



THE PLACE REPORT

*Top ten global trends redefining how
we live, work, shop, stay and play*

2013

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ABOUT PLACE ASSOCIATES

Place Associates is a property consultancy that positions, markets and activates places.

Working with property owners, operators, city councils and retail precincts, we create strategies that increase customer visitation, loyalty and spend.

Our approach helps retail, commercial and hospitality destinations measure the impact of customer experience investment, command a price premium and achieve financial returns above the market.

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LOCATIONS

Sydney

+61 2 9332 4781
david.grant@placeassociates.com.au

Melbourne

+61 3 9428 2741
jeanette.lambert@placeassociates.com.au

Singapore

+65 6534 9366
robbie.robertson@placeassociates.com.au

Los Angeles

+1 (213) 255 -5457
sonja.kallstrom@placeassociates.com.au



Additionally Place has representatives based permanently in London, Paris and New York.

ABOUT THIS PUBLICATION

We have gathered the most progressive destination, property and travel marketing examples from the past 12 months and used them to determine the most influential trends defining how we live, work, eat, shop, stay and play.

Don't have time to read this report, or want to find out more about a specific trend? We are happy to come to you and present or discuss the report in person. Drop us an email, give us a call or follow us online.

Please share this document with your colleagues – all information contained within is published under a Creative Commons licence. Refer to the Acknowledgments page for more details.

The Place Trends Report is published annually in February, with preview presentations held in September of each year. More frequent updates are made to the Trends section of our website **placeassociates.com.au**

This report was compiled in February 2013 and all information is accurate at the time of publication. Every effort has been made to identify individual copyright holders of all imagery used in this publication. However, should any copyright holder not be acknowledged, please notify us and we will include the details in future issues.

Special thanks to our panel of contributing editors:

Brendan Blakeley
Associate Director
Elton Consulting
elton.com.au

Andrew Paterson
Development Manager
TOGA Group
toga.com.au

Lachlan Cameron
Development Director
The GPT Group
gpt.com.au

Danielle Pinkerton
Associate Director
Urbis
urbis.com.au

Dr Stuart Candy
Australasia Foresight
and Innovation Leader
Arup Australasia
arup.com

Simon Trude
Director
2d3d
2d3dcreative.com

Philip Hannaford
Director
HASELL
hassellstudio.com

Richard Wykes
Development Manager
Catylis Properties
catylisproperties.com

Narelle Hutchins
National Asset
Design Manager
AMP Capital Investors
ampcapital.com.au

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01

CRITICAL MASS

*Using art, architecture and brands
as catalysts for rapid transformation
in former industrial sites*

1 CRITICAL MASS OVERVIEW

As the use of space and infrastructure needs of cities are changing, large-scale industrial sites, which have fallen into disuse, continue to be redeveloped into leisure, retail and commercial destinations.

While the sites may be known to residents, until recently they have been off limits to the public, which means people have no pre-existing visitation patterns or expectations about the area as a retail or leisure destination.

The short-term, high-level investment creates an immediate need to attract a critical mass of visitors. The number of visitors that would activate a mid-sized development leaves large-scale sites feeling deserted and lacklustre.

The risk is of premature impressions that the precinct is failing to reach occupancy and sales targets even before it has a chance to demonstrate its value.

The process of developing inner-urban industrial sites is becoming more sophisticated and site specific. The following global examples illustrate the range and impact of four particular drivers:

1. Creative industries
2. Historic preservation
3. Architecture
4. Brand

Clockwise from top: Twitter feed printed onto vinyl hoarding, South Street Seaport faux historic facade and Urban Outfitters' lobby at Navy Yard

Benefit for destinations

Rapidly accelerates visitation rates and advocacy for industrial redevelopments

Benefit for visitors

Diverse, site-specific experiences in new inner-urban precincts



1 CRITICAL MASS BROOKLYN BRIDGE PARK

New York

In New York, two waterfront redevelopment projects have each taken unique approaches to appeal to their respective visitor segments.



Along the shore of the East River, Brooklyn Bridge Park is a mixed-use sustainable waterfront site stretching two kilometres. A not-for-profit organisation manages the planning, construction, maintenance and operations.

The **Brooklyn Bridge Park Corporation** focused on art and digital innovation to win the hearts of highly creative local residents while attracting a wide range of visitors through family-friendly leisure and retail options. It is currently reviewing proposals to redevelop the Empire Stores, a complex of seven historic warehouses.



1 CRITICAL MASS DUMBO

New York

To promote events, retail and food offers, the **DUMBO Improvement District** – a partnership of DUMBO's property owners, merchants, businesses and cultural organisations – operates a website and sponsors events and initiatives, such as being the first neighbourhood in New York to offer free Wi-Fi in the streets and public spaces. The DUMBO Improvement District is as progressive as it is inclusive, stating that everyone who works, lives or owns a business in the area is already a member.



THE FIRST NEIGHBOURHOOD IN NEW YORK TO OFFER FREE WI-FI IN THE STREETS AND PUBLIC SPACES



Left: Solar-powered recharge stations at a growers' market
Above: The DUMBO Improvement District information desk at a free live afternoon concert under the Brooklyn Bridge

1 CRITICAL MASS SOUTH STREET SEAPORT

New York

Directly across the river, adjacent to the conservative Wall Street financial district, is South Street Seaport.

This 3.5-acre retail and dining precinct juxtaposes popular national retailers with a charming historic setting, reminiscent of the early nineteenth-century port trading. The majority of the buildings, along with a large multi-level shopping centre on nearby Pier 17, are owned by the Howard Hughes Corporation, which has recently received approval to begin a major three-year redevelopment plan. Flooding and structural damage from Hurricane Sandy has delayed construction and left retailers wondering if they will be able to re-attract fickle shoppers after stores were closed for weeks.



Far left: Suits mix with tourists in this pedestrian-only shopping and dining precinct. **Left:** Distressed graphics match the lampposts and other playful historic references.

1 CRITICAL MASS SOUTH STREET SEAPORT

New York

Dilapidated loading docks and entrances were transformed into understated facades that suggest historic preservation, rather than fanciful adaptation.



Pre-development shopfront



Post-development restaurant exterior

1 CRITICAL MASS HAFENCITY

Hamburg



HafenCity is Europe's largest inner-city waterfront development project.

The former port area, located in the middle of Hamburg, is being redeveloped into a dense, multi-layered residential, commercial and retail district. Over 40,000 people currently work in HafenCity, with an additional 40,000 visiting daily for shopping or dining. Swiss architects **Herzog and de Meuron** have been commissioned to create the stunning Elbe Philharmonic Hall. To avoid creating a limited-use example of 'starchitecture', the building includes an on-site hotel, exclusive residential apartments and an elevated public viewing plaza.



Far left: Activations and cultural events encourage the use of public spaces.

Above: Aerial view showing the Elbe Philharmonic Hall under construction

1 CRITICAL MASS NAVY YARD

Philadelphia



Urban Outfitters has been the catalyst for transforming a decommissioned shipbuilding yard into a dynamic office park with more than 120 tenants.

In 2006, retailer **Urban Outfitters** purchased four buildings and leased a fifth from the City of Philadelphia for one dollar. It then invested \$140 million over two years to renovate and fit out the five buildings to house 600 staff.

The adaptive reuse headquarters is a perfect expression of the brand, which has become synonymous with placing



stores in idiosyncratic locations such as former car dealerships, factories, churches and mansions. Founder Dick Hayne credits the inspiring post-industrial location as a key draw for top creative talent, saying: “The campus has sparked recruitment and improved creative collaboration, which ultimately impacts our bottom line”.

Since relocating to the new site, Urban Outfitters has doubled its workforce, posted record sales increases, reduced staff turnover and shortened hiring times for senior positions.

Above & left: Urban Outfitters contrasts industrial materials with its signature vintage-inspired fabrics.

1 CRITICAL MASS NAVY YARD



URBAN OUTFITTERS' PIONEERING RELOCATION WAS THE CATALYST FOR THE MIGRATION OF 120 OTHER COMPANIES.

The latest and highest profile tenant is the pharmaceutical giant [GlaxoSmithKline](#), which signed a 15.5-year lease for a new, \$81 million commercial building.

The opening of GlaxoSmithKline's headquarters in February of this year marks a significant milestone for Navy Yard: the 10,000th job at the site – the exact number of jobs that were lost when the navy closed the facility in the late 1990s.

1 CRITICAL MASS GLOBAL EXAMPLES

Online



The following list demonstrates the application of this trend globally. Some references have been cited in this section while others have not.

The names and icons in this list are embedded with hyperlinks to the company websites and related social media content.

Brooklyn Bridge Park New York				
District 798 Beijing				
DUMBO Improvement District New York				
Eastern Docklands Amsterdam				
Hafen City Hamburg				
Mission Bay San Francisco				
Navy Yard Philadelphia				
Pier 70 San Francisco				
South Street Seaport New York				
The Yards Washington DC				
Zidell Yards Portland				

02

DELIBERATE DENSITY

Solutions that improve the use of retail and commercial spaces in high-density urban areas



2 DELIBERATE DENSITY OVERVIEW

Multiple studies over the past year have confirmed that walkability has a measurable impact on retail sales and property values.

In Australia, the United States and Europe, local governments, community organisations and businesses are actively working to increase the density of urban areas by improving public spaces, reducing or eliminating car traffic and encouraging the development of smaller format retail, housing and accommodation.

The Brookings Institution used a measurement tool called the Irvine Minnesota Inventory of urban design dimensions

to create a five-tiered scale of walkability, from completely non-walkable to mixed-use, dense and amenity-rich neighbourhoods where people may not need a car at all. For each step up this walkability ladder, a retailer increases sales by 80 per cent and the value of office space goes up \$8.88 per square foot.

By evaluating the financial impact of environmental design elements, it's possible to forecast the potential returns and allocate funds accordingly.

A similar approach is being used by the **Australian Centre for Retail Studies** to assess and compare the impact of design elements on customer experience within shopping centres and retail precincts.

Clockwise from top left: The pedestrian-only Third Street Promenade in Santa Monica, Japan Rail Skyfarm in Kyoto and a lane of traffic turned into public seating in New York

Benefit for destinations: Has been linked to increased retail sales and land value

Benefit for visitors: Lowers barriers to visitation and makes precincts more convenient, accessible and social



2 DELIBERATE DENSITY CITY COUNCIL INITIATIVES

Paris & New York



The increased emphasis on walking and cycling infrastructure has been dramatic in major cities around the world because of the impact it is believed to have on national and regional economic performance.

In Paris, a city where 80 per cent of residents don't own cars, the city government has been installing traffic lights along the banks of the Seine to slow traffic and increase accessibility to waterfront public space. For a month each summer, it closes off the Pompidou Expressway to create a mini inner-city holiday resort, or **Plage**, with sandy beaches, deckchairs, sports, dance lessons and concerts.

Similarly, New York introduced **Summer Streets**, a series of three consecutive Saturdays when the Department of Transportation shuts down more than ten kilometres of roads to encourage cycling, walking and outdoor recreation. People can hire and ride bicycles, rock climb and zip line through the city, all free of charge.



The initiative was inspired by similar events including Bogotá Ciclovía and Jakarta's Car-Free Days, but the major difference in New York was the bold sponsorship by outdoor retailer REI, which offered rockclimbing, bike repair and product testing at rest stations.



Above: Paris Plages
Right: REI rest stop in New York

2 DELIBERATE DENSITY CITYTARGET

United States

Big-box retailers are changing their growth strategies to follow the density trend, moving into city locations they wouldn't have previously considered and closing suburban locations that are underperforming.

This is a reversal of the growth strategies that the same companies thrived on a decade ago, and involves reformatting the suburban big-box retail experience that they helped define to fit the operational and spatial constraints of inner-urban retail sites.

Above: CityTarget is the new retail offer that Target rolled out across three cities in the US in 2012.



THE STORE SIZE IS 30 PER CENT SMALLER BUT OFFERS A SIMILAR PRODUCT ASSORTMENT.

In addition to the increased cost of site-specific fit-outs necessary to move into existing buildings, there are also significant operational adjustments, such as smaller delivery trucks for city loading docks.

2 DELIBERATE DENSITY HOTELS

Kyoto & Amsterdam



Growth in the hotel industry is also focused on small-format, inner-city locations.

9h in Kyoto is a design-driven adaptation of the Japanese concept of a capsule hotel for commuting businesspeople. The name is an abbreviation of nine hours, the amount of time one needs to rest and prepare for the day.

