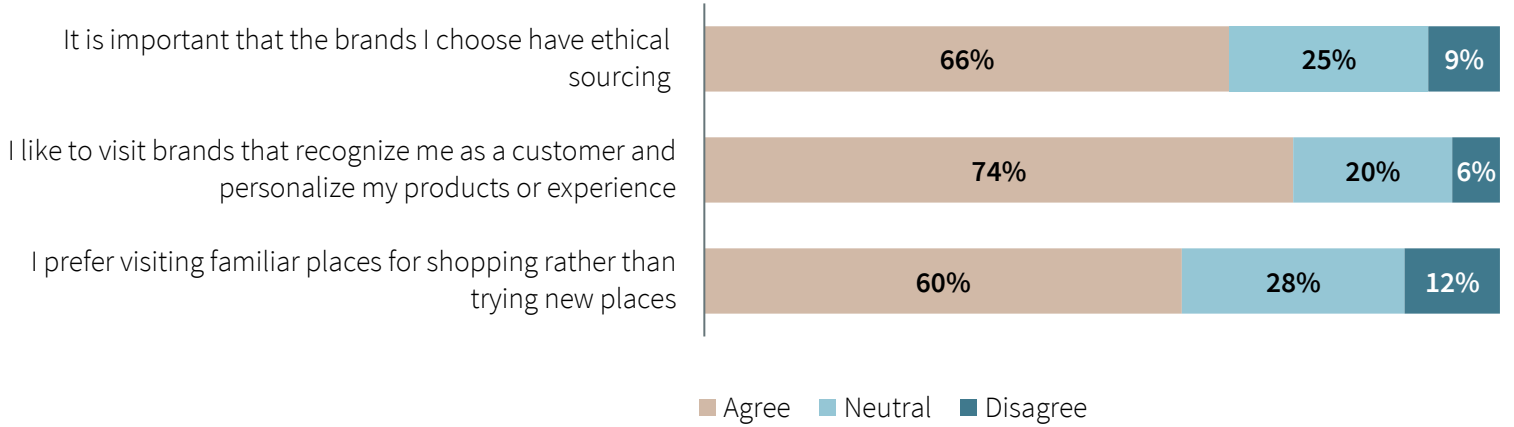
While today's real estate sector is primarily shifting towards experience led strategies, overly complex interactions or over provision of novelty can have a negative impact on experience, and the importance of consistency and 'trust' is emerging as a key component of experience strategies for developments that can build loyalty and meet long term objectives for footfall, attendance or visitors.

Within the built environment, consumers want to be loyal and benefit from the convenience of mixed-use developments, but they also have expectations of baseline experience factors which need to be delivered consistently.

While 60% of consumers say that they prefer to return to familiar places and 73% prefer to visit multi-purpose destinations, this commitment is not unconditional and requires places and brands to build trust through consistent delivery, accessibility, and meaningful interactions.

Critical value drivers for building trust in developments are personalization (74% prefer brands that remember them), ethical practices (66% value ethical sourcing), and contribution to local community & business ecosystems (72% expect businesses to contribute to local communities).

Loyalty and trust to brands and places



© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Experience drivers

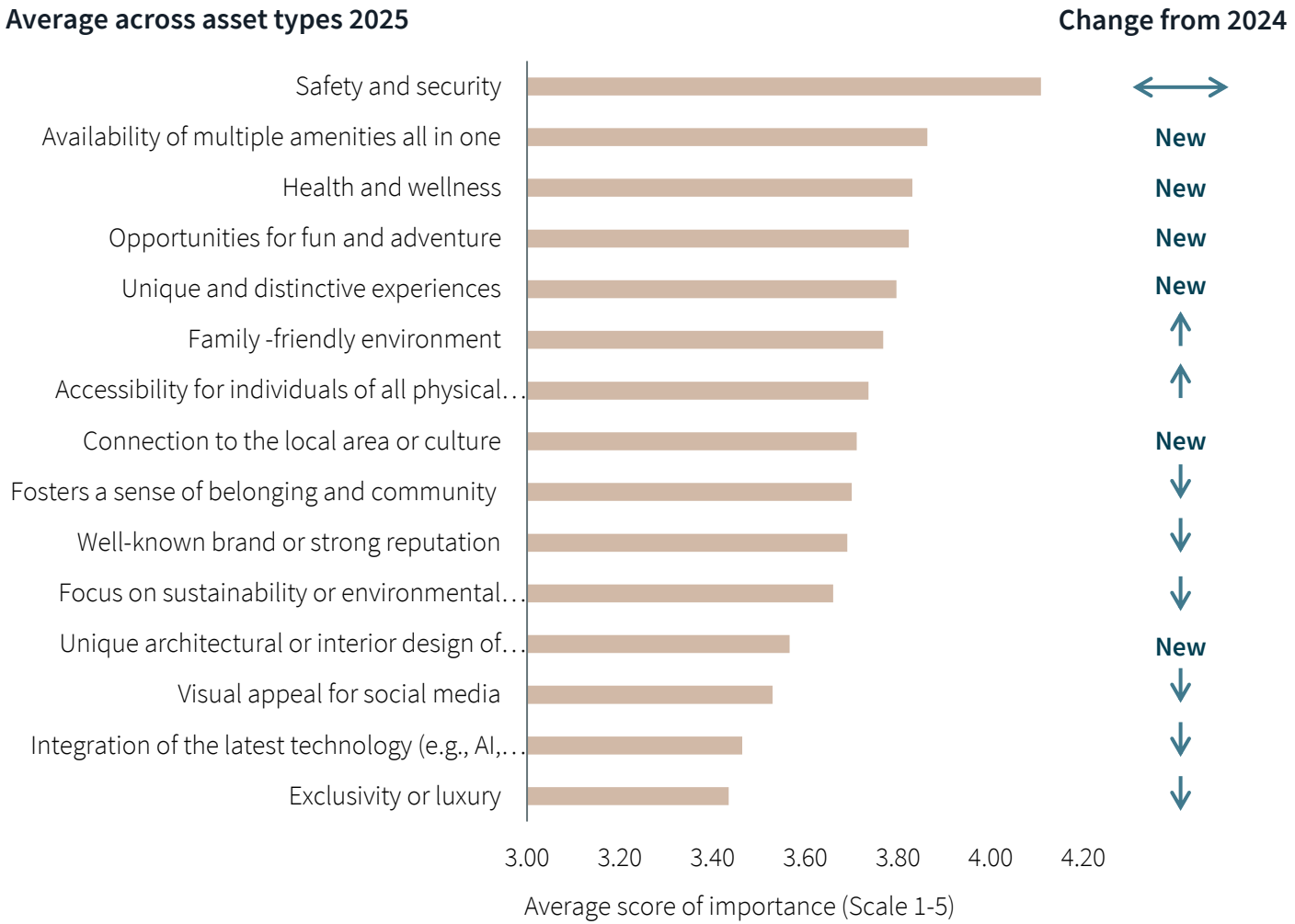
The ranking of experience drivers in 2025 underlines the need to balance both convenience and dynamic experiences. The importance of accessibility and convenience is second only to safety and security, as 69% rate 'availability of multiple amenities in one place' as very or extremely important for leisure destinations, and 67% for retail destinations, scoring this second highest in importance across all asset classes.

