



Experience IndexSM

Gensler
RESEARCH
INSTITUTE

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Quantifying the X factor of design

Everybody's talking about experience. Defining it, that's another matter. The Gensler Experience Index identifies the key drivers of a great experience, quantifies the direct impact great design has on experience, and provides a holistic framework for understanding experience. The goal: to inspire the creation of great places that engage people's emotions and keep them coming back.



Executive summary

The Gensler Experience Index proves that design is among the critical factors that create an enhanced human experience. Our insights resulted in the development of a holistic framework for experience that incorporates intention, expectation, interaction, and space. **Our findings and our framework combined allow us to better understand the nature of human experience and how it is evolving in the current experience economy.**



Capital One West Creek | Richmond, VA

Great design is great for business

The connection between a great experience and business performance is well documented—multiple studies have connected the overall quality of customer, visitor, or employee experience to a company's long-term stock performance and growth. The measurable impact of design and physical space is, however, frequently left out of the equation, and the majority of companies have no systematic approach to creating a differentiated experience.

To understand experience, understand intentions

We uncover five intentions that frame our expectations and experiences: task, social, entertainment, discovery, and aspiration.

Single-use spaces are becoming obsolete

Experiences are primarily multimodal, and that's how people like it. Spaces that satisfy user needs in multiple experience modes are rated higher.

Design has a quantifiable impact on experience

The qualities of physical place are a key component when the goal is to deliver a great experience and stand out from the crowd.

Ignore social space at your peril

People crave social connection, and that drives an outside portion of experiences. Welcoming, inclusive, social spaces perform better.

Six design factors have the most significant impact

Places that are beautiful, unique, authentic, inspirational, intuitive, and welcoming offer the best overall experiences.

In-between time isn't wasted time

Unplugging, escaping, browsing, and killing time are all activities to be supported and courted, encouraging open-mindedness and creativity.

Everyone is doing everything everywhere

The traditional uses of space are blurring. People are working, eating, socializing, exercising, having fun, taking classes, and shopping everywhere.

Technology matters, but not in the way you think

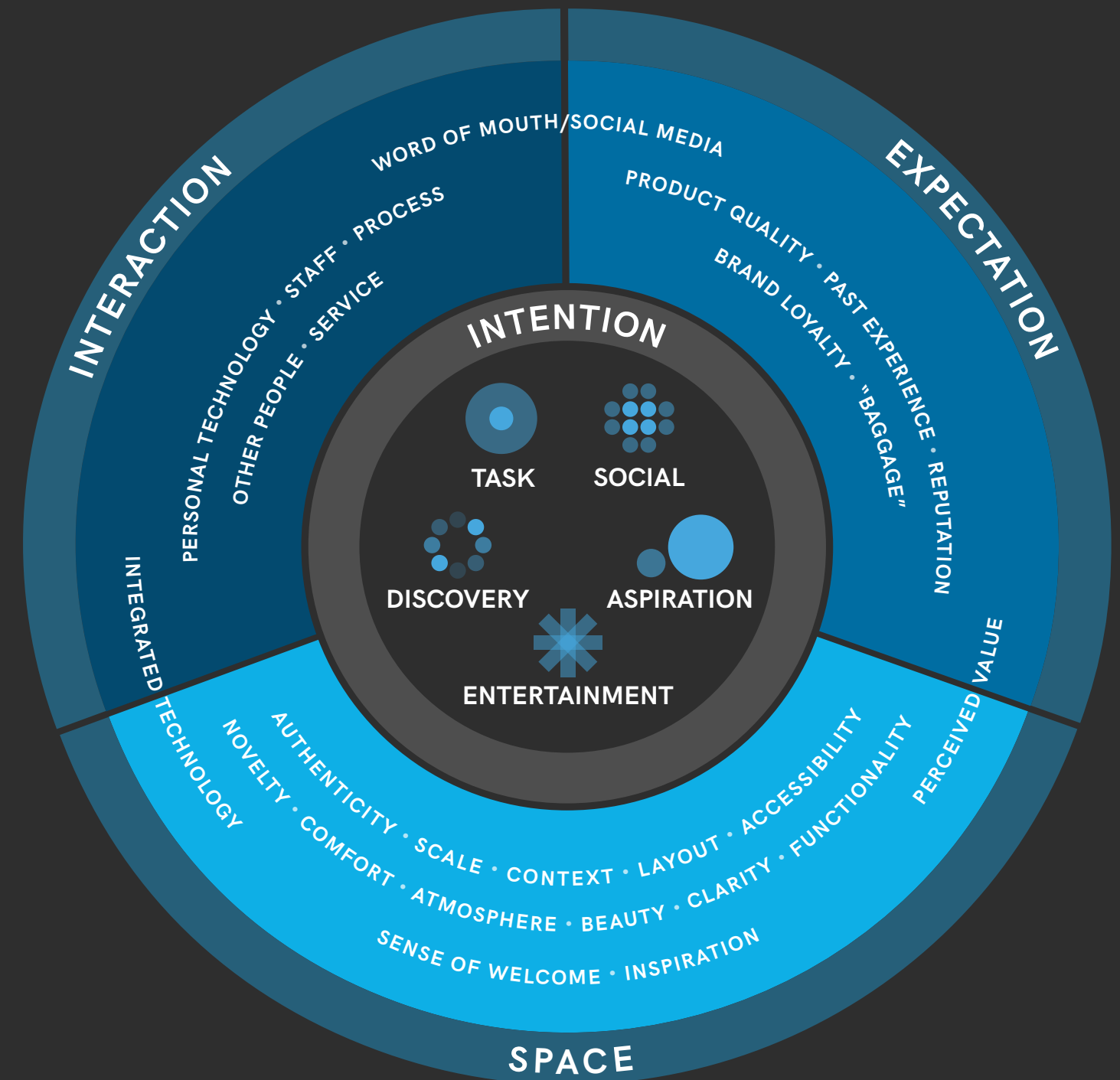
Places with the latest technology are more likely to offer a great experience, even if most people don't interact with technology directly.

