

A universe in motion

The evolving retail cosmos 2026

44 forces reshaping the future
of retail real estate



Research

Global
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jll.com



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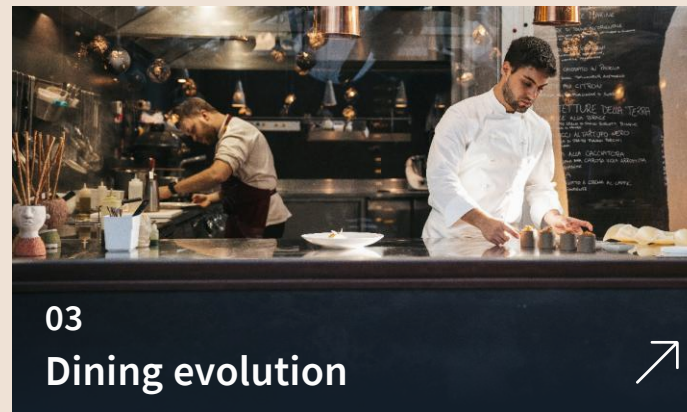
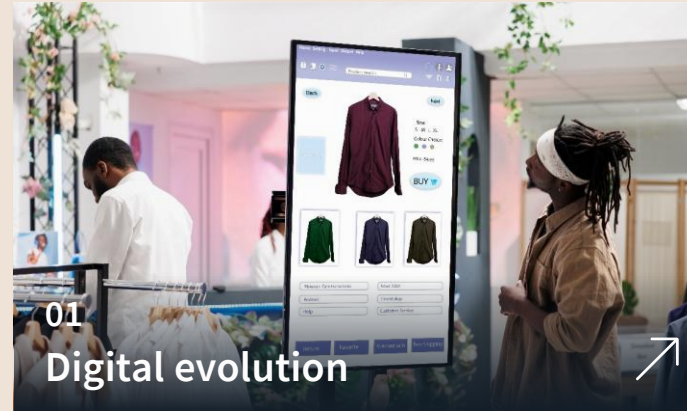


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Key findings

- *AI and data analytics are fundamentally reshaping retail operations.*
These technologies enable predictive inventory management, personalized in-store interactions, and algorithmic decision-making, resulting in significantly higher efficiency.
- *Business models are shifting beyond single transactions toward recurring revenue.*
This evolution is driven by subscription and sharing concepts that foster long-term customer relationships and create stable, predictable income streams.
- *Physical retail spaces are transforming into dynamic, multi-sensory destinations.*
The focus is shifting from transactions to brand experience and community building, achieved through flexible, mixed-use designs that create immersive environments.
- *The dining sector is becoming a holistic, technology-driven experience.*
This trend merges immersive, multi-sensory environments with hyper-local supply chains and advanced kitchen automation to create unique culinary experiences.
- *Sustainability has become a critical strategic factor in the retail industry.*
It compels retailers to implement transparent supply chains and circular economy models to meet regulatory demands and strengthen their brand reputation.
- *Retail success is increasingly tied to deep integration within urban ecosystems.*
Synergies are created through mixed-use developments, neighborhood integration, and connected mobility solutions that enhance a location's overall value and attractiveness.



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Insight journey



The universe in motion

Retail is changing. Not gradually – but fundamentally. The forces reshaping how people shop, eat and experience physical spaces are accelerating, converging and, in many cases, defying conventional wisdom.

The Evolving Retail Cosmos is JLL Research's response to that complexity. We mapped 44 trends across four categories – Digital evolution, Space and business, Dining evolution, and Sustainable future – drawing on real-world examples from markets across the globe, from Asia-Pacific to the Americas and Europe.

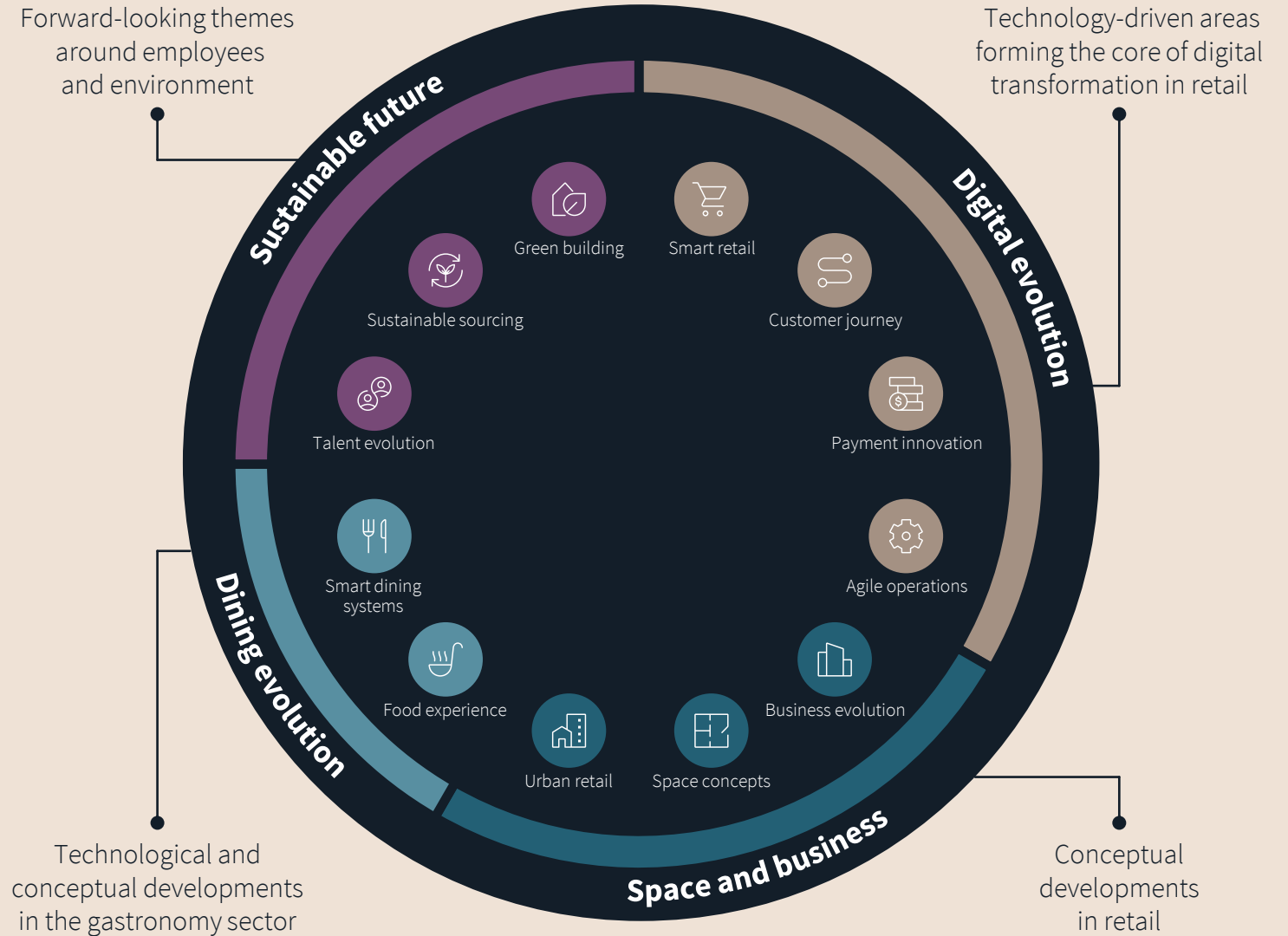
The result is a structured, evidence-based view of what is driving change, what it means in practice, and what it demands from those who own, operate or invest in retail real estate.

The future of retail is already taking shape – in the markets, the stores and the strategies of those who choose to lead.



Our framework

Retail does not change in isolation. That is why we structured the 44 trends into 12 thematic clusters – groupings that reflect how shifts in technology, consumer behaviour, urban space and sustainability are collectively reshaping the retail landscape, from the digital to the physical, from the operational to the strategic.



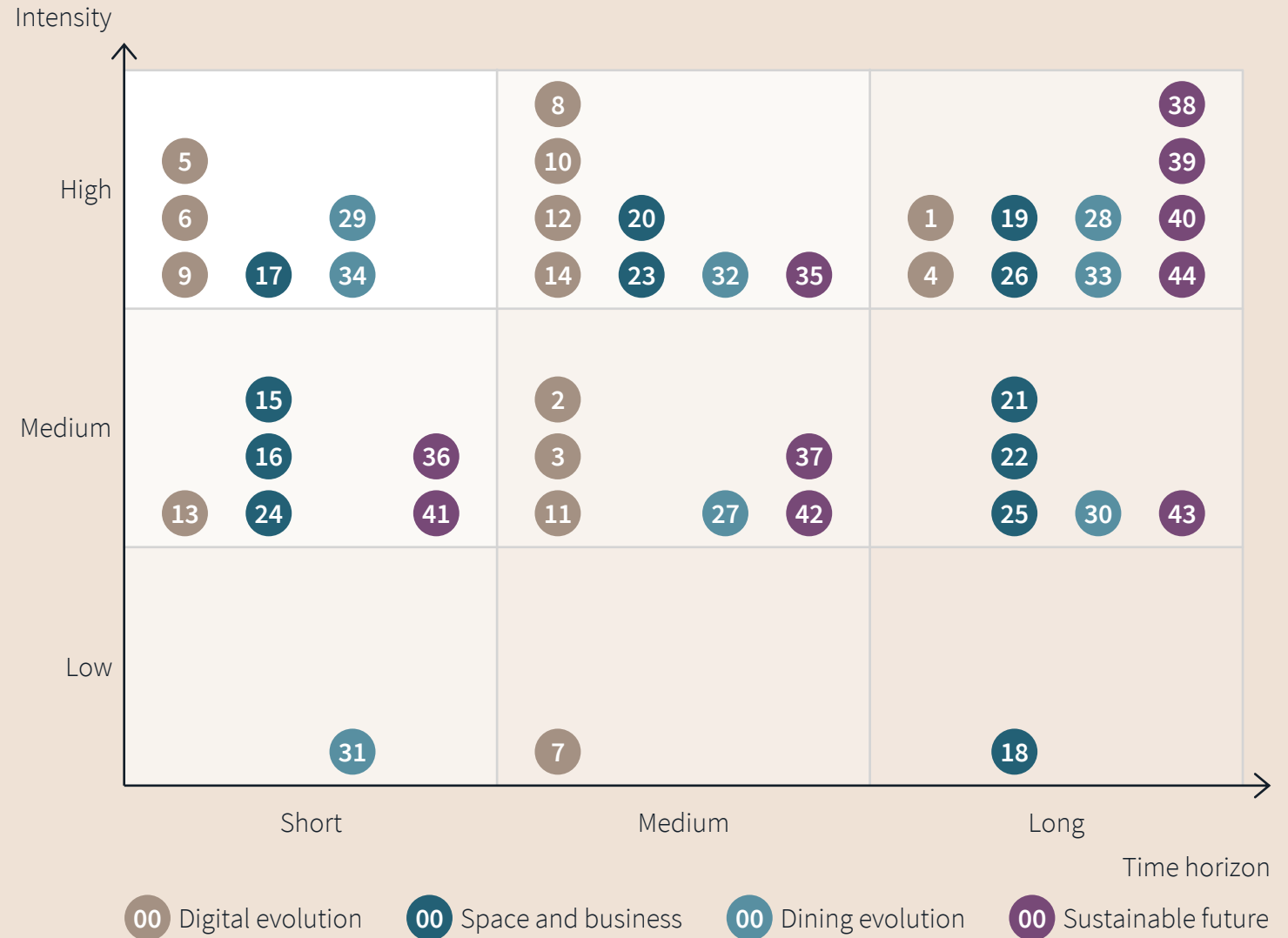


Measuring what matters – from trends to strategy

Each of the 44 trends has been evaluated along two dimensions: **Time horizon and intensity**.

Time horizon classifies each trend into one of three stages reflecting where a trend is in its development cycle and when it is expected to reach broader market relevance. Intensity rates the potential of each trend to reshape retail structures, influence customer behaviour and demand strategic adaptation.

Mapped together, the two dimensions form a matrix that allows you to identify which trends are most urgent, which are most transformative – and where to focus your strategy first.





Definitions – Time horizon

Short-term



The trend is **already in the implementation phase** and:

- Will achieve **broad market penetration within 1-2 years**
- Is based on available and market-tested technologies/concepts
- Is already being successfully implemented by market pioneers
- Does not require fundamental structural changes
- Has low regulatory or technological barriers

Medium-term



The trend is **in the early adoption phase** and:

- Will achieve **significant market relevance in 3-5 years**
- Is based on existing but not yet fully mature technologies/concepts
- Is being piloted by initial innovative companies or implemented in specific areas
- Requires moderate adjustments to processes or infrastructures
- May be delayed by existing regulatory or market barriers

Long-term



The trend is **in the development or early testing phase** and:

- Will presumably **gain broader market significance only in 5+ years**
- Is partly based on technologies/concepts still under development
- Exists primarily as a concept study or in isolated pilot projects
- Requires significant structural or infrastructural changes
- May require adjustments to regulatory frameworks
- Is dependent on societal transformation processes



Definitions – Intensity

Low



The trend **leads to incremental improvements** and:

- Optimizes existing processes or offerings
- Is easily integrated into existing structures
- **Requires limited investments**
- Creates marginal competitive advantages
- Has limited impact on customer behavior

Medium



The trend **leads to significant changes within existing structures** and:

- Influences specific aspects of the value chain
- Creates differentiating competitive advantages for early adopters
- **Requires moderate adjustments to processes or business models**
- Improves customer satisfaction or operational efficiency in certain areas
- Is relevant for specific retail segments or target groups

High

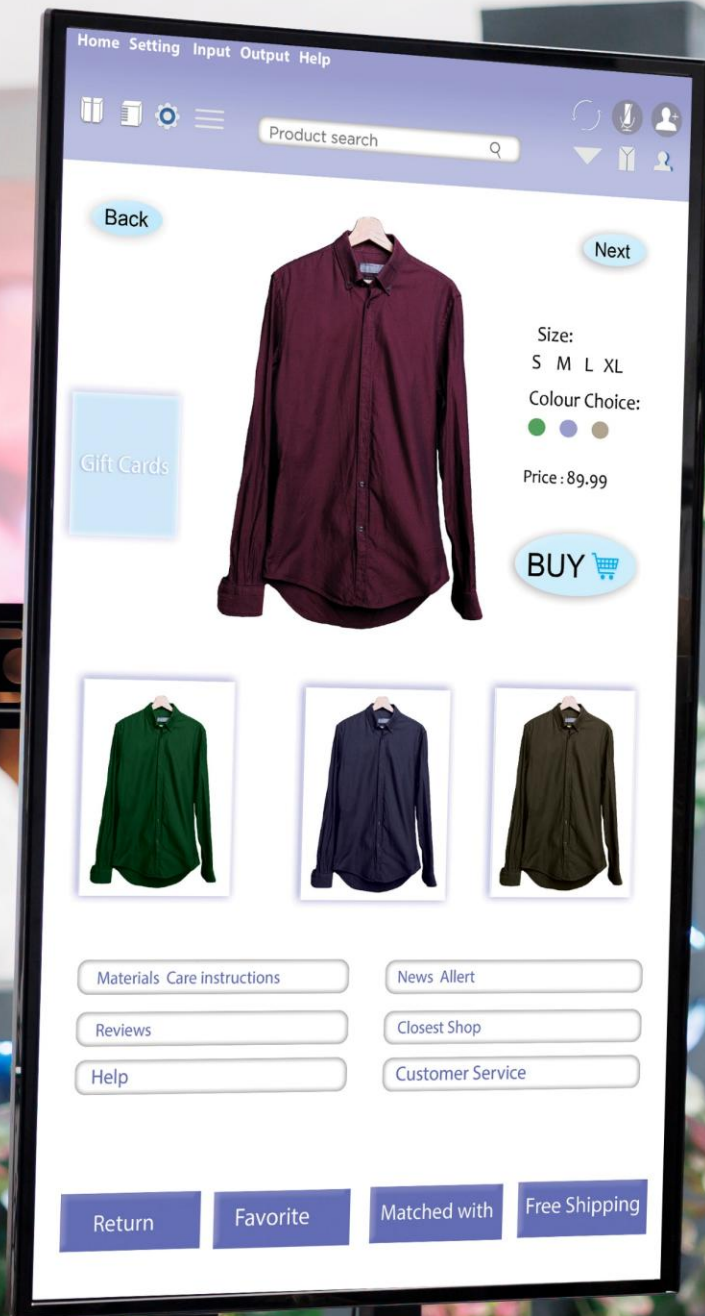


The trend has the **potential to fundamentally change retail structures** and:

- Significantly influence the competitiveness of companies
- Have considerable impact on customer expectations and behavior
- **Require significant investments or business model adjustments**
- Enable substantial new revenue potential or cost savings
- Have disruptive effects on existing market structures

01

Digital evolution

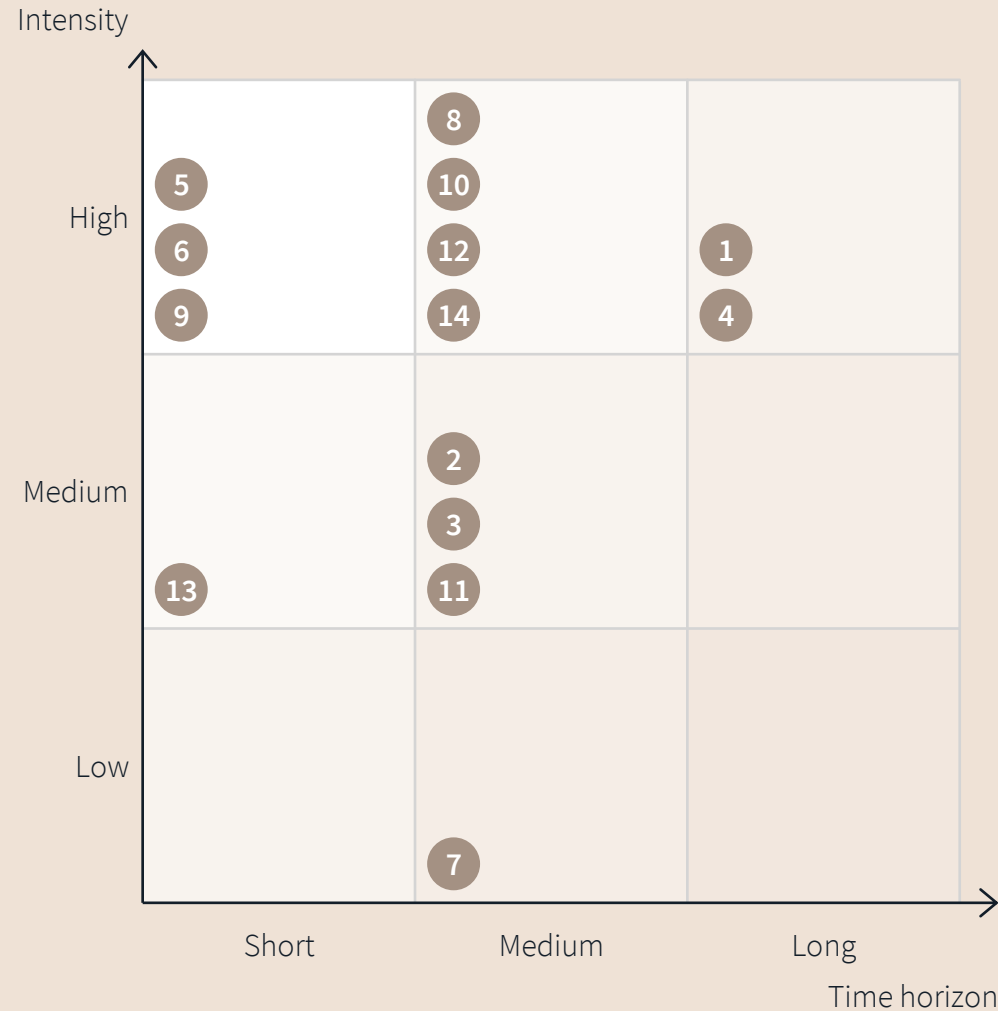




The digital imperative

The Digital evolution cluster is characterized by its immediacy and profound transformative power, demanding both agile execution and long-range strategic vision.

The vast majority of its trends are classified as high-impact and are heavily concentrated in the short-term to medium-term. This signals that the core transformation is a current reality, requiring immediate action to maintain competitiveness while also strategically planning for the foundational shifts that will define future market leadership.