9h is a low-cost option for travellers who want to stay in the heart of Kyoto. Guests sleep in compact individual pods and during their waking time have access to self-service shared facilities for preparing food, bathing and using the Internet.



In the Netherlands, the small-format hotel chain **citizenM** keeps costs low by offering space-efficient rooms complemented by generous shared ground-floor spaces to eat, relax and socialise.

The hotel chain, which is quickly spreading across Europe, has also reduced costs through streamlining construction and operations. The hotel rooms are prefabricated off site and guests check themselves in and serve their own food and drinks.



Middle & right: Self check-in and compact room configuration at citizenM

Far left: Navigational icons applied to the floor direct guests to self-service facilities.

2 DELIBERATE DENSITY MIAMI DESIGN DISTRICT

Miami



The Miami Design District is a high-profile development transforming a centrally located, underutilised low-income area into an aspirational fashion and design destination.

Led by Craig Robins, president of real estate development company **Dacra**, the \$312 million project includes renovations on existing buildings and 540,000 square feet of new construction. Dacra's development plan preserves the district's character and increases density by closing down four blocks to car traffic, creating plazas for dining, entertainment, accommodation and retail. Pieces from Craig Robins' extensive private art collection are rotated and put on display as public art.



The precinct has already attracted more than 20 luxury retail tenants, including the Louis Vuitton flagship store, shifting the core of Miami's luxury market away from the prestigious Bal Harbour Shops in North Beach.

Dacra is partnering with L Real Estate, an investment fund backed by luxury conglomerate Louis Vuitton Moët Hennessy, which is moving its Miami office and flagship store to the area along with 11 of the company's other brands.

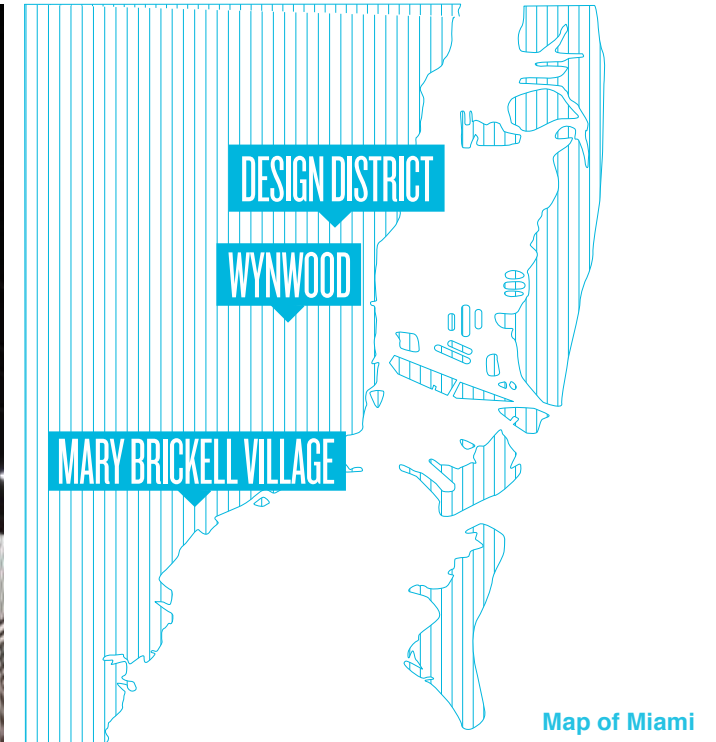
Even before the paint dries on the new stores, Dacra has been creating a strong identity for the precinct to attract visitors, retailers and potential residents. There is a monthly gallery night featuring talks, performances and late-night shopping.

PRE-OPENING EVENTS ARE CAPTURED AND SHARED THROUGH ONLINE VIDEOS AND A PRECINCT WEBSITE.

2 DELIBERATE DENSITY MIAMI

Miami


In Miami, the simultaneous development of three very distinct precincts is fundamentally changing where residents live, work and play in the city.



All three precincts have their own distinct micro-culture, attracting different retailers, restaurants and visitation patterns.

The exclusive Miami Design District is complemented by the independent art and creative culture in Wynwood to the east and the retail, commercial and residential Mary Brickell corridor to the south.

The three areas are collectively contributing to the resurgence of the inner-city centre, a major change from the decades-long focus on living, shopping and dining on the waterfront.

2 DELIBERATE DENSITY GLOBAL EXAMPLES

Online



The following list demonstrates the application of this trend globally: Some references have been cited in this section while others have not.

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9h Kyoto



citizenM Netherlands



Mary Brickell Village Miami



Miami Design District Miami



Paris Plages Paris



Summer Streets New York



03

CROWD-FUNDED URBANISM

*Tapping into the public's enthusiasm, money
and talent for improving shared spaces*



3 CROWD-FUNDED URBANISM OVERVIEW

Using crowd funding for property development reduces risk by gauging market demand at a preliminary stage, generating early adopter engagement and advocacy and more accessible cost expectations.

A crowd-funded approach keeps projects grounded and practical, often saving property owners money and time while encouraging participation from people who are forward thinking and socially connected.

An unexpected benefit is that the reduced budgets often force the implementation of low-risk, temporary installations that function as prototypes for testing and adapting before a permanent solution is installed.

More sophisticated, investment-based crowd funding is emerging for commercial developments. This approach divides buildings into low-cost shares, making them accessible to people who might not normally consider investing in real estate.

A clear advantage of this approach is that it distributes risk across a broad group of investors, who collectively invest a lot but individually don't have much influence.

Clockwise from top:
The Walls Have Ears, CoSign retail signage initiative and UP: San Francisco

Benefit for destinations
Gauge market demand and generate engagement at an early stage

Benefit for visitors
Opportunity to be involved in the design and use of space



3 CROWD-FUNDED URBANISM ONLINE PLATFORMS

Rotterdam



Crowd funding started as a platform for product and video game development and is being used to seek funding for developments.

Over the past three years, the website Kickstarter has raised in excess of \$323 million for more than 10,000 projects. People donate money in exchange for access to early releases of products and other perks. Most projects are less than \$10,000 each and there are more that fail to meet their funding goals than those that succeed. When used in property, the funding targets are much higher and the returns are more enticing. The benefits for the project stakeholders go far beyond raising capital.



I Make Rotterdam is an initiative of the International Architecture Biennale Rotterdam that raised €440,000 to build a temporary pedestrian bridge to test whether increasing pedestrian accessibility into an emerging mixed-use precinct would increase visitation and accelerate commercial investment.

The money was raised entirely through an online platform. People could choose to pay either 25, 125 or 1250 euros and in exchange could customise a visible component of the wooden pedestrian bridge built over an expressway.

Above: Detail of the donation panels

Left: Aerial view of finished bridge

3 CROWD-FUNDED URBANISM COMMERCIAL PROPERTY

Washington, DC & Bogotá

Fundrise, based in Washington, DC, is a new business model for raising money to redevelop shopfronts and incubate local businesses.



Within a week, its first public offering raised \$100,000. The company is projecting returns of 8.4 per cent from rental income and a 30 per cent share of profits for investors. The advantage for the two founders of **Fundrise** in soliciting investment from the community rather than traditional equity investors is that the community backers understand the area and what will likely work there. They have a vested interest in the success of the development and are motivated by the potential to raise the profile of the entire neighbourhood.

CROWD-FUNDED DEVELOPMENT IS EMERGING AS A HYBRID BETWEEN INVESTING IN SHARES AND BUYING REAL ESTATE.



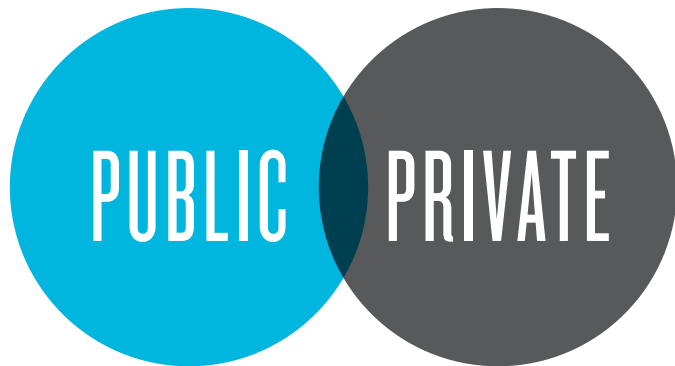
In Bogotá, an ambitious execution of the crowd-funding approach was used to fund the construction of the city's tallest skyscraper. **BD Bacatá** cost 4 million dollars, which was contributed by 300 individual Colombians. For Latin American investors, buying real estate is perceived as a more stable investment than regionally traded shares. This model is potentially a less time-intensive alternative to purchasing apartments overseas.

Left: A local street-level brick building was the first collective investment by Fundrise.

Right: Columbia's tallest building was built through crowd funding.

3 CROWD-FUNDED URBANISM URBAN PROTOTYPING

San Francisco



URBAN PROTOTYPING IS A TERM USED TO DESCRIBE OPEN-SOURCE, LOW-COST METHODS OF DEVELOPING, DISTRIBUTING AND FUNDING CHANGES PEOPLE WANT TO SEE IN THEIR CITIES.

The first urban prototyping festival was held in Singapore in June 2012 to share potential projects with the public and get feedback before deciding whether to install them in public spaces.

The best known example of urban prototyping can be traced back to 2005 when creative agency Rebar in San Francisco challenged conventions of public space by converting a parking spot into a green space for two hours.

The idea caught on and turned into an annual global event called **Park(ing) Day**. The city of San Francisco went on to create the Pavement to Parks program.



The program is described as a lab for testing new ideas in the public realm. Residents and businesses can submit proposals for converting and maintaining parking spaces for public use. Applicants pay for construction, maintenance, permit fees of \$US1000 to \$1600, plus a \$221 annual fee. The city considers the loss of parking meter revenue to be offset by not having to invest in enhancing the streetscape.

The city is effectively getting people to cover the cost of materials, design and labour to make improvements, which benefit visitors and local businesses. There are now well over 100 parklets across San Francisco and parklet programs have been replicated in Chicago, Vancouver, Philadelphia, Boston and Adelaide.

Above & left: Prototypes on display at UP: San Francisco

3 CROWD-FUNDED URBANISM RETAIL REVITALISATION

Australia & USA



For property owners, giving individuals and community groups access to space and curatorial responsibility can be effective as a short-term solution for underutilised space.

Stockland Spaces is a new pilot initiative in partnership with Renew Australia that incubates creative projects in Stockland-owned properties in Victoria and New South Wales.

Renew Australia is a not-for-profit company that aims to catalyse economic development and creative industries. It works with communities and property owners to fill otherwise vacant storefronts, commercial and public buildings with short-term activations by artists, community groups and creative initiatives. It is based on a highly effective, low-cost local renewal scheme that activated more than 150 buildings in Newcastle.

Popup Hood is increasing the vibrancy, safety and liveability of Old Oakland by curating independent retailers to fill vacant or new commercial storefronts, highlighting emerging brands and retailers while attracting foot traffic to the area.

CoSign paired independent businesses with designers and sign fabricators to create original exterior signage that draws attention to the historic architecture, craftsmanship and walkability of the Northside precinct in Cincinnati.



Top left: CoSign
Right & bottom left:
Popup Hood

3 CROWD-FUNDED URBANISM GLOBAL EXAMPLES

Online



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BD Bacatá Bogotá				
CoSign Cincinnati				
Fundrise Washington, DC				
Grow It Local Sydney				 
I Make Rotterdam Rotterdam				
Platoon Berlin				
Popup Hood Oakland				
Stockland Spaces Australia				
The Walls Have Ears London				
UP:San Francisco				
Village Underground London				

04



DECONSTRUCTED RETAIL

Moving the boundaries that once separated how products and services are created and sold

4 DECONSTRUCTED RETAIL OVERVIEW

Retail is undergoing a paradigm shift and long-held constructs of how, where and by whom products and services are made and sold are unravelling. The emerging retail landscape is omnipresent and unstructured.

The shift is being aided by advances in mobile technology but the real driver of change is coming from consumers' expectations, values and purchasing behaviours.

Many shoppers are willing to pay a steep premium for products that express local tastes and values or change based on seasonality and availability. This level of customisation isn't possible with mass production because there is no economy of scale.

In many respects, shoppers' interest in new models of production and purchasing is benefiting operators, reducing overhead costs and introducing new, often less expensive options for solving complex operational challenges.

