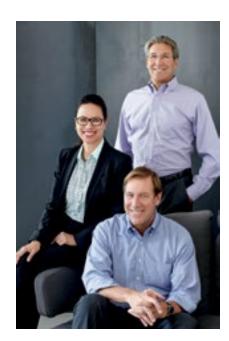
Design Forecast 2014



Our 2014 Design Forecast highlights the trends that will shape design in the coming decade. They reflect six big topics that form an agenda for the future.



The trends that make up our 2014 Design Forecast reflect six big ideas that form a working agenda for design's impact on our clients' success in the coming decade.

That agenda includes workplace, wellness, technology, urbanization, globalization, and development. Hands-on experience with our clients exposes us to these topics as they play out in hundreds of cities.

All six ideas are reflected in the most important trends—the meta-trends—that will drive design between now and 2025. (See the next page.) They set the agenda for our practice areas' research initiatives. Together with our experience, they give us a solid basis for forecasting what's ahead.

Knowing what's next will matter more in tomorrow's design economy. When design is the difference between a great outcome and something less, a design perspective on the future is a competitive advantage.

We focus on transforming aspects of our clients' businesses to help them achieve their goals and strategies. In this sense, we are business innovators, leveraging design's power to change the game.

As a global design firm, we never lose sight of the fact that the game we're changing is one that our clients play to win. It's their competitive landscape we're transforming.

Our 2014 Design Forecast captures the insights of 22 global practice areas, 46 offices, and 4,000 design professionals. This is the design team our clients depend on every day to bring their projects and programs to fruition, deliver value on a planetary basis, and most of all learn from the experience and apply it to the future.

We're honored to share this forecast with you. Our designers discuss these trends constantly across our firm. We invite you to join the conversation in 2014.

Olane

Diane Hoskins, FAIA



Andy Cohen, FAIA, IIDA



David Gensler



SCAN CODE FOR MORE CONTENT

Throughout the year, we discuss the latest trends, present research findings and design developments, and analyze the issues that matter to our clients. We invite you to participate!

http://designforecast.gensler.com

With our global markets in mind, here's a report on the future of design.







Mobility and performance

Organizations will get serious about the problems of mobility and collaboration. As they recognize the benefits of faceto-face interaction, "getting everyone under one roof" will grow. Mitigating conflicts between interactive and focused work will be a top priority, given the negative impact of distraction on people's effectiveness. (See our 2013 U.S. Workplace Survey.) Since mobility, density, and interaction are here to stay, the work settings of the future will be expected to resolve these dilemmas.

SEE TRENDS

Pg. 07 Effectiveness requires choice

Pg. 07 Toward a next-gen workplace

Pg. 08 New drivers of change

Pg. 13 Two main functions: catalyst & accelerant

Pg. 18 A need for greater workplace choices

Nudging people to health

The wellness movement will prompt major changes in how healthcare is delivered (local and accessible, with more choices), how cities work (encouraging walking and biking), and how buildings are designed (encouraging people to take stairs, not elevators, for example). Wellness is a social issue, so design will be called on to make it part of the everyday. The goal is to do this so seamlessly that people can incorporate wellness in their lives without having to think about it.

SEE TRENDS

Pg. 38 Demographically driven expectations

Pg. 38 Medical and wellness tourism

Pg. 56 Wellness is the new green

Pg. 56 Healthcare's focus is on consumers

Integrating tech with place

As smart devices proliferate, the world will be easier to navigate. As places get "smarter," people will shape how they experience places to reflect their preferences. While tech's integration with place is a given, getting there will still be a challenge. Tech is unpredictably disruptive and its innovation cycle can lead to overinvestment in the last big thing. Done badly, it can be intrusive. But tech is undeniably in place's future. Realizing tech's full potential will be a design priority in every market sector.