Digital evolution

Smart retail

- 1 Intelligent store environments: AI-powered retail spaces
- 2 Smart inventory intelligence: Predictive stock management
- 3 Retail automation ecosystem: Robotics in daily retail
- 4 Data sovereignty: Data control as a business foundation

Customer journey

- 5 Unified commerce experience: Seamless customer journeys
- 6 Tailored customer experiences: Individualized shopping journeys
- 7 Social retail environments: Community-driven retail concepts

Payment innovation

- 8 Invisible payment journey: Frictionless transactions
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Agile operations

- 11 Operational excellence automation: Smart operating efficiency
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- 13 Dynamic retail architecture: Transformative spatial concepts
- 14 AI-driven decision making: Algorithmic management

☆ Digital evolution | Smart retail | Trend #1

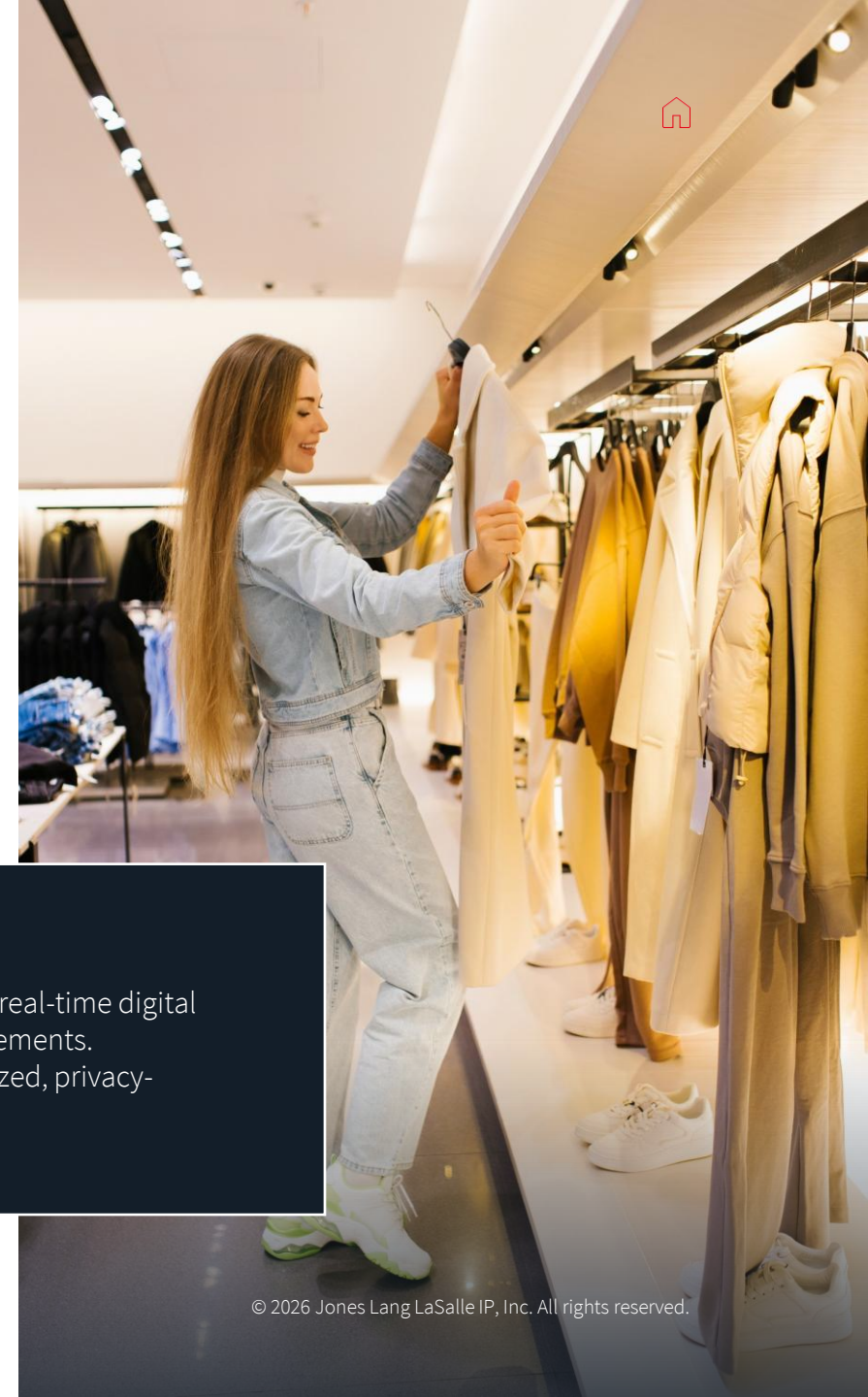
Intelligent store environments: AI-powered retail spaces

Intelligent store environments revolutionize customer interaction in brick-and-mortar retail through AI-enabled recognition systems. Cameras and sensors identify customers, analyze their behavior, and enable personalized addressing in real time. These technologies can recognize loyal customers, retrieve their preferences, and provide tailored product recommendations via digital displays or directly to sales staff. This allows physical retail spaces to offer personalization similar to online commerce, resulting in improved shopping experiences and higher customer satisfaction. Privacy-compliant design is key for customer acceptance.

Case study



The Dubai Mall (UAE): This global retail hub utilizes AI-driven environments to merge physical foot traffic with real-time digital personalization. Smart digital billboards analyze nearby shopper demographics to dynamically adjust advertisements. Simultaneously, the mall's integrated loyalty app tracks location and purchase history to push hyper-personalized, privacy-compliant promotions directly to visitors' smartphones as they pass specific storefronts.



Smart inventory intelligence: Predictive stock management

Smart inventory intelligence transforms inventory management in retail through precise forecasting models. AI algorithms analyze historical sales data, seasonal trends, weather forecasts, and even social media sentiment to accurately forecast demand spikes. This enables optimized stockholding with minimized overordering and reduced storage costs while also preventing out-of-stock situations. Retailers can plan just-in-time deliveries and flexibly adapt their assortments to local customer needs. Predictive inventory steering improves capital efficiency and reduces ecological impact through lower write-offs.

Case study



REWE International AG with Blue Yonder (Austria and CEE countries): Using Blue Yonder's AI, the company shifts its inventory strategy from reactive to predictive. The system analyzes a wide array of data points beyond just sales history to generate highly accurate demand forecasts, simultaneously preventing out-of-stock situations and reducing waste from overstocking.



Retail automation ecosystem: Robotics in daily retail

The retail automation ecosystem fundamentally changes retail operations through smart integration of humans and technology. In warehousing, autonomous vehicles and robots take over repetitive tasks such as inventory, picking, and transport, enhancing process quality. On the sales floor, robots assist with shelf stocking, price labeling, and inventory counting, while smart shelves with automatic inventory tracking are implemented. Self-checkout solutions and fully automated retail concepts reduce staff requirements for routine tasks, allowing staff to focus on high-value customer service and keeping retail competitive even with rising labor costs.

Case study



Autonomous shelf-scanning robot tally (USA): This autonomous robot leverages computer vision and AI to audit store shelves in real time. By identifying out-of-stock items, pricing errors, and misplaced products, it automates a critical inventory task, providing retailers with actionable data to optimize operations and enhance the customer's on-shelf experience.





☆ Digital evolution | Smart retail | Trend #4

Data sovereignty: Data control as a business foundation

Data sovereignty transforms the handling of customer data into a strategic asset, offering full control and independence. These data architectures implement first-party data systems, proprietary customer data platforms, and compliance-oriented structures as alternatives to third-party cookies and external platforms. The technology enables sovereign data collection, analysis, and activation while meeting regulatory and privacy requirements. This transition responds to the end of third-party cookies, tighter privacy rules, and rising consumer sensitivity. Strategic data control becomes a decisive competitive edge for future-proof business models.

Case study



Schwarz Group's data strategy (Various European countries): This strategy is built on a two-pronged approach: establishing a robust first-party data foundation through its extensive loyalty program and then capitalizing on this asset by creating "Schwarz Media," its own retail media division, to monetize this data control independently.



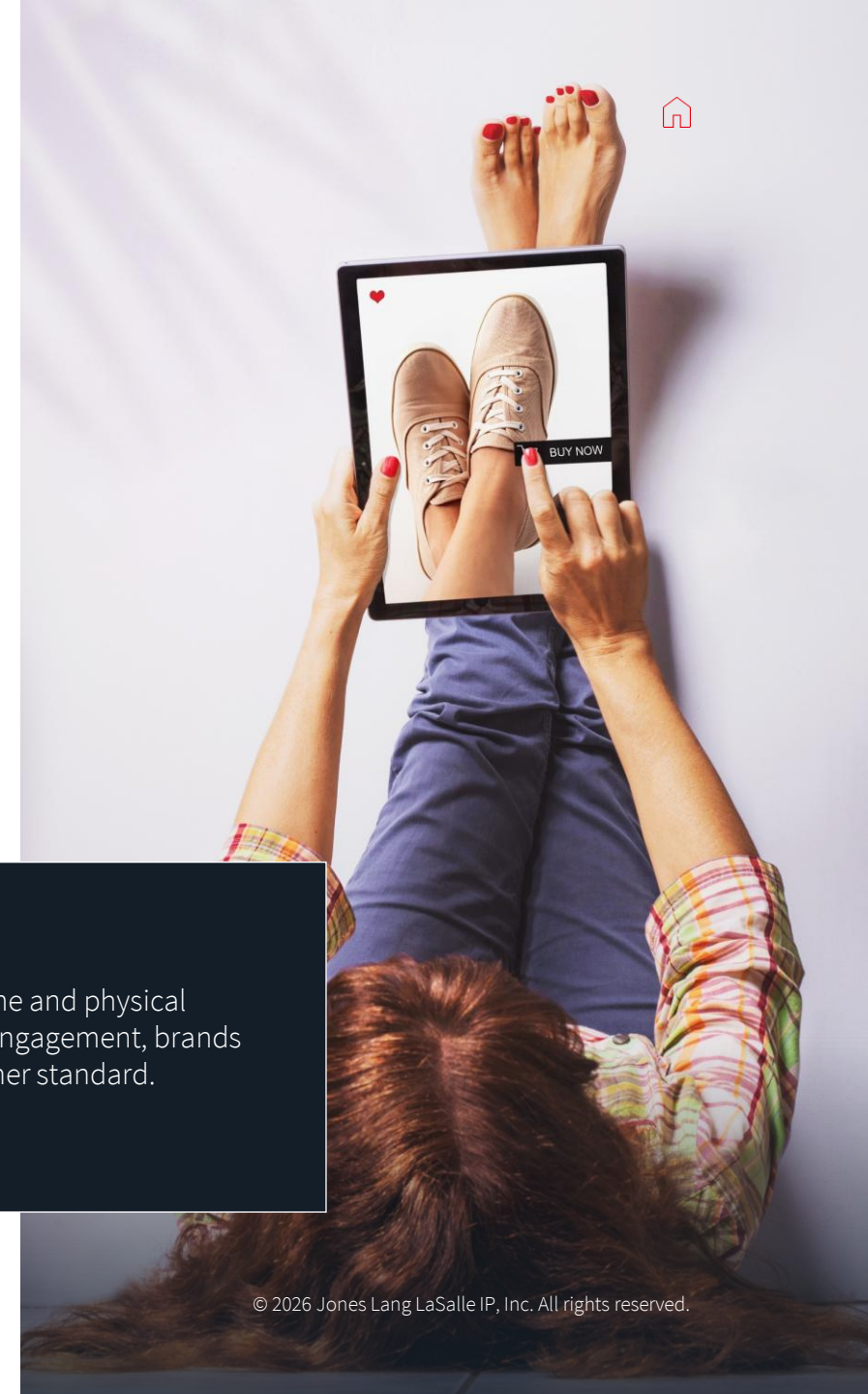
Unified commerce experience: Seamless customer journeys

The unified commerce experience creates a seamless shopping journey across all touchpoints. Today, customers expect a consistent transition between online shops, mobile apps, social media, and physical stores. Retailers deploy unified data platforms that synchronize customer profiles, shopping carts, and preferences across channels. This allows a customer to research online, try on in-store, and order via the app with their context maintained throughout. Services like click & collect, in-store returns for online purchases, and location-based offers become standard. Retailers mastering this integration create boundless customer journeys and deepen brand loyalty.

Case study



Nykaa, The Souled Store, Lenskart or CaratLane (India): Their strategies erase the distinction between online and physical channels to deliver a unified commerce experience. By leveraging their strong digital identity to drive in-store engagement, brands across beauty, fashion, eyewear and jewellery are establishing the seamless, hybrid journey as the new consumer standard.



Tailored customer experiences: Individualized shopping journeys

Individualized shopping experiences use advanced analytics to create deeply personalized customer engagement. By linking shopping history, browsing behavior, location data, and even biometric signals, highly accurate customer profiles emerge. These enable context-sensitive product recommendations, personalized pricing, and real-time tailored communication. Modern systems can even detect emotions and moods to adapt their approach. Examples include automatic outfit suggestions based on the wardrobe or lifestyle-oriented product recommendations. Increased personalization deepens customer loyalty and provides greater market differentiation for retailers.

Case study



Inspiration-led purchase journeys (India): This concept used by various Indian retail brands leverages curated social media content and influencer storytelling to initiate a highly individualized shopping journey. It strategically transforms passive browsing and content consumption into an impulse-driven purchase by creating a tailored, inspirational path that leads the consumer directly from digital discovery to commerce.



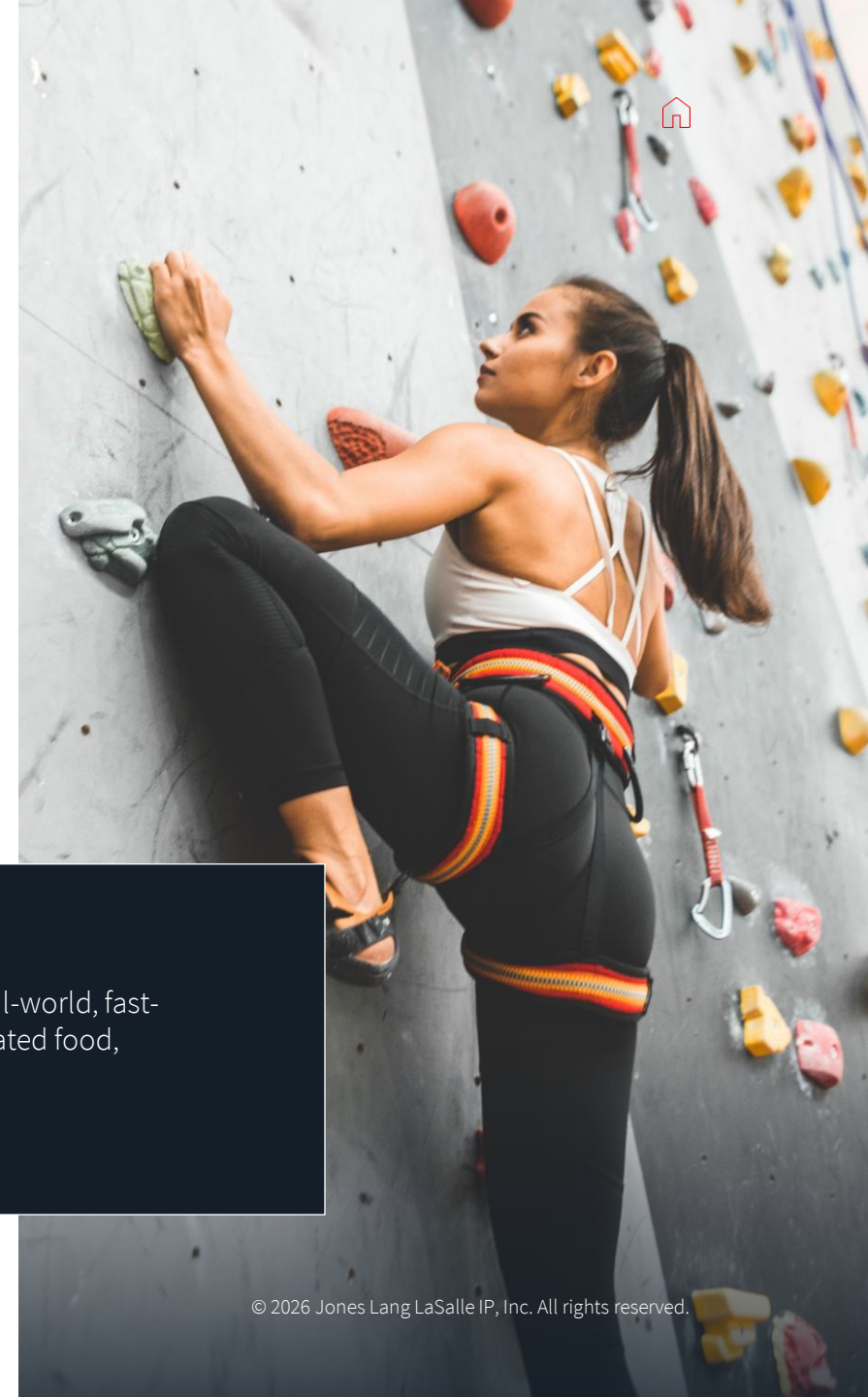
Social retail environments: Community-driven retail concepts

Community-driven retail concepts transform sales floors into meeting spaces and experience centers. Modern retail concepts integrate interactive elements such as AR mirrors, product workshops, pop-up events, and gastronomy offers that go far beyond simple product sales. The goal is to build emotional connections and authentic communities around the brand. Successful retailers establish physical and digital platforms for exchange, organize community events, and encourage user-generated content. This transforms passive consumers into active brand ambassadors. These concepts sustainably drive visitor frequency and strengthen brand loyalty through authentic customer engagement.

Case study



LEVEL99 (USA): This venue transforms retail into a social playground where teams collaborate in dozens of real-world, fast-paced challenge rooms testing physical or mental skills. Centered on cooperative play and competition, integrated food, beverage, and leaderboards foster a community-driven atmosphere where socializing is the core experience.



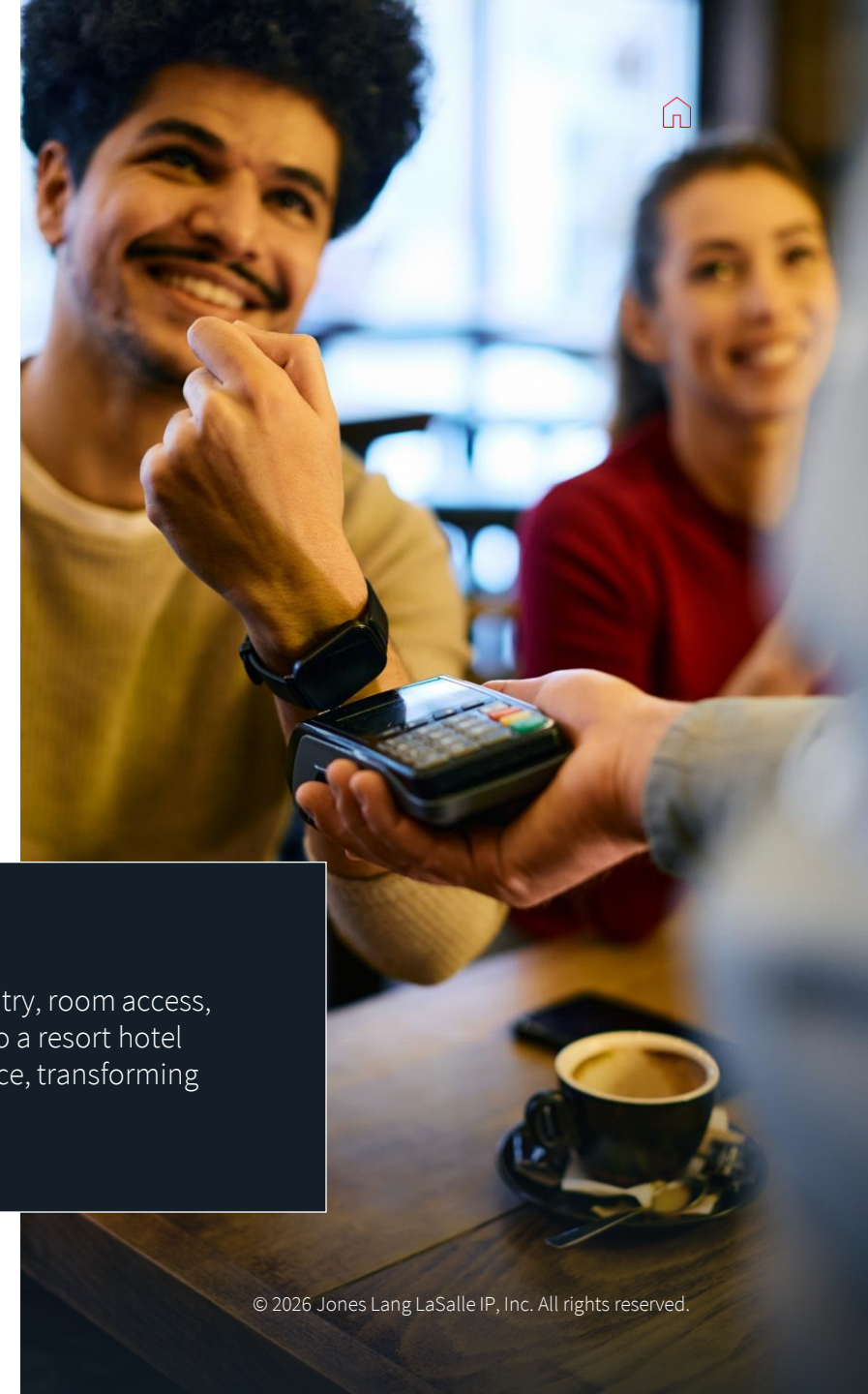
Invisible payment journey: Frictionless transactions

Frictionless transactions are becoming a key differentiator in retail. Mobile payment solutions via smartphones and wearables, contactless card payments, and biometric authentication (e.g., fingerprint or facial recognition) eliminate barriers in the purchase process. Integrating payment functions into shopping apps, social media platforms, and even augmented reality apps accelerates purchase decisions and improves the customer experience. Innovative concepts like "Just Walk Out" or "Scan & Go" systems eliminate checkout lines. This fundamentally changes physical retail as sales areas can be redesigned and the traditional checkout ceases to be a bottleneck.

Case study



Disney MagicBands at Walt Disney World Resort (USA): This wearable RFID technology consolidates park entry, room access, and payments into a single wristband, creating a truly frictionless guest journey. By linking purchases directly to a resort hotel account, it eliminates physical transaction points and embeds commerce invisibly into the park-wide experience, transforming the act of buying into just another seamless part of the on-site experience.



Transaction intelligence: Strategic use of payment data

The strategic use of payment data opens new dimensions of personalization for retailers. Transaction data provides precise insights into purchase frequency, preferred product categories, and customers' spending habits. Advanced analytics tools enable relevant real-time offers, such as automatic loyalty discounts or cross-selling suggestions based on current and past purchases. The integration of payment systems with loyalty programs enables automatic point collection and personalized rewards without extra customer effort. Privacy-compliant implementation uses anonymized data analysis and opt-in mechanisms to maintain customer trust and generate valuable business insights.

Case study

Payback's loyalty network (Various European countries): This program creates a powerful network effect in data intelligence. By consolidating purchase histories from diverse partners like dm and Rewe, the platform transforms raw transaction data into a strategic asset, enabling highly personalized, data-driven offers that a single retailer could not generate alone.