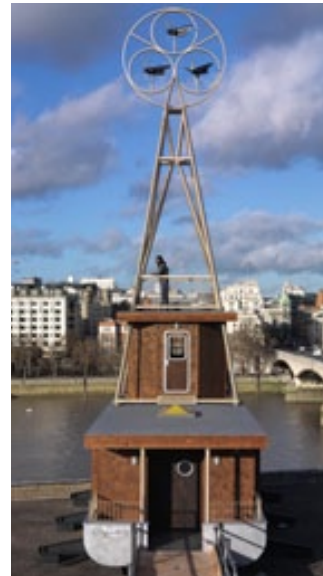
With the roles of producer, retailer and consumer becoming more fluid, building codes, zoning and the use of space are changing in response.

Informal, small-format, temporary and mobile retailing are providing tenants with low-risk alternatives to long-term inflexible leases. In response, property owners are introducing more adaptable leasing terms.

Clockwise from top left: A Room for London, an apartment offered through Airbnb, Bristol Pound notes by Banksy, Grow It Local dinner in Bronte

Benefit for destinations: Reduced risk and low start-up costs through flexible product and service offers

Benefit for visitors: Increased customisation, visibility and direct access to producers



4 DECONSTRUCTED RETAIL BARTER MARKETS

London & Mexico City

BARTER FOR YOUR LUNCH

Ridley's was a temporary restaurant built out of two levels of scaffolding on the site of the Ridley Road growers' market in London. The project challenged the traditional restaurant structure by making all participants an integral part of the meal production.

People could purchase three pounds' worth of any ingredient on the day's posted shopping list in exchange for lunch. Those ingredients were used to make that evening's dinner. Or shoppers could choose to pay fifteen pounds for a seat at dinner and receive a five-pound voucher to spend at the market. The money from dinner went to purchase produce for the following day's lunch, creating a system that continually drove trade to the growers' market.

THE PROJECT CHALLENGED THE TRADITIONAL RESTAURANT STRUCTURE BY MAKING ALL PARTICIPANTS AN INTEGRAL PART OF THE MEAL PRODUCTION.



GARBAGE FOR GROCERIES

Another example of an alternative exchange is the barter market set up by the Mexico City Department of Environment. For one day each month at “**Mercado de Trueque**”, people can trade recyclables for fresh, locally grown produce.

Shoppers receive “green points” in the form of notes based on the value of the things they bring to recycle. Participants can exchange the green point notes for produce at the adjoining growers' market, creating a micro-economy that promotes sustainability in two ways at once.

4 DECONSTRUCTED RETAIL ALTERNATIVE CURRENCY

Bristol



*A bold initiative
launched in Bristol
last year.*

Above: Promoting Bristol Pound at a weekend market
Right: Square credit card reader and iPad app

The city introduced an alternative currency called the **Bristol Pound**, which is valued one for one with the pound sterling but can only be used at independent traders. The goal is to keep more money circulating between Bristol-based businesses and give people an easy way to choose to spend money at local businesses more often. The notes were designed through a public competition, with the five-pound note featuring an illustration by the area's most famous street artist, Banksy.

Mobile wallets and app-based payment systems are still in early stages of adoption in Australia. A handful of retailers have introduced Paypal mobile app payments in store. This intermediate step is building demand and interest in the convenience of mobile payment technology. The transaction cost to the merchant is similar to credit cards but it provides cash-poor customers with an easy alternative that could one day replace needing to carry a wallet.



The integration of Near Field Communication chips into handsets will increase the use of mobile payments among customers because it will reduce the number of steps required to make a transaction.

4 DECONSTRUCTED RETAIL ONLINE PLATFORMS

Global



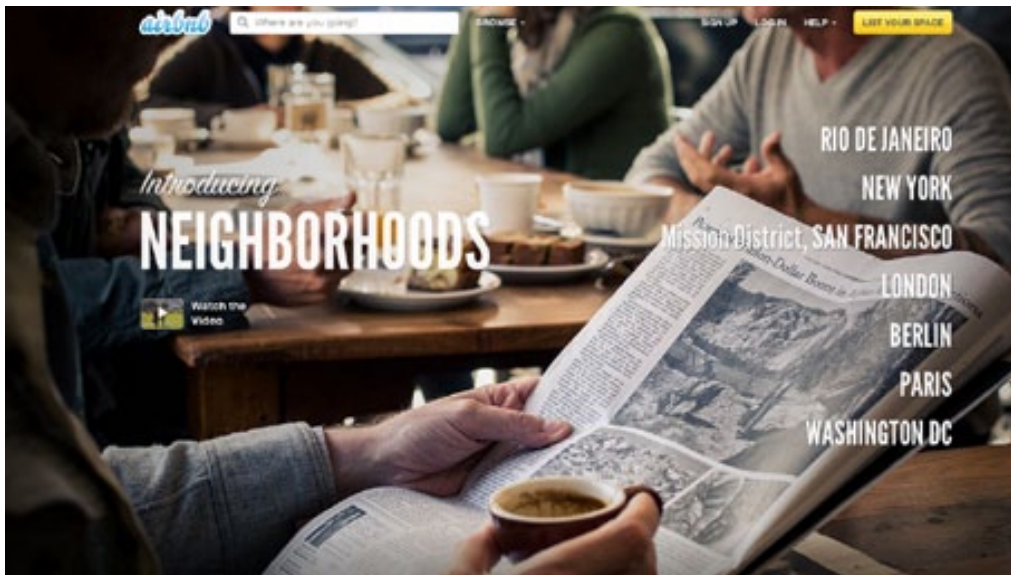
Alternative retail models are the foundation for a host of start-up companies based on collaborative consumption, where people buy access to accommodation, workspaces, transportation, household goods and services from other individuals.

One of the leading examples is the room-letting website, **Airbnb**, which started five years ago and is now valued at more than \$1.3 billion. Through the site, people can book sofas, spare rooms, entire apartments and even islands. Over the past year, site usage has increased by more than 400 per cent.

There are a host of similar sites that offer online booking of private spaces. For example, **One Fine Stay** is a platform for booking luxury accommodation with hotel-style services in London and New York, and **ShareDesk** is a peer-to-peer marketplace for co-working spaces. Online marketplaces are gaining interest among commercial and industrial property owners. In early 2013, GPT invested \$6 million in an online platform for sourcing temporary office accommodation and meeting rooms called **LiquidSpace**.

What attracts people to Airbnb initially is not difficult to pinpoint: the ease of navigation, high-quality photography and transparency of comments and reviews. What creates repeat visitation and advocacy among users is more subtle. It's the high user engagement and streamlined administration of payments that build trust, the key reason people might not otherwise feel comfortable staying in or sharing their homes with strangers.

In November 2012, the company went a step further and introduced an online travel guide called **Airbnb Neighborhoods**. Airbnb found that location was the number one deciding factor in where people chose to stay when booking accommodation through the site. Providing a better picture of the various parts of a city through the guide helps to contextualise the accommodation listed on the site. The content of the guide is a combination of commissioned photography and user comments, creating further overlap between the providers and consumers.



4 DECONSTRUCTED RETAIL EXCHANGING SPACE FOR CONTENT

London



A Room for London is a one year temporary installation where the guests receive an overnight stay in exchange for producing media content.

Perched above the Queen Elizabeth Hall, the boat-shaped structure was commissioned by Living Architecture, a social enterprise that invites world class architectural practices to create holiday homes that people can hire out to experience the best contemporary materials, design and technology firsthand. Alain de Botton is the organisation's Creative Director. Guests of A Room for London are invited to stay for one night and are asked in exchange to record and share their thoughts on art, life and London.



MORE THAN JUST A UNIQUE PLACE TO SPEND A NIGHT, THE BOAT IS A PLATFORM FOR EXPERIENCING AND EXPRESSING A UNIQUE PERSPECTIVE ON THE CITY WITH GUESTS CREATING CONTENT FOR AN ONLINE RADIO STATION, BLOG AND VIDEO SERIES.

4 DECONSTRUCTED RETAIL GLOBAL EXAMPLES

Online



The following list demonstrates the application of this trend globally. Some references have been cited in this section while others have not.

The names and icons in this list are embedded with hyperlinks to the company websites and related social media content.

Airbnb Neighborhoods San Francisco					
Bristol Pound Bristol					
Mercado de Trueque Mexico City					
Liquid Space Palo Alto					
One Fine Stay London					
Ridley's London					
Share Desk Vancouver					
Square San Francisco					
Trade School Coop New York					

05

DATA CARTOGRAPHY

*Translating mass data from smart phones and
social media into actionable customer insights*

5 DATA CARTOGRAPHY OVERVIEW

Mass data streams from mobile phones, social media, transport and point of sales systems are being harnessed to reveal patterns in the visitation, behaviour and use of space.

The potential to accurately track foot traffic and purchasing patterns has led to intense competition for dominance in the emerging field of indoor navigation. Tracking and predicting visitation creates operational efficiencies and the opportunity to push real-time, highly targeted offers and messaging.

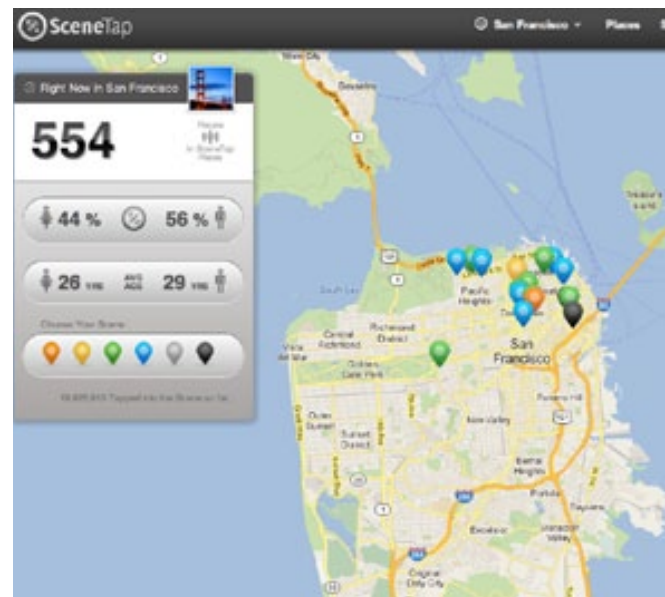
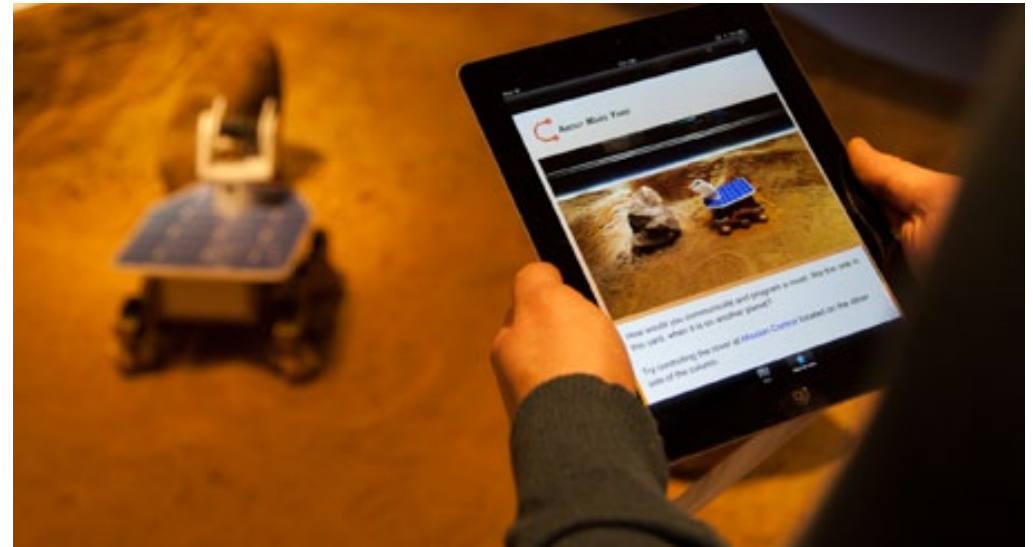
Indoor positioning is a term being used to describe a wide range of technologies all trying to address the challenge of providing accurate wayfinding and navigation in high-traffic areas that GPS signals can't reach. GPS, used for most navigation apps, requires a line of sight between the mobile device and the satellite, whereas indoor positioning can be based on several different methods, including radio signals, Wi-Fi access points, Bluetooth or Near Field Communication (NFC).