Following this, the top-rated drivers for experiences are wellness, uniqueness and opportunities for fun, representing the complexity of expectations.

Family-friendly and inclusive spaces are also reported higher experience drivers, while traditional differentiators like exclusivity, technology, and social media appeal have declined in importance from 2024 to 2025.,.

Balancing the varied and sometimes competing experience demands requires developers, occupiers and tenants to consider both design strategies and operational strategies.

Experience drivers



© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

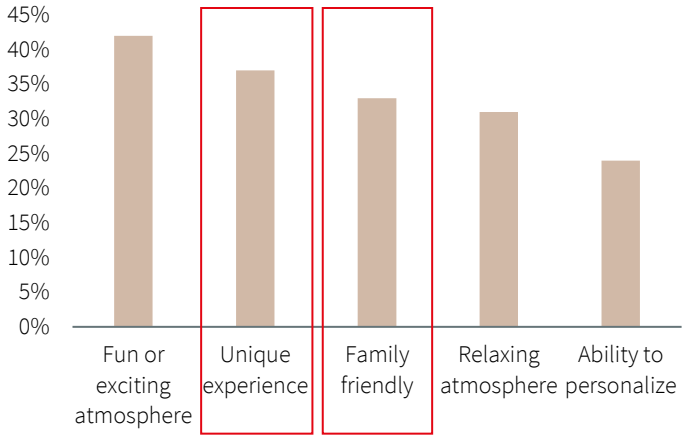
Return factors vary across space and building types

Despite consumers preferring multi-activity and mixed-use developments, the factors which drive return visits can vary significantly across different spaces of typologies, such as entertainment spaces, restaurants or retail. Delivering high quality and specific experiences across varied spaces in the same development can be a challenge at any scale.

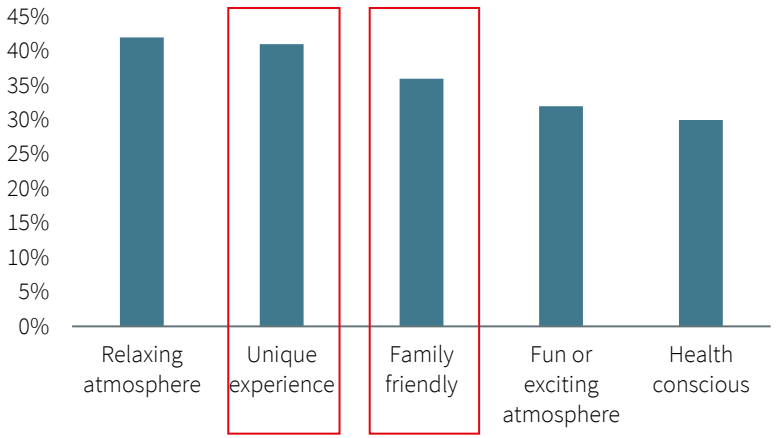
Consumers prioritize relaxing atmospheres at restaurants while emphasizing distinct design and excitement at cultural spaces. And while family-friendly environments and unique experiences are common across typologies, retail demands personalization, whereas entertainment requires fun and excitement balanced with relaxation.

In response to these increasingly complex experience requirements, the need for flexibility and variety in buildings and developments is increasingly important. The challenge lies in balancing long-term costs for future adaptations. Considering flexibility requirements and constraints at both design and operational stages is vital, including flexible building systems and infrastructure, innovative approaches to modular fit-outs, and flexible leasing strategies are some strategies.

