Global Trends

Bike Parking and Change Rooms

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Embedding Flexibility Into Spaces

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Moving Beyond Box Ticking
& Utilitarian Spaces

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Get Smart

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Micromobility
The Changing Transportation Landscape

Trends, by nature, look to the past in order to better predict the future. But if there's one thing this year has taught us so far, it's that the future is always unpredictable. 2020 has been heavily defined by a pandemic that has caused disruptions large and small to every major economy in the world, and we are beginning to witness how these disruptions are affecting transportation and real estate as social-distancing is becoming a new normal. Public transport, for example, has dropped to 15 percent of capacity in major cities like Sydney, London, and San Francisco, and we already know the road networks can't support the reallocated demand. The good news is that people are getting on their bikes instead, bringing historic increases in ridership to cities around the world: 52% in NYC, 300% in Melbourne, 48% in Vancouver, and over 100% on London's bike share service. The list continues.

We are clearly amidst a bicycle revolution; more people biking means more people needing bike parking and change rooms (aka end-of-trip facilities or EOT for short). Not all EOTs are created equally, however, and if you want to position your building favourably in a post-pandemic working world, you'll want to pay attention to what comes next.

Bird's Eye View

Through our work with leading designers and building owners, we've witnessed (and contributed to) trends that will take off in this new environment. This document will delve into the following five trends that we see in bike parking and change rooms across the globe:

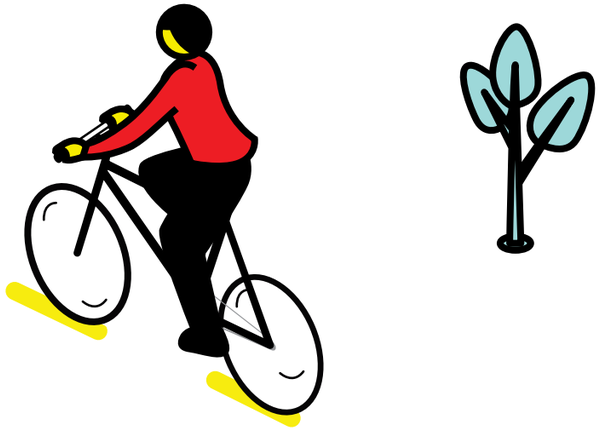
FLEXIBILITY. In a socially distanced world, emphasis will be placed on generous and private spaces that can ensure two meters of personal space. This means bigger showers with floor to ceiling walls and doors, island bench seating, and plenty of aisle space between bike racks and lockers. If you don't have the space, flexible design helps you hit the quantity without compromising on quality.

USER EXPERIENCE. The amount of stuff in the space isn't what makes it great. That comes from how it makes you feel. Smart projects around the world have thrown away their abacus and focused on users. And the effects are amazin'.

INTEGRATED TECHNOLOGY. Some trends, such as the role technology plays in our lives, remain steadfast and persist across all industries, and they are sure to play a major role in a post-pandemic working world. Data is now driving project outcomes more than ever.

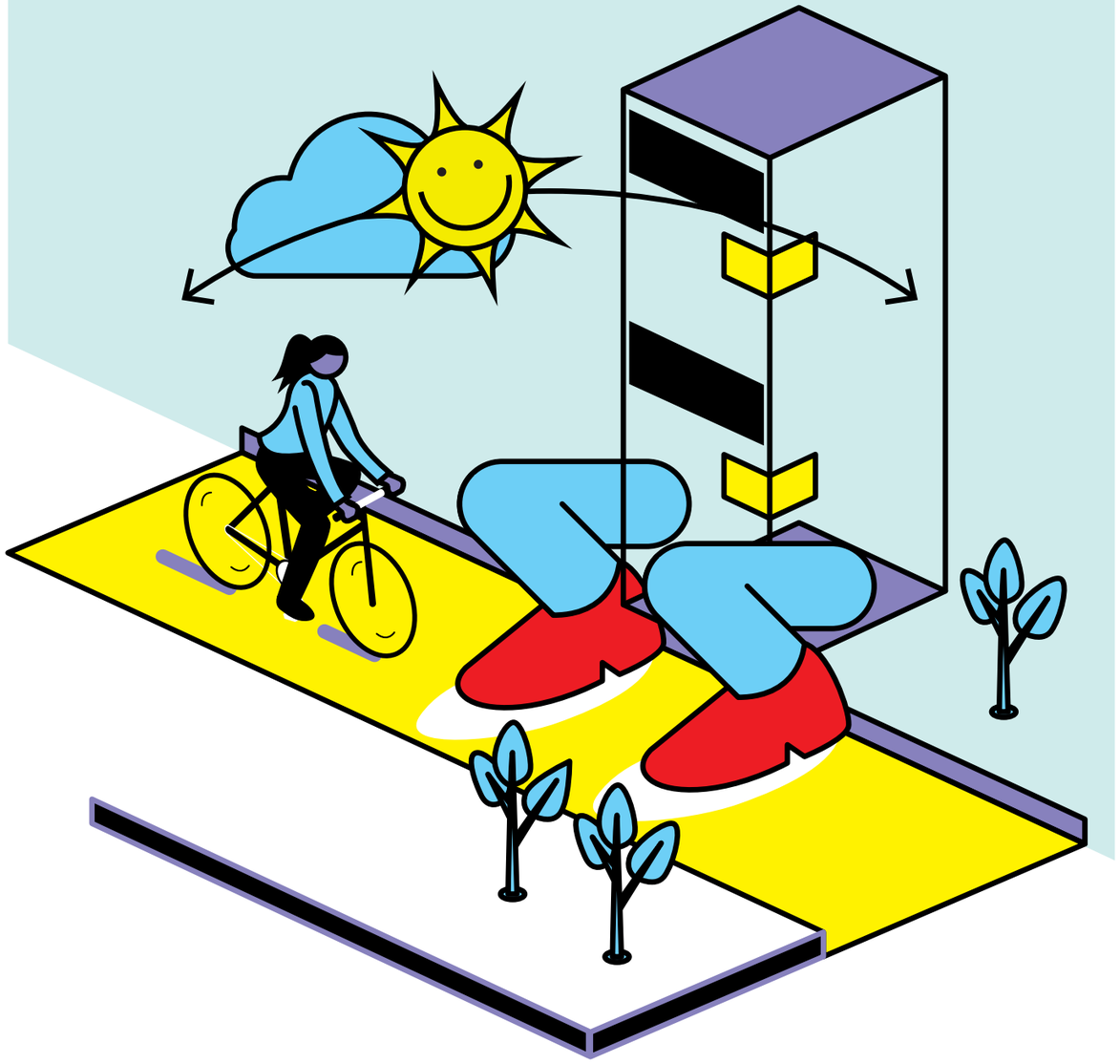
SUPPLY CHAINS REIMAGINED. Where stuff comes from has finally taken its rightful place at the big boys table this year when China shut down. Sourcing for holistic value rather than price has never been so important. As designers, manufacturers, distributors, and cyclists, we know a thing or two about this space. See what leading global projects are doing.