The marketing complement to indoor positioning is using Radio Frequency Identification (RFID) to customise displays and messaging based on people standing in proximity to digital displays. RFID chips embedded into mobile devices can send and receive information from signage and other physical elements.

Clockwise from top:
Bytelight in use at the Museum of Science, GPS app and real-time venue occupancy by Scene Tap

Benefit for destinations
Accurate customer insights and targeted marketing

Benefit for visitors
Seamless navigation from home to shop aisles



5 DATA CARTOGRAPHY INDOOR POSITIONING

Global

Google was the first company to build an indoor positioning feature into the navigation app for its Android operating system.

Google conducts site surveys as a free service and has already mapped 10,000 locations in eight countries, including the Las Vegas strip and Japanese railway stations. There is a long wait list, with the highest priority going to heavily trafficked locations in strategic markets. Google also allows business owners to upload their own maps using an Android App and is exploring crowd sourcing as a solution for keeping content up to date.

Dozens of patents for **indoor positioning** technology have been filed in recent years, most based on either software or chips capable of combining information from multiple signals. To reduce the risk of redundant infrastructure investment and compete effectively for widespread market adoption, a group of 22 companies, led by Nokia, has formed the In-Location Alliance.

GOOGLE USES WI-FI TRIANGULATION TO MEASURE THE RELATIVE STRENGTH OF KNOWN SIGNALS TO ESTIMATE A USER'S LOCATION.

POTENTIAL

Does not require any additional infrastructure or handset upgrades

LIMITATION

Wi-Fi does not transmit any spatial positioning information, which means that for triangulation to work it requires an extensive site survey.

Indoor Positioning



Outdoor GPS



The **In-Location Alliance** member companies will continue developing and piloting services independently but will benefit from shared, standardised data and an open, multi-vendor approach.

The balance for destinations in choosing a technology solution is finding one that is accurate, works seamlessly with popular outdoor navigation apps and does not require a large investment in new infrastructure.

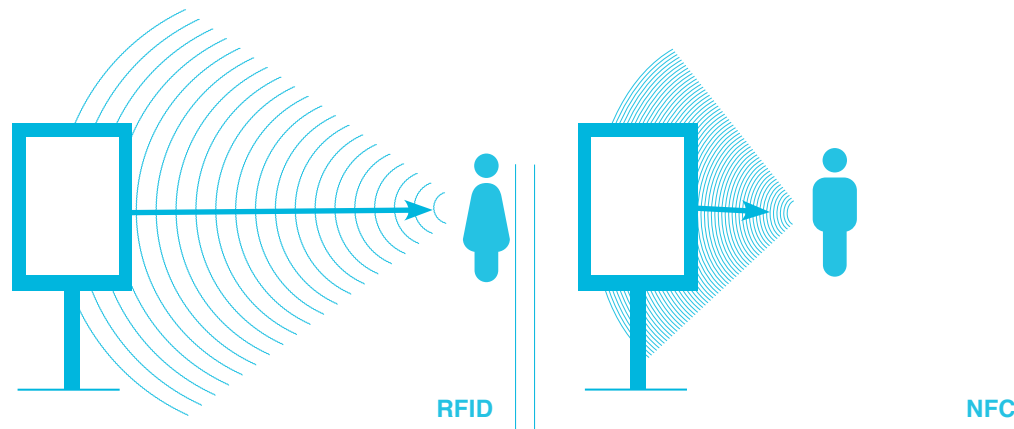
5 DATA CARTOGRAPHY RFID

Orlando



RFID

Radio Frequency Identification



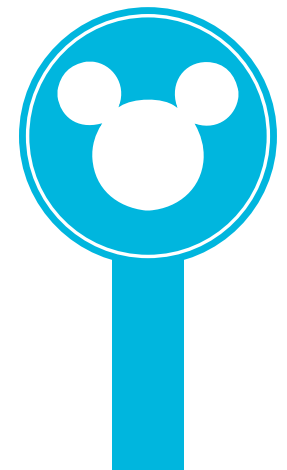
Radio Frequency Identification (RFID) chips embedded into mobile handsets or other physical objects can send and receive information from signage. This relatively simple and accessible technology enables the exchange of information or customisation of messaging targeting anyone standing in close proximity.

A subset of RFID is Near Field Communication (NFC), the technology used in many of the mobile wallet systems being trialled in the US and Asia. The combination of an NFC-enabled device and a mobile payment app can store more detailed personal information and can replace a wide range of physical objects such as tickets, money and keys.

In January 2013, the **Walt Disney World Resort**, in Orlando, Florida, unveiled an RFID wristband system called MagicBands. The wristbands reduce wait times for attractions, serve as room keys and enable cashless payment for admission, food and merchandise. The visitor experience for families will be enhanced; for example, they can choose to opt in to have characters say children's names.

Instead of having to wait to print a "fast pass" in order to jump the queue for their favourite ride, guests can select the ride remotely using a mobile app and the wristband serves as their fast pass ticket.

DISNEY BENEFITS
FROM GAINING
UNPRECEDENTED
VISIBILITY TO PATTERNS
IN GUEST ACTIVITY
BEFORE, DURING AND
AFTER THEIR VISIT.



5 DATA CARTOGRAPHY INFORMATION VISUALISATION

Global




Eric Fischer, a former Google programmer, creates data visualisations that elegantly illustrate how people travel within and use cities, with mobile phone data being the lens for isolating and magnifying specific actions.

Fischer has generated several series, each examining a different theme, all using mobile phone uploads to social media sites as a data source. All of his work is published on Flickr.



Above left:
San Francisco
Above right:
Jakarta

In **See Something or Say Something**, he used the geolocation of Twitter posts (shown in blue) and Flickr uploads (shown in orange) to create maps and insights about cities around the world. A glance at the overwhelmingly blue map of Jakarta reveals that it's a city where the market is dominated by Blackberry handsets, data connectivity is unpredictable and there are relatively few tourists taking photos. In comparison, San Francisco is home to the headquarters of both online sites, has an equally creative and tech-savvy local population and plenty of tourists.

Fischer's newest project, in partnership with Carnegie Mellon University, connects check-ins to businesses on Foursquare to form neighbourhoods based on people's patronage of businesses, rather than geography.

5 DATA CARTOGRAPHY ACTIONABLE DATA TRACKING

Global



PlaceIQ translates mobile phone data to into patterns, trends and meaning, creating actionable analysis about a specific physical location.

Within the system, a city is organised into tiles, each about the size of a city block, and discrete time segments. This gives marketers a mini profile of each block to determine the best time and location to distribute mobile advertising messages.

The data comes from a mixture of open source and commercial data sets.



Bundle also converts location-based behavioural data into useable information but its primary audience is other consumers.

Bundle tracks aggregated spending patterns from public sources, point of sale systems and Citibank credit card records and uses it to create unbiased ratings for restaurants in New York. The credit card information is stripped of personal details but retains a unique identification number,

meaning that individual dining choices can be tracked over time. The site links average spend, frequency and time of visitation to demographic profiles, enabling it to recommend a destination based on the user's age, address, marital status and salary.

ALL OF THE INFORMATION COLLECTED IS AVAILABLE ON BUNDLE'S WEBSITE, CREATING AN ACCURATE AND TRANSPARENT PRICE COMPARISON.

5 DATA CARTOGRAPHY GLOBAL EXAMPLES

*The following list demonstrates the application of this trend globally:
Some references have been cited in this section while others have not.*

*The names and icons in this list are embedded with hyperlinks to the
company websites and related social media content.*

Abuzz Sydney



Bundle New York



ByteLight Boston



Livelihoods Pittsburgh



MagicBands Walt Disney World Resort

PlaceIQ New York



SceneTap Chicago



See Something or Say Something Oakland

Sense Networks New York



Skyhook Boston



06

SMART TEMPORARY

Fluid solutions that anticipate and respond to changes in demand



6 SMART TEMPORARY OVERVIEW

By bringing a product or service offer to the location with the highest concentration of target customers, companies are removing barriers to purchase while also creating a sense of limited supply:

In 2012 temporary activations became more strategic. The year's best examples are cost-effective, site-specific and easy to adapt to different locations.

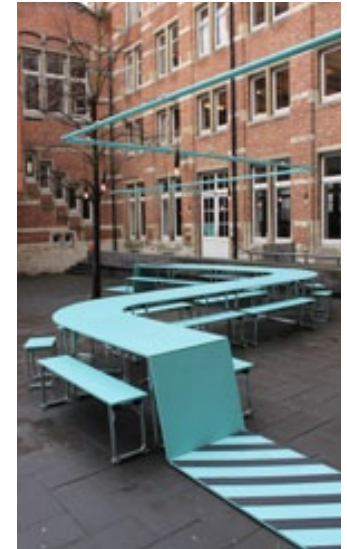
Businesses are using temporary experiences to prototype products, services and locations, reducing the risk inherent in initial investment.

By keeping operational costs down and locations flexible, these longer term temporary spaces can afford to be highly thematic and target niche audiences.

Clockwise from left: Trish Hunter Finds at Westfield Southland, BMW Guggenheim Lab event space and café

Benefit for destinations
Cost-effective, easy to replicate, high level of engagement

Benefit for visitors
Accessibility, convenience and variety of offer



6 SMART TEMPORARY PRE-DEVELOPMENT ACTIVATIONS

New York & Greenwich



Dekalb Market is a long-term temporary activation on an inner-urban site slated for development.

It is made up of about a dozen shipping containers, featuring local clothing, accessory and homeware brands, an etsy shop, local Brooklyn food specialties and a community garden.

The **Movement Café** was built on a former industrial estate, slated for redevelopment into a mixed-use residential community. Its location adjacent to Greenwich railway station made it a high-traffic area during the London Olympics. The developers recognised the potential to attract the attention and interest of the thousands of spectators attending the Games. They commissioned artist Morag Myerscough to help create an eye-catching, unconventional organic café and performance space to operate for six months leading up to the start of construction.



Top right: Eye-catching signage by Morag Myerscough
Top left & bottom: Market entrance and shop window merchandising

6 SMART TEMPORARY TEMPORARY HOSPITALITY

Global



The **Wahaca Southbank Experiment** in London is a two-year temporary location that is incremental to the original Wahaca restaurant in Covent Garden. The two-level structure was built using eight stacked shipping containers. They commissioned street art curator Tristan Manco to select artists to create murals on the site. The unconventional look and placement of the restaurant expresses the team's intention to trial new recipes and change the menu more frequently than they would in a more conventional setting.



Snoozebox offers fast, flexible accommodation options for sporting events, music festivals, production locations and disaster relief. The rooms are built into shipping containers, which can be transported by rail, road or sea to any location in the world. A configuration of between 40 and 400 rooms can be constructed in less than 48 hours at sites with no electricity, water or waste services.

The **Xiang Xiang Xiang Prayer House** is a five-star hotel made up of 35 recycled shipping containers. The rooms were designed, fabricated and installed on site in three months and can be moved to a new location in the future if needed.

Attrap'Rêves is a hotel consisting of a series of prefabricated bubble tents situated in the forests outside Marseille. The clear tents give guests a unique experience of nature and can be set up or taken down quickly with very little impact on the surrounding area.

6 SMART TEMPORARY BMW GUGGENHEIM LAB

Global



NEW YORK



BERLIN

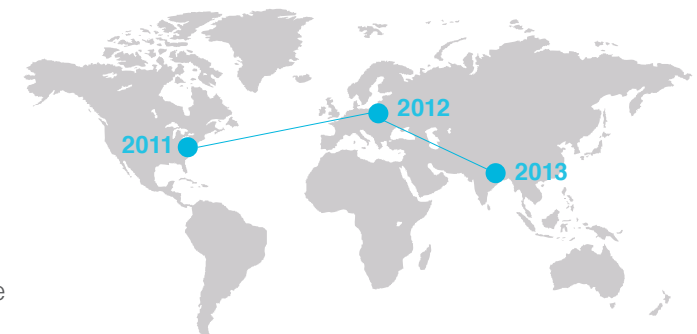


MUMBAI

The most ambitious temporary experience is the BMW Guggenheim Lab, a cross between a think tank, community centre and gathering space that is travelling through nine cities over six years.

The objective of the travelling lab is to bring the Guggenheim's thought leadership and public forums on architecture and urban planning out of its 5th Avenue, New York museum and connect to a broader global audience.

The six-year duration of the lab is divided into three cycles, each lasting two years and transiting through three locations. Each city hosts free workshops, panel discussions, film screenings and city tours on the topic of understanding and improving urban life. The first cycle started in New York, then moved to Berlin and Mumbai, staying in each location for approximately a month.