Experience Framework

At the core of experience is a person's **intention**, or the reason they are embarking on that experience. Their reason for visiting informs how they will ultimately perceive and evaluate their experience. Those intentions, our "experience modes," form the center of our Experience Framework. After understanding their intentions, the **expectations** a user brings to an experience inform how it will be perceived. During an experience, the quality of **interactions** a user has have a significant impact on experience, combined with the qualities of **space**—which range from functional issues like the ability to navigate intuitively, to higher-order items like beauty, authenticity, and uniqueness.

What makes our framework different

Precedent research has proven the role that product, brand, and service quality play in creating a great experience; and a separate body of research also explores the role of specific design factors to the quality of a person's experience. These studies, however, are often limited to retail or consumer-focused environments, and do not offer a comprehensive picture in which the design and qualities of physical space are explored alongside other experience factors. Our study seeks to fill this gap by examining all the elements of a great experience across retail, workplace, and public spaces. In it, we document the impact of physical space within a broader suite of factors that together offer a holistic framework for understanding experience.



The experience modes

A key finding of our research, identified through our ethnographic research and confirmed in our 4,000-person survey, suggests that a person's intention in visiting a space ultimately frames their experience. Are they there to pick something up and leave? Are they there to browse and be inspired, or will they grab dinner with a friend? There are, of course, myriad reasons people embark upon experiences, but in our research, they began to cohere into a set of five distinct categories—our “modes” of experience.

While the five modes represent distinct user intentions, that doesn't mean places should cater to just one. The same space can deliver a very different experience depending on a person's reason for visiting, and spaces that support multiple modes tend to offer better experiences overall.



TASK

Task mode is when a user has something specific they are trying to accomplish. Users are typically very focused and direct.

DESIGN IMPLICATIONS

Users in task mode want to be in control. They seek efficient, easy to navigate spaces and are not open to distractions.

EXAMPLES

Getting through security at an airport, having a business meeting, shopping for a specific purpose.

49%

Less than half of visitors to retail stores are there primarily to make a purchase.

Users in task mode show significant differences from those in other modes. They are less likely to have a great experience, and care less about uniqueness and beauty than people in other modes.



SOCIAL

In social mode, people's main intention is engaging with other people. Social mode is frequently combined with other modes.

DESIGN IMPLICATIONS

Providing a wide variety of spaces that support social connection and a sense of community is paramount.

EXAMPLES

Going out for a meal with friends, taking a break during the workday.

85%

The vast majority of people report visiting public spaces to spend time with friends/family.



DISCOVERY

In discovery mode, people do not have a concrete plan. They are often killing time between other activities, and are likely to wander.

DESIGN IMPLICATIONS

Focus less on clarity and more on inspiration, authenticity, and novelty. Users in discovery mode are the most open to the unexpected.

EXAMPLES

Browsing in a store with no specific purpose in mind, exploring a city or neighborhood, killing time between planned activities.

65%

Most office workers take breaks to “unplug” while at work; those who do are higher performing.



ENTERTAINMENT

Entertainment mode describes the moments when people are looking to be entertained and brought away from “everyday life.”

DESIGN IMPLICATIONS

Spaces designed for entertainment should employ novel and unique design features that make a memorable impact.

EXAMPLES

Going to the movies, seeing a live performance, visiting a destination store.

57%

Just over half of retail visitors have fun while in store; those who do have a significantly better experience.



ASPIRATION

Aspiration mode describes the experiences through which users seek to grow, expand, or be connected to a larger purpose.

DESIGN IMPLICATIONS

Connecting users to a larger mission and purpose, and providing opportunities for personal growth and inspiration are crucial here.

EXAMPLES

Joining a gym, taking a class, visiting a global landmark.

20%

Public spaces are the most aspirational space type. One out of five users visits specifically for inspiration or to learn something new.

1 Better design, better experience

The design of physical space proves to have a significant, quantifiable impact on the quality of people's experience.

To quantify the broad impact of design on experience, we conducted a nationwide survey of 4,000 US respondents, and examined a wide range of factors to explore potential relationships across factors that drive a great experience. Two key variables showed dramatic results: the overall design look and feel of the place visited, and the quality of the experience while in the space. Users who reported the space they visited to be extremely well designed on average rated their experience nearly twice as high as those who said the space was poorly designed.