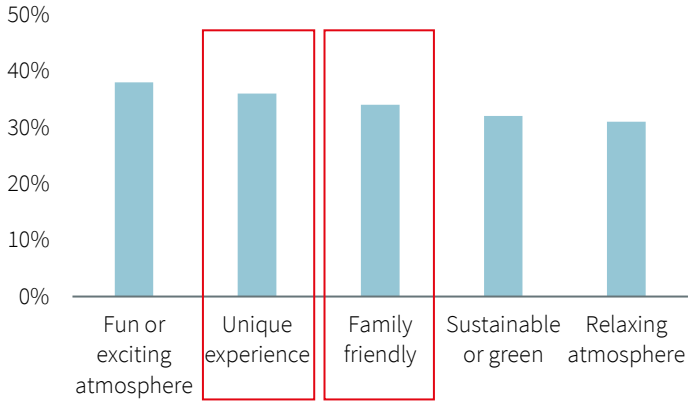
Entertainment



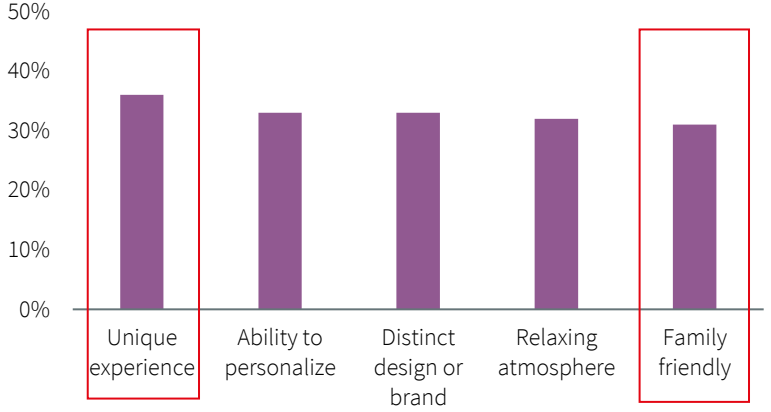
Restaurants/Cafes



Cultural spaces



Retail

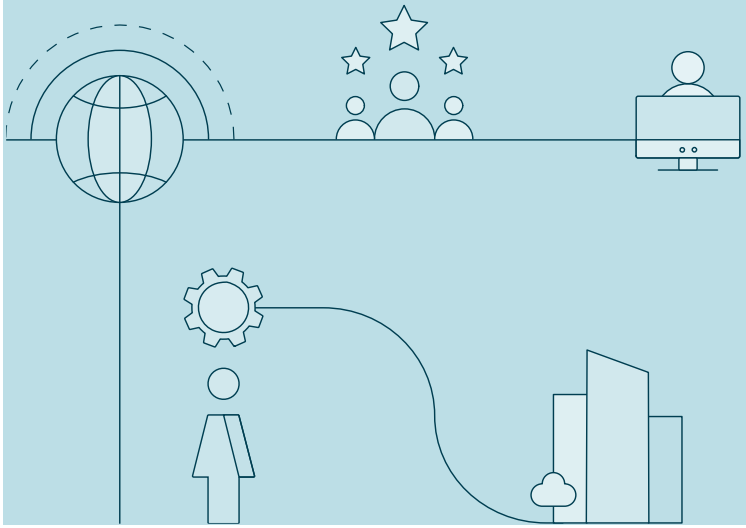


Question: Score for importance of a factor for influencing return to building type

© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

02

Personalization expectations in real estate experiences



Consumers increasingly view spaces as extensions of their personal identity, values, and aspirations. Driven by shifting expectations across demographics, younger and middle-aged generations are curating lifestyles that reflect values around family, ethics, and community contribution rather than simply buying products.

With 69% wanting to shop at places that align with their values, developers must pivot from utility-focused design to identity expression, as generic spaces face commoditization risk while authentic environments command market premiums.

Premium positioning now requires clear lifestyle differentiation, as consumers prioritize ethical sourcing, local businesses, and personalized experiences, and a clear trend is emerging for places that are locally connected and support social connection.

The data reveals consistent patterns across global markets, with value-driven indicators showing remarkable stability across age groups, suggesting this trend will strengthen as younger generations mature into peak spending years.

People seek more from their built environments

69%

Want to shop at places that align to personal values

68%

Prefer to purchase products produced in local region over global

66%

Prefer to support local businesses over multi-national

© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Generational perspectives and ‘street to seat’ experience

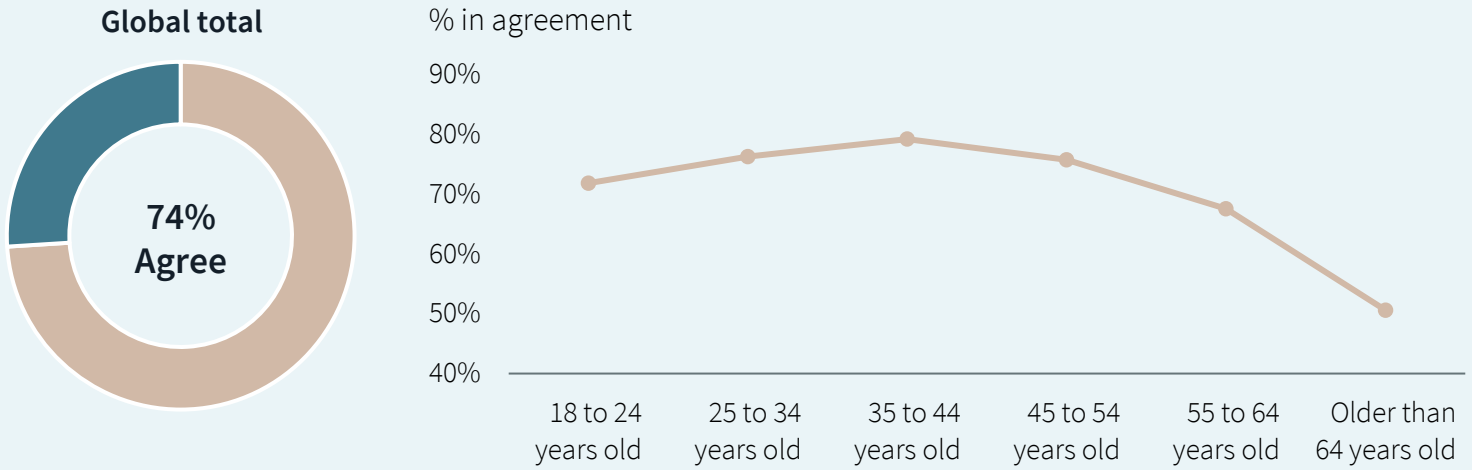
Personalisation preferences can differ considerably by generation, and understanding these be a key contributor in development strategies or location strategies.

Mid-age consumers are driving lifestyle affirmation trends in the places they visit, as they have both purchasing power and established identity preferences. 79% of the mid-age demographic (35-44) prefer to visit brands that personalize their experience, and 72% expect retail spaces to provide events and in-store experiences.

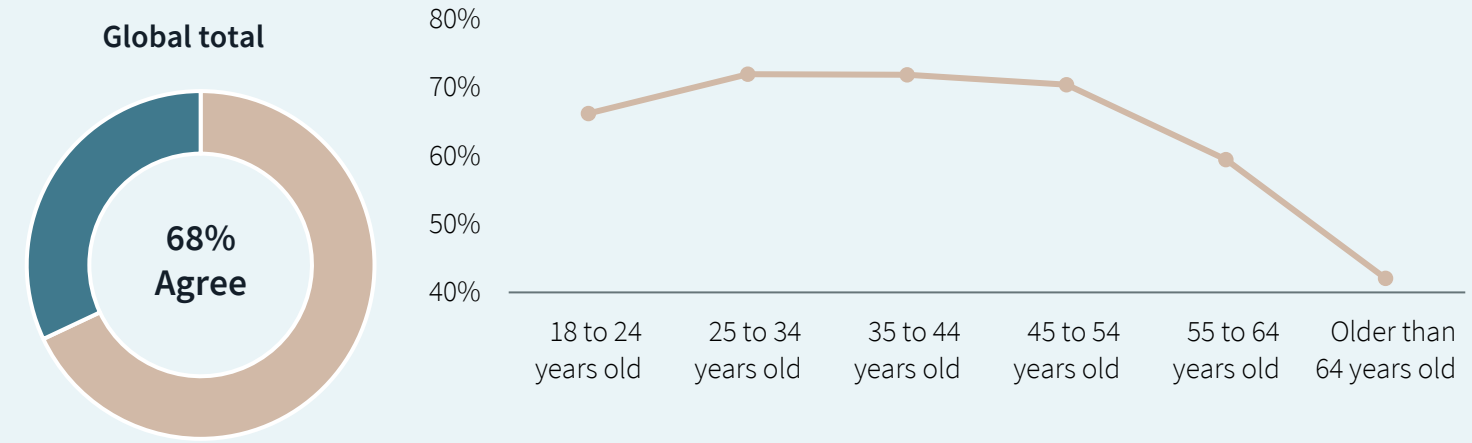
There is a demand for workplaces in vibrant locations 65% of 25-34 years, and 63% of 35-44 years say they ‘prefer to ‘shop and socialize after work around my workplace, rather than near my home’, higher than other generations.