SEE TRENDS

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The hunt for new

markets is global



URBANIZATION

Cities as the vortex of massive growth

By 2050, cities will have 3 billion more people than they had in 2000. Africa and Asia will urbanize at twice the rate of everywhere else. Africa will be the next high-growth economy, with a pressing need for modern infrastructure. Urbanization in East Asia will be fueled by a surging middle class. The affluence of this immense cohort (3 billion strong by 2030) will spur substantial real estate investment so the cities in the region can live up to the rising expectations of new consumers.

SEE TRENDS

Pg. 13 Shifting views on headquarters

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Pg. 50 The rise and rise of the metropolis

Pg. 50 The importance of resilience Pg. 58 Urbanization boosts connectivity Regional economic parity means

that leading companies in Asia, Latin America, and the Middle East will expand into new markets. Investors in these regions, including sovereign funds, will favor safe havens, with real property as a prime target. In many cases, they will be moving into unknown territory, so getting the nuances right will be crucial. More than just bridging the differences, design will have to build on them to create new approaches and models that can generate higher value.

Urbanity takes the mixed-use stage

The future is a mix of land uses, urban in character. The next generation of real estate development will differ from the last in its willingness to mix it up. The anchors and types of spaces will be more varied and easier to resize and reallocate in response to shifting demand. Look for strong interest in urban moves that activate and then play the activities off each other to create integrated destinations. Planning and design will stress their open-ended nature—settings that can be reshaped to stay fresh.

SEE TRENDS

Pg. 13 Shifting views on headquarters

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SEE TRENDS

Pg. 08 New drivers of change

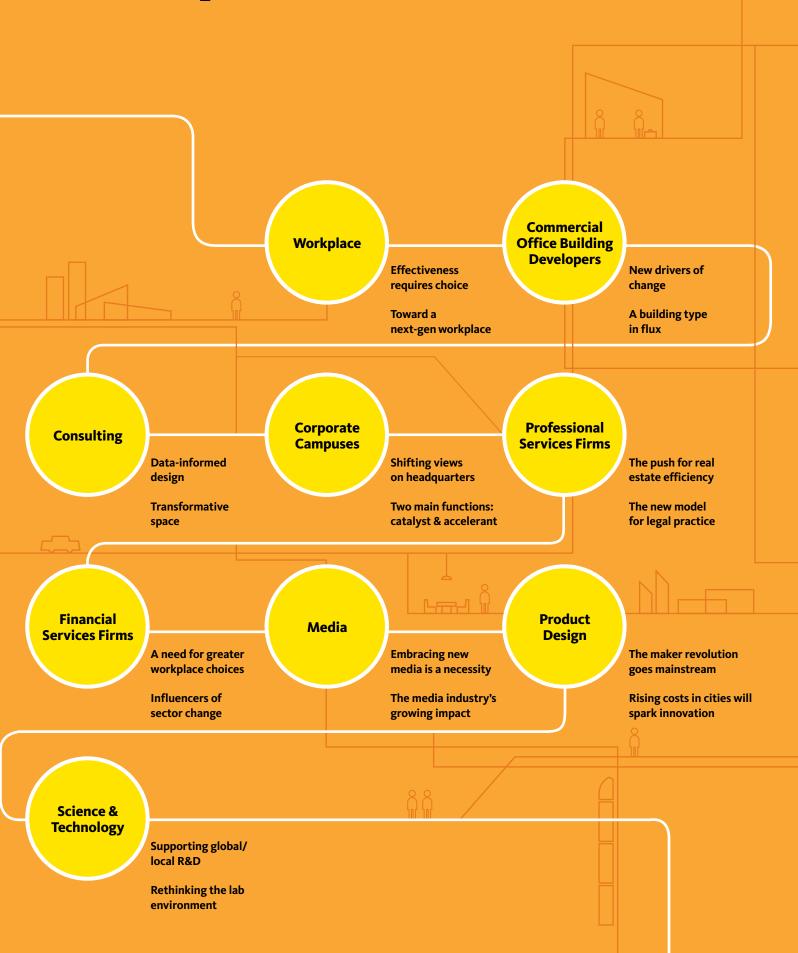
Pg. 28 Total immersion steals the show

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The Future of Workplace



The revolution is about design.