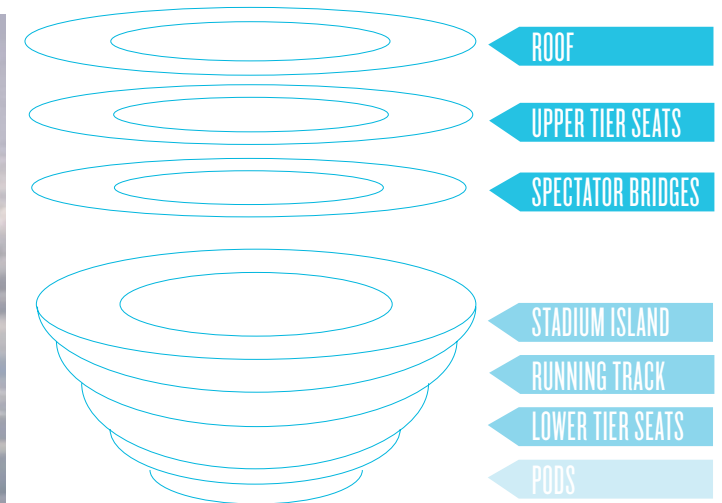


6 SMART TEMPORARY LONDON OLYMPIC STADIUMS

London



Sports stadiums are exploring the efficiencies of temporary construction, with the London Olympic Games being the first to fully embrace temporary structures as venues.



The 80,000-seat Olympic Stadium was built with the intention to be downsized to a 25,000-seat soccer stadium at the conclusion of the Games. The temporary Basketball Arena is being relocated to Brazil for the 2016 Olympics.

In the latter case, building a temporary structure reduced costs by 75 per

cent and construction time was only 18 months, the shortest for any basketball arena in the history of the Olympics. The foresight and innovative approach is more sustainable and economical, especially factoring in the onward sale of the stadium to the next site.

6 SMART TEMPORARY GLOBAL EXAMPLES

Online



The following list demonstrates the application of this trend globally. Some references have been cited in this section while others have not.

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A Room For London UK



Attrap'Rêves France

BMW Guggenheim Lab New York



Gap Filler Christchurch



Dekalb Market Brooklyn



Kitchain Switzerland



Movement Café Greenwich



Snoozebox London



Trish Hunter Finds Melbourne



Wahaca Southbank Experiment London



07

72

R2

REAL-TIME ENVIRONMENTS

*Engaging customers through interactive spaces
and highly targeted messaging*

7 REAL-TIME ENVIRONMENTS OVERVIEW

Retailers are using sophisticated touchscreen displays to capitalise on shopper downtime, increase staff engagement and streamline high-involvement purchase decisions.

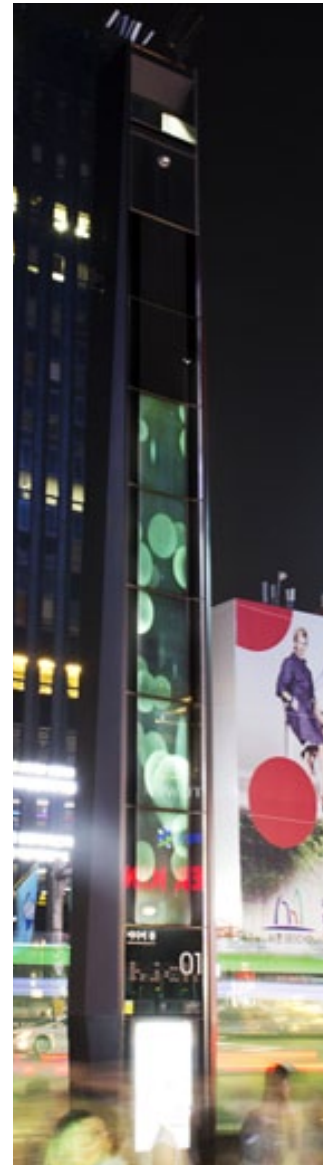
Intelligent digital displays are using facial detection to change onscreen content based on the viewer's demographic profile and response rates. The interaction between individual mobile data and shared digital displays allows people to have a direct impact and leave a virtual mark on a space by being there.

Such technology can invite interaction, for example, through the use of retail touchscreen displays, or be hidden. **Powerleap** has developed plates for installation beneath furniture and flooring that track occupancy and usage patterns, creating data streams and automatically informing adjustments to the temperature and lighting systems in the room.

Clockwise from top right: Cosmopolitan Hotel lobby in Las Vegas, Seoul Square and Internet Media Art poles in Gangnam

Benefit for destinations
Improves the relevance of physical retail space and messaging

Benefit for visitors
Combines online functionality with offline sensory experience



7 REAL-TIME ENVIRONMENTS BUSAN CINEMA CENTER

Seoul

A DYNAMIC SPACE THAT RESPONDS TO THE CLIMATE, SEASON, TIME OF DAY, EVENTS OR THE NUMBER OF PEOPLE USING THE SPACE

The newly unveiled Busan Cinema Center in Seoul contains a theatre and outdoor and indoor cinemas, office space, creative studios and dining, all linked by two undulating LED ceiling surfaces. Lighting programs and full motion graphics designed by artists are displayed across the ceiling and can be seen both day and night, enhancing and responding to events taking place on site.

7 REAL-TIME ENVIRONMENTS BARCLAYS CENTER

Brooklyn

The new Barclays Center in Brooklyn is the most technologically advanced arena in the world. Its centrepiece is the Oculus, a 360-degree LED marquee that encircles the outer pavilion.



What makes the Barclays Center a great place to see concerts or basketball games isn't the size of its digital displays. When designing the digital experience for visitors, the primary focus was on addressing basic user needs. Guests can access free, high-speed Wi-Fi, purchase food without waiting in line using a mobile app, and won't miss calls due to network overload, even

during capacity events. The physical design of the stadium expresses the same visitor focus. It is positioned at street level with doors that lead directly into the main part of the arena, and to connect it to the surrounding neighbourhood, the scoreboard is visible to people passing by.

Left & below: The digital screens and scoreboard are intentionally visible from the street.



7 REAL-TIME ENVIRONMENTS VIRTUAL STORES

Global



One of the most successful uses of interactive technology in retail did not require the installation of any digital screens.

Homeplus, the Korean subsidiary of Tesco, applied posters featuring grocery store shelves to the walls of subway stations in Seoul. Shoppers could scan the QR code beneath each product to make a purchase and the item would be delivered that evening after they arrived home.

ONLINE SALES INCREASED BY 130 PER CENT AND THE COMPANY HAS NOW ROLLED OUT 23 VIRTUAL STORES ACROSS KOREA.



Top left: Commuters order groceries while waiting for the next train.

Top centre: In Australia, Woolworths has rolled out virtual stores in bus stops.

Top right: Tesco's barcode scanning app at Gatwick



In August 2012, **Tesco** trialled the virtual grocery concept with passengers at Gatwick Airport's north terminal. Instead of printed posters and QR codes, the UK adaptation uses poster-size touchscreens for browsing product images, each of which features a scannable barcode. Shoppers buy online using their smart phone and their purchases are delivered the day they arrive back home.

The Tesco concept fits into shoppers' existing routines and takes advantage of predictable dwell time. It's one of the best examples of seamlessly integrating interactive technology into a relevant physical environment.

7 REAL-TIME ENVIRONMENTS AUGMENTED REALITY

China & Sydney

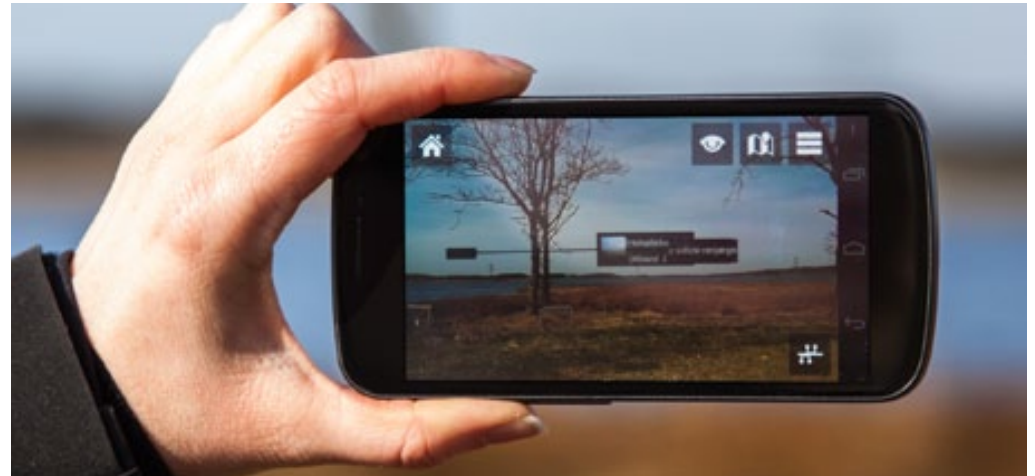


Augmented reality is a form of content delivery where information “floats” on top of real-world objects viewed through a phone’s built-in camera.

In China food retailer Yihaodian, which is majority owned by Walmart, used augmented reality when it launched 1000 virtual supermarkets overnight in high-profile urban spaces, including some directly in front of competitors’ brick and mortar stores.

The campaign made products visible through the camera feature on shoppers’ smart phones. Shoppers had to be physically standing in the location and point their camera in different directions to browse, mimicking the behaviour of shopping in a physical store but one that no one else could see.

Below: Yihaodian used an augmented reality app to launch 1000 stores overnight.



Above: Augmented Reality Android App “Digitale Tråde” being developed for Museum Midtjylland in Herning, Denmark

YIHAODIAN’S APPROACH WAS A GREAT BOOST FOR AWARENESS BUT DOES NOT HAVE THE SAME ACCESSIBILITY OF TESCO’S VIRTUAL STORES.

The 2012 **Art & About Festival** in Sydney featured an augmented reality exhibition called (Un)seen Sculptures. The exhibition was staged in multiple locations where the virtual artworks were hidden from the naked eye but visible to anyone with an iPhone, Android or Nokia smart phone using the Layar Reality Browser.

7 REAL-TIME ENVIRONMENTS NIKE+ FUELSTATION

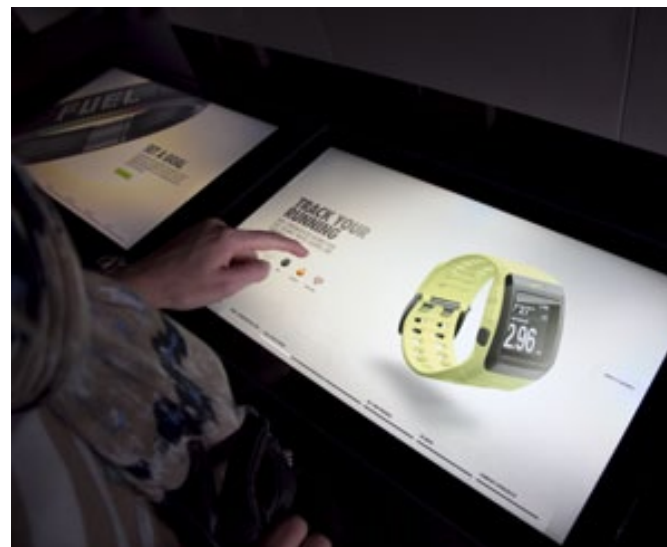
London



Nike selected Boxpark, a shipping container mall, as the location for its most digitally integrated retail store, Nike+ FuelStation.

A large interactive wall displays a 3-D particle mirror that reflects a person's movements in the form of a pixel avatar. The more a person moves, the more their avatar turns from red to green, following the colour language of the brand.

All of the activity is recorded and can be posted to Facebook and Twitter. In the first month after opening, 2000 videos were created and shared, translating a physical in-store experience into shareable online content.