Incorporating experience factors in location strategies is now required across both HQ buildings and CBDS, but also secondary locations. This will be increasingly important in not only head offices or CBDs, but also in secondary locations. and the need for ‘street to seat’ in workplace experience strategies,

I like to visit brands that recognize me as a customer and personalize my products or experience.



I expect shops and retail spaces to provide more than just products (e.g., customer events, in-store experiences, etc.).



© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

03

Conscious space consumption



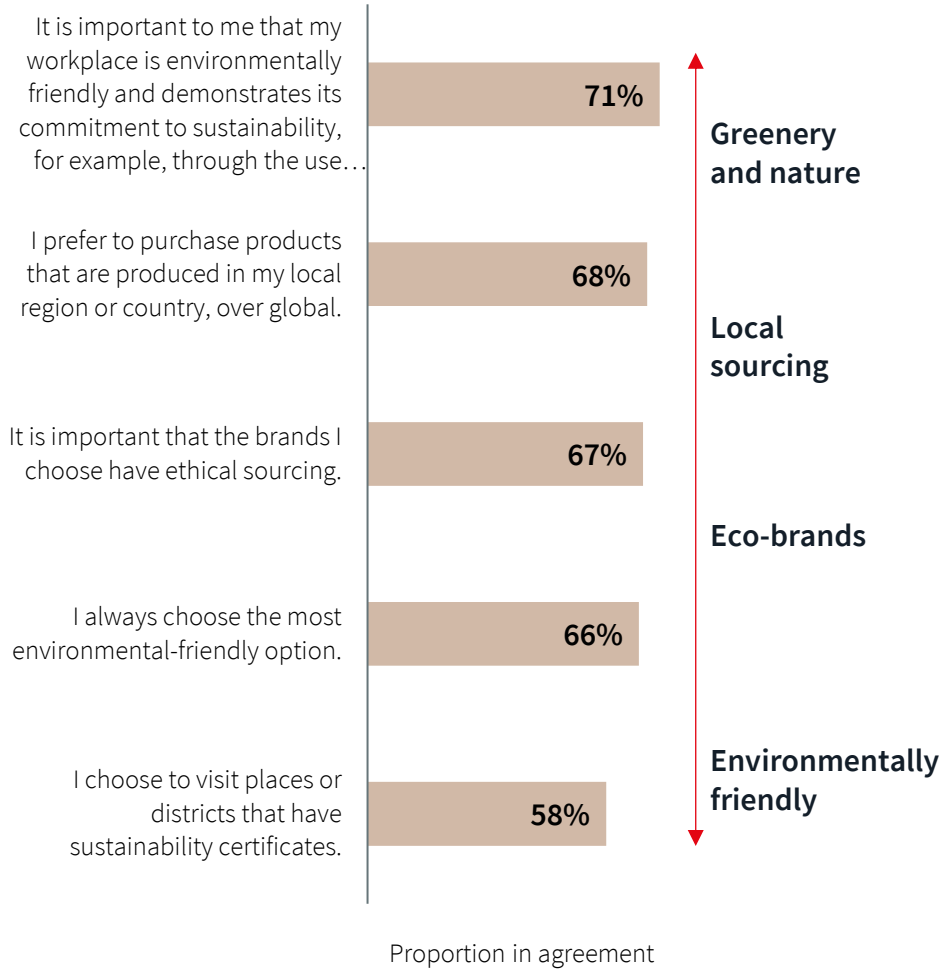
Sustainable design and developments have primarily been driven by regulation and energy efficiency requirements, however a growing concern for environmental and social sustainability across consumers, employees and residents is driving more holistic approaches to sustainability in developments.

Sustainability demand in relation to experience factors centers on a "proximity effect" as people value tangible sustainability experiences such as green spaces and biophilic design, or local sourcing and community connection.

Local sourcing (68%) outperforms eco-conscious brands (66%), suggesting consumers value tangible community connection, while the importance of wellbeing and green spaces near workplaces is the most important factor overall, with 73% agreeing.

Effective sustainability storytelling has become essential for connecting environmental credentials with consumer values and experiences.

Sustainability preference



© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

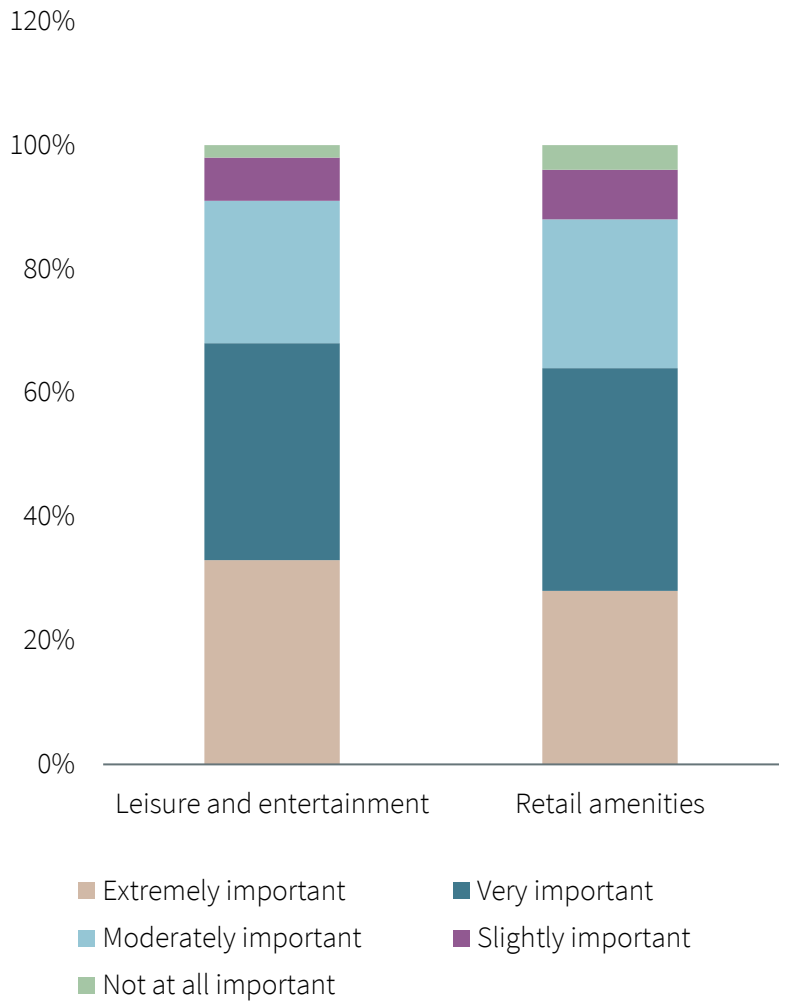
Healthy buildings and spaces remains a top priority, with greater focus on mental wellbeing