This is a time of profound change in how design supports work in all its varied forms.

Old ways are being set aside as organizations look at work and its settings holistically. There's a demand for new approaches and real estate products. It's as much grassroots as top-down. Behind it are two big, future-shaping trends.



Cities and buildings are changing in tandem with work and work styles.

Significant changes, including a younger workforce and the disruptive, innovation-driven nature of business, mean that real estate products are being rethought both in form and provision. The revolution that started changing the workplace in the early 1990s has spread now to the buildings and arguably to the districts—mostly urban, but not entirely—where work locates.

Demographic, economic, and cultural shifts are taking hold worldwide.

We're leaving the vestiges of the postwar era behind. The workforce is in global transition and the old economic order is breaking down. New players are on the scene and established ones are departing or taking on new roles. Working (and designing) across geographic and demographic markets is crucial. It means staying connected and agile while respecting the nuances of different cultures and cohorts.

Gensler Design Forecast 2014



Workplace

Effectiveness requires choice

The workplace suffers from a case of "opposites detract." People need to collaborate and are hungry for places suited to conversations among a few people. They need to focus, but they also need to interact—conference calls, virtual meetings, and people stopping by. Look for activity-based choices, user-shaped space, and furniture to calm distraction—look for balance.

TREND

02

Toward a next-gen workplace

As a new cohort—bigger than the Boomers—gets to work, the office workspace will be reshaped. The line between work and city will blur as towers and campuses mix in "community." Coworking space, with its informal and collaborative ethos, will scale up. "Smart" environments will take hold. Attracting this young and creative generation will be a shared goal of cities and employers.



Commercial Office Building Developers

TREND

03

New drivers of change

Office buildings are changing. This reflects a shift from hierarchy to community, to support innovation. A younger workforce wants to see itself and its locally based culture in the office. Mixing work with other uses is a growing practice; connecting informally with others in and around the building is a plus. Both make urban mixed-use locations more highly valued.

TREND



A building type in flux

Emerging tenant demands challenge conventional approaches to vertical transportation, egress, floor-to-floor heights, and occupancy metrics. Higher densities, greater utilization, and 24/7 use mean more robust infrastructure for new buildings. Low-voltage current and the cloud simplify it for some users, making older buildings easier to convert to meet the needs of office tenants.

THE COMMERCIAL OFFICE BUILDING PARADIGM SHIFTS

PRE-GREAT RECESSION

20–25k square foot (sf) floor plates

250-350 sf per person

Stacked office floors without openings and interconnecting stairs are the norm

10 percent chance of unplanned encounters with others

Center core

Amenities mostly tenantprovided, dispersed

8- to 9-foot ceiling height throughout all workspaces

Favored locations: central business districts or suburbs

POST-GREAT RECESSION

Up to 60k sf floor plates

150-250 sf per person

2- to 3-story opening with interconnecting stairs more common

90 percent chance of unplanned encounters with others

Offset core in some markets

More building amenities in a walkable, amenity-rich setting

9- to 12-foot typical ceiling heights, varying based on use

Favored locations: mixed-use urban districts near transit





Consulting

TREND **05**

Data-informed design

Strategic decisions—locating a headquarters, resolving workplace dilemmas, or designing the user experience—will draw on data analytics for timely, broad-based findings that inform the solutions. By combining sets of previously siloed data, analytics can deliver surprising insights, giving clients new perspectives on the major issues in front of them.

TREND

06

Transformative space

Leading organizations know that well-designed workspace improves performance, speeds innovation, and builds healthy cultures. They see it as crucial to achieving their goals. New research bears them out. The push for transformational space will make it standard practice to integrate strategy, collaborative design, engaged change management, and post-occupancy calibration.