MICRO MOBILITY. At the end of the day, changing how people move is the core of our business and we understand deeply how transportation shapes our cities. All trends point towards more sustainable options, meaning a reallocation of space from cars to people. Cities around the world are investing millions in the infrastructure of the future.



1.

Embedding Flexibility Into Spaces



Try as we might, we cannot see the future. Life happens. Demands on a space constantly shift throughout the life-cycle of a building. Seasonal changes, tenant demographics, cultural trends, new technology, and improved infrastructure affect actual demands on bike parking and change rooms. That's why embedding flexible design into facilities is one of the most crucial design decisions you can make.

While town planning often has rigid quantity requirements, they are generally silent with regards to quality — something we are lobbying hard to fix. Focusing on quality over quantity saves both time and money for projects and maximises user experience. The issue is that doing things well usually takes up a little more space, something most projects are lacking.

Flexibility can solve a lot of these issues, helping projects to avoid building white elephants.

Ways To Create Flexibility
A Phased Approach

Phasing or staging a project is simple. Design a space that satisfies the maximum projected demand with a section you can repurpose for other functions until it is needed. Deliver the smaller footprint now, and expand to the larger area when demand requires it, taking into account any technical improvement that happens in the interim.

One Five At Heart project that nailed this approach was 22 Bishopsgate, the tallest building in London, a facility that delivered over 100 showers and 1,100 bike racks in phase one. While this may sound like a lot, this is actually under the traditional planning requirements, and for good reason. The next phase is already planned out and will more than double the capacity in the long term, but until demand catches up, that valuable space is not wasted.

Using Flexible Products

There are several reasons why facility utilisation changes over time, including changes in weather conditions, tenant demographics, trends, and so forth. Flexible products allow building owners to change with the weather and trends.

Our Wishbone system, for example, was designed to allow building owners to meet minimum bike parking requirements while also allowing a facility to be repurposed should demand decrease (say, in the wintertime in Toronto), fully maximising the efficiency of a space. The system can be installed or removed without a tradesperson on site, allowing the facility to be converted into a pilates/yoga/spin studio, or wellness space, when it's not being used for bike parking.

Knowing how people are going to use a space is more art than science. We recommend the nostradamus method, put more simply, make your answer broad enough to fit any question. That is where our Flexible Lockers came from! Is it for bikes? Is it for scooters? Is it for clothes? It is a Flexible Locker!

Adding Flexibility To Change Rooms

Traditional construction of rooms sets in stone the use for the room, but generally excludes more uses than it creates. Showers are the most expensive part of any facility, and demand is changing every year. Smart projects are taking this into account to embed flexibility into spaces that normally are binary.

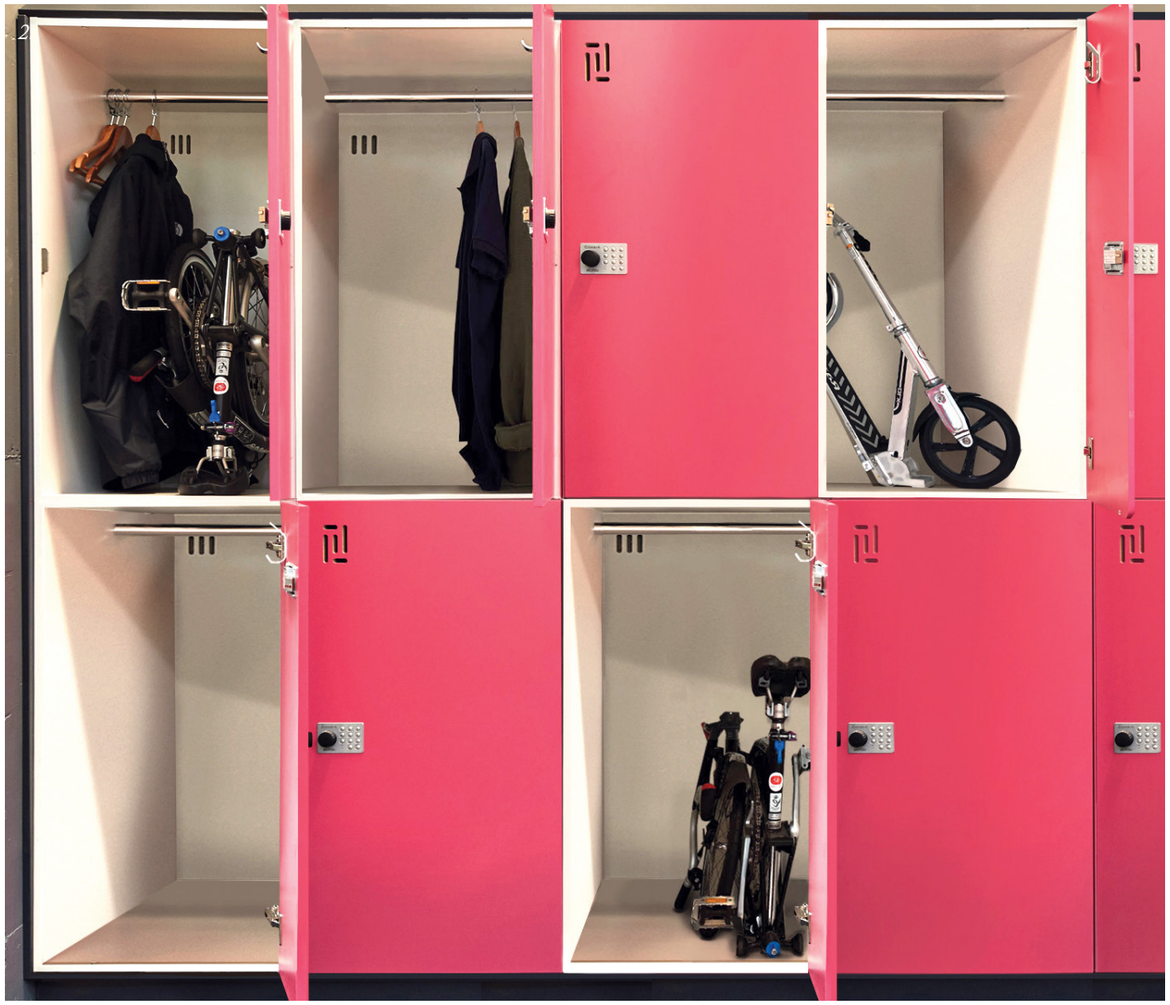
One method is the inclusion of sliding cavity doors to give management the ability to reassign sections of the capacity to different gender groups depending on demand, which in many cities can be skewed as much as 80:20.