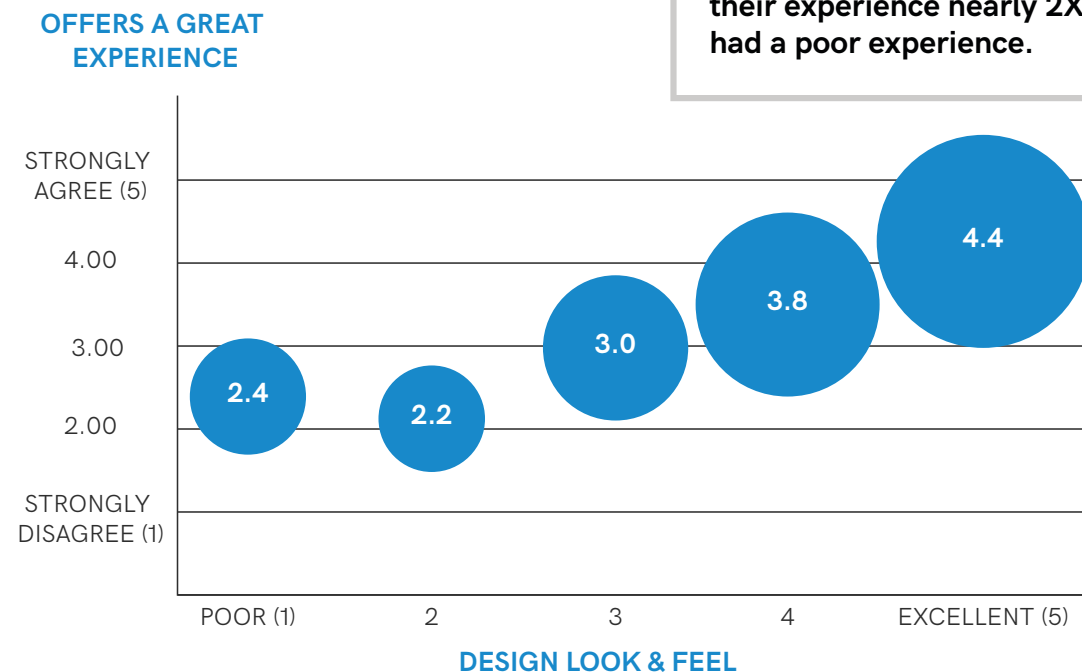
The qualities of a user's expectations and interactions in a space also each show a direct, positive connection to a user's ultimate experience. As we continue to balance the digital and the physical in our interactions, our behaviors, and our spaces, delivering a positive, emotionally charged in-person experience remains the key driver for engagement. From the meteoric rise of co-working to the tremendous shifts in the retail industry, the common thread is experience—offer a great experience, and the business and social value of physical place proves itself again and again.

10X

People are ten times more likely to share their experience in stores with unique design features on social media than those without.

SPACES WITH BETTER DESIGN OFFER A BETTER EXPERIENCE.

Design quality of a space (x-axis) plotted against rating of whether the space offers a great experience (y-axis), representing aggregated scores across retail, workplace, and public space segments.



The difference between good and great

To dig deeper into what makes a great experience, we identified the specific factors that collectively work together to drive the quality of experience across each of our segments. We began with the basics—what are the most important variables when looking to create a good experience that people are willing to recommend to friends and family? This analysis underscored the findings captured in our Experience Framework: the qualities of expectation, interaction, and space combine to inform a good experience no matter the space type.

But in today's experience economy, we know that **creating a good experience isn't enough; the best places—ones that engage people's emotions and keep them coming back—have to be great.** They have to exceed a user's expectations. To meet these higher standards for experience, design proves to be the key differentiator between good and great—and specific factors rise to the top. Spaces that are beautiful, authentic, unique, inspirational, and welcoming are most likely to engage users and stand out from the crowd.

THE MOST IMPORTANT FACTORS TO A GOOD AND GREAT EXPERIENCE

Factors most associated with whether a visitor had a good experience in each space type, and the additional factors that are important to make an experience great, and to exceed expectations.

- Space
- Expectation
- Interaction

EXCEEDS EXPECTATION

GREAT EXPERIENCE

GOOD EXPERIENCE

RETAIL

Novelty	+
Beauty Authenticity	
+	
Product Quality	+
Warm and Welcoming Staff	
Product Value	
Design Look and Feel	
Latest Technology	

PUBLIC SPACE

Novelty	+
Sense of Welcome	
+	
Inspirational Design	+
Clarity	
Design Look and Feel	+
Attractive Neighborhood	
Ideal Space to Socialize	
Beauty	+
Diverse Mix of People	

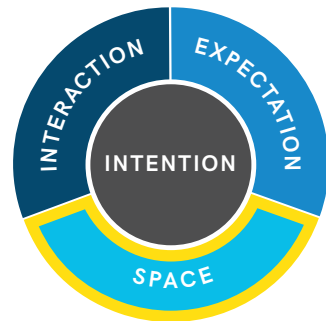
WORKPLACE

Beauty	+
Inspirational Design	
+	
Inspirational Design	+
Meaning/Purpose	
+	
Innovation	+
Sense of Community	
Autonomy	
Relationship with Manager	
Design Look and Feel	

While design is one component of a good experience, when the target is great experiences that exceed expectations, key design factors—beauty, authenticity, inspiration, sense of welcome, and novelty—become critical value-adds.

1.5X

Respondents who visited public spaces designed for inspiration rated the spaces 1.5X higher on exceeding expectations.



The design factors that matter most

In addition to quantifying the impact of design on experience, we also explored how specific design factors relate to the quality of experience. Our goal was to identify actionable insights to inspire the design of spaces and places that delight and engage. From among the 75+ design factors we studied in our survey, six factors emerged as having the most significant impact on experience: beauty, novelty, authenticity, clarity, inspiration, and a sense of welcome. Importantly, these go beyond just functional factors of space to capture the overall impression a space has on a visitor.



826 Valencia | San Francisco, CA

Beauty

Beauty in particular contributes to the quality of people's first impression, and is also connected to how people perceive the value of the products/services associated with a space, whether a store or a workplace. The connection to perceived value underscores an opportunity but also a potential pitfall. Done right, people see a beautiful, well-designed space as a reflection of overall quality; but if a space feels more opulent than the brand, products, or services associated with it, excessive beauty can be seen as wasteful.

Authenticity

Even though most people don't differentiate between the quality of products, interactions, and physical space when describing an experience, the alignment (or misalignment) of these features is a clear driving factor in how they will perceive an experience as a whole. In particular, whether the design of a place reflects the broader brand and mission behind a company, whether it is reflective of its broader neighborhood and cultural context, and spaces with a history or compelling back-story are considered to be more authentic.