Professional Services Firms

ΓREND

09

The push for real estate efficiency

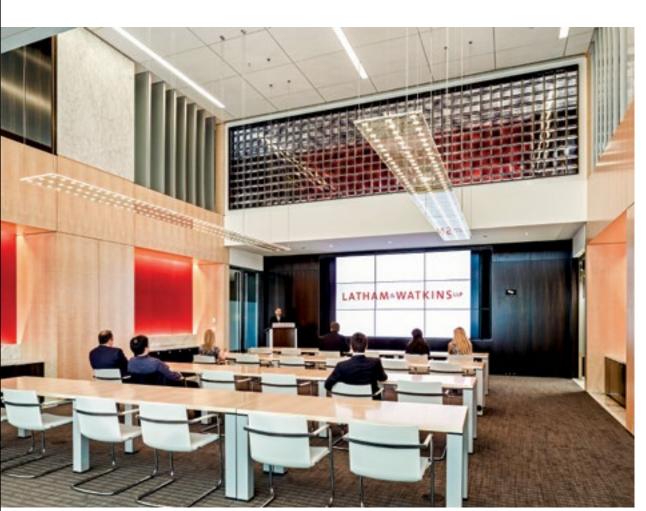
The quest for real estate efficiency is leading law, accounting, and consulting firms to leverage mobility more fully and opt for shared open and team-based workspace over enclosed offices. As new ways of working reduce the size of libraries, records, and administrative staff, firms are consolidating support functions and adding flexibility to grow within smaller footprints.