Another method is allowing a small allocation of flexible shower rooms with direct access from the common areas, similar to an accessible toilet. With the help of access control, these spaces can be allocated on a first come basis or programmed to specific genders to cater for the demand needs.

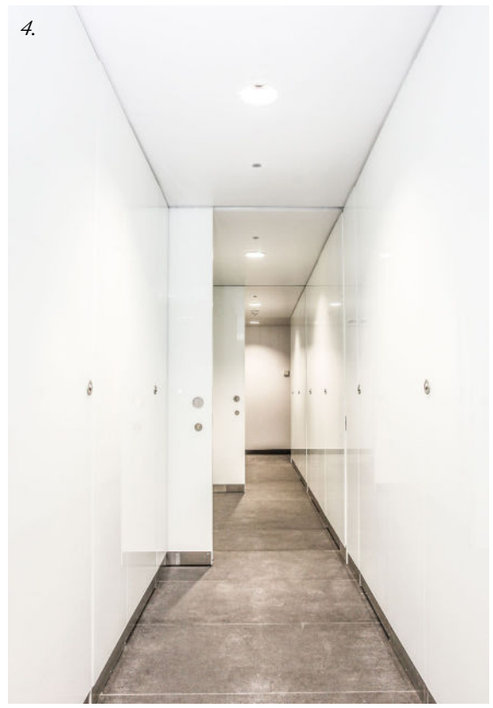
And finally, whatever you do, include some lockers in the common space, they are the first stage of flexibility. They do more for locker waiting lists than any other treatment.

Pooling Demands For A Portfolio Of Buildings

In cities with strict height controls such as Washington D.C. or London, you get huge portfolios of small scale buildings. Delivering top quality facilities under such conditions is challenging as the project size gets too small. Progressive owners have tackled this problem by pooling the demand within local areas and creatingmobility hubs for multiple sites in single locations.



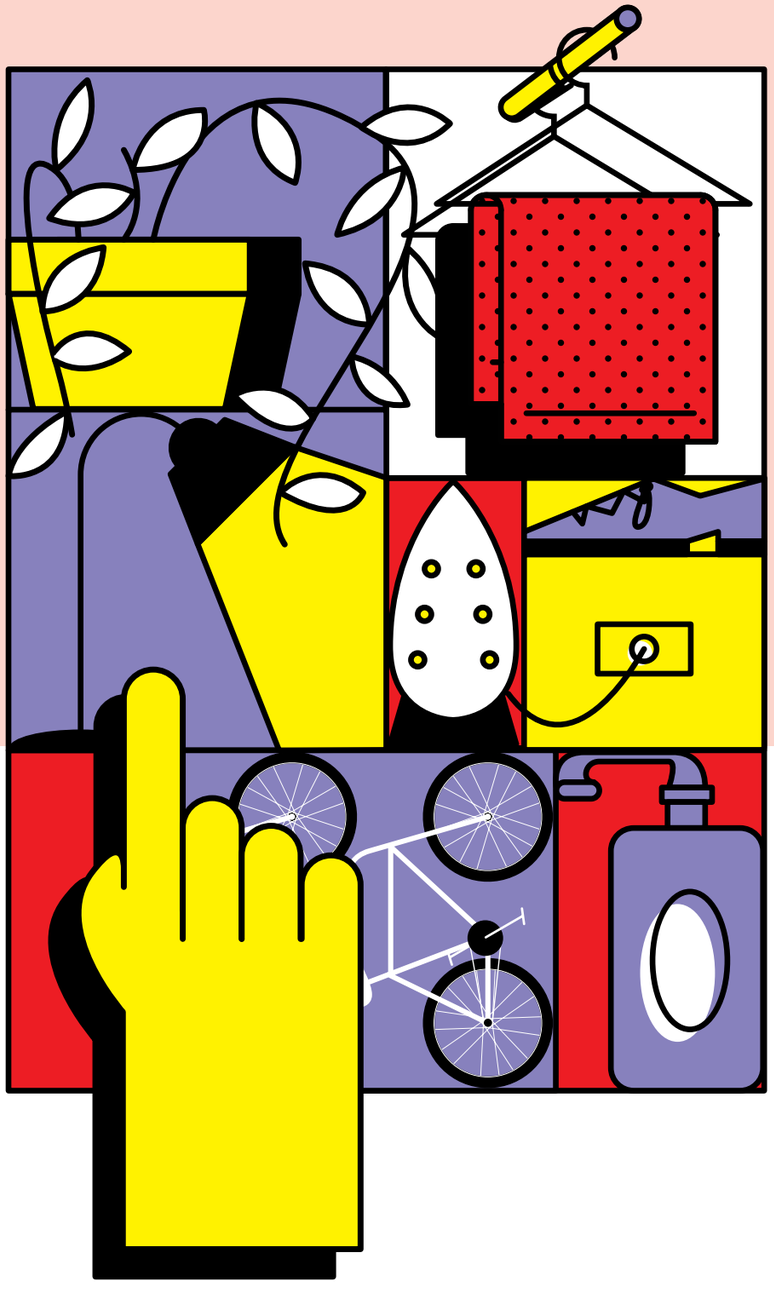
1. *The Wishbone System is designed for flexibility so spaces can be modified easily when demand and usage fluctuates*
2. *The Flexible Locker: For whatever you need*



3. *The Wellness Space at GPT's Melbourne Jewell, CBW*
4. *Cavity Slider: Flexibility at the turn of a key*
5. *Unisex Showers: the ultimate in flexibility*

2.

Moving Beyond Box Ticking & Utilitarian Spaces



The world's smartest building owners and developers understand they aren't in the concrete and glass business; they are in the business of attracting top talent to the spaces they create. Because that's what great companies run on, great people.

Once you understand this fundamental idea, it is not long before you stop counting items on plans like the businessman in The Little Prince, and start focusing on user experience. Compliance is easy, it focuses on the bare minimum, the lowest common denominator. No business is looking for that level of productivity.

A better question than how many bikes does this plan fit is how will the space make the users feel when they are in it? How does one move through the space? Is it a pleasure to be in? Whereas quantity measures simple metrics like capacity, quality measures something ultimately more important user experience.