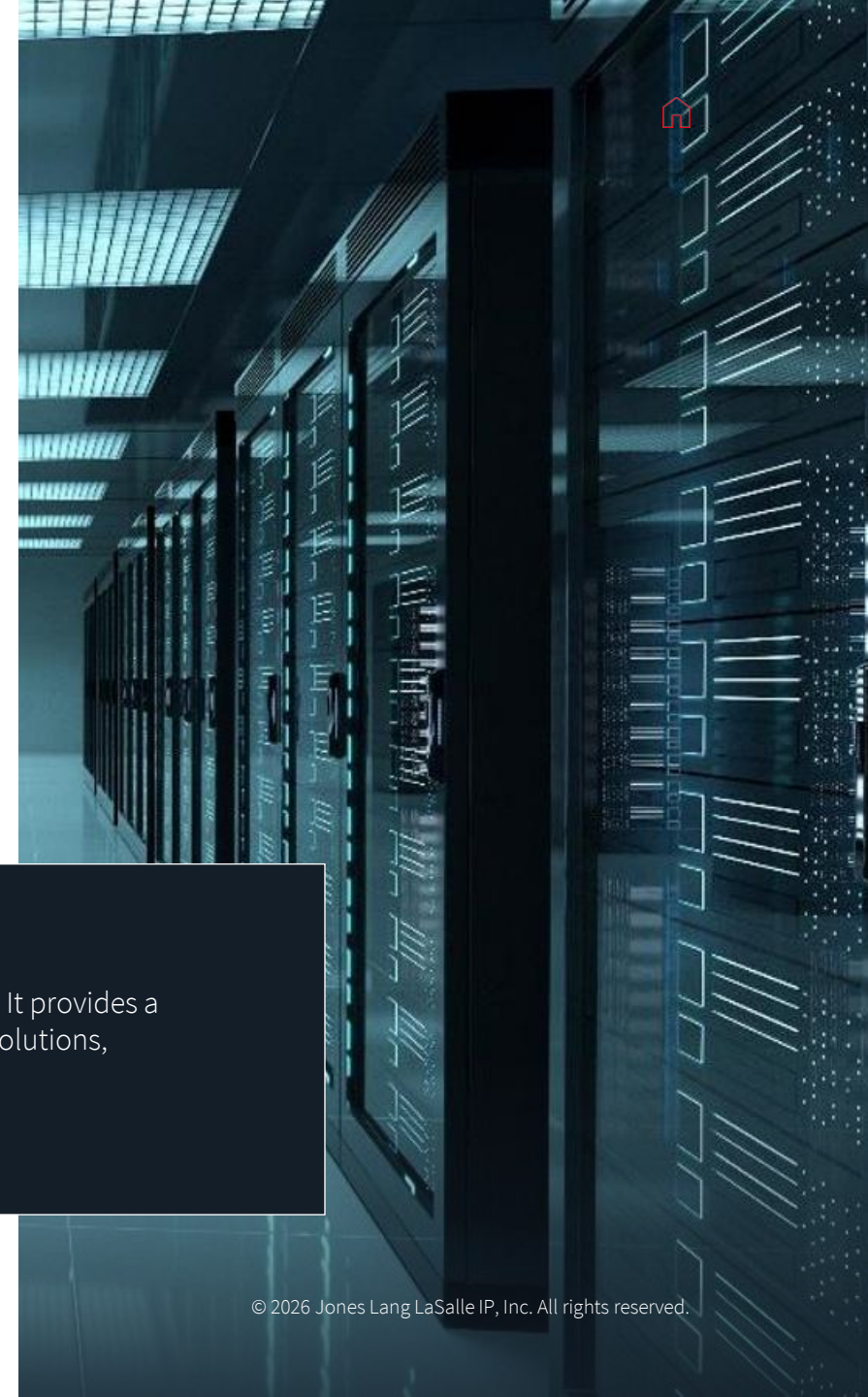


Payment security architecture: Trusted payment systems

Trusted payment systems are crucial for competitiveness in modern retail. The increasing complexity of cyberattacks and regulatory requirements such as PSD2 (EU) and GDPR (Germany) require robust security architectures. Advanced technologies like tokenization, end-to-end encryption, and AI-driven fraud detection form the foundation. Systems must also be flexible enough to integrate new payment methods like cryptocurrencies, buy-now-pay-later, or social payment solutions. Hybrid architectures that combine cloud scalability with local availability ensure resilience and build customer trust through consistently secure transactions.

Case study

Deutsche Bank's API platform (Germany): This platform acts as a secure foundation for payment innovation. It provides a robust, compliant architecture that enables third-party FinTechs to develop and integrate new Open Banking solutions, ensuring that the next generation of payment services is built upon a framework of trusted security.



☆ Digital evolution | Agile operations | Trend #11

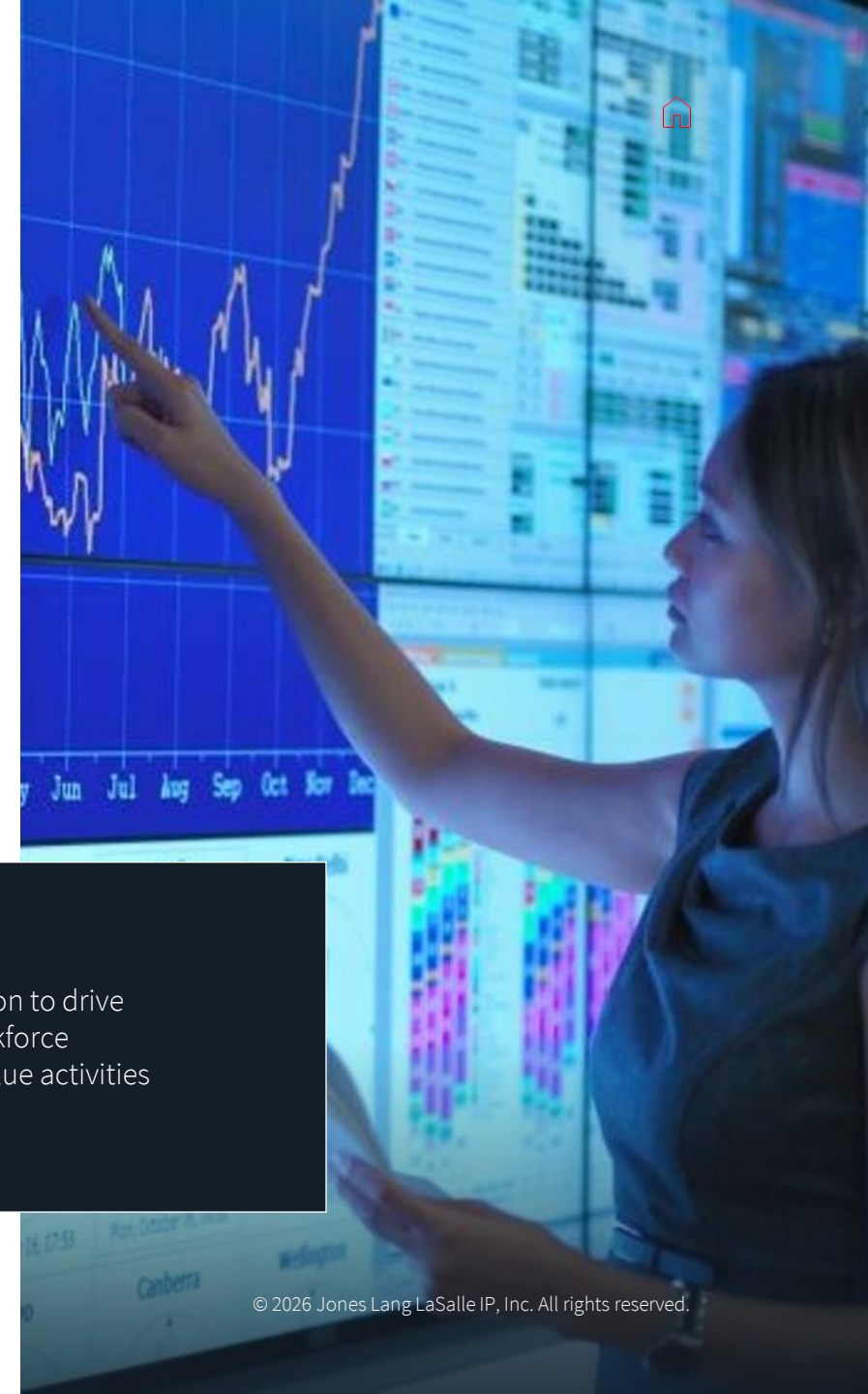
Operational excellence automation: Smart operating efficiency

Smart operating efficiency through process automation transforms operational performance in retail. Modern retail management systems integrate AI and machine learning to automate repetitive tasks – from dynamic pricing to automated orders and AI-driven workforce planning. Cloud-based ERP systems connect branches in real time to enable centralized control with local adaptability. Advanced business intelligence tools visualize complex data and identify optimization potential through predictive analytics. This enables retailers to deploy their resources more strategically and focus on value-creating activities.

Case study



Lidl Digital's process automation (Various European countries): The company leverages process automation to drive smart operating efficiency at a massive scale. By implementing AI-powered systems for complex tasks like workforce planning and automated stock ordering, Lidl frees up resources and empowers its teams to focus on higher-value activities and customer service.

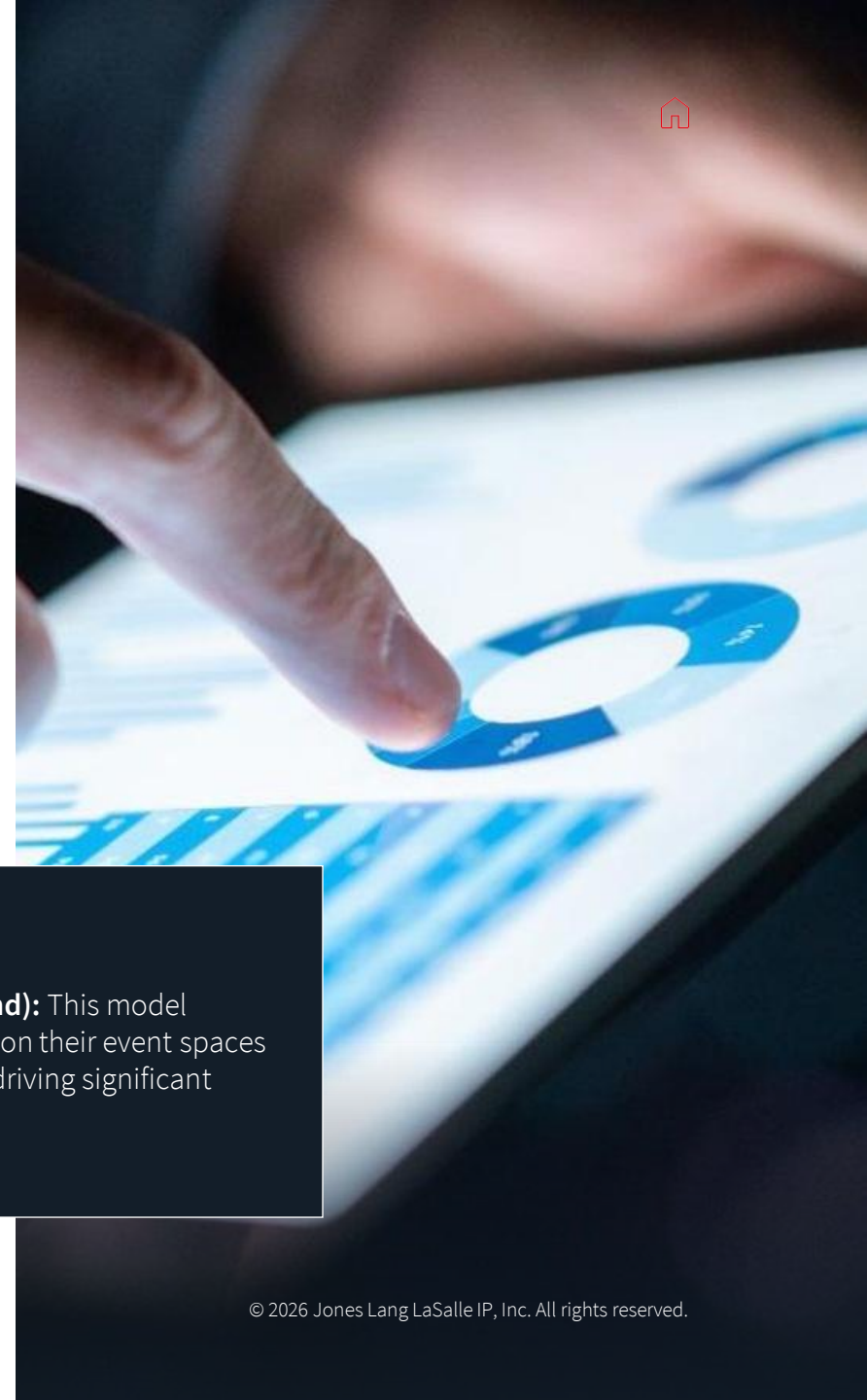


Retail market responsiveness: Adaptive business control

Adaptive business control enables retailers to react quickly and precisely to market changes. By integrating real-time data from various sources – sales figures, competitor analysis, social media trends, weather forecasts, and macroeconomic indicators – a comprehensive market overview emerges. AI-powered forecasting models can predict sudden demand fluctuations and automatically trigger adjustments in purchasing, pricing, and marketing. Connecting data analysis with operational flexibility is crucial: Only when insights are rapidly converted into action does true competitive advantage arise in volatile markets.

Case study

Major retail mall Centralworld in Bangkok adapts its tenant and event structure to latest trends (Thailand): This model demonstrates adaptive business control by strategically responding to a major pop culture trend. Malls reposition their event spaces to host large-scale fan gatherings and related commercial activities, capturing a highly engaged audience and driving significant footfall beyond traditional retail.



☆ Digital evolution | Agile operations | Trend #13

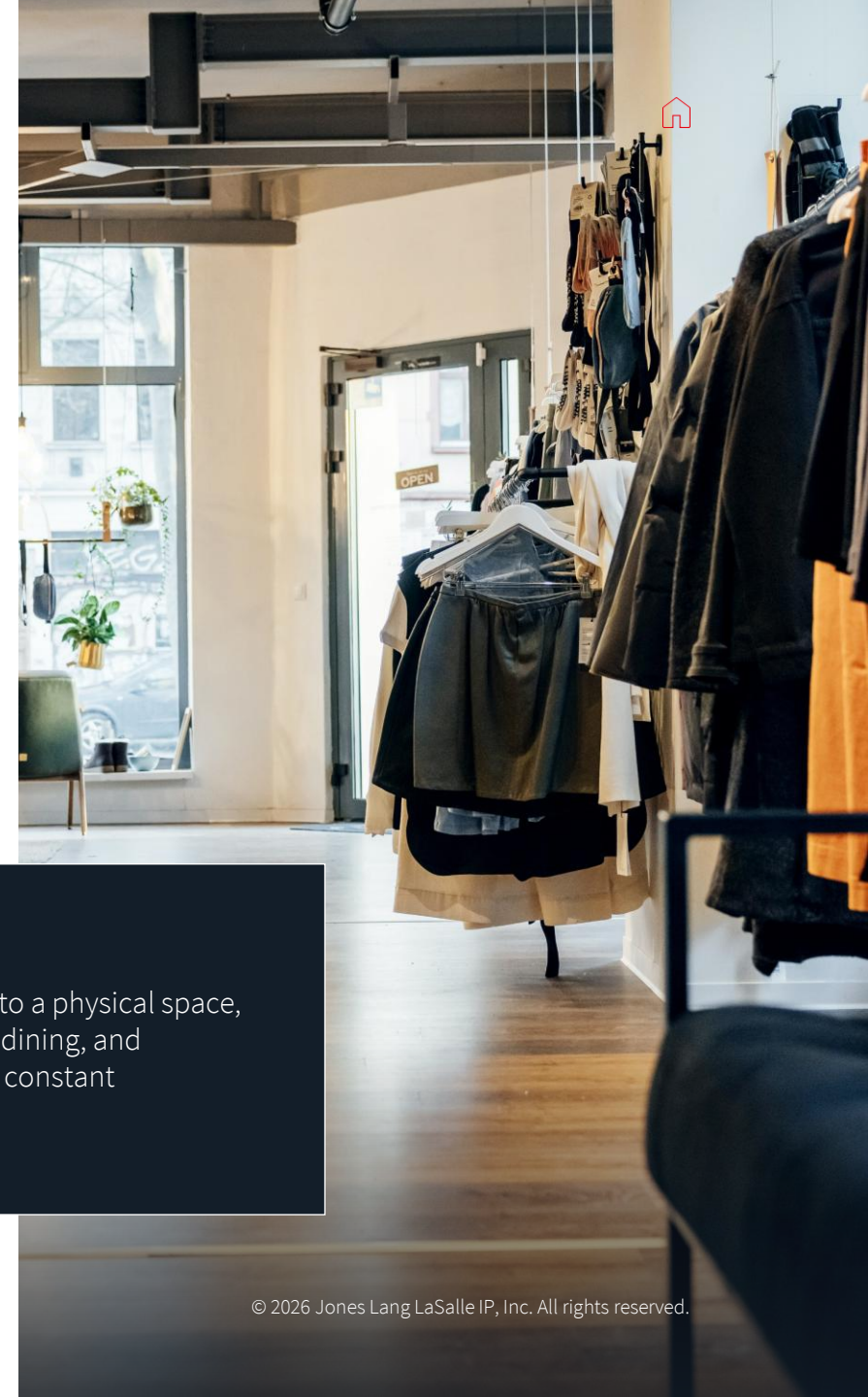
Dynamic retail architecture: Transformative spatial concepts

Transformative spatial concepts are becoming key success factors in physical retail. Modular furnishing concepts with mobile wall systems, flexible displays, and multifunctional furniture enable rapid reconfiguration for changing assortments, seasonal campaigns, or temporary events. Advanced retailers implement sensor-based systems that analyze customer flows and propose or execute layout optimizations automatically. Pop-up concepts within existing spaces create room for brand collaborations and testing new product lines. Multifunctional areas can serve as retail during the day and as event or community spaces in the evening, maximizing productivity and reducing vacancy risk.

Case study



Netflix House Dallas and Philadelphia (USA): This permanent experiential venue translates digital fandom into a physical space, featuring a rotational model of immersive installations that brings popular shows to life through themed retail, dining, and interactive events. The venue's architecture, often an adaptive reuse of large-scale retail spaces, is designed for constant transformation, offering an ever-evolving brand world where fans can become part of the story.



AI-driven decision making: Algorithmic management

AI-driven decision making revolutionizes management by using AI-supported systems for forecasting and optimization models. These systems integrate analytics, machine learning, and simulations to continuously improve operations and strategy. The technology includes predictive analytics for site assessment, autonomous pricing, dynamic resource allocation, and AI-based scenario planning. Ethical frameworks, human-AI interfaces, and algorithmic transparency build trust in automation. As data grows and environments become more complex, these systems enable precise, data-based decisions and organizational agility – key to overcoming intuition-driven practices.

Case study

AI-driven management at dm-drogerie markt (Germany and other European countries): Here, AI is not a standalone tool but is deeply integrated into core business logic. The system autonomously optimizes ordering processes based on predictive demand forecasts and provides AI-generated suggestions for key logistical decisions, embedding algorithmic intelligence into daily operations.





Recommendations for tenants, landlords, and developers from digital evolution

Retailers and restaurateurs

- Develop a first-party data strategy to gain independence from third-party cookies and build direct, monetizable customer relationships
- Implement a unified commerce platform that integrates online, mobile, and physical channels to create a seamless customer journey
- Leverage transaction data to drive personalized offers, promotions, and loyalty rewards in real time
- Automate core operational processes such as inventory management, pricing, and workforce planning using AI and machine learning
- Integrate frictionless payment options like "Scan & Go" or mobile payments to remove barriers at checkout and improve the customer experience

Landlords/Property owners

- Invest in base-building technology infrastructure (e.g., sensor networks, robust connectivity) to enable intelligent store concepts for tenants
- Adopt flexible leasing models to accommodate pop-ups, brand collaborations, and respond quickly to market trends
- Curate and host community-driven events and experiences to increase footfall, dwell time, and transform the property into a social destination
- Offer data analytics as a service, providing tenants with aggregated, anonymized insights on visitor flow and behavior
- Facilitate property-wide frictionless payment systems to create a seamless transaction experience across all tenants and common areas

Developers

- Design new properties with a "digital backbone" from the start, ensuring they are tech-ready for future innovations in AI, IoT, and robotics
- Incorporate transformative spatial concepts with modular and multi-functional spaces that can be easily reconfigured for different uses
- Future-proof logistics infrastructure by designing loading docks, back-of-house areas, and delivery zones to accommodate automation and robotics
- Prioritize Direct-To-Consumer (DTC) brand needs by creating smaller, flexible, and highly visible retail formats suited for their business model

02

Space and business

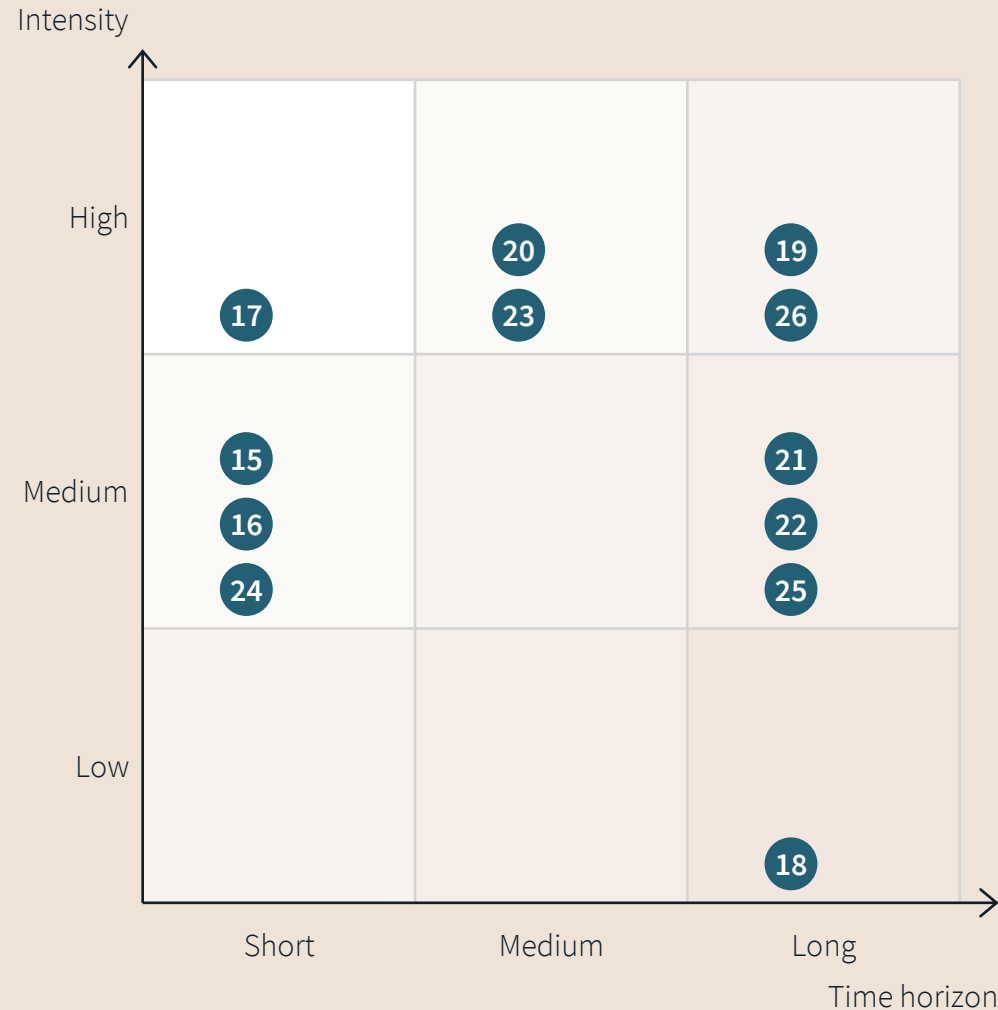




Shaping tomorrow's spaces

In contrast to the digital cluster's immediacy, the Space and business cluster presents a more balanced, forward-looking strategic map. While several trends demand short-term action, the majority are positioned on a long-term horizon. The intensity is equally varied, mixing high-impact disruptions with crucial, incremental evolutions.