TREND

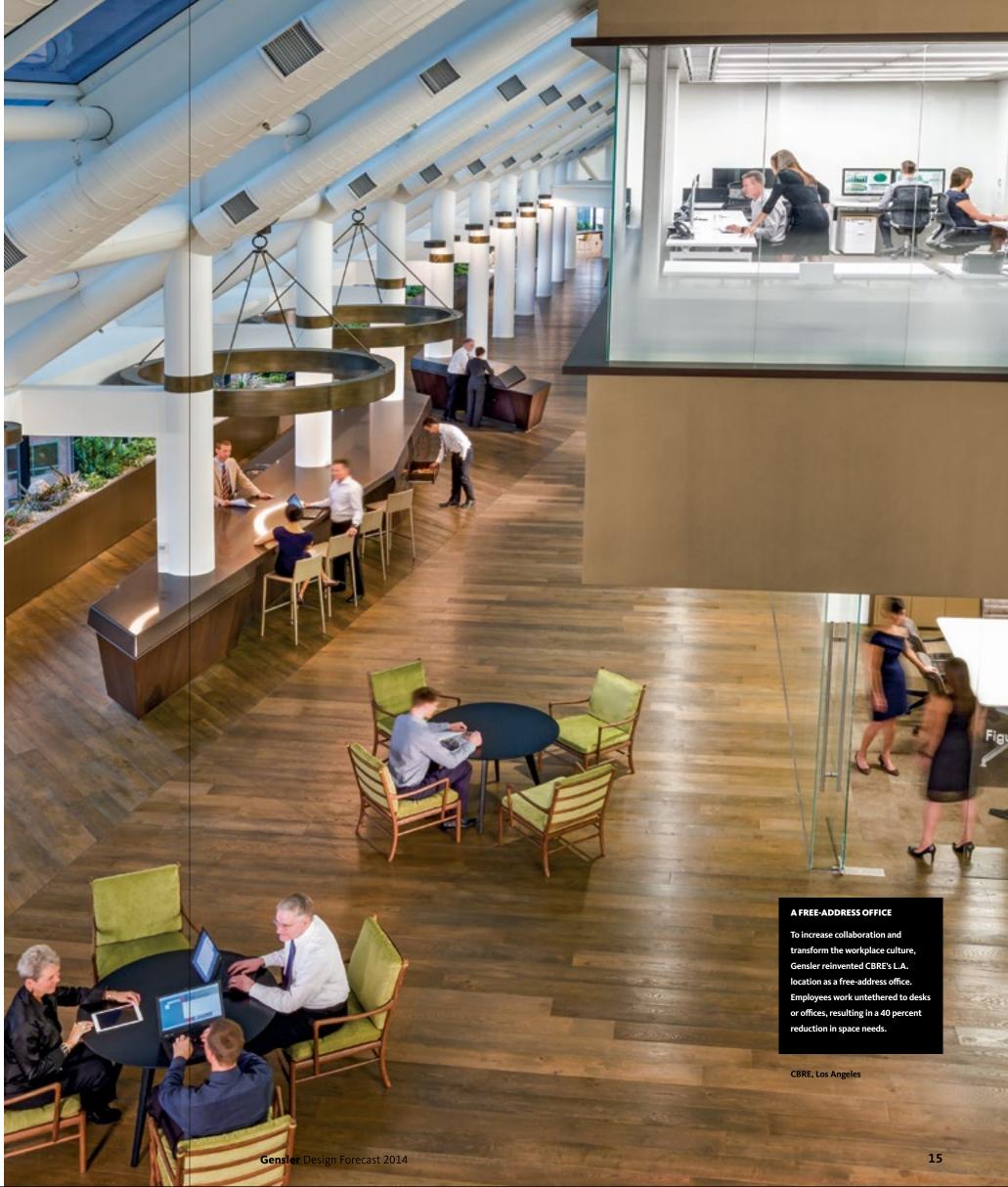
10

The new model for legal practice

Law firms traditionally handle unique and complex matters, yet about 80 percent of their work is transactional. New business models are shifting the focus from solving legal problems to solving business problems. As law firms' corporate clients take on more routine legal work, wholly owned legal process organizations (LPOs) are competing with law firms for some of it.



Latham & Watkins, Houston





Financial Services Firms

11

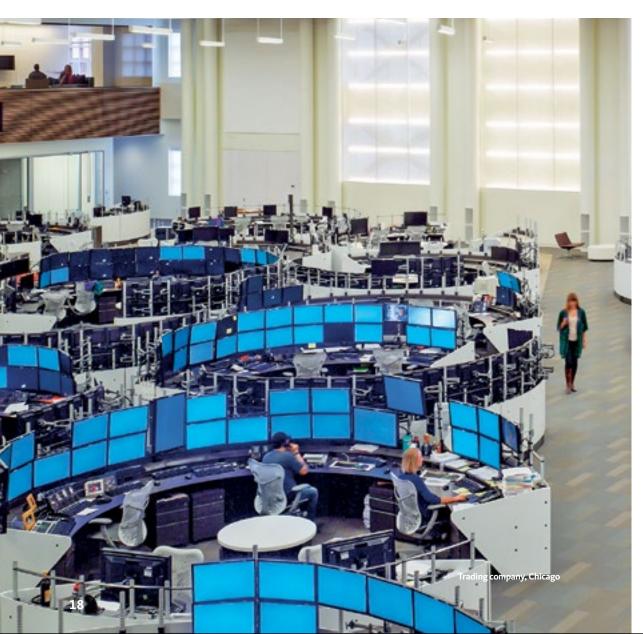
A need for greater workplace choices

Recognizing the difficulty of devising "global" standards, firms are opting for a kit of parts that is adaptable to many different locations. Firms are also testing touch-down tech hubs, easily reconfigured offices, openbench workstation neighborhoods, and open network team areas. While technology may be visible or invisible in these settings, it is integral to how well they work.

TREND 12

Influencers of sector change

There are two big influencers in the sector. One is the changed regulatory regime following the 2009 financial crisis, which has led big banks to spin off proprietary trading and private equity. The other is the unsettled question of retail banking: will technology make branch banks disappear or will they be reinvented as a brand- and relationship-building space?