In essence, user-experience means understanding that bike parking and change rooms are not simply for the storage of bikes and clothes, but easy and relatively inexpensive ways to illustrate to tenants that you have their best interests at heart.

The following features projects that have nailed this thinking and we've aptly organized them around the senses, because that's how we experience the world after all. If you're looking for help on benchmarking quality, check out our Cycle Heart Rating tool, or our article on the Australian Bike Parking Standards (AS 2890.3).

Smell

Nothing quite makes an impression like that which lingers. Buildings are opting to offer premium soaps for tenants to add an extra element of luxury and je ne sais quoi.

Feel

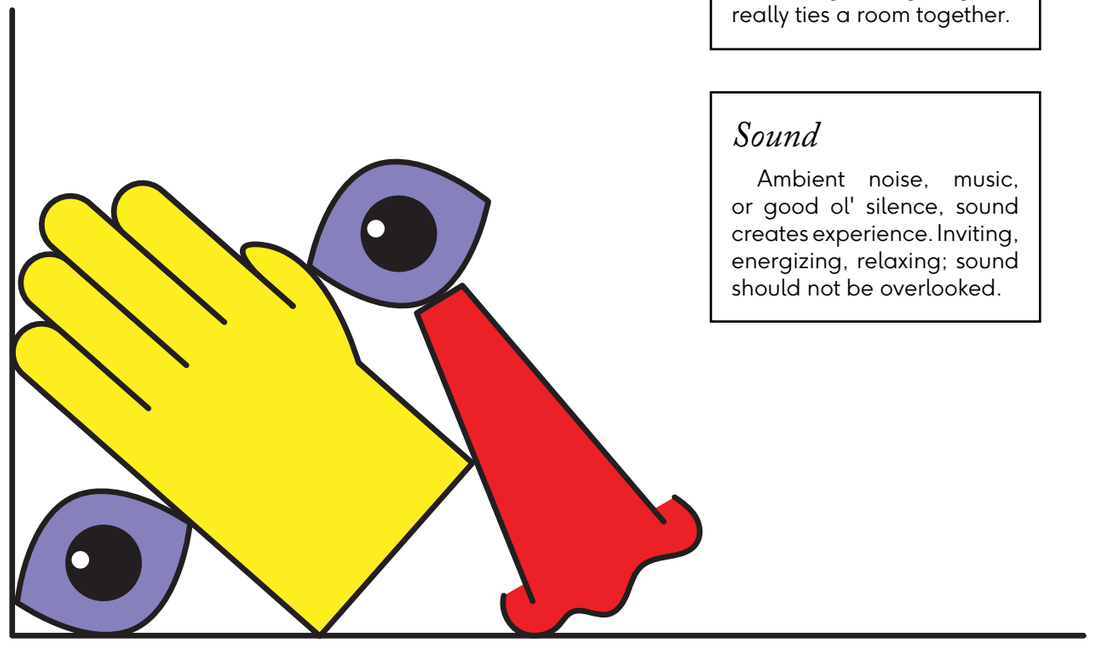
Natural materials like marble, stone, leather, and wood offer a more inviting space, especially when used with proper lighting.

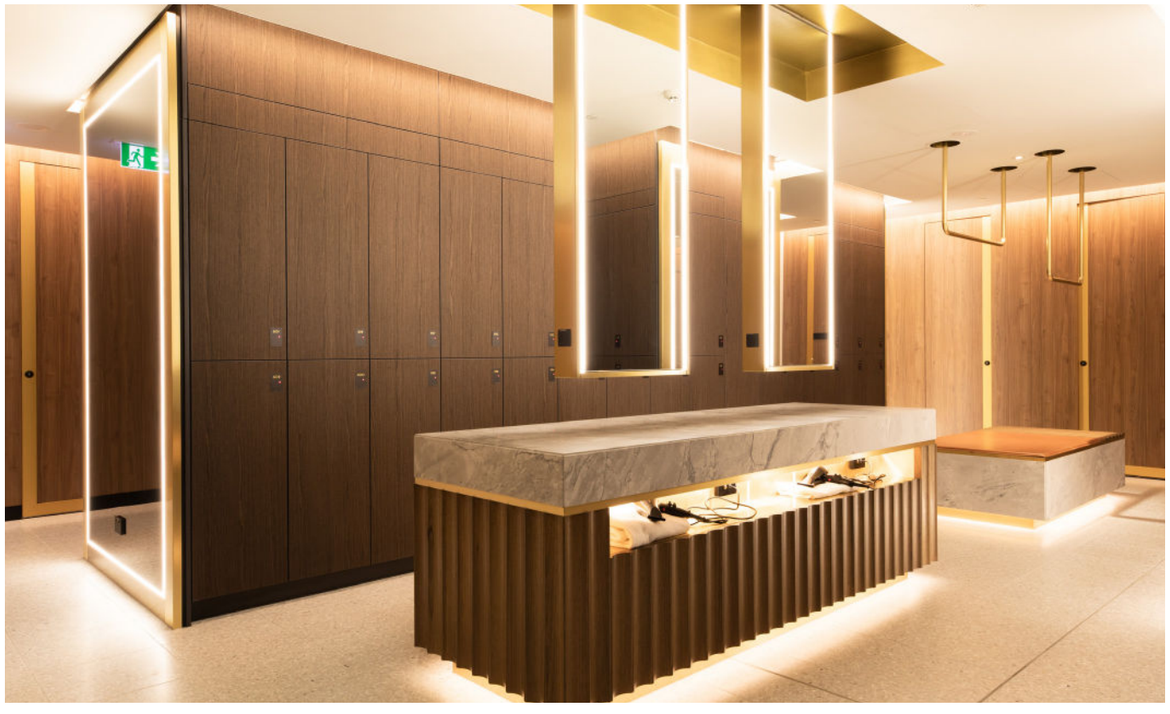
Sight

Natural light brings life to any room, opens up small spaces, and offers an inviting disposition. The next best thing is well designed and thoughtful lighting that really ties a room together.

Sound

Ambient noise, music, or good ol' silence, sound creates experience. Inviting, energizing, relaxing; sound should not be overlooked.