This landscape demands a dual focus: adapting business models for immediate opportunities while engaging in the long-range capital planning needed to shape the physical environments and assets of the future.



Space and business

Business evolution

- 15** Subscription commerce models:
Recurring customer relationships
- 16** Collaborative consumption
platforms: Shared usage concepts
- 17** Direct consumer relationship:
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Space concepts

- 18** Flexible retail spaces:
Temporary retail concepts
- 19** Immersive retail environments:
Multisensory brand experiences
- 20** Mixed-use retail concepts:
Integrated use landscapes
- 21** Retail space as a service:
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- 22** Biophilic design:
Nature-integrated retail landscapes

Urban retail

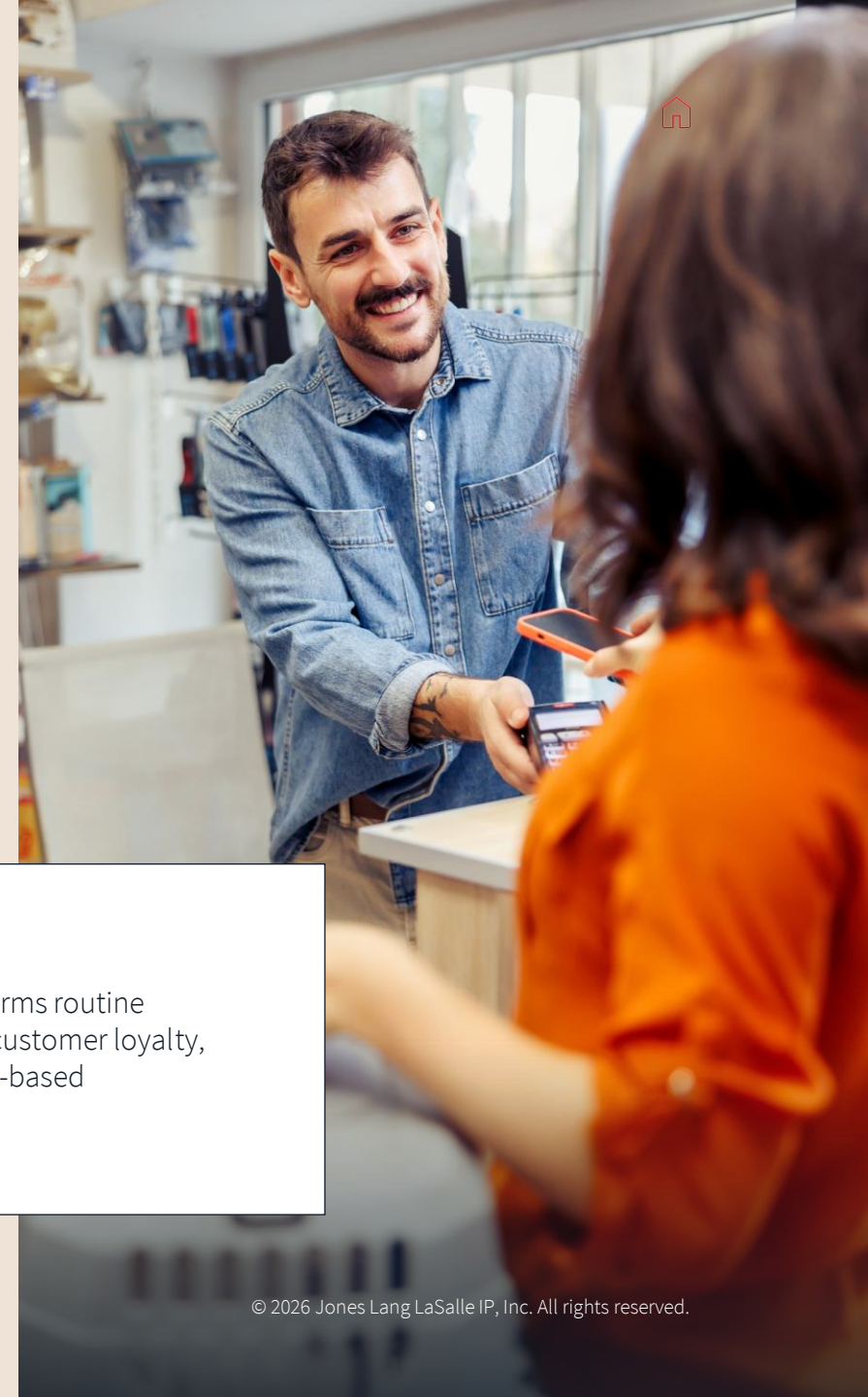
- 23** Urban mixed-use development:
Vibrant usage ecosystems
- 24** Neighborhood retail concepts:
Local supply systems
- 25** Retail mobility solutions:
Connected supply systems
- 26** Digital twin technology:
Virtual replicas of physical spaces

Subscription commerce models: Recurring customer relationships

Subscription commerce models complement traditional purchasing with regular, predictable delivery of products or services in exchange for recurring payments. These range from simple product subscriptions (cosmetics, groceries, clothing) to sophisticated product-as-a-service models (electronics maintenance, regularly rotating wardrobes). Retailers benefit from stable revenue streams and deeper customer insights through long-term relationships. The shift from transactional to relationship-oriented business requires a fundamental reorientation of operational and analytical processes. Personalized subscriptions with curated product selections enjoy particular success.

Case study

Pet retailer Chewy with auto-delivery model Autoship (USA): This pet retailer's auto-delivery model transforms routine purchases into a powerful subscription service. By automating the replenishment of essentials, it fosters deep customer loyalty, seamlessly integrating the brand into the daily care routines of pet owners and establishing a predictable, trust-based relationship.





☆ Space and business | Business evolution | Trend #16

Collaborative consumption platforms: Shared usage concepts

Shared usage concepts in retail allow for temporary product access instead of permanent ownership. The growing movement includes rental, sharing, and resale – from apparel and accessories to electronics and furniture. Advanced platforms use AI for personalized recommendations and authentication of high-value pre-owned items. Brick-and-mortar retailers increasingly integrate sharing components through rental options, repair, and resale programs. The trend is driven by sustainability, economic factors, and a desire for premium access. Retailers gain new revenue sources and customer loyalty through ongoing interaction over a product's entire lifecycle.

Case study

Share Now's consumption platform (Various European countries): This service exemplifies the shift from ownership to access-based consumption. Its digital platform provides the crucial infrastructure for a flexible, on-demand car-sharing network, allowing for efficient resource optimization while offering users the convenience of mobility without long-term commitment.

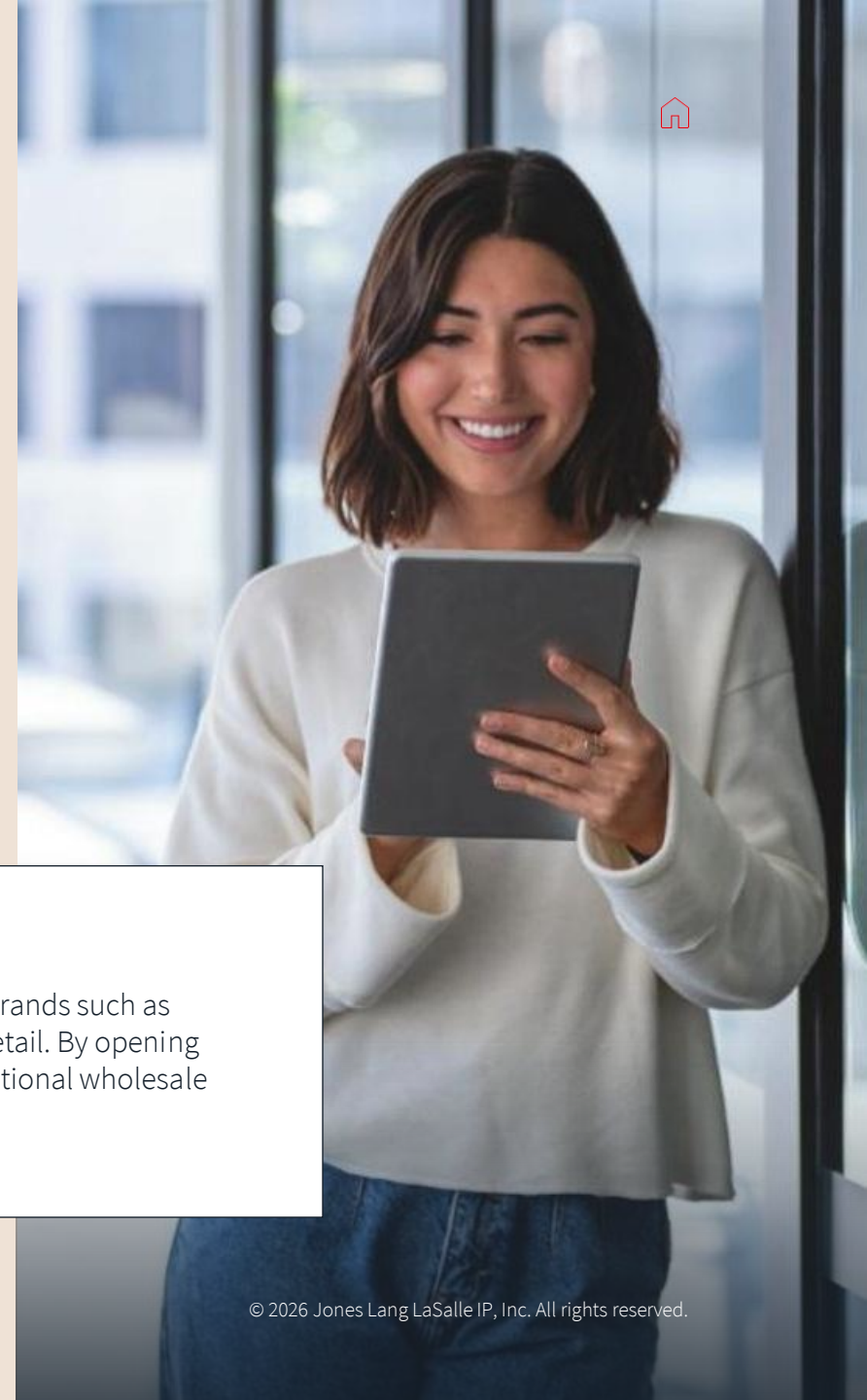


Direct consumer relationship: Brands without intermediaries

Direct consumer relationship describes the growing trend for brands to build direct customer relationships without intermediaries. This enables full control over brand perception, customer experience, and pricing. Digital-native brands use data analytics for in-depth insights and highly personalized experiences. Direct customer contact enables fast feedback and agile product development. Large manufacturers expand DTC activity via their own platforms and flagship stores while also maintaining traditional channels, creating both challenges and opportunities for curated multi-brand concepts offering unique combinations and services.

Case study

Physical expansion of contemporary and fashion jewellery brands (India): This model sees digital-native brands such as Bluestone or Tribe by Amrapali extend their direct consumer relationships from online channels into physical retail. By opening dedicated stores, often in specially zoned mall spaces, they create tangible brand touchpoints and bypass traditional wholesale intermediaries, maintaining full control over the customer journey.

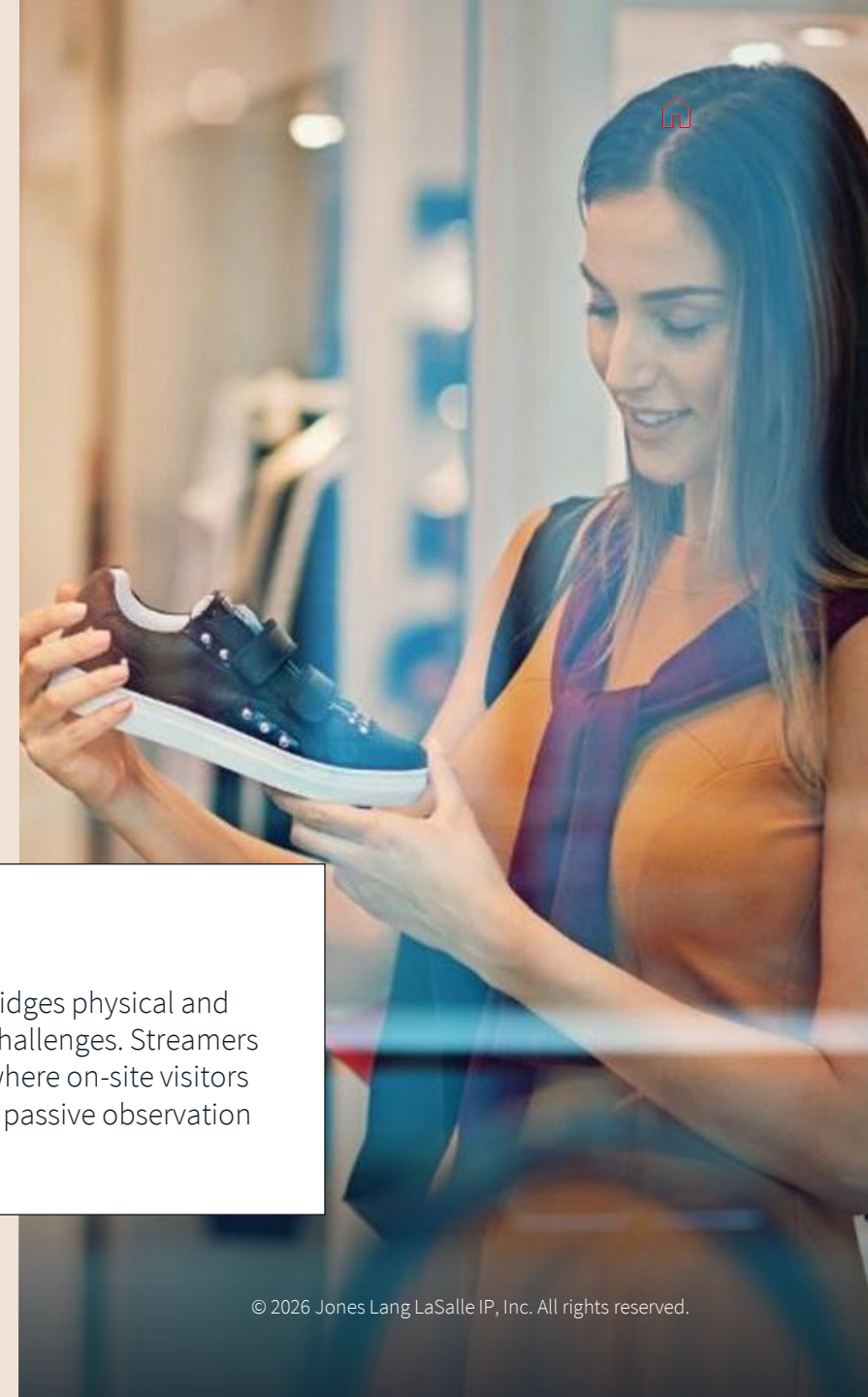


Flexible retail spaces: Temporary retail concepts

Temporary retail concepts transform the rigid retail landscape with time-limited, agile presences. Pop-up stores, mobile points of sale, and short-term marketplaces allow brands to test locations with minimal risk, launch products, or meet seasonal demand. This flexibility provides customers ongoing novelty. Real estate developers and malls increasingly allocate dedicated space for rotating concepts to reduce vacancy and drive frequency. Modular furniture, mobile POS, and temporary networks speed up implementation and lower costs. This flexibility will fundamentally change location strategies and leasing models.

Case study

"The Artifact" – pop-up by Alienware and Twitch in New York City (USA): This hybrid pop-up installation bridges physical and digital realms by enabling online viewers to directly influence the real-world environment through interactive challenges. Streamers solve puzzles that trigger lighting and environmental changes in real time, creating a bidirectional experience where on-site visitors and digital participants engage equally, compete for prizes, and collectively shape the narrative – transforming passive observation into active community-driven storytelling.

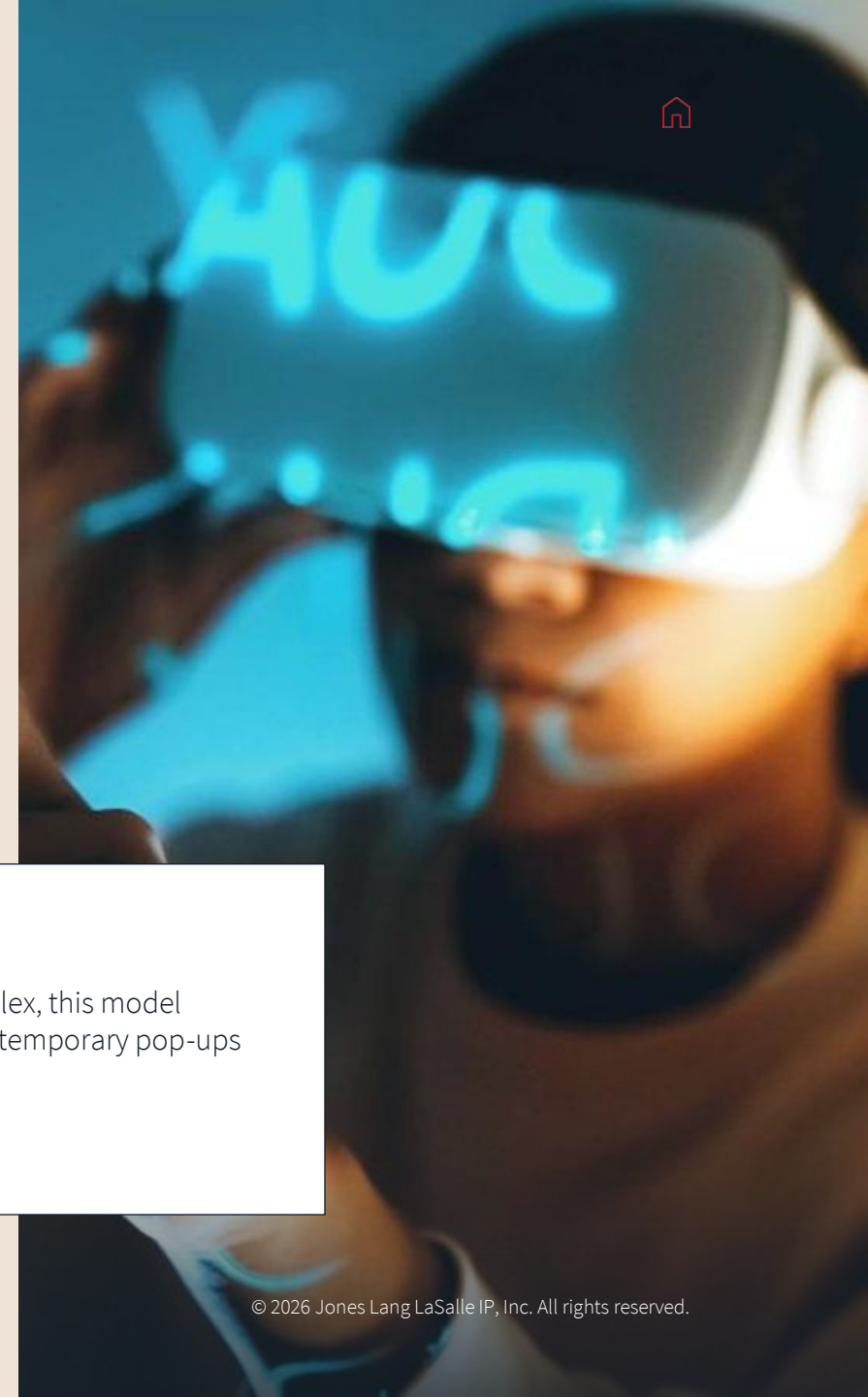


Immersive retail environments: Multisensory brand experiences

Multisensory brand experiences transform conventional retail spaces into captivating experiential worlds addressing all senses and making brand essence tangible. Concept stores merge product presentation with entertainment, education, and social interaction via architecture, materials, lighting, sound, and even scent, creating consistent and memorable brand experiences. Advanced technologies like augmented reality, interactive displays, and personalized digital touchpoints enhance the physical experience. These “destinations” attract customers for experiences, not just purchases, increasing dwell time and strengthening brand loyalty.

Case study

Shanghai Zhang Yuan (China): Leveraging the city’s largest and most complete Shikumen architectural complex, this model transforms heritage architecture into an immersive retail backdrop. Global brands use these unique spaces for temporary pop-ups and exhibitions, creating powerful, site-specific brand stories that deliver a multisensory experience.



Mixed-use retail concepts: Integrated use landscapes

Integrated use landscapes combine retail with complementary functions such as work, dining, entertainment, and community services in seamless transitions. These hybrids create synergistic ecosystems, generating cross-traffic. For example, coworking with cafes, lifestyle shops, and event space generates all-day frequency. Blending gastronomy and retail through food-retail hybrids lets guests experience products in context. Integration of uses increases relevance for experience-oriented shoppers and boosts resilience through diversified revenue streams and longer stays.