Media

TREND

13

Embracing new media is a necessity

Mastering media in all its forms is almost mandatory for effective organizations. Social media in particular has matured to the point that personal digital connectivity is a given. This interactivity will revolutionize every sector that it touches. Despite the potential for disruption, the growing hunger for digital content is likely to spur creative enterprise, not stifle it.

TREND

14

The media industry's growing impact

Media now includes all forms of interpersonal communications, entertainment, and interactive technologies. It comprises both conveying information and sharing it. The emerging media industry reflects how content and delivery are fused together. It is changing the competitive landscape and challenging other industries' business models and use of physical space.

THE TOP FACTORS THAT ARE DRIVING

THE SURGE IN MEDIA DEMAND

WEB ACCESS IS CLOSE TO TOTAL

90 percent in developed countries

SOCIAL NETWORKS

Smart devices fuel community

A DATA-DRIVEN SOCIETY

Data is at everyone's fingertips

MOVING TO THE CLOUD

Media gets more room to play

THERE'S AN APP FOR THAT

Portals are ultra-easy and branded

PP UNTETHERED ACCESS

The media portals are all mobile

NEW INTEREST IN VIDEO

Every smart device is the TV

MEDIA IS PART OF EXPERIENCE

It contributes to making great places

Product Design

TREND 15

goes mainstream

With small-scale 3D printers becoming more affordable, expect to see a steady evolution of what people can make with them. Look for 3D printers to emerge as creative tools, adding an artisanal element to fabrication. As it proliferates, this kind of printing will reshape mainstream manufacturing, making larger components and short runs of backlist and bespoke products.

TREND 16

The maker revolution Rising costs in cities will spark innovation

Soaring urban real estate costs will generate new products aimed at maximizing the use of minimal space. A big part of this trend is a greater willingness to share what was formerly assigned or owned. From free-address work settings to car- and bike-sharing, new products will be developed to serve greater numbers of people "just in time" in less space and at lower cost.



Coalesse Teamwork Satellite Tables



Leland HiFi Collection





Products are an important aspect of the workplace, addressing the need for scale, comfort, and enjoyment in ways that speak to brand and choice. Our growing catalogue of products reflects our knowledge of the trends affecting work's settings and users.



Cooper Lighting Petite Nuage







Martin Brattrud, One Lounge Seating











Cooper Lighting Neo-Ray Versys









23

Nienkämper Yabaco Chair

Luxo Ninety Task Lamp Collection

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Science & Technology

TREND

17

Supporting global/ local R&D

Multidisciplinary collaboration and knowledge sharing with outside (often offshore) companies and institutions around early-stage research is growing. Later-stage development takes place in-house, but the collaboration continues. R&D space has to serve the ageand culture-diverse workforce, with shared settings and amenities that support it through every step in product development.