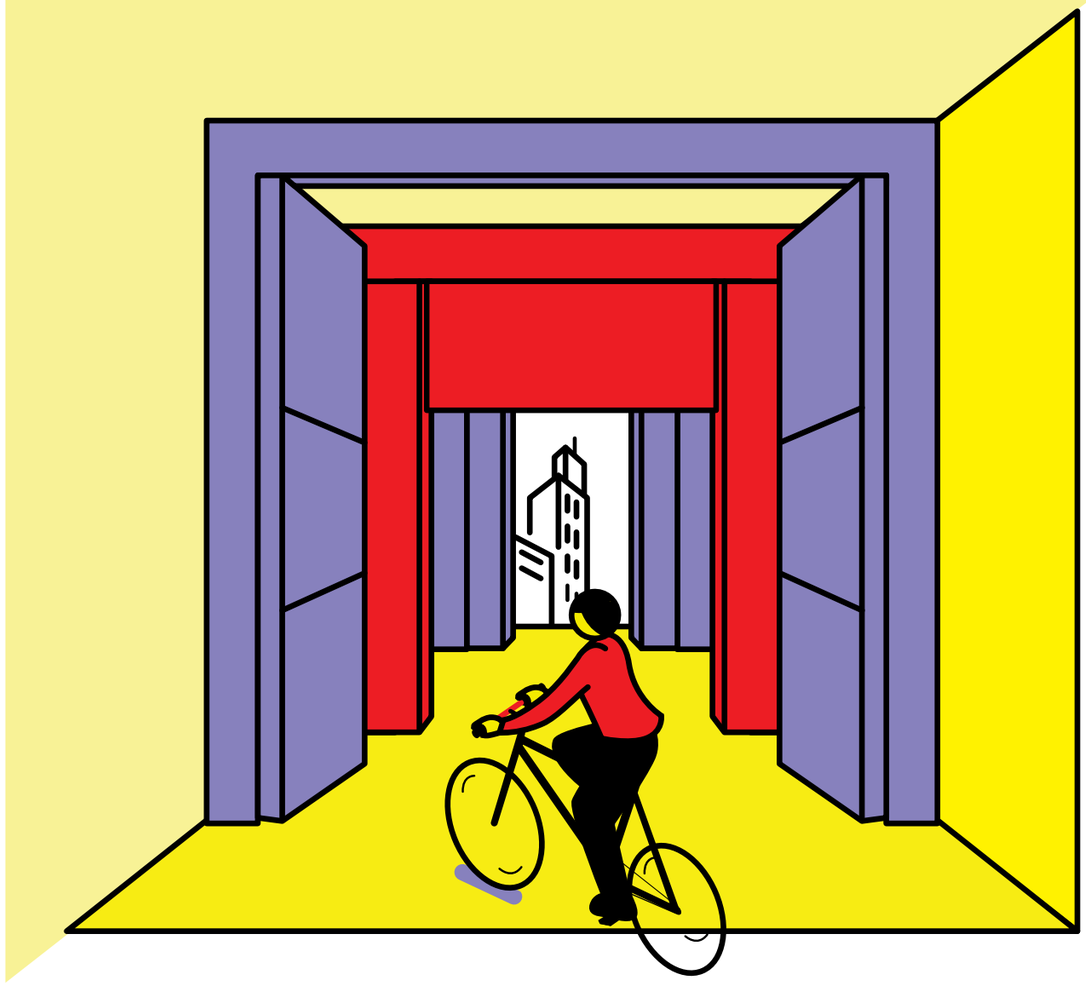


1. *Two Beautiful vanities by Gray Puksand Architects at*
(above) 420 George Street Sydney (below) 101 Collins Street Melbourne

2. *The light filled 16 Chestnut Place bike room in Denver*
3. *AMP's new arrival space at 255 George Street Sydney*

3.

Get Smart

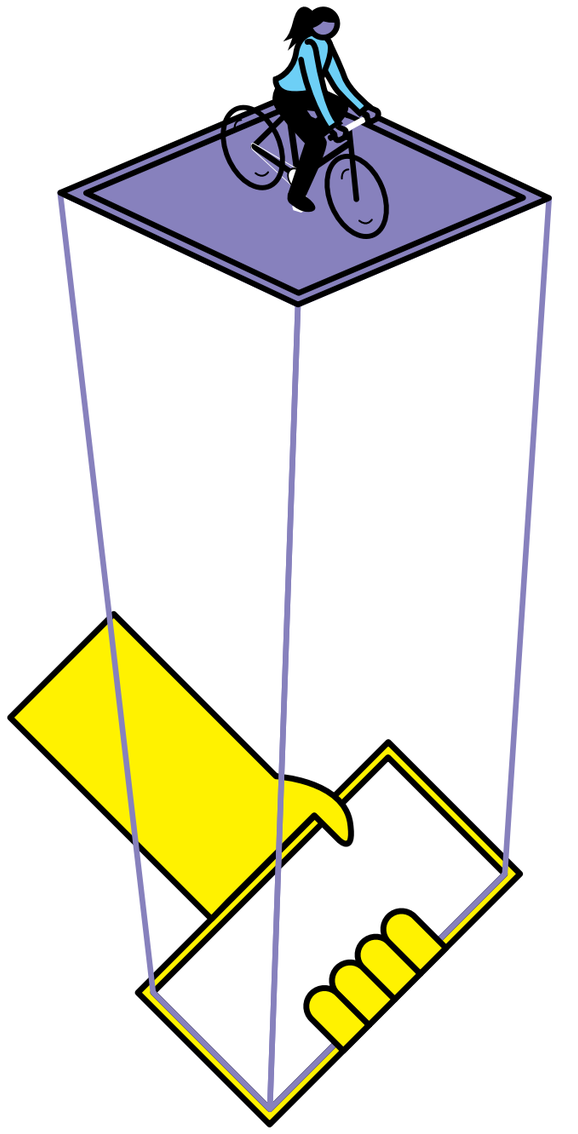


Technology offers increased control for building managers to track data and help inform the key decisions for the future of their facility. Smart tech helps businesses save not only time, but money, as the capital expenses of integrating digital technology are quickly offset by savings in operating expenses thanks to access to real-time data on locker usage, wait times, room occupation, and more.

Smart Lockers

Smart lockers allow users to access their stuff via their swipe card or an app on their phone. It is the step up from the popular digital key pads.This level of convenience for users also offers building managers more control over their space including:

- Being able to quickly measure true demand and locker utilisation, which helps managers assess the amount of lockers being used and whether or not more lockers are needed.
- Preventing users from occupying multiple lockers or holding onto lockers when they are not using them.
- The monetisation of locker use.



Smart Devices

Internet of Things Devices are being used by buildings to measure water usage, wait times, room occupation, and more. As stated above, this helps businesses save not only time, but money, as the capital expenses of integrating digital technology are quickly offset by savings in operating expenses.