Inspiration

The search for inspiration is a core aspect of our behaviors and decision-making, and spaces that are designed to inspire and spur creative thinking offer some of the best experiences. In particular, public spaces and workplaces need to inspire people to be successful—whether that means connecting them to nature, exposing them to new or unexpected ideas, or creating places that support a diverse range of demographics and activities that broaden perspectives.

Novelty

People enjoy the unexpected and being surprised—"wow" moments excite and engage, and our research shows that unique spaces are more likely to be shared and recommended to friends and family. But as much as people like experiences that are new and different, they dislike not knowing how things work or how to get around. People want control over their pace and path through a space. That means making the functional aspects of a space familiar and intuitive whenever possible, and leveraging less pragmatic design features to make a space unique.

Clarity

Spaces that are enjoyable and easy to navigate and wander connect to an ingrained human need to feel in control and understand one's surroundings. To support this, the best spaces are designed with an understanding of people's intuition and ingrained assumptions about how things work and are organized, and leverage that knowledge to make things as easy for visitors as possible.

Sense of Welcome

Most experiences include some level of social activity, but even those that don't should be designed to accommodate human needs for belonging and community. Spaces that feel welcoming and support a diverse community of people are consistently rated as better experiences by survey respondents. In places with a service component, staff who are warm and welcoming also proves to be a key component of a great experience.

4/5

For people who have a great workplace experience, four out of five can identify something unique about their office design.

2 Everyone is doing everything, everywhere

The traditional uses of space are blurring. People are working, eating, socializing, exercising, having fun, taking classes, and shopping everywhere.

Our data brings specificity to what we intuitively know and feel—that working, playing, and living are no longer distinct activities. From work/life balance to work/life “blur,” we live in an always-on era where multitasking is the norm and time is increasingly stretched. People are taking classes in stores, socializing in hotel bars and lobbies even when they’re not guests, having business meetings in malls, working at home and in public parks, and running errands at work.

As designers, we need to work with our clients to navigate what this means for the spaces and places that are increasingly accommodating everything,

whether they were designed to or not. Flexibility and adaptability are the first step—we need to design spaces that meet a wide variety of needs for a wide variety of users, and are adaptable to change as activities shift or grow over time. For example, spaces that can flex, such as work cafeterias that can convert to event or community space, or public spaces that support pop-up retail or work activities, will prove most effective over time.

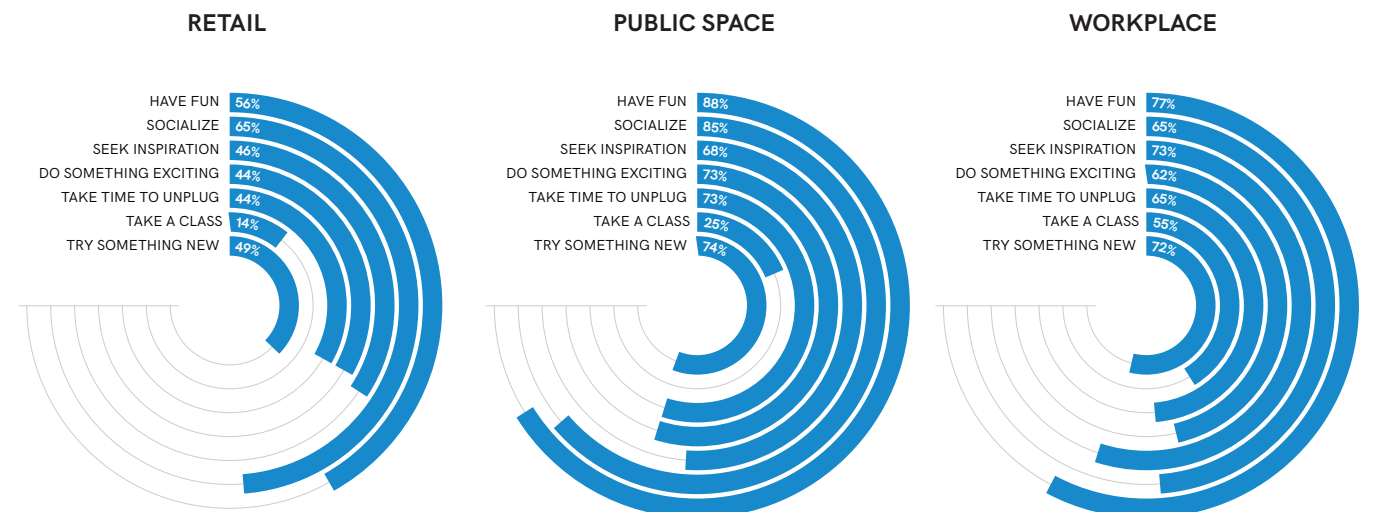
2X

People who do more than one activity in a store rate that store as one of their favorite places nearly twice as often.

EVERY SPACE WE STUDIED SUPPORTS A VAST ARRAY OF ACTIVITIES.

Percent of respondents who report doing each activity in each space type.

People are 1.4X more likely to report having fun at work than while visiting a retail store.



3 Single-use spaces are becoming obsolete

People who do more than one activity in a place rate their experiences significantly higher and are more likely to report it as their "favorite place."

Today's everything/everywhere mindset has already begun to impact the spaces in which we spend our time—and the spaces that are most accommodating show signs of greater success. Our ethnographic studies showed that the places where people had great experiences in more than one mode are often the places to which they are emotionally attached. Our survey confirmed this insight, showing that most experiences involve multiple activities and more than one experience mode. It further confirmed that multimodal experiences and places that offer a variety of spaces tend to be more highly rated and are more likely to be noted as a respondent's favorite place.