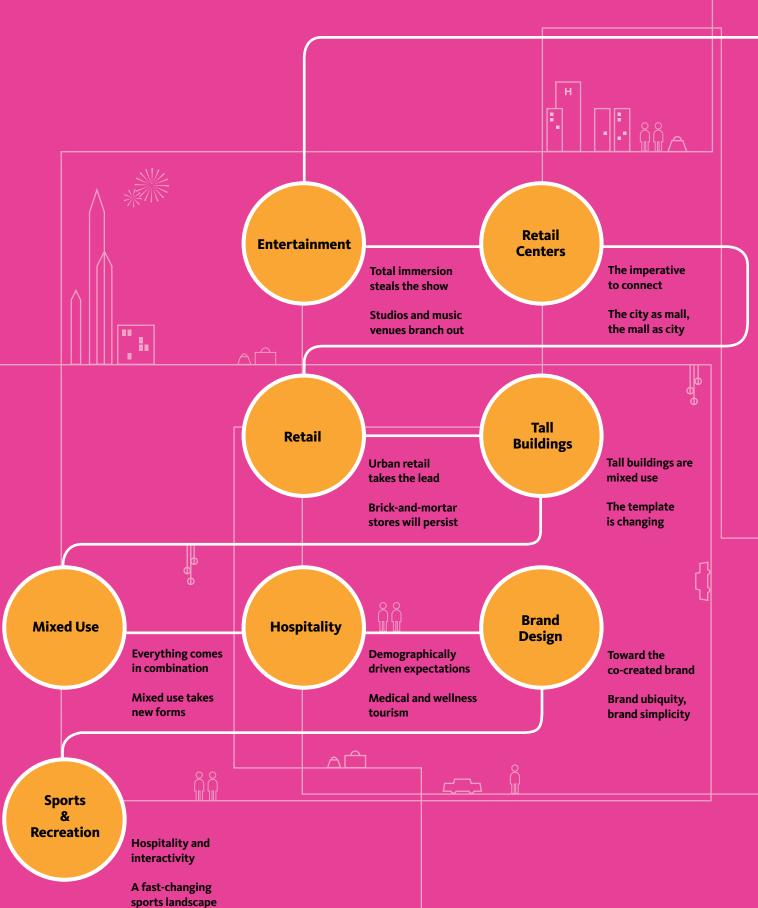
TREND 18

Rethinking the lab environment

The use of advanced technology is transforming how lab research is done. Labs are becoming more compact, flexible, modular, and better integrated with the larger workspace. This gives researchers a wider choice of work settings. Because speed to market is crucial, labs are designed for rapid prototyping, enabling the product/ project teams to innovate without losing momentum.

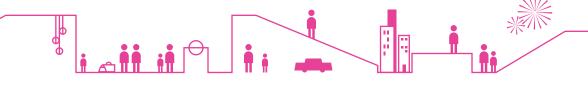


The Future of Lifestyle



The relationship is personal.

Differentiation is a theme as brands reach out to individual consumers. Brands have to learn to speak to a desire for authenticity and urbanity. They have to bring consumers into the picture. These steps need care and cultivation to work effectively. Here are two reasons why.



The Lifestyle sector's new mix involves some contradictions.

Consumer expectations that upend what tradition says should pair (or not) are driving change across the sector. While the mix of uses is growing in variety, some of the uses are shrinking. New forms and formats are emerging in response. Mass appeal matters, but bespoke, local, artisanal, and elite are a desirable counterpoint. The challenge is to make the resulting mix work in a business sense and as a compelling destination.

Signal to noise is a real issue in an age of hyperconnectivity.

When every lifestyle brand hawks experience and uses multiple touch points to attract business, there's a risk their clientele will turn off or turn hostile. Self-curated experience is on the rise as people take the lead and draw on what their cohort thinks, not what brands tell them. Brands want in on the conversation, but it takes finesse to pull this off without seeming tone deaf. Engaging people is one of design's biggest challenges.

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Entertainment

TREND **19**

Total immersion steals the show

People are seeking immersive environments that take them to new places. Large-scale theme parks and themed attractions are appearing in the Gulf, China, and Turkey. Casinos take on spectacular new forms or recall exotic locations. Even cinemas offer high-end experiences. While technology is part of it, the settings and sensory engagement are the main events.

TREND 20

Studios and music venues branch out

New centers of creative content are emerging in the film industry, with studios on the rise in East Asia and Europe to develop major motion pictures. The economic impact of iTunes and other digital media has raised the importance of live performances to musical artists and promoters—a catalyst for new concert venues that often double as anchors of mixed-use projects.





TREND **21**

The imperative to connect

Retail

Centers

Retail centers are pulling out the stops to connect with shoppers, both by curating the mix to reflect local tastes and by layering in activities—a full calendar of farmers' markets, concerts, craft and maker fairs—and amenities that their target markets will appreciate. The aim is to increase the touch points with shoppers so a center is on their map and worth return visits.