Smart Bike Management Platforms

Smart Bike Management Platforms, often popular in larger developments, use a combination of CCTV footage, pressure sensors, and beacon technology to provide real-time utilisation data on each individual bike space.

Smart Apps

Finally, the technology that ties all of the previous technologies together comes (of course) in the form of an app. Tech companies such as Smart Spaces (UK) and ACG (Australia) bring together seemingly disparate platforms within a building to create a seamless and holistic user experience that encourage user engagement.

In conjunction with this tech, organisations like our friends at Love to Ride (UK, USA and APAC) offer a customisable behaviour change app that uses gamification techniques to encourage and reward sustainable travel behaviour.

Together these various forms of app technology allow users and building managers to track data, provide effective data analysis key to managing and improving facilities, and boost user experience across the board.

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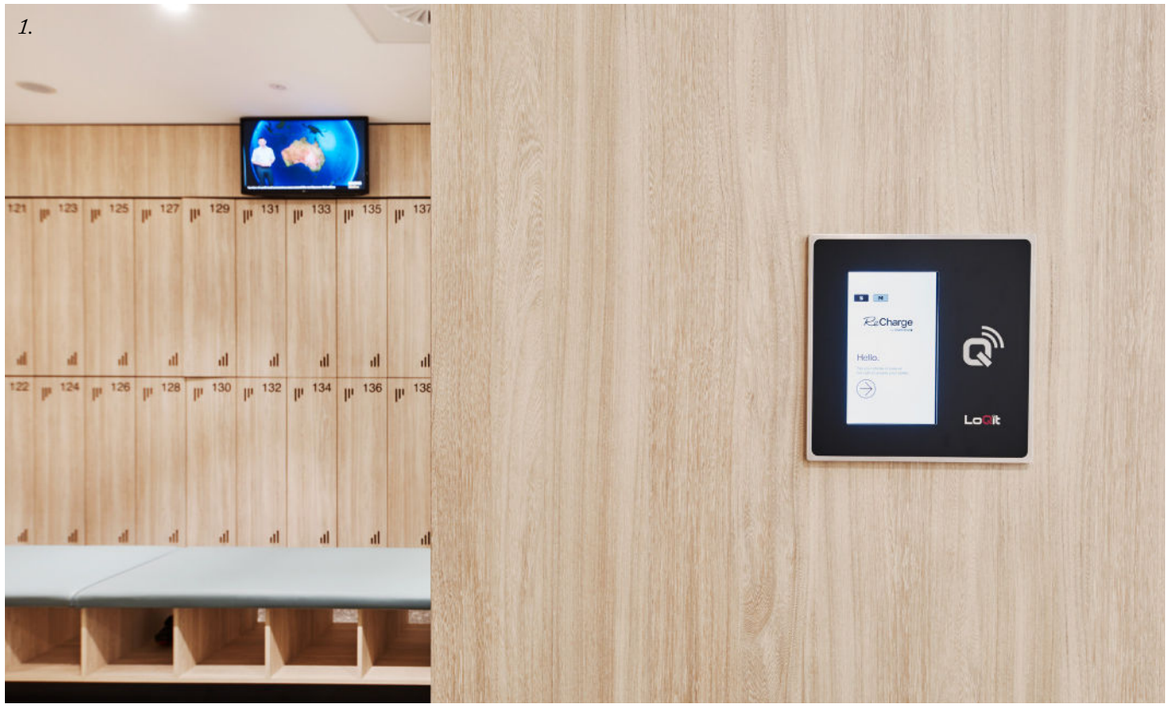

2.

1. Charter Hall's 231 Elizabeth Street showing off its new smart lockers
2. Flowers framing smart lockers at Bates Smart's One Denison Street

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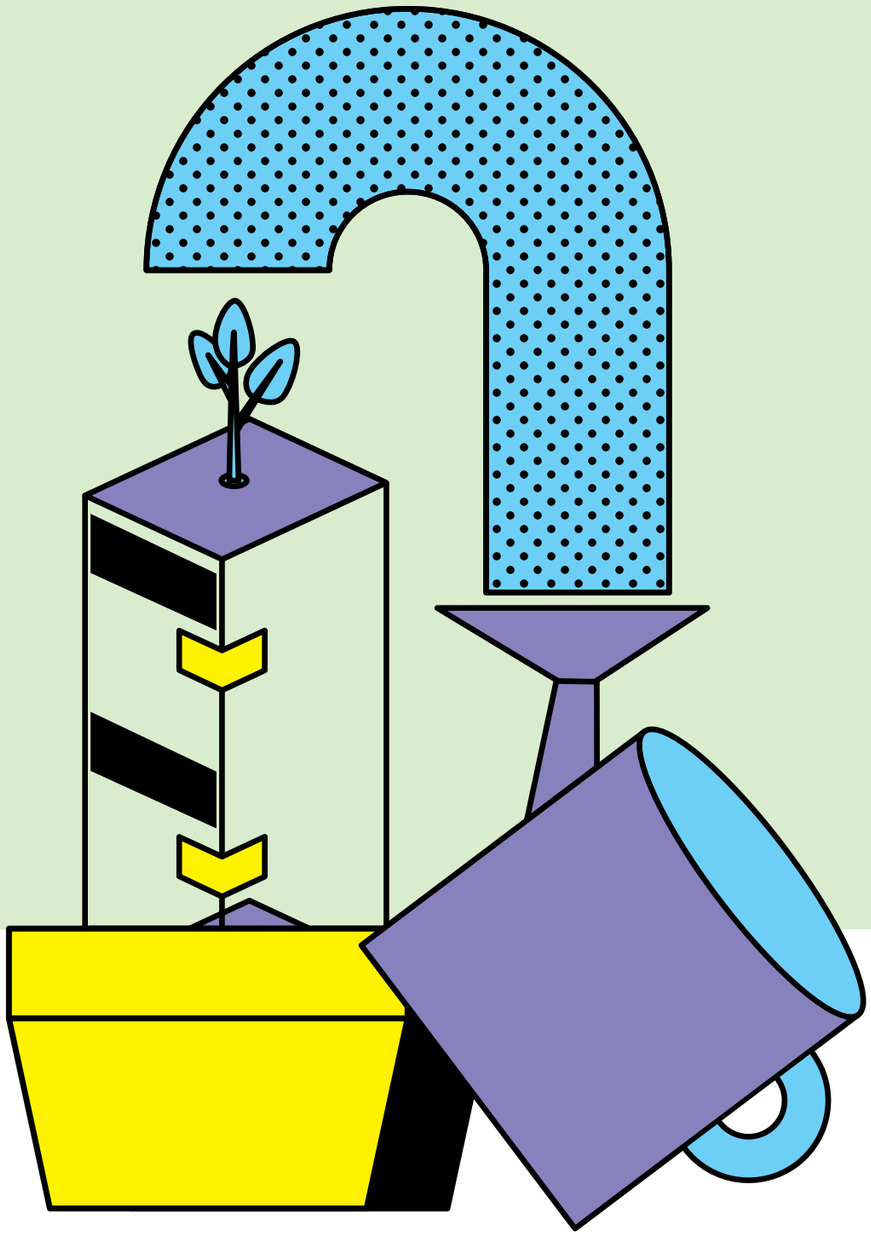
3. Charging lockers, making modern life possible
4. 388 George Street, beauty and smarts in one package

4.