Health & wellness continues to be a key factor of sustainable places, ranked as a top driver for experiences in places for both retail and leisure. People's expectations of holistic health and wellness provision in buildings requires a focus not just on physical health but integrating mental wellbeing and social health into designs and placemaking.

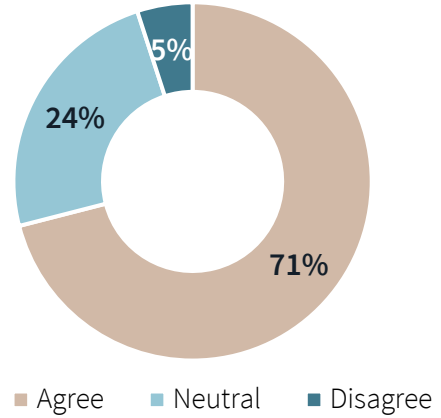
This particularly relevant for both urban spaces and workplaces , 71% report that it is important they live in a 'healthy city' and 73% think more green spaces near their workplaces would improve their wellbeing. Recent JLL research also shows that mental wellness and burnout risk are top concerns for employees worldwide in 2025. Designing for mental wellbeing will be a key focus for workplace investment and wider urban developments in the near term.

This includes considering the wider impacts of design of physical and mental wellbeing alongside locational and amenity factors, for holistic health & wellbeing support.

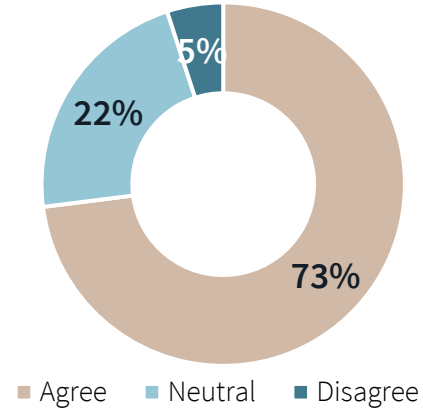
Importance of health and wellness for choosing…



It's important to me that I live in a city that is known for being healthy



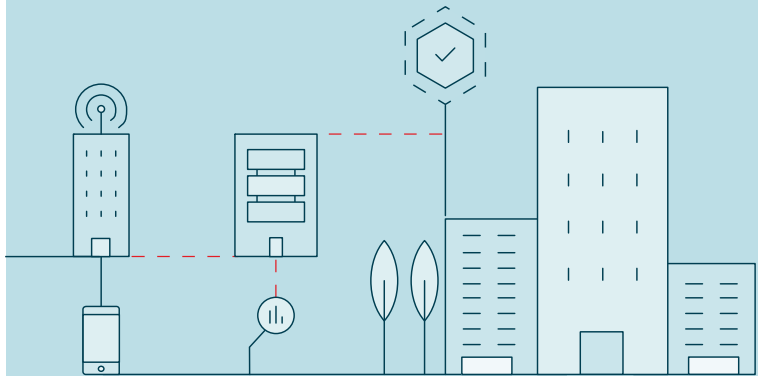
Having more green spaces near my workplace would improve my daily wellbeing



© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

04

Technology as an experience amplifier



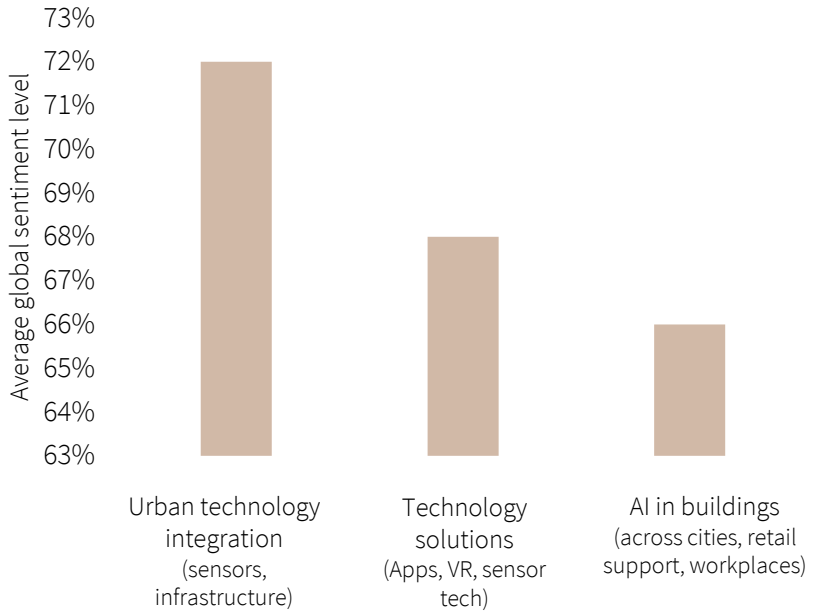
Technology is undeniably one of the most impactful drivers of change for real estate. Global sentiment towards technology and its role in cities and buildings is broadly positive, with greater support for integrated urban solutions than technology within individual spaces and experiences.

End-users prefer technology to be seamlessly integrated to support their day to day living and experiences but have more mixed views on the value of direct interfaces with technology such as automated or AI info kiosks, Virtual Reality or booking apps.