Creating spaces that accommodate myriad activities does not, however, mean that all activities and uses are created equal. Many spaces can, and should, maintain and prioritize a primary focus while layering in additional activities to expand the scope of a user's experience. At work, that means building in space for socializing, learning, and community-building—but without sacrificing the time, spaces, and tools people need to get their jobs done. For shoppers, a layered, multimodal experience is often desirable—but when it's time to make a purchase, the process still needs to be intuitive and seamless.

1/2

Only one out of two shoppers visited a store with the primary goal of making a purchase.

MOST EXPERIENCES ARE MULTIMODAL.

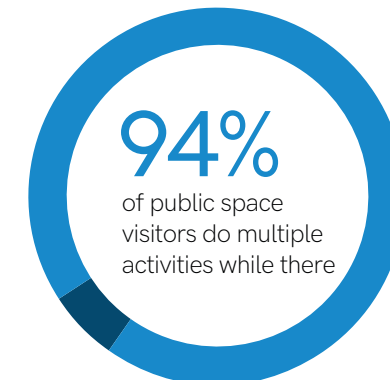
Percent of visitors who report doing more than one activity during a recent visit to the space.

Not only is work happening everywhere, everything is happening at work. Nearly all (49 out of 50) workers report doing non-work activities on a regular basis while in the office.

RETAIL



PUBLIC SPACE



WORKPLACE



4 Ignore social space at your peril

Places that support community and social connection perform better—from higher job satisfaction in the workplace, to a greater likelihood of recommendation for retail stores and public spaces.

As more time is spent online, people are increasingly seeking out places to connect in real life—and for good reason. Loneliness and social isolation are increasingly being recognized as health epidemics, spurred by a growth in social media and a concurrent lack of depth in social connection and communication. Our data underscores both the prevalence and the importance of the social aspects of experience. The majority of respondents report that they socialize or spend time with family and friends at work, in public spaces, and while shopping—and similar to multimodal experiences, they are better off for it.

As designers, we need to create spaces that encourage social behavior, and work with our clients and peers to ensure socializing is valued as a core aspect to a great experience, not just a nice-to-have. This may mean allocating greater space specifically for interpersonal connection, and creating places that build community and connection. Some of the biggest opportunities to improve may be at work, where despite being a proven boon to both employee engagement and performance, companies and workers consistently undervalue the contribution of socializing to their overall work performance.

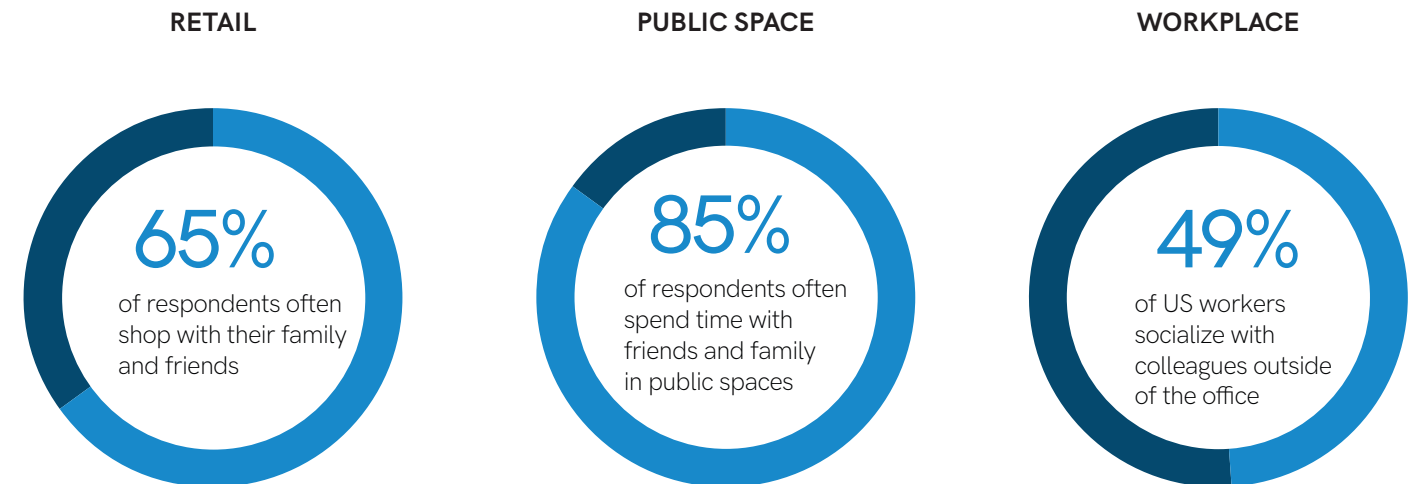
1/4

Only one out of four public space visitors reported socializing as the primary reason for their visit.

A SIGNIFICANT PORTION OF EXPERIENCES ARE SOCIAL.

Percent of respondents who report spending time socializing in each space.

Public spaces that users report as ideal for social connection are ranked 1.3X higher on overall experience.



5 In-between time isn't wasted time

People who take time to reflect and unplug have better experiences, with direct business benefits: employees are more satisfied, and shoppers often end up making purchases despite not originally intending to do so.

Despite the hectic, time-stretched lifestyle that seems pervasive today, it turns out people who are “always on” are often actually not. During our ethnographic study, the idea of “killing time” came up frequently in conversations. This interstitial or “in-between” time is when people are most open to discovery and new experiences—and supporting discovery time proves to be a boon to both productivity and business performance. In every space we studied, people who take time to unplug and escape report a better overall experience and a greater likelihood to recommend that place to family and friends.