Case study

Lifestyle districts (USA): As a macro-version of mixed-use, these districts integrate entire neighborhoods, with curated retail acting as the central magnet that establishes identity and drives primary foot traffic. This retail-first approach generates significant demand for adjacent office, residential, and hotel assets, creating a vibrant, walkable environment where commercial activity is maximized.



Go **behind the scenes of lifestyle districts** to learn how and why dynamic neighbourhoods outperform across all property types





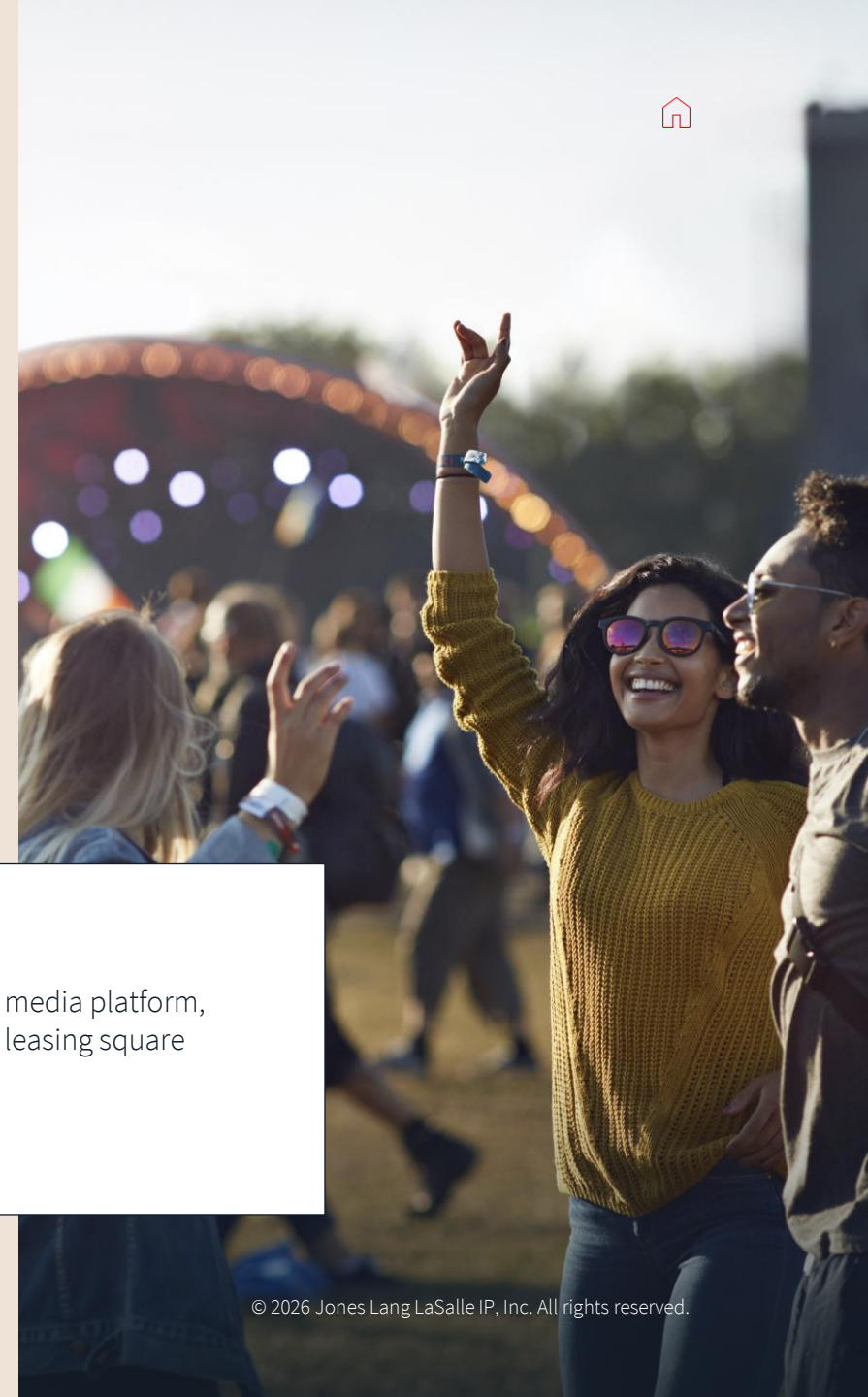
☆ Space and business | Space concepts | Trend #21

Retail space as a service: Flexible space use concepts

Flexible space use concepts transform static real estate structures into dynamic service offerings. Space-as-a-service gives brands and retailers access to sales area without long-term obligation – from fully fitted spaces with staff to shop-in-shop and temporary display space. Operating models like revenue-sharing replace fixed rent, balancing risk and reward. Tech solutions for tracking, billing, and management enable efficient handling even in complex scenarios. Results: dynamic environments, continuous novelty for customers, and easier entry for small/innovative brands.

Case study

TX Huaihai Youth Energy Center in Shanghai (China): This concept positions the retail property as a curated media platform, offering brands flexible, short-term access to an engaged youth community. It shifts the value proposition from leasing square footage to providing a dynamic stage for temporary brand storytelling and capturing audience attention.



Biophilic design: Nature-integrated retail landscapes

Biophilic design revolutionizes retail environments by integrating nature and natural processes in architecture. This includes indoor farming, living walls, natural materials, biomimetic forms, circadian lighting, and air circulation systems. Design brings multisensory nature encounters, daylight use, visual links to the outdoors, and microclimate zoning for comfort. Integrating local ecosystems and seasonal dynamics creates appealing, healthy spaces. The concept answers urban nature deprivation, environmental concerns, and health awareness. Regenerative, nature-centric design becomes a key differentiator for customer retention and dwell time.

Case study

Apple Miami Worldcenter (USA): This innovative retail space exemplifies biophilic design through its mass timber construction and integration of lush greenery both surrounding the store and on its rooftop. The carbon-neutral environment seamlessly blends indoor and outdoor elements, featuring flora inspired by Miami's multicultural Latin American heritage, creating a nature-immersive shopping experience that connects visitors to green spaces throughout.



Urban mixed-use development: Vibrant usage ecosystems

Lively urban usage ecosystems integrate retail, gastronomy, residential, work, and culture into symbiotic concepts. This holistic neighborhood development creates authentic districts with a unique identity, vibrant around the clock, covering diverse needs. The strategic mix promotes social interaction, reduces traffic with short paths, and creates economic synergies. Modern retail serves as a social anchor and traffic generator, while high-quality public space connects everything. Success depends on smart ground floor concepts, flexible building structures, and digital tools for community and service.

Case study

Large format experience-driven shopping malls like the DLF Mall of Noida or the Ambience Mall in Gurugram (India):

Massive, experience-driven malls are strategically developed as new commercial anchors in underserved suburban belts. By catering to emerging residential clusters, these developments create vibrant, self-sustaining ecosystems, effectively transforming the peripheral landscape and establishing new centers of retail and social gravity outside the urban core.

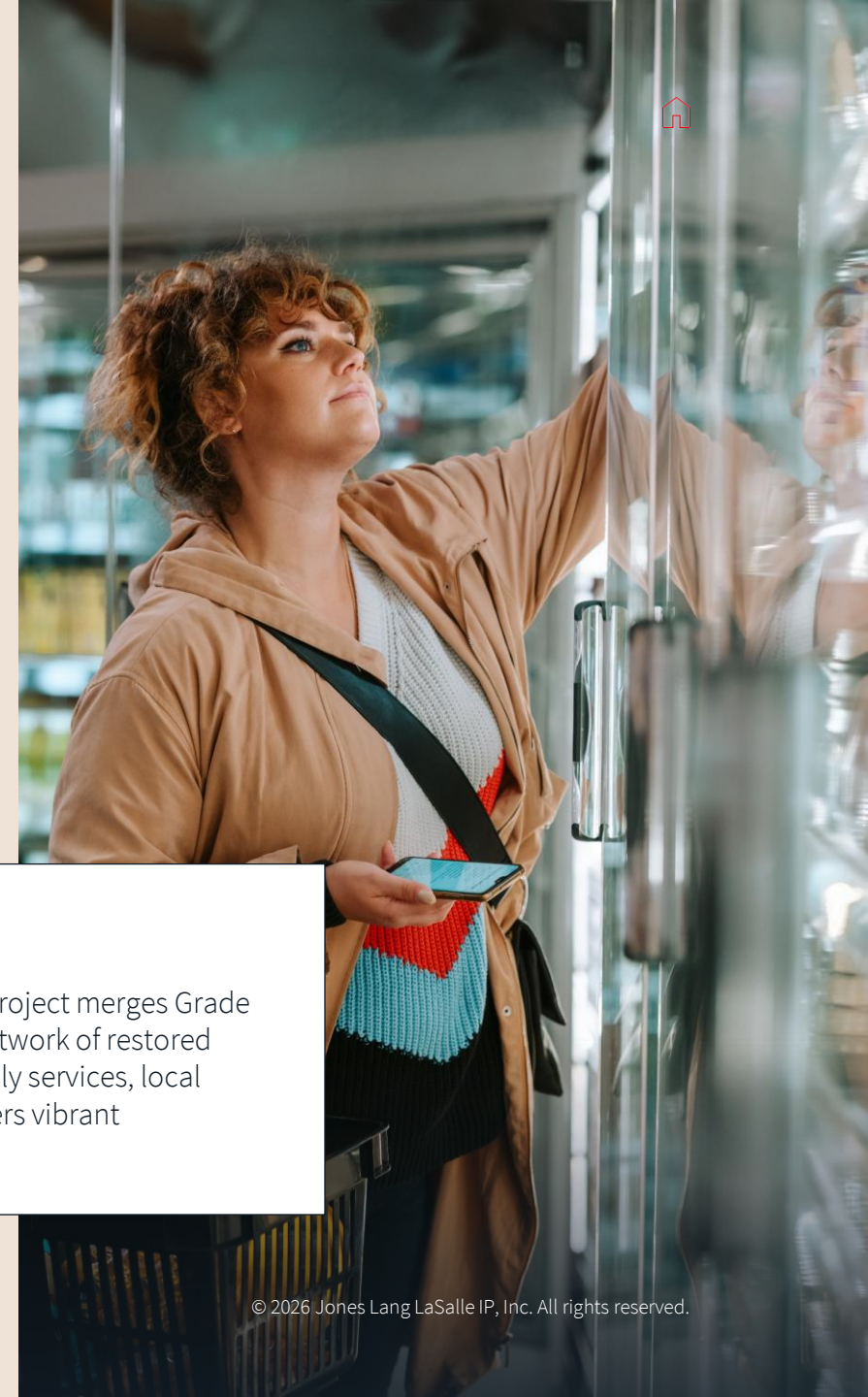


Neighborhood retail concepts: Local supply systems

Local supply systems are gaining importance as a counterpoint to anonymous malls and online commerce. These concepts focus on local identity, short distances, and personal relationships, combining daily needs with health services, community spaces, and hybrid models. Success factors include tailoring to demographics, integration into neighborhoods, and authentic place-based design. Technology enables expanded services like local delivery, click & collect, and location-based offers. Integration into residential areas reinforces local economies, reduces mobility needs, and boosts social structures.

Case study

Urban regeneration project Hong Shou Fang, Putuo District, Shanghai (China): This urban regeneration project merges Grade A offices with a 15,000-square-meter neighborhood marketplace designed around an open, pedestrian-only network of restored Shikumen laneways. Centered on a curated fresh food market and social plaza, the development integrates daily services, local dining, and public gathering spaces into a car-free heritage environment, creating a low-mobility hub that fosters vibrant community connections.

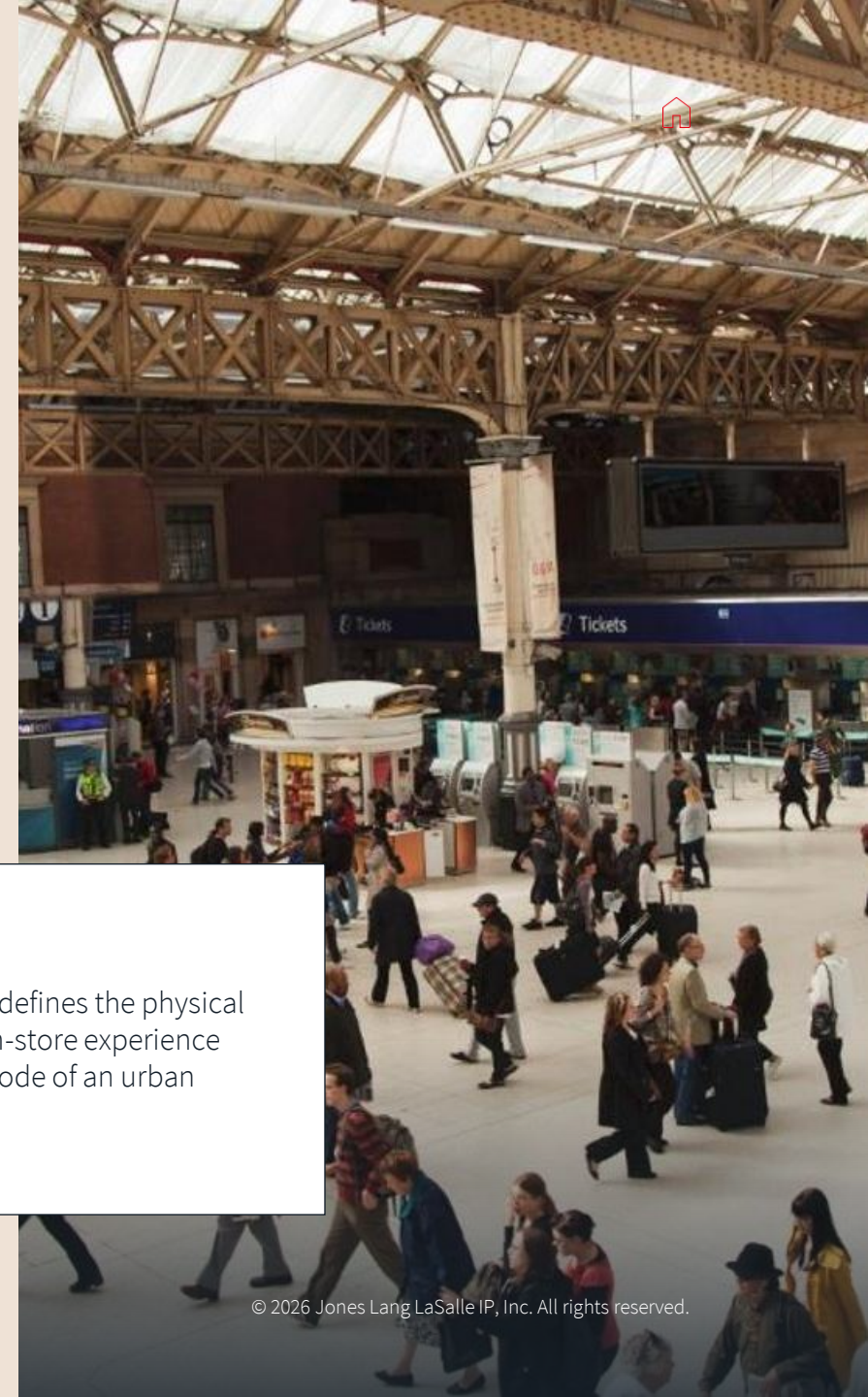


Retail mobility solutions: Connected supply systems

Connected supply systems transform the relationship between mobility and retail. Electrification, autonomous vehicles, and micromobility change accessibility and site attractiveness. Leading retailers integrate mobility options – charging stations, micro-hubs, pickup points at transit nodes. Last-mile logistics evolve via robots, drones, and crowd-delivery, reducing delivery times and environmental impact. Location-specific mobility strategies optimize both customer visits and supply; retail in mobility hubs creates high-frequency sites for convenience and click and collect.

Case study

Freshippo retail platform for groceries and fresh produce (China): This concept as part of Alibaba Group redefines the physical store as a hyper-local logistics hub, enabling a 30-minute home delivery promise. It seamlessly integrates the in-store experience with a restaurant and a dedicated, rapid last-mile delivery network, transforming the supermarket into a core node of an urban mobility and supply ecosystem.



Digital twin technology: Virtual replicas of physical spaces

Digital twin technology transforms property planning and management through real-time virtual replicas of retail environments with dynamic data synchronization. These systems combine IoT, 3D modeling, and AI analytics to continuously map and simulate all spatial dynamics and user interactions. Technology enables virtual prototypes, predictive maintenance, dynamic space optimization, and evidence-based decisions before physical implementation. Building Information Modeling (BIM) integration and collaborative visualization tools accelerate planning and stakeholder engagement. Digital twins are becoming key for minimizing risk, boosting efficiency, and continuous optimization across a property's lifecycle.

Case study

Fraport AG's digital twin (Germany): This comprehensive digital twin is used not just for visualization, but for proactive operational control of the entire airport ecosystem. The system is fed with real-time data to simulate passenger flows, preemptively identify bottlenecks, and schedule predictive maintenance, turning the twin into a core strategic management tool.





Recommendations for tenants, landlords, and developers from space and business

Retailers and restaurateurs

- Develop new revenue streams by launching subscription, rental, or resale models for products and services
- Open physical stores (flagships, showrooms) to complement online channels and build a direct customer relationship
- Utilize pop-ups and temporary formats to test new markets, launch products with minimal risk, and create brand excitement
- Transform stores into immersive brand experiences by using multisensory design to engage customers beyond the transaction

Landlords/Property owners

- Transition from fixed rent to "Space as a Service" models, offering flexible leases, revenue-sharing, and turn-key solutions
- Curate a synergistic tenant mix that blends retail with dining, entertainment, wellness, and services to drive all-day footfall
- Invest in biophilic design by integrating green spaces, natural light, and sustainable materials into common areas to enhance well-being
- Develop integrated mobility hubs on-site that offer EV charging, bike/scooter sharing, and dedicated click and collect points

Developers

- Design projects as integrated "live-work-play" ecosystems rather than standalone properties to create vibrant, self-sustaining neighborhoods
- Implement a digital twin from the project's inception using Building Information Modeling (BIM) to optimize design, construction, and future operations
- Anchor new residential developments with a curated mix of essential, neighborhood-serving retail and services to build community from day one
- Prioritize sustainable and circular principles in the earliest design stages by planning for resource efficiency and adaptive reuse

03

Dining evolution

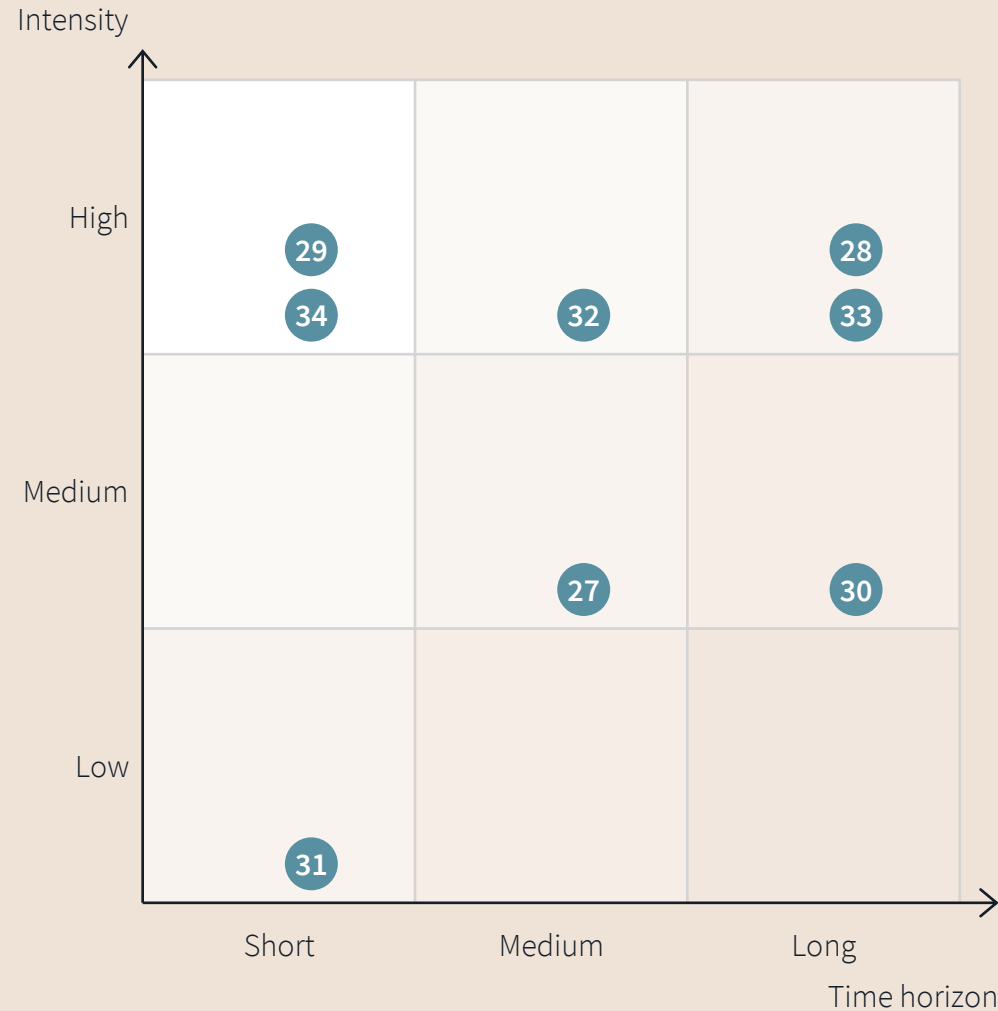




The new recipe for dining

The Dining evolution cluster illustrates a sector undergoing a comprehensive and multi-layered transformation. Its trends are remarkably balanced across the short, medium, and long term, indicating change at every level.

The defining characteristic is a clear focus on high intensity, with a significant number of trends driving a fundamental shift in existing business models. This distribution requires operators to act on pressing, high-impact changes while simultaneously making strategic investments in equally significant long-term innovations.