The value of AI in cities and buildings is seen as a growing opportunity for developers and occupiers.

While the AI boom in PropTech continues with a focus on improving operations and performance of buildings, the role of AI in building experience is less mature. Emerging AI technology to enhance experience in buildings and places should focus on intelligently integrated environments that operates invisibly.

Global sentiment



© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Sentiment varies across technology use-cases

Technology sentiment varies significantly by generation and use case. Older generations are less likely to see technology as important for buildings and places, while middle generations are most likely to embrace technology more than the youngest generation. This reflects reports that the youngest generation of 18-24 years are increasingly aware of both the positive and negative impacts of technology on their daily lives.

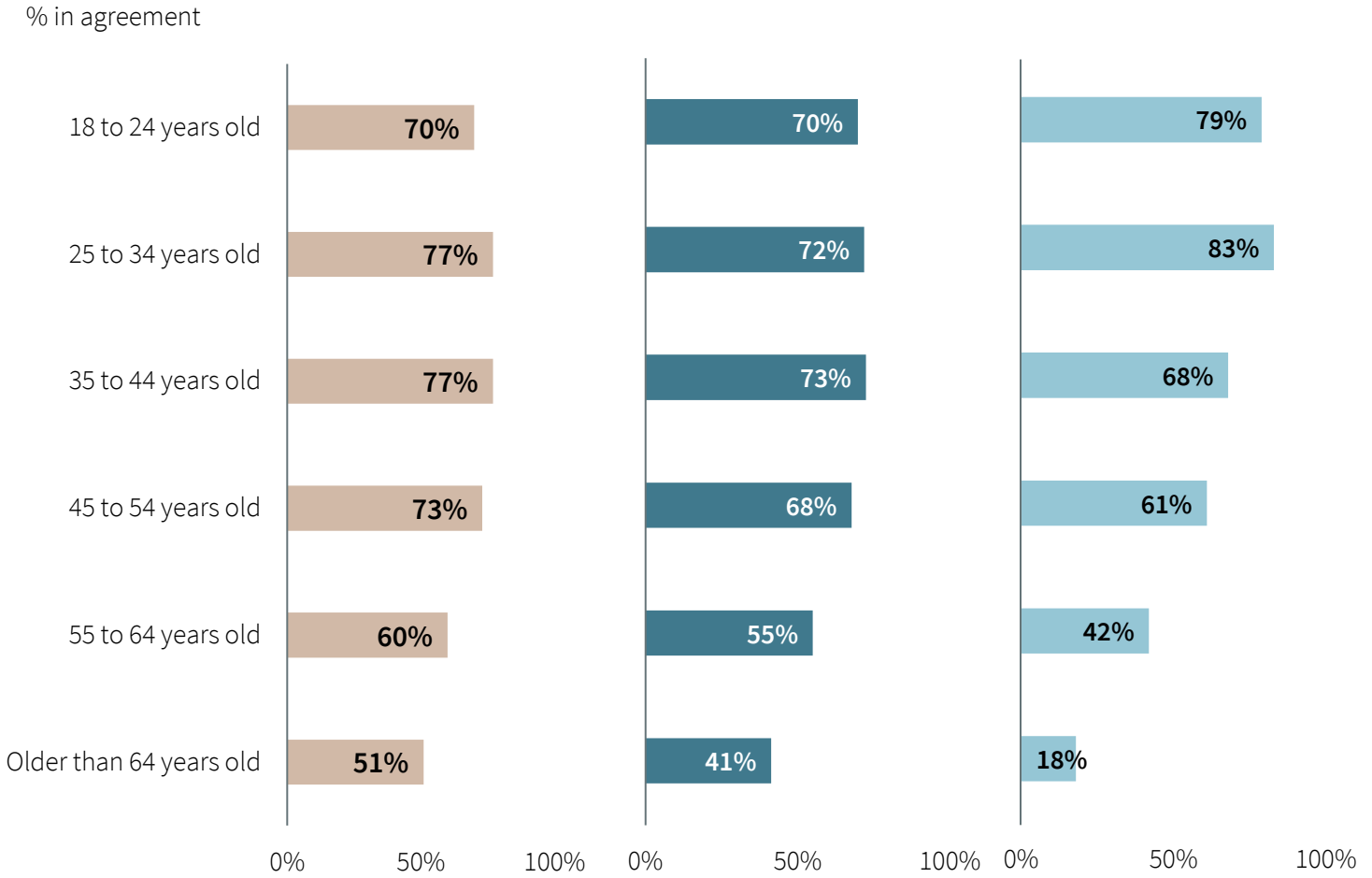
Overall, people are more likely to agree that cities should be digitally enabled, while AI integration n cities is slightly behind.

Immersive technology has become more common is buildings and is of most importance to younger and mid-aged generations, who may be more exposed to these. Many developments are integrating immersive technology as experience differentiators, including Virtual Reality (VR) entertainment and social spaces, immersive digital retail spaces and innovative immersive collaboration spaces in workplaces.

Cities should be digitally enabled and integrate the latest technology into buildings and public spaces

The integration of AI into city infrastructure will significantly improve my daily urban experience in the future

I like to socialize in innovative, technology-enabled spaces that use virtual reality and other immersive technology