Rethinking Supply Chains



Today's workforce acknowledges not only the importance of environmental sustainability, but also the importance of social and economic sustainability. Tenants are expecting, more and more, that buildings incorporate sustainable practices both in terms of design and delivery (embodied energy) and in terms of how a facility is run (operational energy). This means that it will not be enough to simply hit your bike or locker count – the space will be graded on many more benchmarks than that.

Shifting To An Ethical Supply Chain

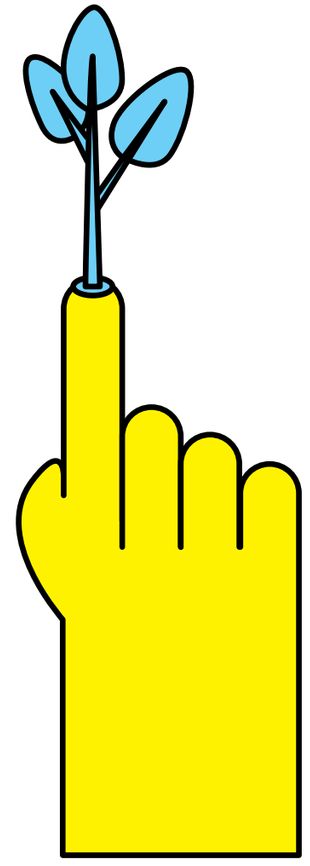
Whether you're sourcing towels for your end-of-trip facility, or sourcing materials for the facility itself, creating an ethical and sustainable supply chain is a must as users now expect it. In addition, more and more commercial property leaders are looking at their corporate social responsibility obligations both internally and externally in the commercial landscape today. The Australian Property Council, for example, is following the lead of the Australian Government in reporting the risks of modern slavery in their operations and supply chains, and demonstrating the actions they are taking to address those risks.

Here at Five at Heart, we love ethical supply chain thinking. In 2016, as a small Aussie company, we partnered with a NGO in Timor Leste (East Timor) to move the manufacturing of our Cradle rack from China, to produce to our knowledge, Timor's first manufactured export. Since then, we have been expanding production and continue to provide formal training and quality job opportunities to a part of the world that truly needs it.

Sustainability

Opportunities to inject sustainable practices into building design are endless and simply require imagination, ingenuity, and dedication to the cause. We're proud to work with some of the most sustainable architecture and design firms around the world who understand the environmental (and commercial) benefits of sustainable building design. ZGF Architects, for example, recently completed an impressive transformation of the former Spruce Goose Hangar outside Los Angeles, turning the space into slick new offices for Google (of course the building would not be complete without a Five at Heart bike room).

We'd be remiss not to mention the trend we are seeing globally of creatively repurposing old, unused bank vaults into bike parking and change rooms. The coolest we have seen are at 44 Montgomery Street in San Francisco and 367 Collins Street in Melbourne.



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1. Beacon Capital's creative repurpose at 44 Montgomery Street
2. Our team in East Timor (Timor-Leste)

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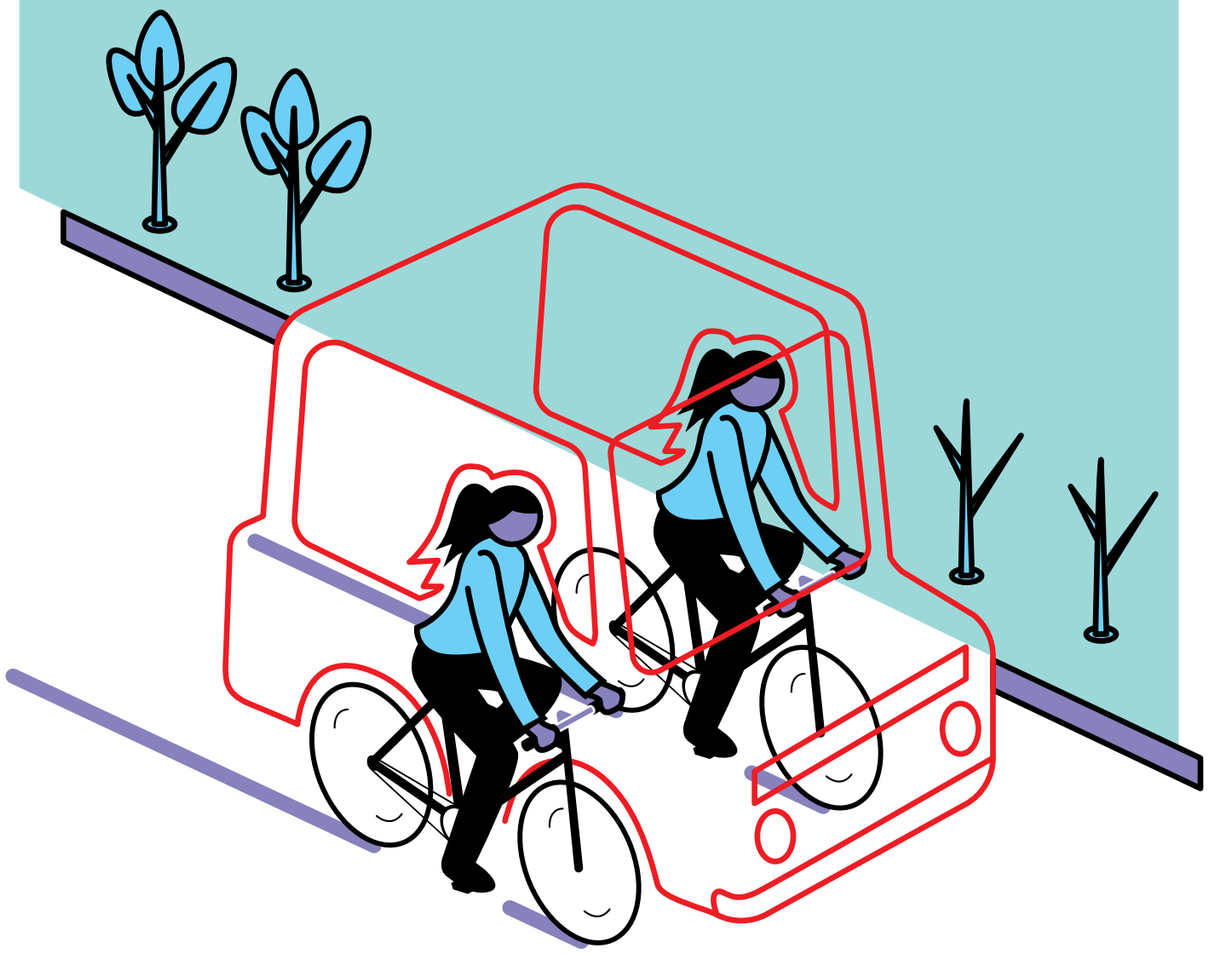
3. Timber ceilings frame a perfect arrival to Woods Bagot's Collins Square Tower 5
4. The amazing repurposing of a historic plane hangar for Google