Dining evolution

Food experience

- 27** Immersive food experience:
Multisensory culinary experiences
- 28** Regional food systems:
Hyper-regional value chains
- 29** Food community hubs:
Collaborative culinary landscapes
- 30** Health-optimized nutrition:
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Smart dining systems

- 31** Adaptive dining concepts:
Flexible food service usage
- 32** Culinary automation systems:
Technologized food production
- 33** Intelligent kitchen systems:
Connected kitchen processes
- 34** Virtual restaurant ecosystems:
Digital restaurant models

Immersive food experience: Multisensory culinary experiences

Multisensory culinary experiences transform classic dining into a holistic adventure. These concepts merge innovative food design, atmospheric space, storytelling, and technology like projection mapping or AR to create a coherent whole. From pop-ups to permanent destinations, they create unforgettable moments by engaging all senses. Digital elements (personalized menus, interactive tables, virtual flavors) enrich the experience. Success means guests not only consume but actively participate and co-create unique memories.

Case study

Eatrenalin's immersive dining (Germany):

This concept elevates dining into a choreographed journey by placing guests in patented "Floating Chairs." These transport them through distinct sensory worlds, where visuals, sound, and scent are precisely synchronized with each course, seamlessly merging culinary art with an immersive theatrical production.

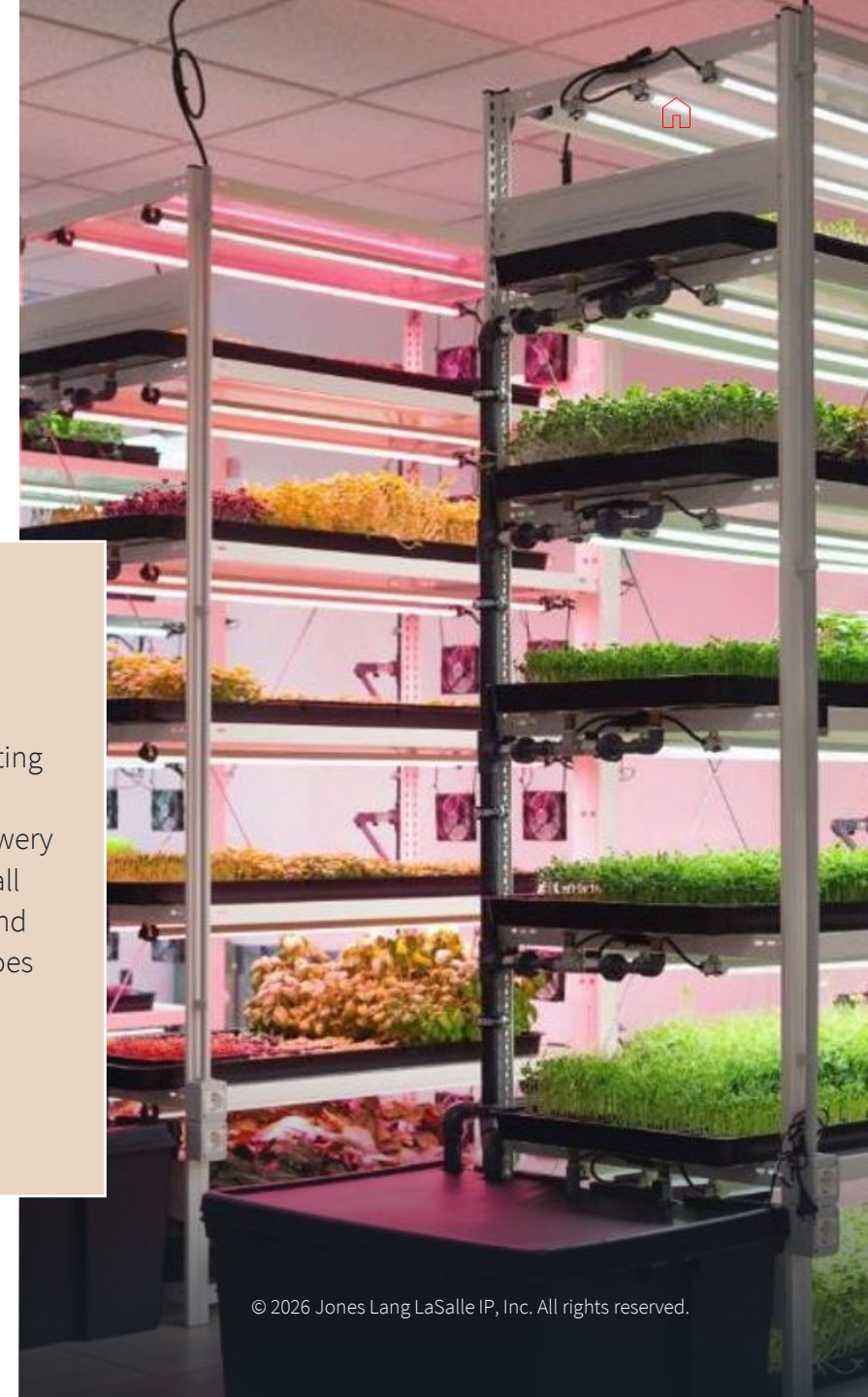


Regional food systems: Hyper-regional value chains

Hyper-regional value chains revolutionize dining by focusing on local resources and closed cycles. These go beyond "farm-to-table," including direct on-site production, vertical farms, or urban gardens near the venue. Innovative operators integrate aquaponics, mini-breweries, or dairies for maximum transparency and authenticity. The hyper-regional focus lowers the ecological footprint and creates site-specific, seasonal specialties. Blockchain and AR can increase trust and emotional guest ties. These systems support resilient local economies and growing demand for authenticity and transparency.

Case study

Restaurant Nolla's zero-waste system (Finland): This Helsinki-based restaurant embodies a true zero-waste ethos by creating a fully closed loop. It complements its hyper-local sourcing with an in-house brewery and an on-site composter that processes all organic leftovers, demonstrating a profound commitment to resource efficiency that goes far beyond the plate.

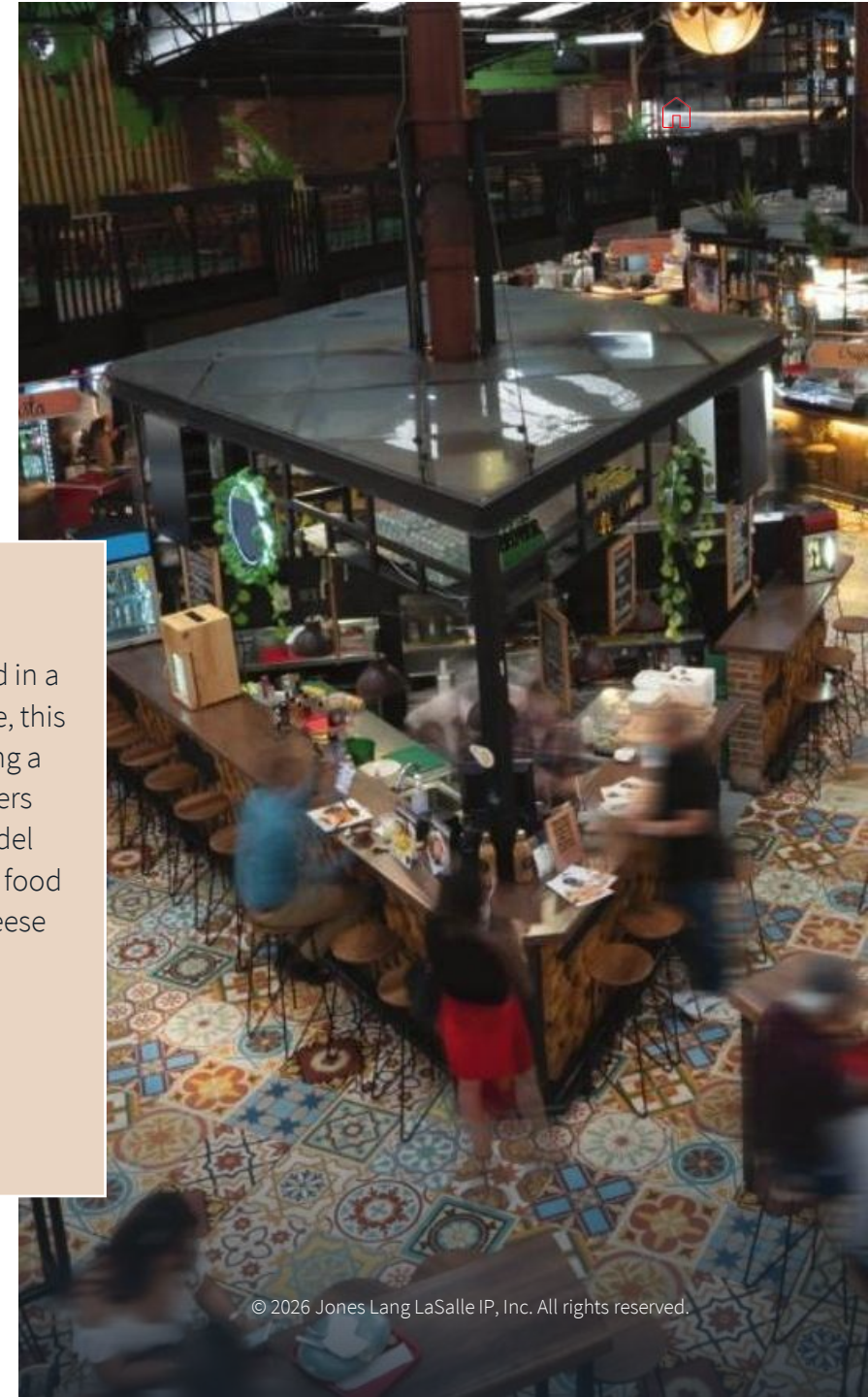


Food community hubs: Collaborative culinary landscapes

Collaborative culinary landscapes create vibrant food ecosystems in one location. Modern market halls bring together independent concepts, bars, micro-production, and experiential spaces with shared infrastructure. Focus is on authentic, handcrafted options and direct contact between producers and guests. Joint resources lower entry barriers for innovation. Social meeting points, events, and community programs extend beyond consumption. Digital elements (joint ordering apps, loyalty programs, shared marketing) boost synergies and urban vitality.

Case study

KERB's Seven Dials Market (UK): Located in a historic Covent Garden banana warehouse, this market acts as a culinary incubator, offering a permanent platform for independent traders transitioning from street markets. The model lowers entry barriers and creates a vibrant food destination with unique features like a cheese conveyor belt.



☆ Dining evolution | Food experience | Trend #30

Health-optimized nutrition: Personalized health dining

Health-optimized nutrition revolutionizes dining via science-based, personalized offerings targeted at wellness. These combine nutrient analytics, customer health data, and nutritional evidence to create tailored menus for specific health goals. This includes allergen management, transparent documentation, functional ingredients, and bioactive components. Integration of nutrition advice, AI-powered recommendations, and ongoing feedback creates holistic health experiences. Driven by chronic health trends and personalization, these concepts set new standards in the food sector.

Case study

dean&david's personalized nutrition model (various European countries):

This fast-casual model successfully brings personalized nutrition to the mass market. It moves beyond vague health promises by empowering customers with a "Mix Your Own" system and transparent ingredient data, allowing them to actively construct a meal that aligns with their specific dietary goals.





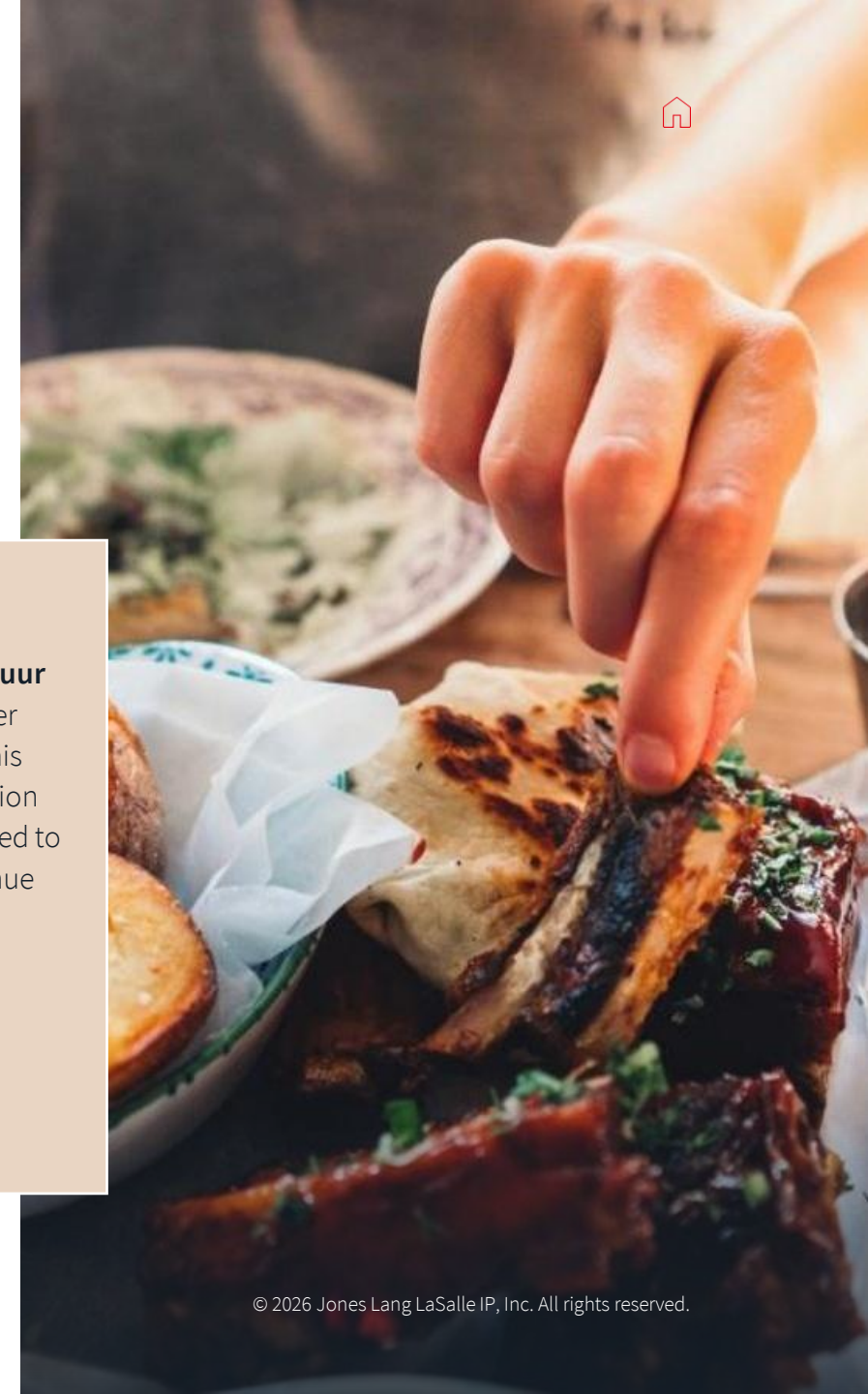
☆ Dining evolution | Smart dining systems | Trend #31

Adaptive dining concepts: Flexible food service usage

Flexible dining usage transforms rigid concepts into dynamic, multi-purpose spaces that change identity throughout the day. These adaptable venues shift from café in the morning to lunch restaurant, bar, or event space in the evening. Modular furnishings, dynamic lighting, and multifunctional kit allow for quick transformations. Flexible POS, kitchen modules, and digital menus support this operational versatility. The concept maximizes space use, attracts multiple customer groups, and reduces risk through diversified revenue streams – key in expensive urban markets or volatile times.

Case study

Adaptive dining at Hamburgerei/Café Buur (Germany): By housing a café and a burger restaurant within a single shared space, this concept implements a smart asset utilization strategy. The venue's identity is transformed to serve different dayparts, maximizing revenue per square meter by catering to distinct customer groups from morning to night.



Culinary automation systems: Technologized food production

Technologized food production revolutionizes kitchen and service via automation and robotics. From AI-driven cook robots to automated mise-en-place and service bots, tech optimizes efficiency and consistency. Advanced systems combine mechanical precision and learning from feedback/production data. Automation frees staff from repetitive tasks for creativity and service. Especially useful in standardized environments and when labor is scarce, this boosts competitiveness with higher throughput and quality. Automation can itself become a guest experience, e.g., robotic bartenders or show kitchens.

Case study

Good-Bytz's automated kitchen (Germany):

This food-tech company provides a direct answer to labor shortages in system gastronomy. Its fully automated kitchen autonomously handles the entire cooking process, from gram-precise ingredient dosage to final meal output, ensuring constant high quality at high throughput.



☆ Dining evolution | Smart dining systems | Trend #33

Intelligent kitchen systems: Connected kitchen processes

Connected kitchen processes transform traditional workflows through IoT, analytics, and AI assistants. Technology links all elements – from smart devices with precise control to inventory management and demand forecasting. Real-time analytics allow ongoing optimization; advanced energy systems lower costs and resource use. End-to-end digitalization ensures traceability and quality. Systemwide data integration creates holistic insights and enables proactive management and personalized guest experiences through context-relevant service and product customization.

Case study

RATIONAL's ConnectedCooking platform (Germany): This system creates a true digital ecosystem for professional kitchens. It enables the central deployment of cooking programs, automates the documentation of hygiene data for quality assurance, and proactively signals service needs, transforming disparate appliances into a single, intelligently managed system.

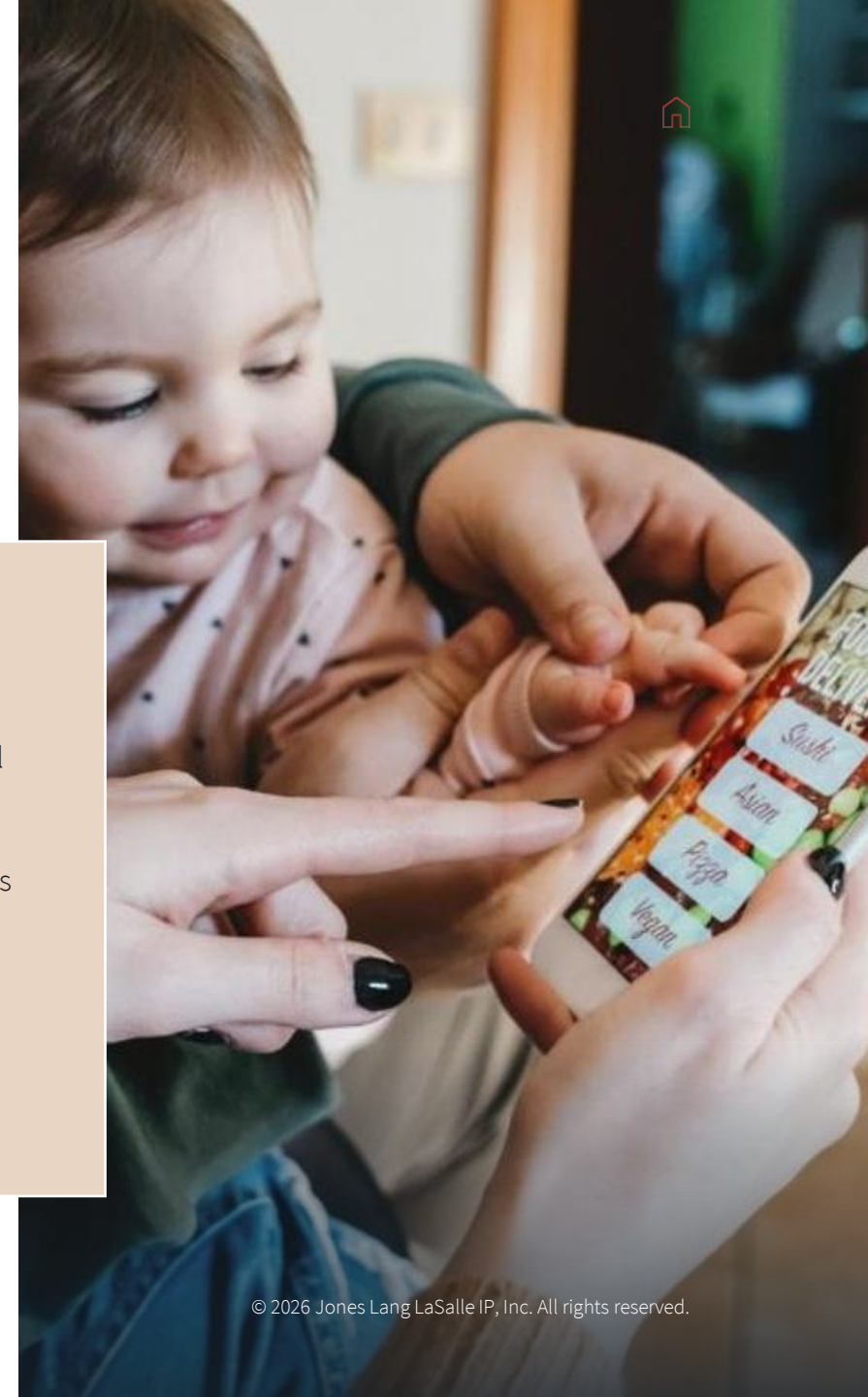


Virtual restaurant ecosystems: Digital restaurant models

Digital restaurant models revolutionize traditional operations by focusing completely on off-premise consumption and tech-optimized production. Dark kitchens (production-only, no guest area) and virtual brands (digital-native restaurant brands with no physical equivalent) operate in fully digitized ecosystems with direct integration into delivery and ordering platforms. These minimize location costs and maximize efficiency via specialized processes and data-based assortment. Advanced models create hybrid concepts with pick-up micro-frontends. Tech infrastructure enables dynamic pricing and assortment optimization in real time. Fast scalability and low market entry barriers address the shift to flexible, location-independent eating habits.

Case study

burgerme's virtual brand incubator (Germany): Beyond its core delivery service, the company functions as a virtual brand incubator. It leverages its existing, highly efficient kitchen and logistics infrastructure to launch digital-only brands like "1Burger," allowing it to capture new market segments with minimal risk and maximum asset utilization.