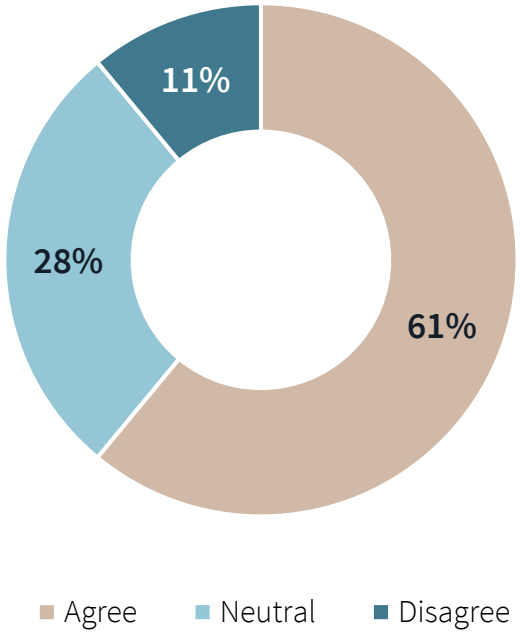


© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

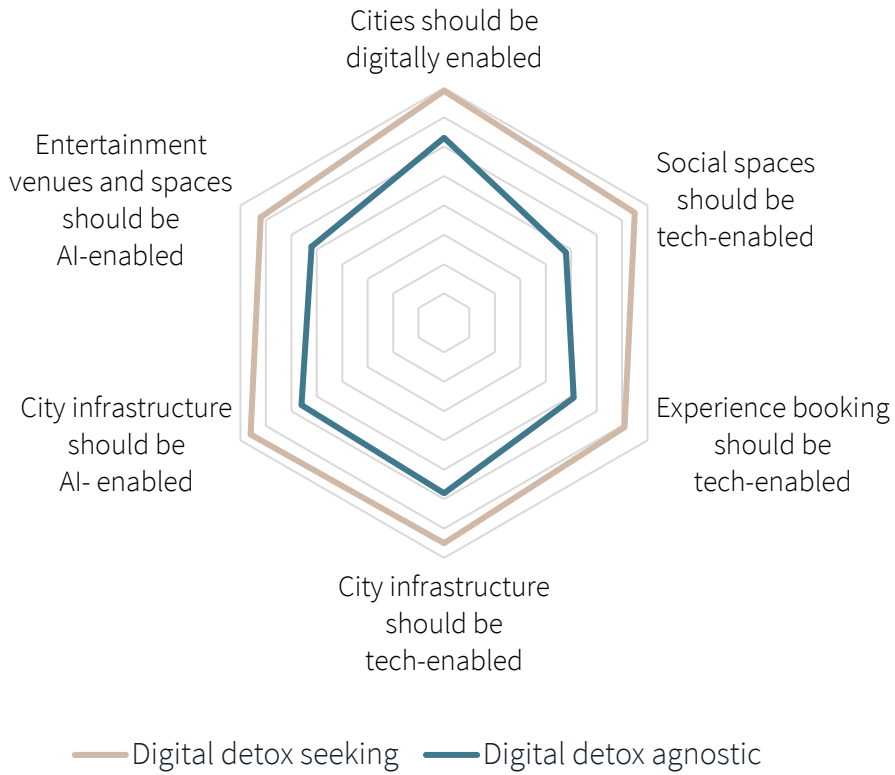
Growing demand for ‘digital detox’ spaces

Technology is integrated into daily lives and within buildings and urban spaces, with building sensors, mobile apps, hybrid working technology and more, a daily part of life and our buildings.
Despite a strong preference for technology overall, there is also a growing interest in spaces without technology. Almost two-thirds of people are seeking spaces specifically for digital detox, a new and emerging typology in the built environment.
Interestingly, this group is not general anti-technology. People who agree they would like to visit ‘digital detox’ spaces simultaneously are more likely to want to use technology across different spaces and activities, including AI, VR and smart buildings and embrace AI-enabled spaces for entertainment and infrastructure.
This group are more likely to want a digital detox, while those that do not seek digital detoxes generally desire less technology integration.
This reflects consumers' desire for intentional technology curation, smart city integration that enhances rather than replaces human connection while balancing digital enablement with authentic experiences.

I like to visit technology-free spaces for a digital detox – Global total



Preferences for technology and AI enablement – Digital detox seeking vs digital detox agnostic consumers



© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Global technology hubs leading the way for AI and experience in buildings

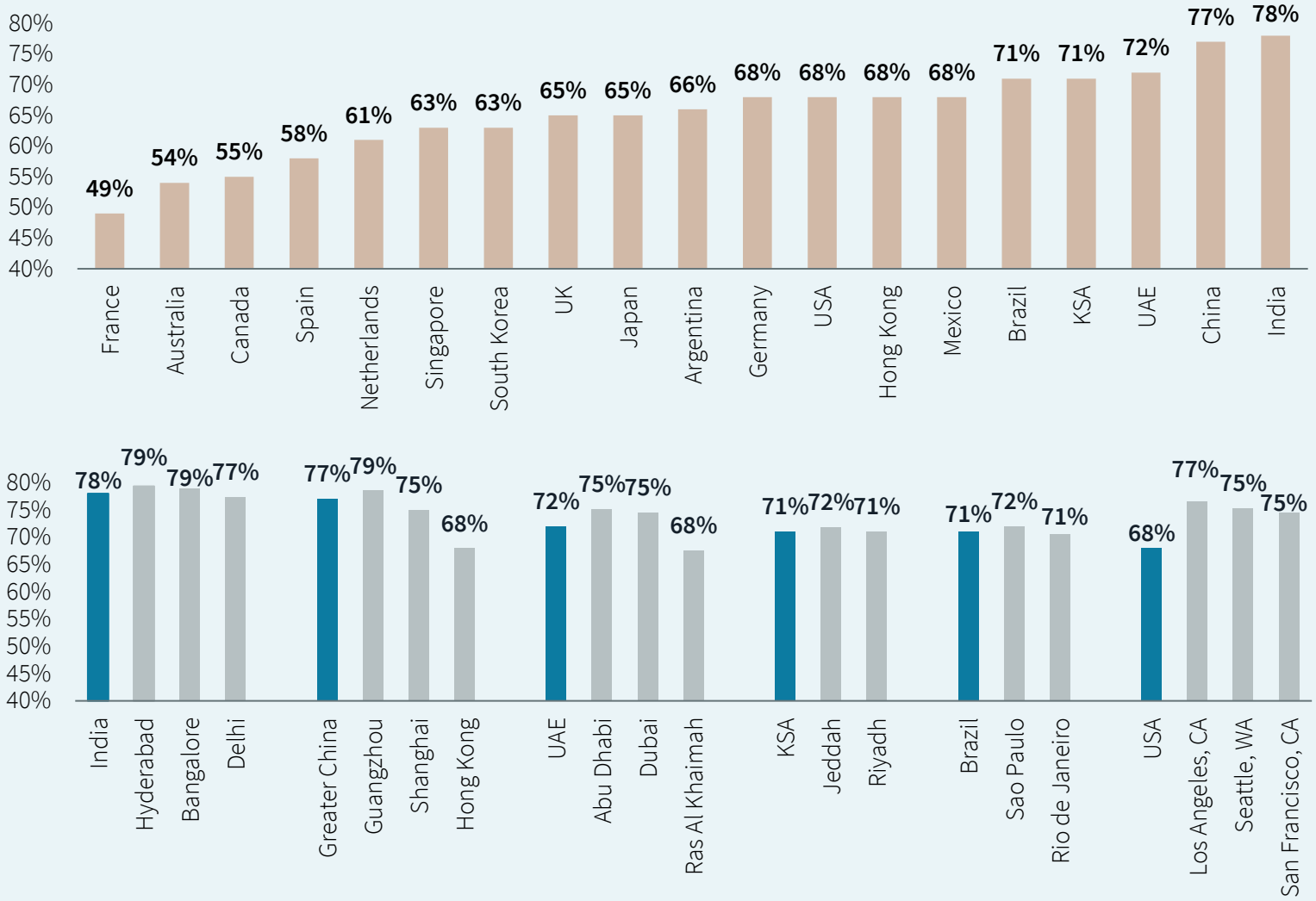
Globally, 67% agree that living in a city that is known for being a smart city and ahead of the technology curve is important, but openness to AI integration and adoption is lower across regions and generations than that of overall technology; however, sentiment towards technology varies by region, country, and city.