TURNING A PHYSICAL
IN-STORE EXPERIENCE
INTO SHAREABLE
ONLINE CONTENT

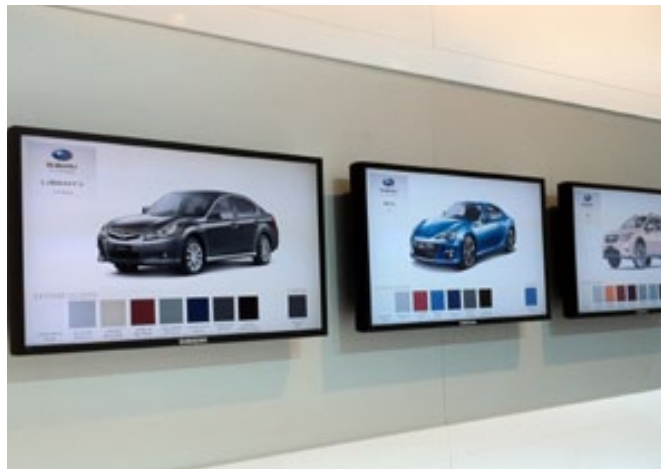
Left:
Floor to ceiling digital
displays, interactive walls and
touchscreen product displays

7 REAL-TIME ENVIRONMENTS SUBARU

Australia

Retailers are using interactive displays to improve shopper engagement in high-involvement decisions.

In Australia, Subaru is offering visitors to its 103 dealerships access to a new kind of interactive technology. The system, based around a CMS and mobile app created by digital agency **Snepo**, allows salespeople to retrieve comprehensive, real-time information on models, options, inventory and more using only their iPhone. The app then links wirelessly to any digital display in the showroom, turning the nearest screen into an engaging sales tool where content is determined by the customer's interests.



Left: Subaru Interactive Displays create a more engaging experience for the shopper.

7 REAL-TIME ENVIRONMENTS IMMERSIVE LABS

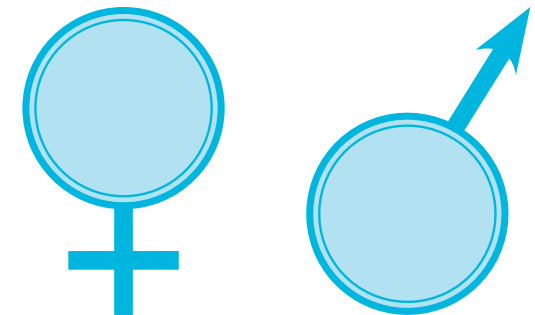
Global




Intelligent ad targeting uses webcams and facial detection to change onscreen content in less than a second based on the viewer's demographic profile and response.

The decision engine tracks and predicts response rates, getting smarter the more people use it. It tracks real-time data and provides analysis on sightlines and visitation patterns.

Left:
Screen grabs showing how
the Cara software works



Immersive Labs launched its Cara software in a joint promotion with Pepsi at the SXSW festival in Austin, Texas. Cara optimises ad displays by gathering real-world data on viewers, such as age, gender, dwell time, glances, top ads and busiest time of day. It then analyses behaviour patterns and sightlines and makes changes to continually increase ad relevance and response rates.

7 REAL-TIME ENVIRONMENTS GLOBAL EXAMPLES

Online

The following list demonstrates the application of this trend globally. Some references have been cited in this section while others have not.

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Barclays Center Brooklyn



Busan Cinema Center Seoul



Immersive Labs New York



Internet Art Media Poles Seoul



Nike+ FuelStation London



Powerleap San Francisco



Snepo Sydney



Tesco Homeplus Korea



The Cosmopolitan of Las Vegas



Wintergarden Brisbane



Yihaodian China

08

SHAPESHIFTERS

*Increasing return by evolving and extending
the use of physical environments*



8 SHAPESHIFTERS OVERVIEW

In response to challenging market conditions, businesses are focusing on ways to adapt opening hours, activities and audiences to expand revenue streams while sharing or offsetting operational costs.

Revitalisation efforts are making shopfronts accessible to short-term, high-quality operators to reactivate the surrounding street-level retail in once-thriving commercial areas. Online platforms are making short-term space hire more appealing by minimising the administrative costs of reservations, payments and marketing.

Extending retail and hospitality, especially after hours, often requires modifications to development applications. The City of Sydney is developing a strategy and action plan for supporting the growth and diversification of the night-time economy, which includes encouraging business and property owners to request permits for longer operating hours.

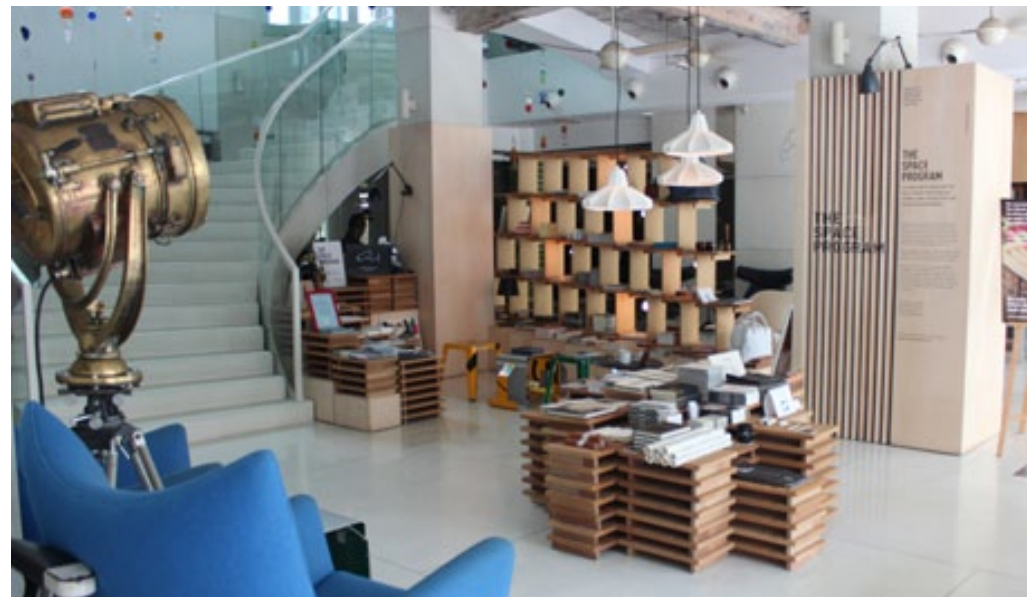
The largest scale and perhaps most literal example is the Arup-designed National Stadium in Singapore.

It's the first stadium designed to accommodate cricket, soccer, rugby and other athletic events. Moving tiers, palletised turf modules and an openable, ultra-thin dome roof maximise the stadium's utility without compromising proximity and sightlines for spectators.

Clockwise from top left: A car park used as an event space at 1111 Lincoln, Story concept store and The Space Program at the New Majestic Hotel

Benefit for destinations
Increases visitation and sales while sharing operational costs

Benefit for visitors
Wider variety of products and experiences on offer, especially after hours



8 SHAPESHIFTERS



The examples in this trend fall into three broad categories:

1

{ CHAMELEON SPACES }

extending the utility of a space by hosting multiple businesses throughout a day or week

2

{ GALLERY SPACES }

serve as shells for a variety of experiences that change weekly, monthly or seasonally

3

{ RE-USE SPACES }

temporarily operating in a different category instead of sitting vacant

8 SHAPESHIFTERS CITY GRIT

New York

{ CHAMELEON SPACES }

extending the utility of a space by
hosting multiple businesses



By night, a supper club



By day, a home interiors store

New York's **CITY GRIT** is a "Culinary Salon" that hosts supper-club style dinners in an old schoolhouse in Nolita. During the day, the schoolhouse is a furniture showroom called WRK Design, featuring locally crafted homewares. Several evenings a week, the showroom is converted into a large communal dining area, using some of the display furniture, which diners can also purchase at the end of the night. CITY GRIT is a membership-based ticketed event.

The cost is \$225 a month for a seat at the table every Thursday night, to enjoy a set menu prepared by guest chefs visiting from around the country. By limiting the operation of the restaurant to peak times during the week, CITY GRIT keeps demand high and can charge a premium. WRK Design benefits from the increased visibility of its products and brand association with the supper club and its early adopter guest list.

8 SHAPESHIFTERS HÔTEL DROOG

Amsterdam



{ CHAMELEON SPACES }

extending the utility of a space by
hosting multiple businesses

Amsterdam's iconic design destination, Hôtel Droog, is a combined design gallery, shop, café and garden.

Droog recently opened the top floor as The One and Only Bedroom, an accommodation and meeting space for hire.

The bedroom is a recent expansion of the brand's offer and all the products in the room are available for sale, making it more of an immersive retail showroom than a business category extension.



"OFFERING CUSTOMERS
MULTIPLE USES IN A
SINGLE SPACE CAN ALSO
BE ACHIEVED UNDER
A SOLITARY BRAND"



8 SHAPESHIFTERS VACANT SHOPFRONTS

Vienna

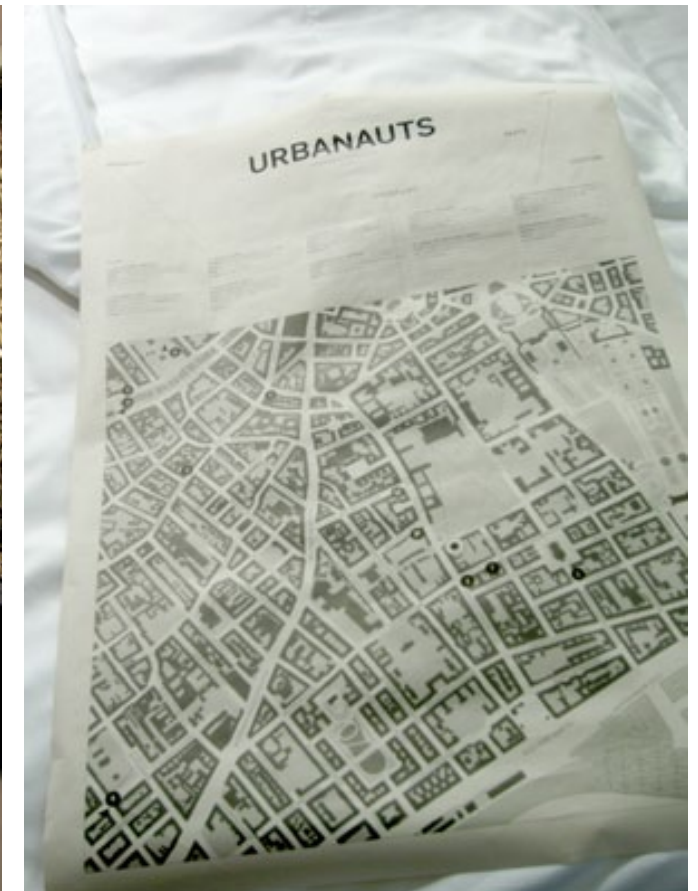
{ RE-USE SPACES }

temporarily operating in a different category instead of sitting vacant

Urbanauts is a deconstructed hotel that customised former street-front shops into centrally located accommodation in Vienna. The loft room rentals include internet access, a minibar and two bicycles. Rooms across the city are loosely connected through a series of curated cafés and restaurants. Guests are completely independent but can pre-book upgrades, such as Vespa hire, daily room cleaning and tailoring.



ROOMS ACROSS THE CITY ARE LOOSELY CONNECTED THROUGH A SERIES OF CURATED CAFES AND RESTAURANTS.



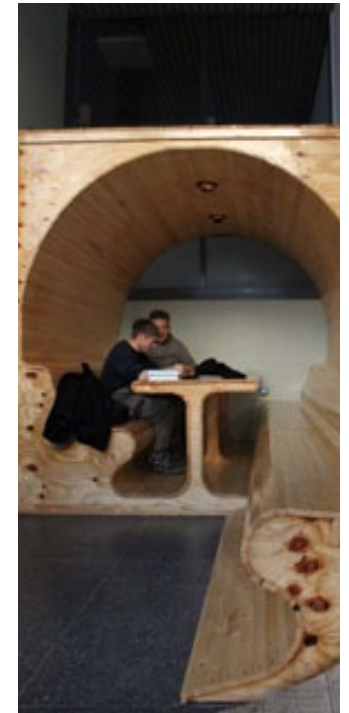
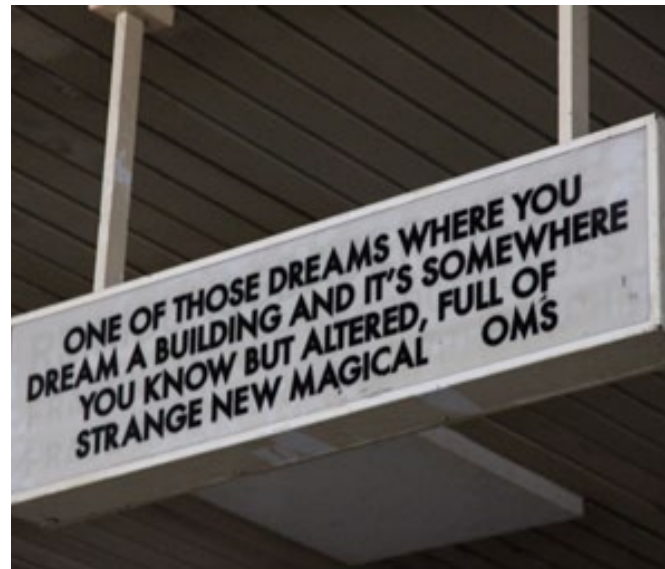
8 SHAPESHIFTERS STATTBAD WEDDING

Berlin



{ RE-USE SPACES }

temporarily operating in a different category instead of sitting vacant



Stattbad Wedding is a cultural and performance space housed in an abandoned swimming pool in Berlin.