Recommendations for tenants, landlords, and developers from dining evolution

Retailers and restaurateurs

- Launch digital-only "virtual brands" from existing kitchens to maximize asset utilization and capture new market segments
- Invest in kitchen automation and robotics to increase efficiency, ensure consistency, and counter labor shortages
- Create unique, immersive, and ticketed dining events that go beyond the meal to offer a memorable, multisensory experience
- Develop data-driven, personalized menus that cater to specific health goals, dietary needs, and lifestyle choices
- Use food halls as low-risk testbeds to trial new concepts and build brand awareness before committing to a standalone location

Landlords/Property owners

- Actively develop and curate vibrant food halls with independent operators to create a unique and compelling F&B destination
- Repurpose underutilized spaces (e.g., basements, back-of-house) as shared ghost kitchens for delivery-focused tenants
- Offer flexible lease structures and modular infrastructure to support tenants who operate multiple concepts or need to adapt their space throughout the day

Developers

- Design dedicated ghost kitchen facilities with optimized logistics (separate entrances, courier staging areas) into new mixed-use projects
- Anchor new developments with centrally located food halls that act as social and community hubs, replacing traditional food courts
- Future-proof dining spaces by designing for the high power, data, and ventilation requirements of automated and connected kitchens
- Incorporate spaces for urban agriculture or other hyper-local food production (e.g., rooftop gardens) into the initial property design

04

Sustainable future

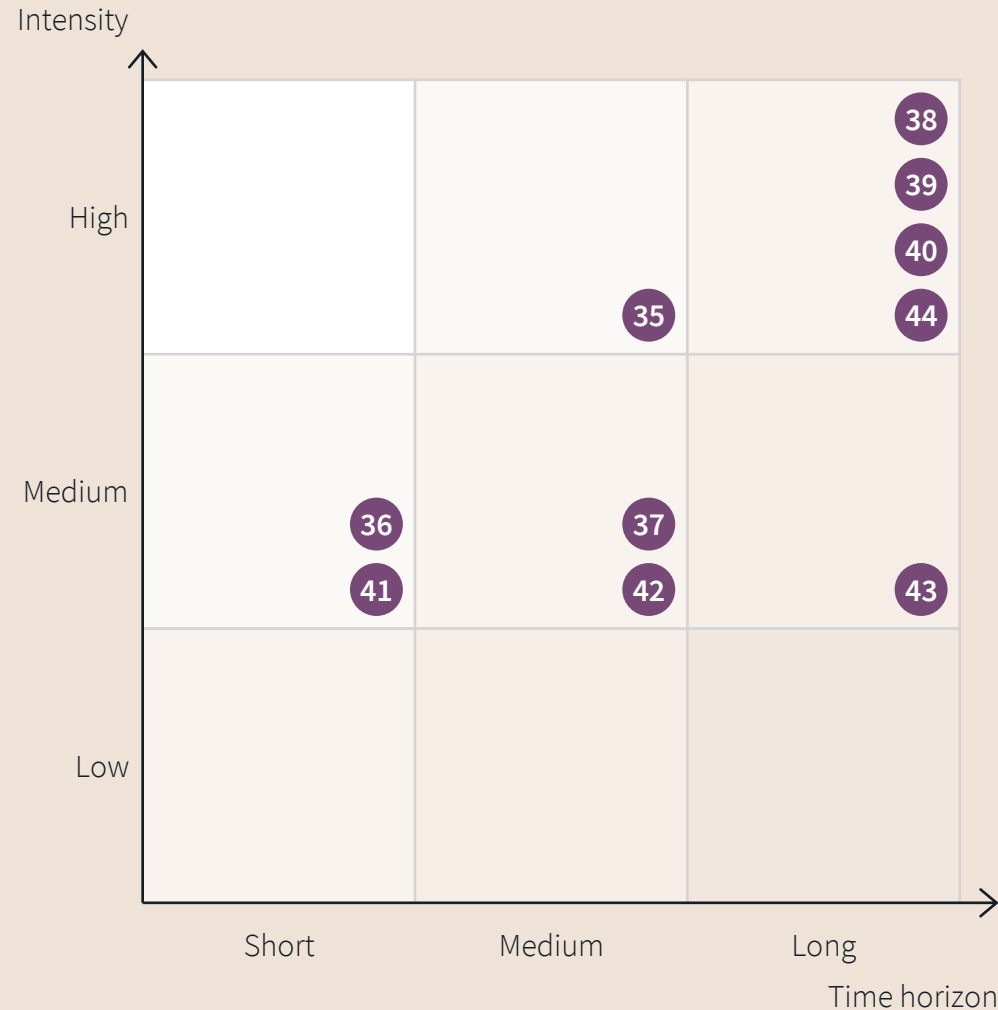




Building a resilient future

The Sustainable future cluster is defined by its long-range perspective. The majority of its trends are long-term, with the highest-impact topics almost exclusively concentrated there.

This indicates that sustainability is a marathon of deep, structural investments, not short-term sprints. While medium-impact trends require near-term action, they serve as foundational steps toward the more fundamental changes ahead. This agenda demands strategic foresight and a commitment to foundational change for long-term value creation.



Sustainable future

Talent evolution

- 35 Digital talent ecosystem:
Technology-driven HR processes
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- 38 Supply chain transparency
systems: Sustainable supply
chain architecture
- 39 Circular economy systems:
Regenerative material cycles

Green building

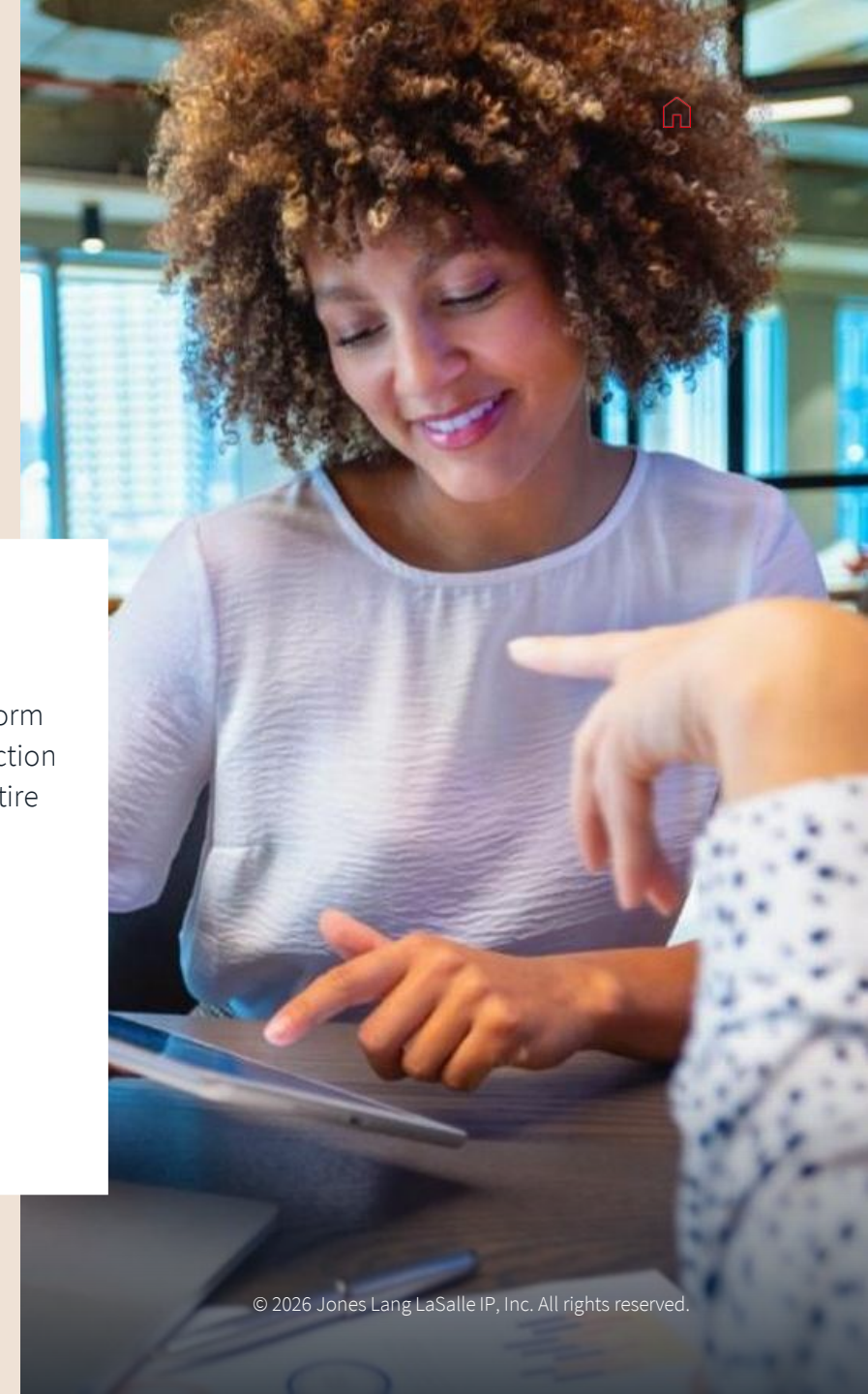
- 40 Integrated resource management:
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- 42 Sustainable mobility integration:
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Digital talent ecosystem: Technology-driven HR processes

Technology-driven HR processes revolutionize traditional human resources through systematic integration of AI, data analytics, and intelligent platforms. These digital ecosystems transform the entire employee cycle – from AI-supported recruiting and predictive assessment to personalized training and data-driven career development. Modern learning platforms enable continuous, personalized upskilling with micro-credentials. These technologies accelerate competence building and strategic talent retention. The transformation addresses technological disruption, with continuous learning as a critical factor. Gamification, VR, and AI coaching enhance engagement and outcomes.

Case study

SAP SuccessFactors' digital talent ecosystem (Global coverage): This platform transforms HR from an administrative function into a strategic partner. By unifying the entire employee lifecycle on a single data-driven platform, it uses AI to proactively suggest personalized learning paths and support management in career development, strategically building the workforce of the future.



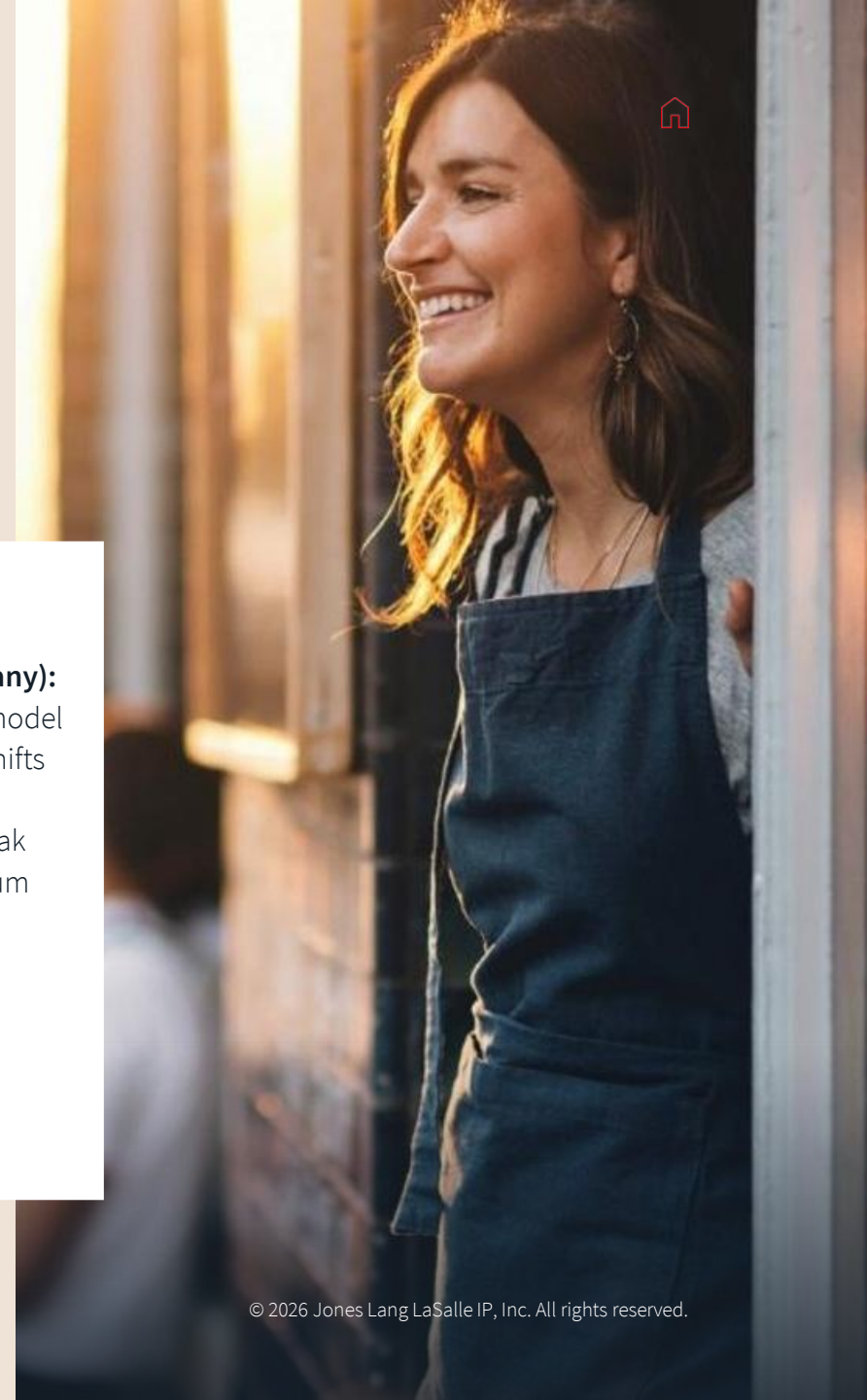
Flexible work architecture: Adaptive work models

Adaptive work models transform traditional employment structures into dynamic, customizable work experiences. These combine spatial (remote/hybrid), temporal (flex-time, working time accounts), and contractual flexibility (project-based, part-time) in unified platforms. Tech infrastructure includes cloud collaboration tools, results-focused performance measurement, and digital project marketplaces. Adaptive work architecture enables work-life integration and broadens the talent pool. Leadership shifts to focus on results, trust, and asynchronous communications. Flexibility has become the main differentiator for employer attractiveness and long-term talent retention.

Case study

Internal flex-pools in hospitality (Germany):

Powered by apps like “gastromatic”, this model allows a fluid workforce to self-schedule shifts across different branches. It provides the operator with dynamic staffing to meet peak demand while offering employees maximum autonomy over their work-life balance.



Multi-generational workforce design: Age diversity as a success factor

Age diversity as a success factor develops into a strategic advantage in demographically changing labor markets. These concepts create inclusive environments that actively address and combine each generation's strengths – from Baby Boomers to Gen Z. Approaches include bidirectional mentoring, mixed project teams, and age-appropriate work design. Tech and management enable differentiated communication, flexible careers, and generation-specific benefits. Especially in knowledge economies, these concepts boost knowledge transfer, innovation, resilience, and sustainable competitiveness by integrating experienced and digital-native staff.

Case study

REWE's training tandems (Germany):

This program creates a powerful, bidirectional knowledge transfer on the job. An experienced employee mentors a young apprentice, who in turn introduces fresh digital skills and perspectives. The model strategically harnesses the complementary strengths of different generations to secure critical know-how.

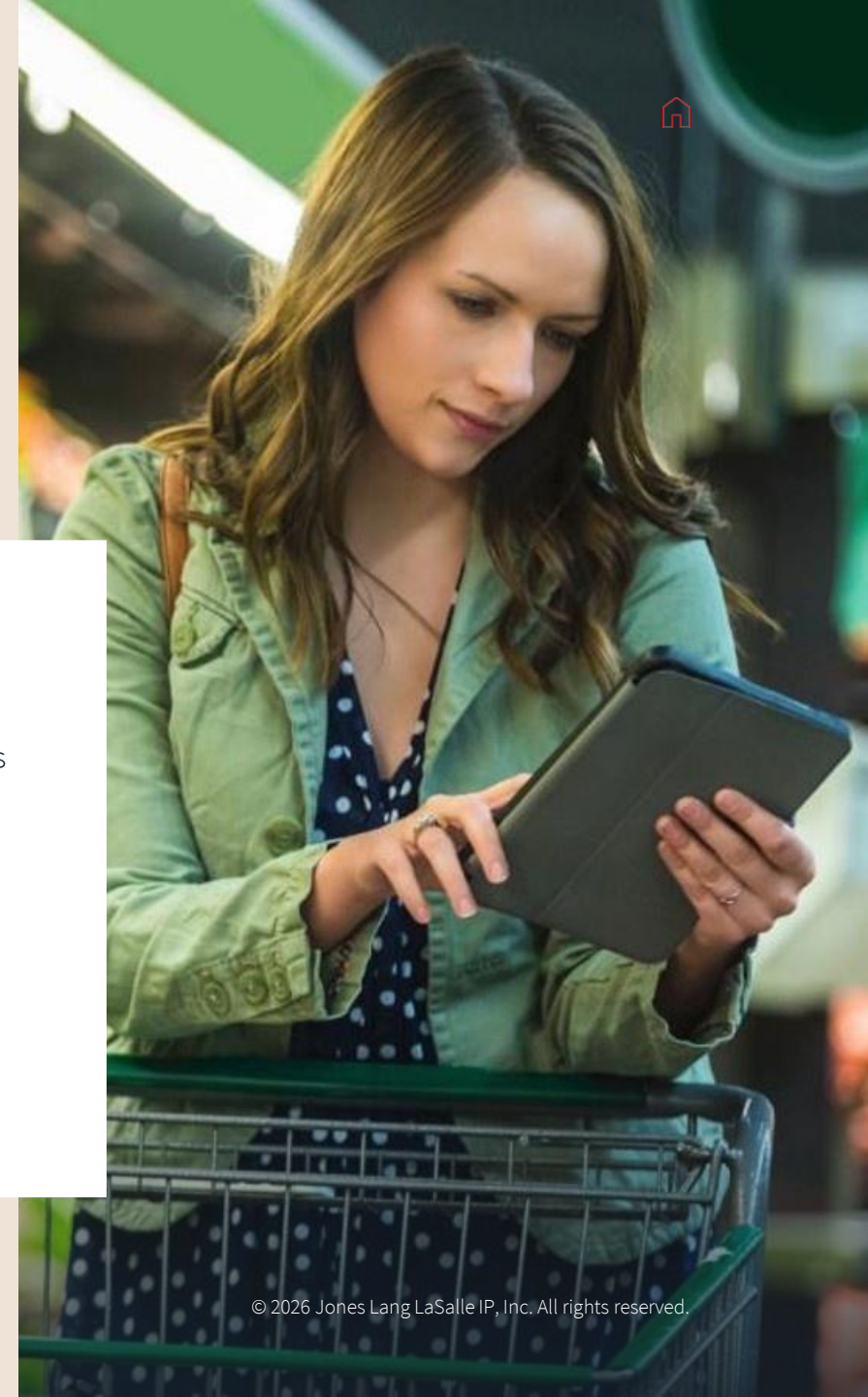


Supply chain transparency systems: Sustainable supply chain architecture

Sustainable supply chain architecture transforms procurement into fully transparent and responsible value networks. These systems combine blockchain, IoT sensors, and AI analytics for full traceability across the value chain. Tech allows real-time verification of sustainability, automated compliance checks, and dynamic risk analysis. Digital product passports and transparency interfaces make this data accessible to consumers/stakeholders. Systems address growing regulatory and consumer demands for ethical and ecological production and become essential factors for brand reputation.

Case study

f-trace's supply chain platform (various European countries): Used by retailers like ALDI and Kaufland, this platform offers customers full product traceability. By scanning a simple QR code, consumers can access a product's complete journey from farm to fork, providing a verifiable, technological answer to rising regulatory and consumer demands.

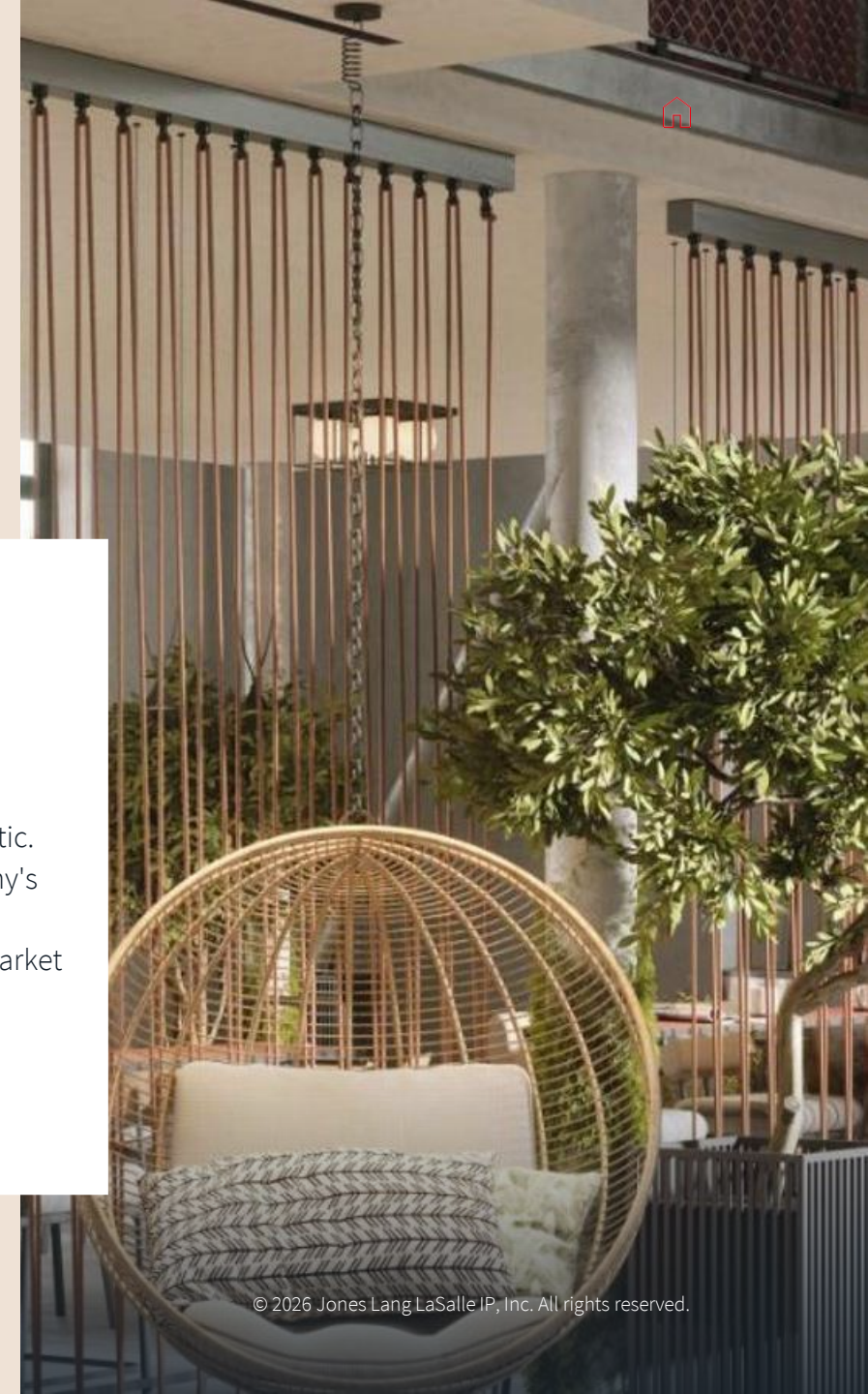


Circular economy systems: Regenerative material cycles

Regenerative material cycles revolutionize linear business models by integrating cradle-to-cradle approaches along the value chain. Systems turn waste into resources via recyclable design, modular architecture, and biodegradable materials. Sophisticated take-back and reprocessing keep materials in circulation. Digital product passports document each step. Resource dematerialization via smart packaging, product-as-a-service, and digital alternatives reduces total resource use. Tightened regulations make these models an economic necessity for future competitiveness – creating resilient businesses less exposed to raw material volatility.