Countries and cities that are tech hubs influence local population expectations and potential openness to new technology. The Global Innovation Index ranked the Shenzhen – Guangzhou – Hong Kong cluster first in 2025, with San Francisco placing third and Los Angeles placing tenth. Major global technology firms have established their Indian headquarters in Bangalore or Hyderabad.

Consumers expect more from AI in these cities, and organizations seeking to attract top talent to global tech and innovation hubs need to consider how to leverage AI and other technologies to create and amplify immersive places and experiences.

*Combined score for:
1. I would prefer to use AI and robotics for information on the places I visit, over an information desk or salesperson.
2. I prefer to use innovative digital technology, like AI-powered apps, to book entertainment or travel.
3. The integration of AI into city infrastructure (such as transportation, energy, and public spaces) will significantly improve my daily urban experience in the future.
4. The integration of AI into entertainment venues and spaces (such as theaters, stadiums, museums) will significantly enhance my experience by making visits more personalized and enjoyable.

***% openness to AI**



© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Strategic implications: Leveraging experience insights for competitive advantage



As expectations of experience in the built environment become higher, the meaning of experience-led developments and their role in value creation has become more complex.

The focus on experience connection between different space types or activities presented opportunities for development to enhance end-to-end experience. Location strategies now consider the ‘street to seat’ experience for employees, acknowledging that workplace experience does not start or end at the office door. Retail and hospitality spaces continue to consider how to blend online and offline experiences for both convenience and innovation, to encourage greater in-person interactions.

Opportunity areas

Unlocking value and future-proofing capital investment

Experience strategies provide an opportunity to deliver additional value from investments. Balancing dynamic experience demands within cost efficiency and portfolio optimisation programs requires innovative and data-driven approaches to design and experience strategies but can unlock enhanced value from investment for both new build and existing assets.

Designing for flexibility and change

More dynamic experience demands require flexible design solutions with potential greater upfront costs. Investing in flexibility should focus on building infrastructure and systems and modular fit-outs to support future reconfigurations. Developers and occupiers should also consider flexible leasing or space programming as part of long-term plans.

Focus AI investment on enhancing physical spaces

AI in real estate provides greater opportunities to create intelligently integrated environments where technology operates invisibly, balancing digital enablement with authentic experiences. Technology strategies should incorporate the physical and digital and utilise emerging AI solutions to better integrate physical and digital experiences.

© 2025 Jones Lang LaSalle IP, Inc. All rights reserved.

Research approach/methodology

Overview

Building on the foundational insights from JLL's inaugural 2024 Consumer Experience Survey, the 2025 edition captures the evolving aspirations and expectations of consumers within the commercial real estate context, demonstrating that 'experience' has solidified its position as a fundamental value driver in real estate decisions.

Data collection methodology

For the 2025 Consumer Experience (CX) Survey, JLL partnered with Oxford Economics to conduct the survey with expanded global research across 19 markets and 64 cities, gathering insights from 12,000 respondents. Established survey panel methodologies were deployed with quotas set for demographic and generational variance. The survey was translated into local languages where relevant.

For any further details or questions on the methodology or sample sizes, please contact:

Ruth Hynes, Director, Research & Strategy (ruth.hynes@jll.com).



JLL Consumer Experience Survey global city coverage **19** Markets **64** Cities

JLL SEE A BRIGHTER WAY

Research authors

Ruth Hynes
Global and EMEA PDS Research & Strategy Lead
Ruth.Hynes@jll.com

Shweta Choudhari
Director, Research and Strategy ,
APAC Work Dynamics
Shweta.Choudhari@jll.com

Allie Kantor
Program Manager, Research, Development and Innovation Partnerships
Allie.Kantor@jll.com

Research at JLL

JLL's research team delivers intelligence, analysis and insight through market leading reports and services that illuminate today's commercial real estate dynamics and identify tomorrow's challenges and opportunities. Our more than 550 global research professionals track and analyze economic and property trends and forecast future conditions in over 60 countries, producing unrivalled local and global perspectives. Our research and expertise, fueled by real-time information and innovative thinking around the world, creates a competitive advantage for our clients and drives successful strategies and optimal real estate decisions.

About JLL

For over 200 years, JLL (NYSE: JLL), a leading global commercial real estate and investment management company, has helped clients buy, build, occupy, manage and invest in a variety of commercial, industrial, hotel, residential and retail properties. A Fortune 500® company with annual revenue of $20.8 billion and operations in over 80 countries around the world, our more than 111,000 employees bring the power of a global platform combined with local expertise. Driven by our purpose to shape the future of real estate for a better world, we help our clients, people and communities SEE A BRIGHTER WAY℠. JLL is the brand name, and a registered trademark, of Jones Lang LaSalle Incorporated. For further information, visit jll.com.

COPYRIGHT © JONES LANG LASALLE IP, INC. 2025
This report has been prepared solely for information purposes and does not necessarily purport to be a complete analysis of the topics discussed, which are inherently unpredictable. It has been based on sources we believe to be reliable, but we have not independently verified those sources and we do not guarantee that the information in the report is accurate or complete. Any views expressed in the report reflect our judgment at this date and are subject to change without notice. Statements that are forward-looking involve known and unknown risks and uncertainties that may cause future realities to be materially different from those implied by such forward-looking statements. Advice we give to clients in particular situations may differ from the views expressed in this report. No investment or other business decisions should be made based solely on the views expressed in this report.