For workers, the benefits are even more direct: employees who take time to reflect or unplug during work are more satisfied and higher performing, in line with a significant body of existing research showing the importance of downtime for creativity, productivity, and happiness. In retail stores, 71 percent of visitors who come without intending to make a purchase often end up doing so. And in public spaces, in-between time proves to be a key reason that users visit—and places that support it best are more likely to inspire repeat visits. We must create spaces that are welcoming and engaging, and encourage visitors/users to spend time there even without an intended purpose.

71%

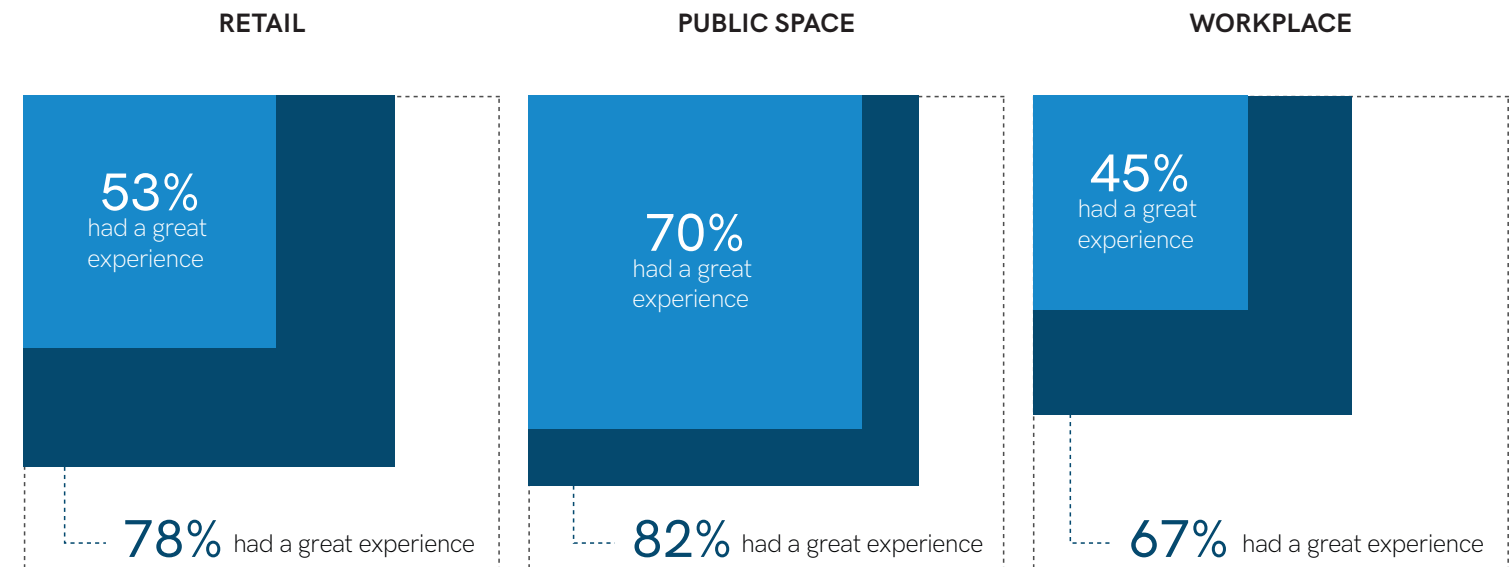
Of respondents visited stores without the intention to purchase, 71% ultimately made a purchase.

PEOPLE WHO TAKE TIME TO UNPLUG AND ESCAPE HAVE A BETTER EXPERIENCE.

Experience ratings of users who spend time unplugging/escaping compared to those who don't.

■ --- People who don't take time to unplug
■ - - - - - People who take time to unplug

Respondents who took time to unplug/escape while in a retail store had a great experience 1.5X more often than those who did not take time to unplug/escape.



6 Technology matters, but not in the way you think

Technology may be more about impression than direct engagement—people see it as a powerful symbol of innovation.

Technology continues to seep into every aspect of our lives, both via the increased power and prevalence of personal technology and its continued integration into spaces of all types. We studied the impact of technology on user experience, and found something counterintuitive. The presence of technology is a key driver of a great experience—spaces that users reported to have “the latest technology” are more highly rated, more likely to be their favorite, and more likely to inspire a return visit. But having the latest technology and having a user actually interact with that technology turn out to be quite different things.

It’s clear that technology makes a significant impression on users of a space, whether a park or a workplace. But users may be less interested in technology that they interact with or use directly, and more interested in technology that is embedded in the space and contributes to the overall designed experience. For instance, integrated technology that displays changing graphics and offers an overall impression may be preferable to a navigational map that users might download to their phone to find their way around a store.