Case study

Werner & Mertz's recyclate initiative (Germany): This initiative proves the industrial-scale viability of a closed-loop system, having produced over a billion bottles from post-consumer recycled plastic. By sourcing material directly from Germany's national collection system for household packaging waste, it creates a true mass-market circular economy.





☆ Sustainable future | Green building | Trend #40

Integrated resource management: Building efficiency systems

Building efficiency systems turn traditional properties into highly efficient, resource-intelligent organisms via holistic energy, water, and material management. They combine IoT sensors, predictive analytics, and automation into self-optimizing building ecosystems. Infrastructure allows dynamic load adjustment based on usage and environmental conditions. On-site energy (PV, geothermal, wind) integrates with storage and water systems for full closed cycles. These systems drive long-term value, lower operating costs, and meet strict ESG requirements.

Case study

EDGE Grand Central's building management (Germany): Acting as a service-oriented platform, this Berlin office is equipped with a digital backbone of thousands of IoT sensors. This enables the building to self-optimize the flow of light, climate, and resources based on real-time occupancy, maximizing efficiency and sustainably increasing asset value.

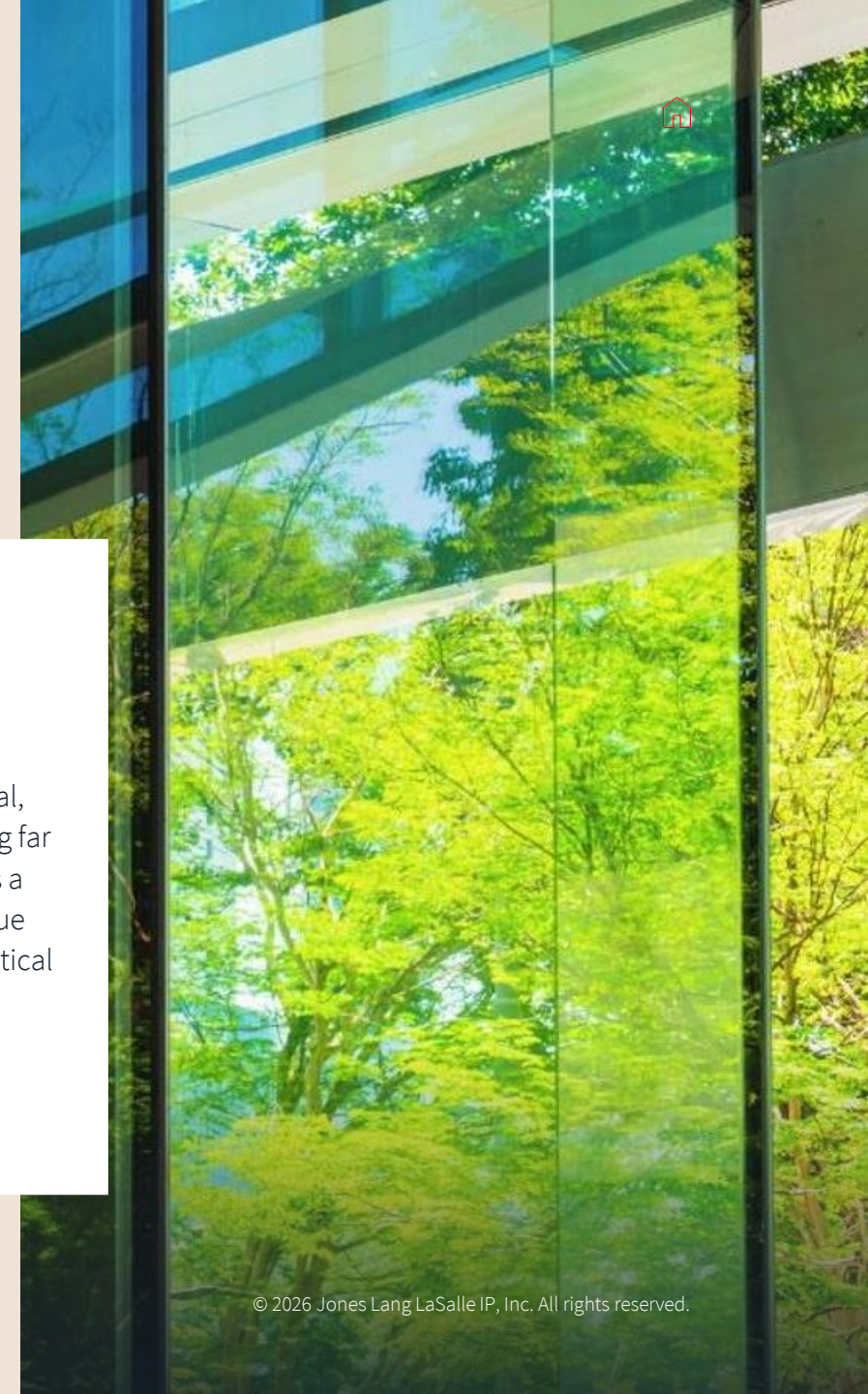


Green building certification: Sustainability rating systems

Sustainability rating systems establish standardized frameworks for holistic sustainable property development/operations. These multidimensional systems (e.g., LEED, BREEAM, DGNB, WELL) include environmental, economic, and social criteria. Building Information Modeling (BIM) integration and automation ease documentation and ongoing monitoring. The systems extend beyond efficiency to health, biodiversity, and social integration. Certifications create transparency and comparability for investors and users and are becoming key differentiators and value drivers in an ESG-driven market.

Case study

The DGNB sustainability certification (Germany): This system stands apart by implementing a holistic, lifecycle-based assessment that equally weights ecological, economic, and sociocultural quality. Going far beyond mere energy efficiency, it provides a transparent benchmark for a property's true sustainability performance, making it a critical tool for ESG risk management.



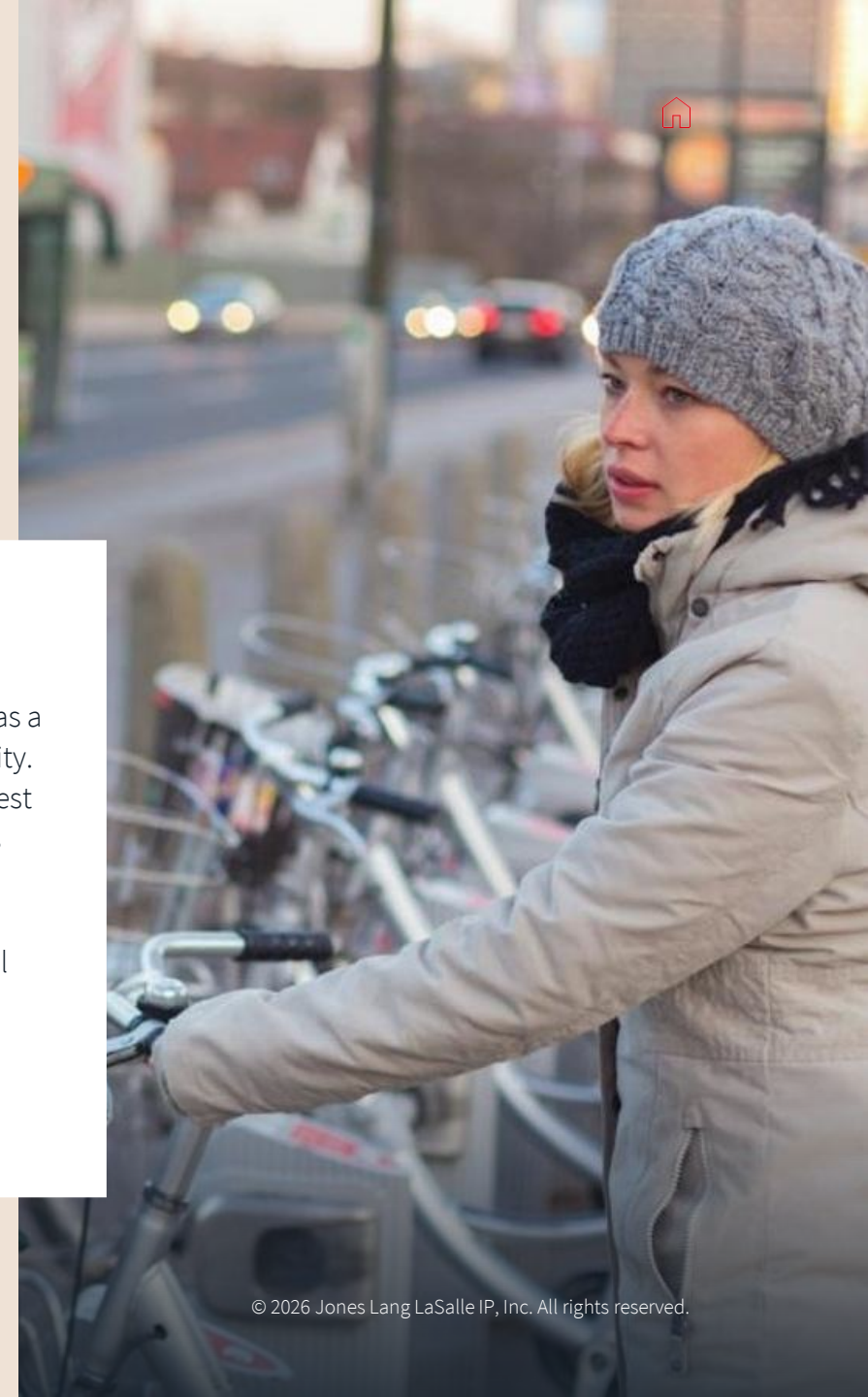
Sustainable mobility integration: Ecological mobility concepts

Ecological mobility concepts transform traditional locations by integrating sustainable mobility into urban development and real estate. Approaches include infrastructure for active mobility, e-mobility, and direct links to public transit. The physical/digital ecosystem features charging, sharing, and smart controls, as well as mobility-as-a-service and autonomous shuttles. These integrated ecosystems address emission regulations and urban density and become key differentiators for location attractiveness and long-term value development.

Case study

EUREF-Campus' integrated mobility

(Germany): This Berlin campus operates as a real-world laboratory for integrated mobility. It weaves together one of Germany's largest smart-charging networks, an autonomous shuttle, and diverse sharing services into a cohesive, largely car-free ecosystem that actively emancipates itself from traditional development models.



Urban resource mining: Local material cycles

Urban resource mining turns waste streams into valuable secondary raw material sources – systematically recovering, processing, and reintegrating materials from the urban environment. This includes decentralized sorting, recycling, modular material banks, and return-to-retail. Digital material tracking and blockchain documentation ensure full transparency. These systems address resource scarcity and waste regulations, making cities regenerative raw material sources for the future economy.

Case study

The UMAR research unit (Switzerland):

This building is the physical manifestation of the urban mining principle (UMAR = Urban Mining And Recycling). Designed for complete disassembly, every component is screwed or clamped – not glued – and documented in a digital material pass. The approach redefines the building as a temporary material bank rather than future waste.

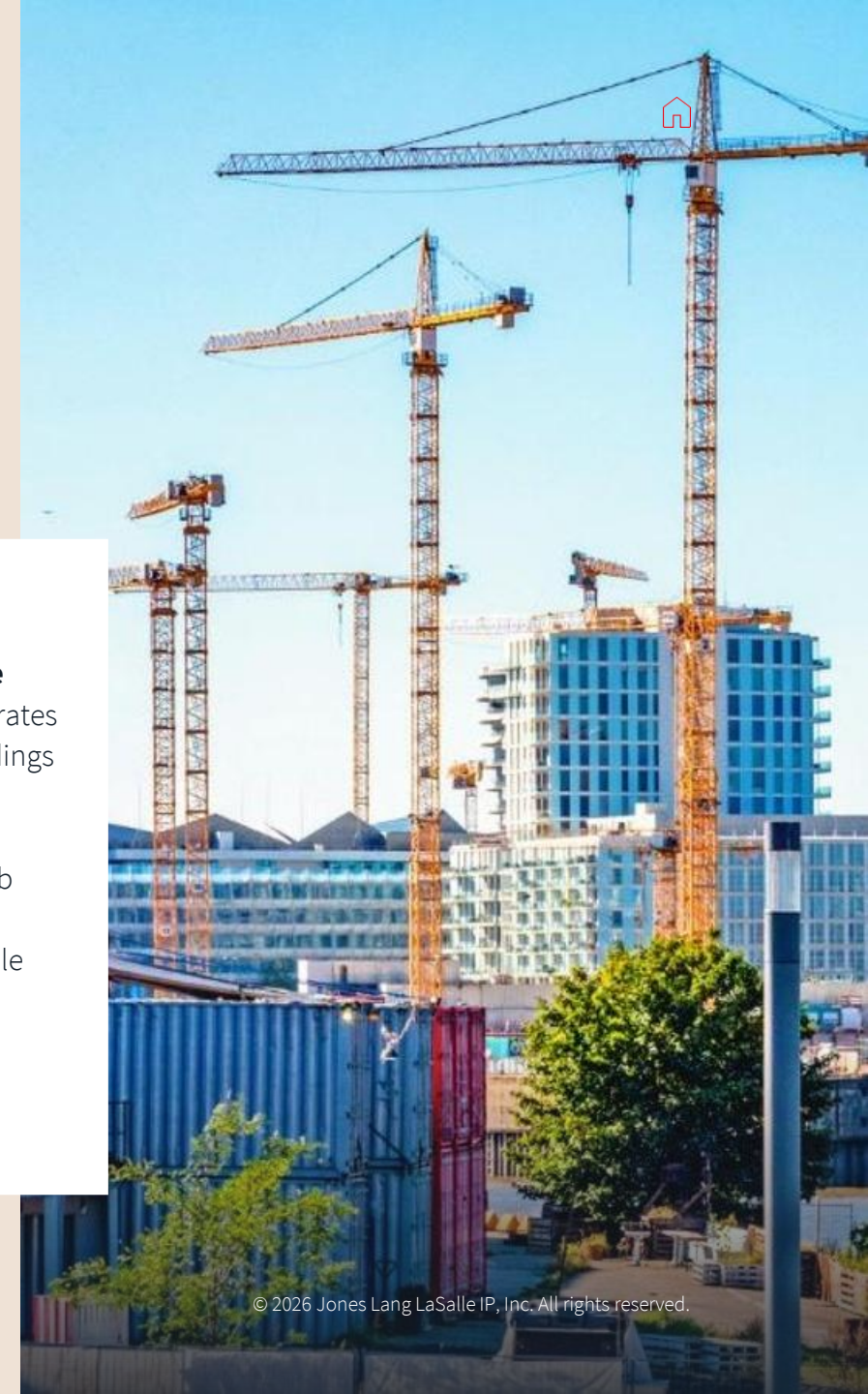


Climate-adaptive architecture: Resilience against extreme weather

Climate-adaptive architecture revolutionizes real estate by systematically integrating preventive and reactive mechanisms against extreme weather and chronic climate stress. Solutions include heat-resistant envelopes, dynamic shading, sponge city features, flood protection, and redundant utilities for operational continuity. Climate simulation and adaptive design anticipate and address risks in advance, becoming critical to long-term property value in a world of rising climate threats.

Case study

Hamburg's HafenCity climate resilience (Germany): This district masterfully integrates climate resilience by constructing all buildings on flood-proof plinths, a modern take on historic terp mounds. Public promenades remain at a lower level, designed to absorb storm surges controllably, thus protecting assets while maintaining vibrant, accessible urban spaces.





Recommendations for tenants, landlords, and developers from sustainable future

Retailers and restaurateurs

- Implement flexible and hybrid work models supported by digital collaboration tools to attract and retain top talent
- Establish a transparent supply chain using traceability technologies (e.g., blockchain, digital passports) to meet regulatory and consumer demands
- Create a circular business model by designing products for recyclability and establishing take-back or resale programs
- Invest in diversity and knowledge transfer by creating multi-generational teams and bidirectional mentoring programs

Landlords/Property owners

- Invest in building efficiency systems (e.g., IoT sensors, smart controls) to optimize resource consumption and reduce operating costs
- Achieve high-level green building certifications (LEED, BREEAM, DGNB) to increase asset value and attract ESG-focused tenants
- Conduct climate risk assessments across the portfolio and implement retrofits (e.g., flood barriers, cooling systems) to enhance resilience
- Upgrade properties with sustainable mobility infrastructure, including EV charging stations, secure bike storage, and micromobility hubs

Developers

- Design for climate resilience from day one, integrating features like green roofs, passive cooling, and flood protection into the initial concept
- Embrace "design for disassembly" principles, creating a digital material pass for all components to enable future urban mining
- Make a high-level green building certification a primary project goal from the outset to guide all design and construction decisions
- Integrate holistic building efficiency and on-site renewable energy into the base design rather than treating them as add-ons



A roadmap for retailers, landlords, and developers

An actionable timeline mapping all 44 retail forces to help you prioritize strategic investments and align stakeholder actions across short, medium, and long-term horizons

Short-term



Retailers and restaurateurs

- Smart inventory intelligence (#2)
- Unified commerce experience (#5)
- Social retail environments (#7)
- Frictionless transactions (#8)
- Transaction intelligence (#9)
- Smart operating efficiency (#11)
- Transformative spatial concepts (#13)
- Algorithmic management (#14)
- Subscription models (#15)
- Direct consumer relationships (#17)
- Flexible retail spaces (#18)
- Retail space as a service (#21)
- Adaptive dining concepts (#31)

Landlords/Property owners

- Unified commerce experience (#5)
- Transaction intelligence (#9)
- Adaptive business control (#12)
- Transformative spatial concepts (#13)
- Algorithmic management (#14)
- Subscription models (#15)
- Flexible retail spaces (#18)
- Immersive retail environments (#19)
- Retail space as a service (#21)
- Flexible work architecture (#36)
- Green building certification (#41)

Developers

- Social retail environments (#7)
- Adaptive business control (#12)
- Transformative spatial concepts (#13)
- Algorithmic management (#14)
- Immersive retail environments (#19)
- Flexible work architecture (#36)
- Green building certification (#41)
- Climate-adaptive architecture (#44)



A roadmap for retailers, landlords, and developers

An actionable timeline mapping all 44 retail forces to help you prioritize strategic investments and align stakeholder actions across short, medium, and long-term horizons

Medium-term



Retailers and restaurateurs

- AI-powered stores (#1)
- Robotics integration (#3)
- Data sovereignty (#4)
- Tailored customer experiences (#6)
- Payment Security Architecture (#10)
- Neighborhood retail concepts (#24)
- Immersive food experience (#27)
- Culinary automation (#32)
- Intelligent kitchen systems (#33)
- Virtual restaurant ecosystems (#34)
- Digital talent ecosystem (#35)
- Multi-generational workforce design (#3)
- Supply chain transparency systems (#38)

Landlords/Property owners

- Data sovereignty (#4)
- Collaborative consumption platforms (#16)
- Digital twin technology (#26)
- Food community hubs (#29)
- Digital talent ecosystem (#35)
- Integrated resource management (#40)
- Sustainable mobility integration (#42)

Developers

- Collaborative consumption platforms (#16)
- Mixed-use retail concepts (#20)
- Urban mixed-use development (#23)
- Neighborhood retail concepts (#24)
- Digital twin technology (#26)
- Food community hubs (#29)
- Digital talent ecosystem (#35)
- Integrated resource management (#40)
- Sustainable mobility integration (#42)



A roadmap for retailers, landlords, and developers

An actionable timeline mapping all 44 retail forces to help you prioritize strategic investments and align stakeholder actions across short, medium, and long-term horizons

Long-term



Retailers and restaurateurs

- Biophilic design (#22)
- Retail mobility solutions (#25)
- Regional food systems (#28)
- Health-optimized nutrition (#30)

Landlords/Property owners

- Biophilic design (#22)
- Circular economy systems (#39)
- Urban resource mining (#43)

Developers

- Biophilic design (#22)
- Circular economy systems (#39)
- Urban resource mining (#43)

Navigating the shift from transactional spaces to relational ecosystems

The future of retail is unfolding as a dynamic and exciting reimagination, signaling a new era of opportunity and innovation. The trends before us paint a clear picture of a landscape where the digital realm is seamlessly woven into the physical world, creating a single, frictionless customer journey. Physical spaces are evolving from transactional points into vibrant destinations for community, experience, and brand storytelling. This transformation is driven by a fundamental shift from purely transactional models to relationship-driven ecosystems, all underpinned by a new, non-negotiable foundation of sustainability, grounded in resilience and circularity.

Success in this new era is not for spectators. It demands active participation and unprecedented collaboration between retailers, landlords, and developers. It requires a willingness to embrace new technologies, adopt flexible business models, and invest in long-term value over short-term gains. The challenge is to move in concert, creating environments that are intelligent, engaging, and responsible. Those who rise to this challenge will not only thrive in the years to come but will be the architects of a more prosperous and connected future for commerce and community.





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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.

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