The site had been out of use since the 1950s until recently, when a community organisation applied to the city to renovate and curate the space with weekly performances, art exhibitions and a licensed café. It has become a neighbourhood icon and is booked with events nearly every night of the week.

8 SHAPESHIFTERS STORY

New York & Sydney



{ GALLERY SPACES }

serve as shells for a variety of experiences that change weekly, monthly or seasonally

Gallery-style retail spaces offer a consistent quality of experience but the content is refreshed every few weeks. Story is a retail concept story in Chelsea, New York. Every six to eight weeks the theme, merchandise and fit-out completely change, making the space feel more like a magazine you can walk into than a conventional retail store. Story's business model is unorthodox as well, with displays sponsored by brands that are rarely associated with retail and a large percentage of products being sold on consignment.

Under New Management (UNM) is a hybrid between a gallery and re-use space. Located in a vacant retail shopfront on Oxford Street, Darlinghurst, it's part of the City of Sydney's revitalisation efforts for the once-thriving commercial area. The shopfront was made available at a reduced cost to activate the surrounding street-level retail and attract a broader audience. The chameleon-like creative space has transformed four times in its first six months of operation, each time offering a completely different experience, from a coffee and Tour de France lounge to live music performances, a national record release and whisky tasting. The hallmark of UNM is its flexibility in how the space is fit out and used, not just throughout the year but also at various times of day and days of the week.



8 SHAPESHIFTERS



ONLINE PLATFORMS ARE MAKING SHORT-TERM SPACE HIRE MORE APPEALING TO PROPERTY OWNERS BY MINIMISING THE ADMINISTRATIVE COSTS OF RESERVATIONS, PAYMENTS AND MARKETING. REPUBLIC SPACES, IN NEW YORK, AND POP-UP BRANDS, IN SYDNEY, ARE TWO WEBSITES SEEKING TO MATCH PEOPLE AND BRANDS WITH TEMPORARY SPACE.

8 SHAPESHIFTERS ONLINE SPACE MATCHING

New York, San Francisco & Sydney

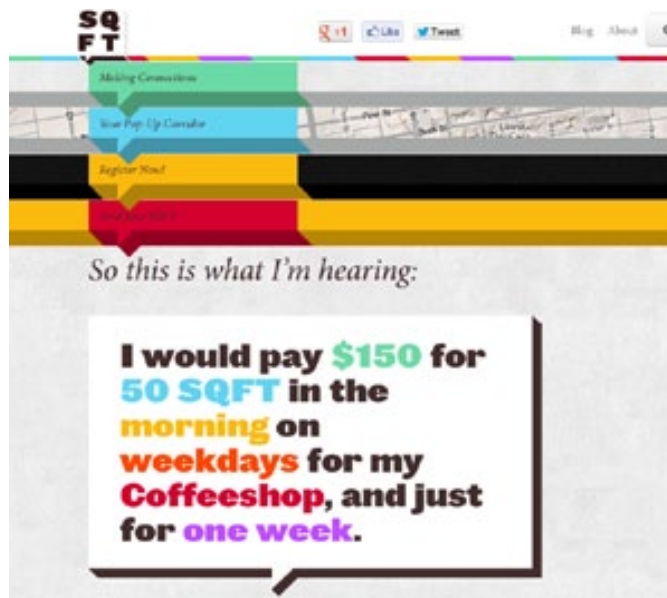


Property owners seek temporary activations, often below market rates, to fill vacant space while they look for long-term tenants.

Top left: A short-term space available through popupBrands

Top right: Display by French brand Aksel Paris in a SoHo store bookable through Re:public Spaces

Right: SQFT's cost estimator for short term space hire



ONLINE SPACE-MATCHING PLATFORMS ARE FACILITATING THE PROCESS OF ACQUIRING SHORT-TERM TENANTS.

popupBrands is an online platform, based in Sydney, that connects people who have short-term spaces to rent, from vacant retail spaces to commercial kitchens or office space, with prospective tenants.

Re:public Spaces in New York uses its website to draw awareness to available commercial space across a vast range of sizes, context and location. Pricing is visible and there is an online booking capability.

SQFT is an organisation partnering with the San Francisco City Government to attract events, classes and retail to vacant space in the Mid-Market area. Its website includes a simple calculator that allows users to specify the amount of space, time of week, frequency and amount they are willing to pay for the space. It was built to quote costs for short durations, sharing the cost of the space among multiple users, similar to a car share service for real estate.

8 SHAPESHIFTERS GLOBAL EXAMPLES

Online



The following list demonstrates the application of this trend globally. Some references have been cited in this section while others have not.

The names and icons in this list are embedded with hyperlinks to the company websites and related social media content.

1111 Lincoln Miami



1933 Shanghai

CITY GRIT New York



Hôtel Droog Amsterdam



popupBrands Sydney



Re:public Spaces New York



Singapore National Stadium



SQFT San Francisco



Story New York



Stattbad Wedding Berlin



UNM Sydney



Urbanauts Vienna



09

INDUSTRIAL DEREVOLUTION

Creating a new paradigm for the places where we choose to work

9 INDUSTRIAL DEREVOLUTION OVERVIEW

As the focus of GDP growth shifts towards knowledge creation and innovation, the design of environments that facilitate this progression are becoming more dynamic.

Gone are the rows of desks and enclosed offices, artefacts from the industrial revolution, which focused on increasing productivity through time-based, mechanised efficiency.

Long before activity-based working was popular, advertising agencies and creative studios were experimenting with alternative workspace configurations. For creative services companies, the combination of personal and shared, interactive space is a physical expression of brands that value collaboration and ideation. It is a point of difference that clients can experience firsthand and one which gives them confidence that the agency can generate great work in advance of anything having been created.

In recent years tech companies have been heralded for their distinctive, attention-grabbing and at times, extravagantly playful workspaces. The strategic motivation for this investment in high-profile workspace design is to recruit large numbers of young, talented employees that are critical to survival in a highly competitive industry.

Changes in expectations of workspaces are most noticeable in workers aged 18–24, which make up about a third of the Australian workforce.

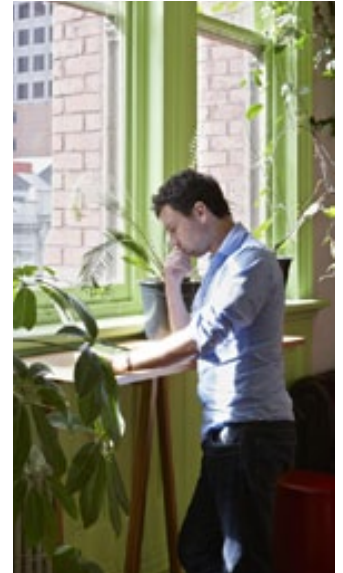
If companies want to attract and retain talent, they need to understand, embrace and facilitate these changes.

In the future, corporate office managers may be incentivised along the lines of a co-working model, with employees' attendance being optional and office manager performance reviews based on how many people actively choose to do their work in the office.

Clockwise from top left: MOV, standing workspace and interaction at HUB Melbourne

Benefit for destinations
Growth in productivity, recruitment and retention

Benefit for visitors
Adaptable environments increase satisfaction and collaboration



9 INDUSTRIAL DEREVOLUTION CHANGING WORKER PERCEPTIONS

Global



One of the most significant shifts is in the perception of how a workspace is defined.

Mobile communication technology is enabling this perceptual shift, expanding both the physical location and time of day that work is done. The ability to do tasks before and after traditional work hours has given office employees more flexibility.



In a recent survey of workers in a premium-grade office tower in Melbourne, when asked what they consider to be their workspace, the 35–55-year-old workers identified only their desk, whereas the 18–34-year-olds identified the entire precinct where their building was located.

The workers surveyed indicated they are willing to travel as far as a kilometre from their building if they intend to stay for a longer period of time and work from that space.

External spaces that workers return to are often cafés and hospitality spaces which give them relative anonymity and aren't disruptive. The quality of the experience is consistent but the characteristics vary. Workers in Melbourne cited **Market Lane Coffee** as a destination during the workday because of its communal seating, welcoming approach, reliable service and products and blurred edges between indoor and outdoor seating.



FIFTY-EIGHT PER CENT
OF RESPONDENTS SAY
THEY ARE MORE LIKELY
TO COME UP WITH A NEW
IDEA OUTSIDE OF WORK.

When asked why they choose to hold face-to-face meetings outside of the workspace, employees cited that they often leave when they need to think creatively and don't expect to be able to achieve that at their desk.

9 INDUSTRIAL DEREVOLUTION YOUNGER WORKERS

Global



MOBILE DEVICES



LAPTOP



FACE TO FACE

WORKING BEYOND
THE OFFICE WALLS

RETAILERS, CAFES, LIBRARIES, PUBLIC AND IN-BETWEEN SPACES

Younger workers have a distinctly different set of expectations regarding their physical workspaces, which in most traditional office buildings are currently not being met.

These employees are seeking communal and interactive spaces and when they can't find the experience they are looking for within the office, they seek it elsewhere, often in cafés or other public spaces.

Younger workers are 35 per cent more likely to leave the building three times or more during the working day and 35 per cent more likely to take a lunch break of 45 minutes or longer. At first glance, the numbers seem to suggest that younger workers are less focused and disciplined.

However, the statistics could be misleading, given that younger workers are also 18 per cent more likely to work 40 hours or more each week. What the numbers suggest is not a difference in dedication or prioritisation of work but a dramatic cultural change in how people perform their jobs and compartmentalise the role that work serves within the broader context of their lives.

9 INDUSTRIAL DEREVOLUTION GIBLIN EUNSON LIBRARY

Melbourne



Libraries and universities are setting the benchmark for spaces that facilitate a wide range of activities and engage visitors.

The exposure at tertiary level to progressive environments for study and collaboration will lead to an ever-greater discrepancy between young workers' expectations and existing office environments. This puts more pressure on employers and, in turn, commercial building owners to reassess office space design and the connection to surrounding precincts.

The **Giblin Eunson Library** at the University of Melbourne was designed by HASSELL in 2011 to offer a variety of spaces to facilitate learning and collaboration, from single desk study boothsto open work and lounge areas, all supported by integrated technology.

The design intention was to create a collective living room for students, with spaces suitable for focused independent work, rest, discussion, collaboration and play.

9 INDUSTRIAL DEREVOLUTION CO-WORKING

Melbourne



Co-working has commercialised drop-in workspaces, with financial performance being based on how much and how frequently members come to use the space.

This fundamental shift is reflected in the spatial design, which is driven entirely by user needs and reflects the micro-culture of the surrounding area, as opposed to being dictated by corporate brand values and organisational structure. The rising popularity of co-working spaces around the world reflects that the true value of offices is not in the physical spaces themselves but the interpersonal interactions that take place within them.



HUB Melbourne is a professional member community that uses its HASSELL-designed 'clubhouse' space to facilitate collaboration among members through shared desks, meeting rooms, events and an online connection to other locations in the global HUB network.

There are over 700 members, split almost evenly between men and women, with the majority of members paying for access to the space one day a week. Seventy-three per cent work independently, with the lead industries being technology and professional services.

All images: Members working at HUB Melbourne

9 INDUSTRIAL DEREVOLUTION RETAIL AND HOSPITALITY

Tokyo & Glasgow



MOV is a membership-based co-working space located in the Shibuya Hikarie Shopping Centre in Tokyo. It doesn't look anything like an office, with the design taking cues from restaurants, libraries and airport lounges. It features tables rather than desks and stylish meeting rooms suitable for even the most fickle clients.