5.

Micromobility
The Changing Transportation Landscape



[1] www.businessinsider.com/promises-carmakers-have-made-about-their-future-electric-vehicles-2020-1
[2] www.autonews.com/commentary/3-trends-could-fuel-success-2020
[3] www.mckinsey.com/industries/automotive-and-assembly/our-insights/micromobilitys-15000-mile-checkup

How people move from one place to another is multifaceted and constantly evolving. The COVID-19 pandemic has changed the transportation landscape practically overnight. Traffic has decreased sharply and public transport experienced temporary shutdowns and historically low usage. The nearly empty streets have given us a once in a lifetime opportunity to finally see the forest for the trees and what we're seeing is bicycles. Everywhere. Bicycling has skyrocketed in cities around the world as essential workers are discovering new ways to get to work. This surge is prompting action by cities across the globe to install temporary infrastructure, and many are committing millions of dollars to permanent improvements that will dedicate more road space to bicyclists and pedestrians.

This trend is an obvious one, given the social distancing reality. However, it's important to understand how this will evolve over time and how our design decisions impact it. Transportation is an inevitable part of our lives and how we get around has become second nature, but when you step back, it's clear that transportation impacts every facet of our lives and now is the time to analyze what that means for building design.

As a matter of organization, we have divided this section into four major trends that we see as having an impact on building design. These categories reflect both pre- and post-pandemic trends, with research conducted in marketplaces across North America, Europe, and Australasia.

Cars, Sharing Is Caring

Over the past year, trends in the auto industry have reflected consumer demands for more energy-efficient vehicles, and the industry is following suit. In January of 2020, Business Insider published an article on the future of the auto industry that spoke of numerous developments in the electric-vehicle space, as well as the fact that many car makers are revising earlier estimates and planning to reach electrification targets sooner than expected. [1]

Thanks to Tesla, the hype for driverless capabilities has had everyone dreaming about having their own personal driver (read: robot). This sentiment is reinforced by the booming rideshare industry and subscription-based car rental services like Zipcar, GoGet, and FlexiCar continue to grow. **Automotive News** predicts subscription-based car sharing services to increase throughout the year, with an anticipated annual growth rate of 71% through 2022. [2]

These driving trends show a decreased demand for traditional automobile parking at many facilities and an increased demand for electronic charging stations, as well as rideshare drop-off zones. Additionally, bike share and bike hire stations (like Brompton's daily bike hire scheme in the UK) are taking cities by storm, with many buildings investing in stations to complement other modes and expand their multi-modal options for tenants.

E-things

While in previous years, it appeared that e-bikes and e-scooters could simply be the latest fad, the last five months say otherwise. E-bike manufacturer Ampler, in the UK, reported an 88% increase between January and May of 2020. E-scooters continue to see a significant uptick in sales with several new lightweight models entering the market this last quarter, demonstrating a rosy future for micromobility. In fact, a McKinsey study[3] estimates that the micromobility market could reach $150 billion in Europe and $300 billion in the U.S. by 2030.

Forward-thinking companies have already considered the needs of micromobility users by incorporating simple changes into their end-of-trip facilities including:

- Installing power points in the bike rooms to act as charging stations for e-bikes and e-scooters
- Allowing for flexible lockers (preferably up on the tenant floors) that cater to folding bikes, scooters, hoverboards, and whatever else the future generation dreams up next.

Heavy Rail

Globally, large amounts of governmental resources are being allocated to the improvement and expansion of heavy rail in major metropolises. Los Angeles, long known as the archetypal car city, has begun to implement Measure M - a sales tax that will offset the cost of implementing transit - in order to help fund an $80 billion plan to add over 170km to the county's rail network. Toronto has proposed a fifteen-year $33 billion investment to expand their current subway network.

Down under, Sydney is investing record amounts of money for transit, committing to a new metro line as well as several new tram lines, all of which will undoubtedly transform how commuters travel to and from work.

London may have the most ambitious plans of all, looking to spend upwards of £1.3 trillion over the next 30 years in capital infrastructure.

As with the changes we've seen in the *(Cont.)*

automotive industry, the increase of rail lines in our urban environments are aimed at giving commuters a greener, more flexible, driverless option to help ease congestion and transform the way people move.

Public Space Campaigns Tiny Sprockets Turn Big Wheels

We are lucky to work alongside advocacy groups whose sole mission is to get more people cycling. Our friends at Love to Ride leverage data and smart devices to encourage sustainable behavior change towards cycling across the globe. Partnering with a growing number of businesses worldwide (over 27,900), they are a small team making a massive difference.

Cycling Works Australia is one of the only business-led movements in the country pushing for government to invest more in bicycle infrastructure. The likes of ISPT, Committee for Sydney, Mercer, Gehl, Planex and more have joined the movement because they have put their money where their mouth is and they understand that bicycling is the key to urban resilience. You've already invested in bicycle infrastructure, take the next step and join the movement to make sure you can continue to attract top talent and tenants.

Community support is as important as bicycle infrastructure and when it comes to change, power in numbers is the way to make it happen.

1. *Commuters on Brisbane's Goodwill bridge*
2. *The growing "bike jam" of the City of Yarra's Canning St. Bicycle Bouelvard*

3. *Bikes lighting up the room at Investa's 60 Martin Place by Hassell*
4. *Westpac is ready for change with e-bike charging in their Sydney HQ*

Get in touch

Enjoyed this? Reach out to our team to learn more, ask us anything, or if you just want to chat.

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