1/2

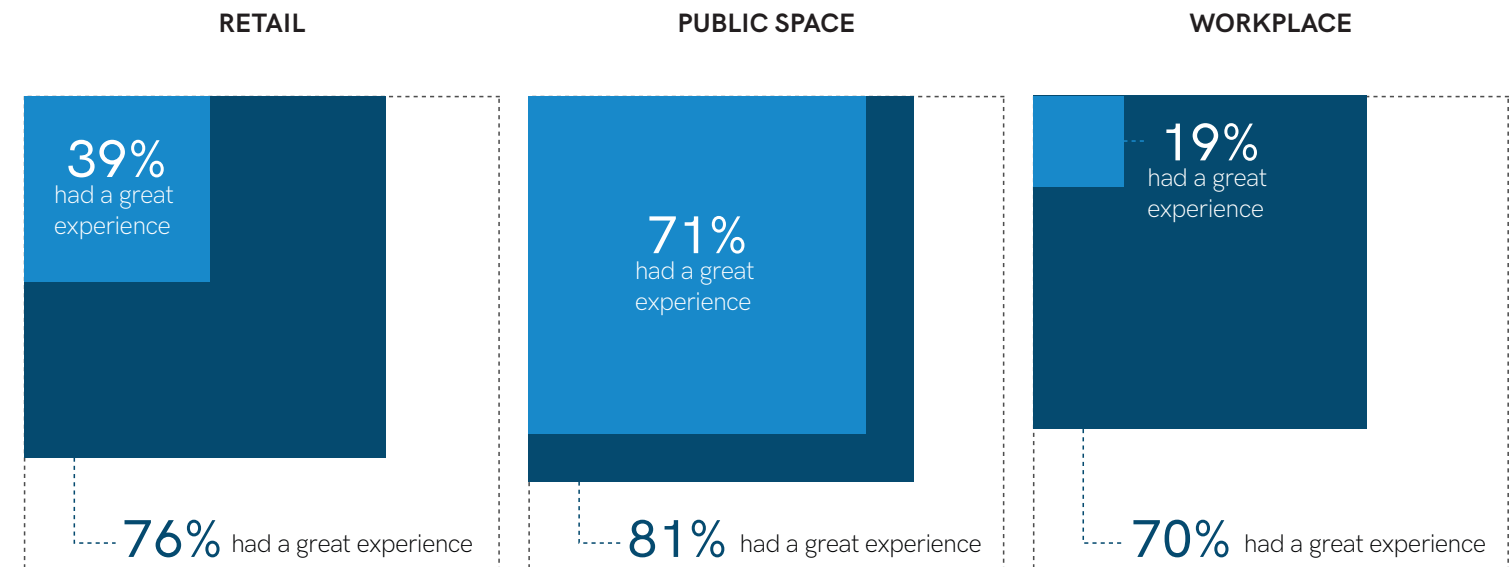
One out of two stores and two out of three workplaces have the latest technology according to survey respondents.

PLACES WITH THE LATEST TECHNOLOGY DELIVER A BETTER EXPERIENCE.

Experience ratings of users who visited a space with the latest technology compared to those who did not.

--- Places without the latest technology
 --- Places with the latest technology

Respondents whose workplaces have the latest technology report a great experience 3.7X more often than those whose workplaces do not have the latest technology.



Compete on experience; win with design

Every place and space today is ultimately competing on the experience it delivers. As a new generation of consumers shifts spending and attention toward experience-based consumption, the need to deliver a differentiated experience has never been stronger. **The human experience must be the driving force behind every element of a space—from the design of physical space to the qualities of interaction, expectation, and intention.**



FirstEnergy Stadium | Cleveland, OH

Experience is emotional; so is design

A key aspect of our research was quantifying the impact of design on a great experience. We know that design is a key driver of a great experience, and that better designed spaces elicit a greater overall experience for users. How? Tapping into human emotion is the key component. We proved that there is a direct connection between design and experience through human feelings and emotions. The overall design look and feel of a space influences positive emotions, which in turn influences positive experience—and positive emotions and experience are at the heart of engaging users, whether connecting employees to organizational purpose or shoppers to a brand's larger mission and story.

Design with intention(s) in mind

Creating emotional connections requires a nuanced understanding of the needs and expectations a user brings with them to an experience—we can't exceed expectations if we don't understand them. Our experience modes offer a framework to explore intentionality as a new way to target and segment a user base: is your core audience in task mode, there to get something done, or are you courting a discovery-based audience seeking inspiration and new ideas? Meeting the needs and expectations of your users is the necessary first step to delivering a great experience. Once primary needs are met, people are often open to new activities that expand experience and drive emotional connection, and those multimodal experiences are more likely to drive engagement and recommendation.

Design sends a strong message

Beauty, authenticity, uniqueness, and the overall design of a space consistently proved important variables to overall experience. In particular, as places seek to accommodate users beyond task mode, the importance of these variables rises—the broader a person's mindset, the greater the impact of design on their emotions and experience. Our ethnographic work offers a key caveat here, however: design sends a strong message, but only when it's aligned with the overall brand and value proposition people expect. A task-focused value shopper will be put off by design they perceive as excessive; a traveler trying to get through security may ignore, or be annoyed by, a big design statement pre-security; and a workplace where investment is solely in common spaces while neglecting the individual worker can communicate a lack of respect and value. Every design decision should be considered within a person's mindset—sometimes a "wow" is the answer, but not always.

Make every place feel like a public space

Every space we studied supported a strikingly wide variety of activities—a symptom of today's everything/everywhere culture and a recognition that the spaces we spend time in must reflect the "blur" of our modern lifestyles. As we continue to conceptualize and create great places, public spaces offer a number of lessons that can be adapted to any space type, and with good reason. Public spaces support the widest diversity of experiences, offer some of the best experiences overall, and are the most likely to be shared on social media by visitors. Why? Their capacity to support unstructured time—providing a platform for reflection, inspiration, and unplugging as well as fun, socializing, and work—is a lesson in variety and adaptability. Their diversity and welcoming nature prove to be key components of success too, a goal toward which every space should aspire.

A mixed-methods approach

The **Gensler Experience Index** is the result of a rigorous, mixed-methods research investigation that combined qualitative, ethnographic research—30 two-hour observations and interviews with people in five markets across the US to gather insights about experience—with quantitative research that included a nationwide, panel-based survey of 4,000+ US respondents. In addition, incidence and pilot surveys were conducted to prepare for the ethnographic and survey work. This mixed-methods approach allowed us to capture the stories and contextual insights that speak to user emotions, or the “soft” side of experience, while the analytics allowed us to confirm and enhance our insights through quantitative, statistical methods.

Phase 1: Roundtables

We began our research by hosting a series of roundtables with clients across five cities: Los Angeles, New York, San Francisco, Shanghai, and Washington, DC. Our goal was to explore what companies are currently doing to create great experiences, and to understand how we might better measure and track experience and its impact on business. Our results showed that experience means different things to different people, and that we needed to develop a common language around experiential elements. This critical insight, complemented by extensive secondary research, informed development of the methods used and the domains we explored to better understand experience and the role played by design.