Top: MOV
Bottom left & right: SocietyM

To cater to the needs of an emerging breed of “business nomads”, cheap-chic hotel brand **citizenM** has created a new space, called **societyM**. Understanding people's needs for connectivity, inspiring design and a sense of global belonging, this distinctive hospitality initiative allows nomadic workers to stay, work, think creatively and interact with clients.



9 INDUSTRIAL DEREVOLUTION GLOBAL EXAMPLES

Online

The following list demonstrates the application of this trend globally: Some references have been cited in this section while others have not.

The names and icons in this list are embedded with hyperlinks to the company websites and related social media content.

Central Working, Google Tech Campus London



Giblin Eunson Library Melbourne



MOV Tokyo



societyM Glasgow



HUB Melbourne



Tietgenkollegiet Copenhagen



A photograph of a city street at dusk. In the background, a tall, illuminated tower with a circular observation deck is visible against a twilight sky. The street is lined with tall palm trees. In the foreground, a group of people are gathered on the sidewalk, and a small stage with a DJ booth and speakers is set up. The overall atmosphere is vibrant and urban.

10

BRAND NAME DEVELOPERS

Property players from the retail sector are challenging the status quo

10 BRAND NAME DEVELOPERS OVERVIEW

Companies best known for their retail brands are disrupting the property market with a fresh and progressive vision of the use of space.

The customer-centric focus, adaptability and innovation that it takes to establish strong global brands are giving retail and media companies an unexpected advantage in their approach to property development. Tech companies looking to relocate head offices are choosing to invest in the development of entire neighbourhoods, improving underutilised precincts to foster the growth of surrounding businesses rather than leasing isolated, restricted-access campuses.

Residential developments, such as **Muji Village** and Melbourne-based **Assemble Projects** use their established brand ethos and loyal customer following as the basis for development strategy. While retail brands are taking on the challenge of property development, established property industry leaders are looking for ways to differentiate their commercial office space through value-added facilities and services.

Strategies for attracting and retaining office tenants include offering a broad range of cross-tenant facilities, creating brand-driven marketing communications, worker-centric benefits and progressive leasing arrangements that adapt to the rapidly changing needs of tenants.

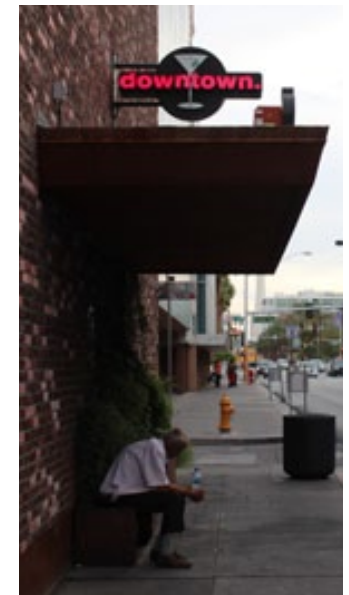
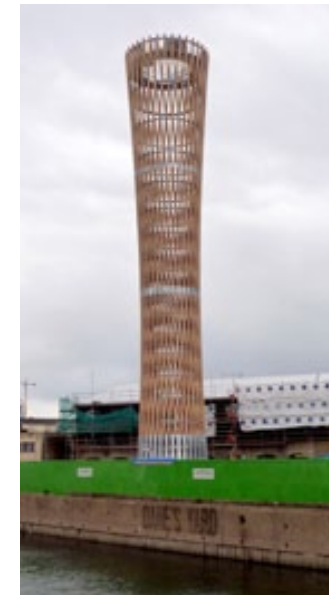
Clockwise from top:
Assemble Projects,
Downtown Lounge,
Dane's Yard at
Strand East,
Muji Village

Benefit for destinations

Ambitious and disruptive visions for change move the entire market forward

Benefit for visitors

Customer-centric design and planning creates a refreshing point of difference



10 BRAND NAME DEVELOPERS AMAZON

Seattle



Online retailer Amazon became a dominant figure in Seattle's commercial real estate market with two enormous deals.

The company purchased its head office in South Lake Union for \$1.16 billion. Prior to the purchase, the 11 buildings that make up the head office were 100 per cent leased by **Amazon**, which moved there in 2010. There is also 100,000 square feet of retail, including eight restaurants and cafés, a bank and a medical clinic. Amazon's other deal was three blocks between South Lake Union and downtown Seattle, in a long stagnant area. It has submitted plans to develop three office buildings on the site.



Amazon's growth has revived the entire market, driving down office vacancy rates from record-high levels during the recession. Twenty-six office buildings were sold in Seattle in 2012, compared to two years prior, when no buildings were sold. Amazon's 67 per cent increase in staffing levels over the past two years has also sparked the area's biggest apartment construction boom in two decades.

Top, left and below: Amazon headquarters exterior, interior and aerial views



10 BRAND NAME DEVELOPERS ZAPPOS

Las Vegas



Online apparel retailer Zappos is turning downtown Las Vegas into a destination for creative culture and innovation.

Amazon purchased **Zappos** in 2009, and the following year, Zappos CEO Tony Hsieh decided that rather than build a campus to accommodate his growing staff, he would lease the former Las Vegas city hall building and invest \$350 million of his own fortune into revitalising the blighted downtown area.



The majority of the funding will go into residential and real estate, with \$200 million set aside to invest in tech start-ups, small businesses and arts, education and culture. When Zappos moves its 1500 staff from suburban Henderson, Nevada to downtown Las Vegas in late 2013, the City of Las Vegas estimates that the total economic impact to local businesses from real estate, retail, food and beverage sales and professional services will total more than \$336.6 million.

Above left: First Fridays, a monthly art, music and food event **Above right:** The former Las Vegas Townhall will be Zappos' new headquarters. **Left:** Local street-level retail on Fremont Street

10 BRAND NAME DEVELOPERS ZAPPOS

Las Vegas



First Fridays is a thriving event that draws over 20,000 people, requiring several city blocks to be partitioned off from traffic to make room for food vendors, retailers, recruitment tents and bands.



To create a place where employees and local residents could connect outside of work, Hsieh purchased First Fridays, a monthly open gallery event that had been operating for ten years but wasn't attracting a critical mass of attendees.

Left: Events in Downtown Las Vegas attract people and foster the flourishing of culture.

Hsieh's vision is to catalyse changes in just five to seven years that would normally take decades to happen organically. The tools he is using are architecture, community events and education spaces that increase interactions between people and foster a culture of innovation and entrepreneurship. The Las Vegas Tech Fund has already backed nine start-ups and is set to give \$500,000 to another 150.

Incubator fund meetings are run out of a multi-use space, which operates as the Downtown Lounge bar at night. Hsieh rents the top four floors of a serviced apartment building across the street from Zappos' future headquarters. He lives in one unit and makes the other 39 available to entrepreneurs and other guests in the hope that they will stay in Las Vegas and invest in the local community.

10 BRAND NAME DEVELOPERS MUJI

Japan

Muji is a Japanese retailer known for its “design by subtraction” ethos, with unbranded, good-quality homewares, food, apparel and accessories.

Muji began its extension into property development in 2007 with a partnership with Mitsubishi Estate on a collective housing development in Chiba Prefecture. This was followed up by a second development in Tsudanuma. Unit sizes range from 70 to 80 square metres and are competitively priced with developments in the area.

Clockwise from top left: Muji flagship store, Muji Village website, closet interior



The company began the project by creating a research centre and engaging 700,000 of its customers through an online survey. The Muji research team then spent time in people's homes, observing how families addressed the everyday challenges of domestic life. The ethnographic research informed key design decisions, resulting in a built environment that is highly user-centric and undeniably Muji.

10 BRAND NAME DEVELOPERS IKEA

London



DIVERSIFYING IKEA'S EXTENSIVE GLOBAL PROPERTY HOLDINGS



IKEA is taking a different approach to its regeneration project, Strand East.

The mixed-use residential project is not a brand extension or marketing exercise; in fact, it will not feature any **IKEA** products, branding or retail space. Strand East is a long-term business investment aimed at diversifying the company's extensive global property holdings. It is being developed by LandProp, part of the property division of parent company Inter IKEA.



On a near-derelict former industrial site, just south of Olympic Park, Strand East is being transformed into an 11-hectare neighbourhood with 1200 homes, a Courtyard Marriott hotel, restaurants, shops and offices, a school, a child-care centre and a healthcare facility. The street plan is being designed to include pedestrian-only streets, dedicated cycling routes and underground parking.

The historical preservation of several buildings and a "walk of chimneys" will celebrate the site's industrial heritage. Strand East has started attracting visitors through the opening of its creative hub, Dane's Yard, a joint restaurant and exhibition space. The rest of construction is slated to begin in 2013 and be completed in five years.

10 BRAND NAME DEVELOPERS VALUE-ADDED SERVICES

Melbourne



While retail brands are taking on the challenge of property development, established property industry leaders are looking for ways to differentiate their commercial office space through value-added facilities and services.



Above: @Rialto website landing page

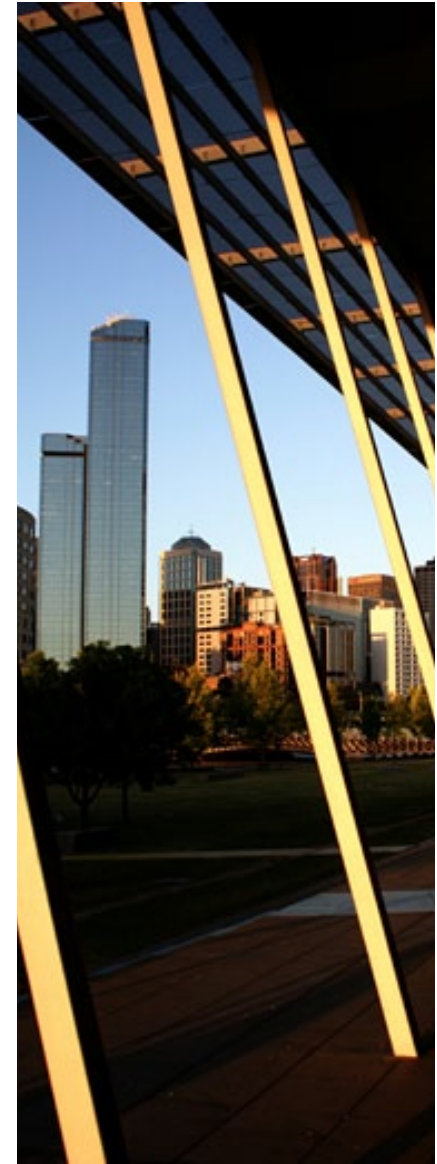
Right: View of Rialto Tower from Melbourne Central

Strategies for attracting and retaining office tenants include offering a broad range of cross-tenant facilities, creating brand-driven marketing communications, worker-centric benefits and progressive leasing arrangements that adapt to the rapidly changing needs of tenants.

Property owners and operators are looking to negotiate better lease terms based on the location's potential to impact tenants' operational efficiency, talent attraction and retention.

This shift away from the basic provision of space to also include facilities, resources and services is reminiscent of how the hotel industry evolved in the 1960s. The most direct service adapted from the hotel industry is the concierge. **First Contact** specialises in placing hotel industry trained staff in commercial office buildings to provide services such as booking restaurants, greeting guests, purchasing gifts and ordering taxis.

The concept of a concierge has been updated using online platforms. The **@rialto** internal website offered by Melbourne's **Rialto Tower** that connects workers in the office tower to a range of concierge services, such as food delivery to desks, dry cleaning pick-up, restaurant reservations and gift purchases. The site complements the physical experience of working in the building and engages tenants and individuals in ways that would be impractical and costly without the use of technology.



10 BRAND NAME DEVELOPERS GLOBAL EXAMPLES

Online



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@Rialto Melbourne



Assemble Projects Melbourne



Downtown Project by Zappos Las Vegas



First Contact Melbourne



Fulham Wharf by Sainsbury's London

Muji Village Tokyo



Strand East by IKEA London



Wilshire Grand by Korean Air Los Angeles



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DAVID GRANT

Strategy Director

TRENDS RESEARCH

Sonja Källström, Place Associates

EDITING

Ginny Grant (ginnygrant.com.au)

DESIGN

Joanna Grygierczyk, Place Associates

PRODUCTION

Georgia Jenkins, Place Associates

TYPEFACES

Helvetica, Didot & Knockout

PHOTOGRAPHERS AND REPORTERS

Cynthia Emon

Michael Lyons

Ari Moskowitz

Paul O'Connor

Michelle Teh

Rebecca Vulic

Ash Watson

Liz Wilson

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