Phase 2: Incidence Survey

To prepare for our ethnographic work and large-scale survey, we commissioned consumer research firm DYG to conduct a telephone-based incidence survey among a nationally representative sample of 1,700 respondents across the US. The survey was designed to provide insights about people’s attitudes and feelings about design and its role in creating experience. It also helped us develop a common language and definitions that could be used for subsequent phases of our study.

The effort resulted in the creation of demographic and psychographic profiles of populations—or personas—that could be classified as “design enthusiasts,” and, at the other extreme, “design disengaged.” These profiles helped guide our recruiting efforts for the ethnographic phase of our study.

Phase 3: Ethnography

Informed by the results of the incidence survey, we conducted an ethnographic study comprised of observations and in-depth interviews with 30 people in five markets across the US. Our researchers spent two to three hours with each participant, shadowing and interviewing them at a location of their choosing. Participants who were identified as either valuing design or not caring about design were recruited to understand sentiment at the extremes of our population. The ethnographies were conducted in the following markets: New York City, Minneapolis, Raleigh, Seattle, and Los Angeles.

In order to have a broad understanding of experience, we visited a variety of locations chosen by our participants, including cultural institutions, restaurants, hotels, retail stores, and train stations. By conducting interviews on-site, we were able to observe participants in the space, and could witness behaviors and discuss emotional

reactions that influenced the experience. Sites chosen by users were places they felt strongly about—either positively or negatively.

Our ethnographic work uncovered three formative insights that are central to this research. First, the language most people use to describe design and experience differs significantly from the language used by designers: people speak in terms of feelings and emotional outcomes, not about specific materials or the design factors of a space. Second, the development of our holistic framework for experience—space, intention, expectation, and interaction—and the recognition that while the impact of each is distinct, to users they are combined and hard to distinguish. And third, that the intention behind an experience acts as a frame for the experience overall, which led to the creation of our experience modes.

Phase 4: Pilot Survey

Findings from our ethnographic work were translated into a short, online pilot survey sent to 1,000 panel-based respondents in order to test the experience modes framework and the language we used to identify the modes. The data was analyzed using factor analysis to ascertain the latent variables that relate to the different intention activities. Results determined that a) the experience modes and the variety of activities they represent do exist and are occurring in a wide range of spaces, and b) there are two latent variables related to intention: “task/goal directed” and “experiential focused” intentions.

Phase 5a: Analytic Survey (Structure)

Quantitative data for Gensler’s Experience Index was gathered via an online, panel-based survey of over 4,000 respondents across the U.S. Responses were anonymous and the sample was managed for proportional representation across age, income, race/ethnicity, and geographic distribution.

There were four surveys in total, each measuring respondents’ experiences in retail, hospitality,* workplace, and public space environments. Each survey contained between 1,000 and 1,300 respondents. Retail respondents were required to have visited a retail store within the past three months; hospitality and public space respondents within the past year. Workplace respondents were required to work on a full-time basis, in an office environment at least some of the time, and for a company of at least 26 people.

Retail stores included a wide range of types: department store, warehouse store, boutique/independently owned store, big box store, specialty store, brand retail store, supermarket/grocery store, pharmacy, and museum gift shop. Public spaces studied were limited to outdoor spaces, including outdoor markets, town squares, public commons, plazas, parks, gardens, and landmarks.

Phase 5b: Analytic Survey (Analysis)

Stepwise multiple linear regression, a robust inferential statistical method, was used to predict different dependent variables, such as Net Promoter Score, on the basis of various independent variables related to different aspects of human experience. Through this technique, we identified the strongest drivers of likelihood to recommend the space to a friend or family member (i.e., Net Promoter Score), exceeding expectations, and having a great experience. Among the independent variables studied were ones related to technological and interpersonal interactions, product, and place.

Various descriptive statistical techniques were employed such as quartile analysis (comparing top and bottom 25 percent) and segmentation technique (Top 2 vs. Bottom 2 ratings on a 5-point rating scale) to analyze the data. Analysis of variance (ANOVA) and t-tests were used to test mean differences between segmented groups for statistical significance. Correlation techniques were used to assess some relationships between variables.

Exploratory factor analysis was used to identify various dimensions among the variety of activities related to intention to test the mode/intention construct. We created some variables through data reduction techniques such as factor analysis and also tested them for both reliability and validity, ensuring high standards on both. Cronbach’s alpha was used to determine the reliability of the Innovation and Autonomy Indices used in the Experience Index.

Statistical analysis was conducted in-house via Gensler’s internal research team with expertise in data analytics, survey design, and data visualization. The survey’s margin of error is 5 percent, a standard within social science research.

**Findings for the hospitality segment are not included in this report, but will be published separately.*

About Gensler

As architects, designers, planners, and consultants, we partner with our clients on some 3,000 projects every year. These projects can be as small as a wine label or as large as a new urban district. With more than 5,000 professionals networked across 44 locations, we serve our clients as trusted advisors, combining localized expertise with global perspective wherever new opportunities arise. Our work reflects an enduring commitment to sustainability and the belief that design is one of the most powerful strategic tools for securing lasting competitive advantage.

The Gensler Research Institute supports research investigations important to our firm, our clients, and to the ongoing learning and development of Gensler professionals. Research projects are practitioner-led with involvement across the globe. Our teams bring thought leadership to the table as we seek to solve our clients' and the world's most pressing challenges by creating high-performance solutions that embrace the business and world context in which we work, enhance the human experience, and deliver game-changing innovation.



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