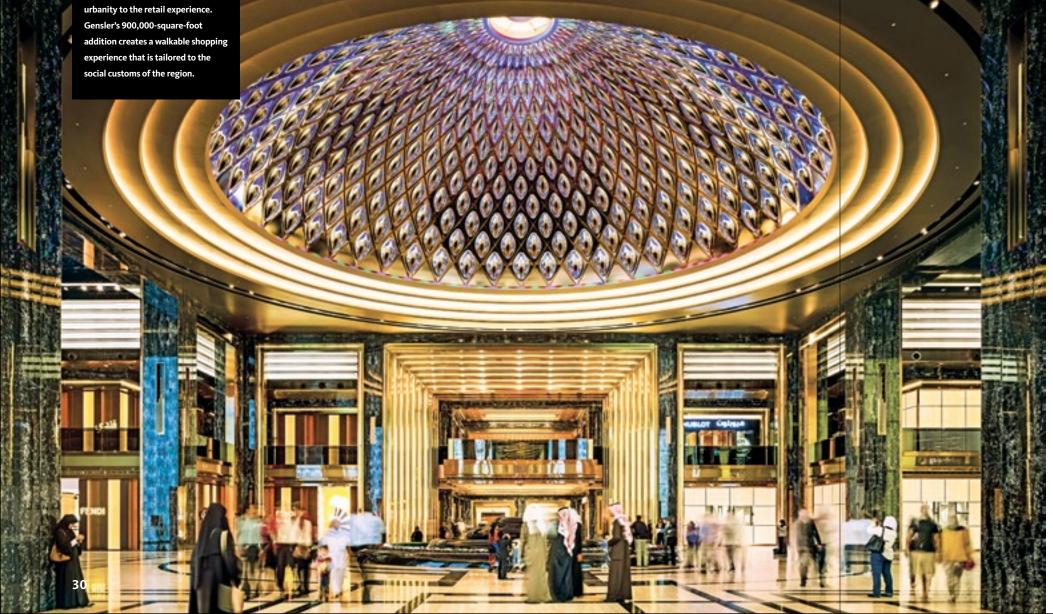
TREND **22**

The city as mall, the mall as city

Urbanization is shifting retail centers to the urban core as retailers focus on dense, transitserved districts. In established urban markets with a lot of infill sites, retail centers are shrinking. They're also engaging the street rather than turning their backs on it. In other markets, the scale is much bigger, but the feeling is urban and walkable, activated by density and events.

TAILORED TO FIT

above, below, and below right: The Avenues, Al Farwaniya, Kuwait City









above: The KeurigsM Store, Burlington, MA below: Topshop, Los Angeles

Retail

TREND
23

Urban retail takes the lead

In cities, brand consistency is
less important than getting local
culture and preferences right.
Self-expression trumps brand
identification among consumers.
Entrepreneurship in urban markets
will generate new retail concepts
catering to many different lifestyle
choices. To attract these customers,
retailers may venture into smaller,
nontraditional settings conveying
uniqueness and authenticity.

TREND

24

Brick-and-mortar stores will persist

Although their overall contribution to retailer revenues is declining, stores will persist because they offer brick-and-mortar retailers a way to differentiate themselves from online shopping. To shrink stores and decouple inventory and delivery from the hands-on, techaugmented experience of stores, sales staff, and goods, retailers will need to integrate and orchestrate their different retail channels.



Tower will be China's tallest building—the centerpiece of the Lujiazui Finance and Trade Zone. Im aminima a salam

Tall Buildings

TRENI

25

Tall buildings are mixed use

To minimize investment risk and activate the larger setting, the trend in tall buildings is to mix headquarters-quality office floors with hotel, residential, retail, cultural, and community spaces. Separate access is important—and VIP access is crucial in China. The retail podium, sky gardens, sharedamenity floors, and public club/ observation spaces all support round-the-clock vertical living.

TRENI

26

The template is changing

Central cores persist in China, but some markets opt for split, offset, and perimeter cores with more open, flexible office floors. Façades are now a key component of building performance, not just a pretty skin. They also serve the desire for outdoor access, even at great height. Look for continuing innovation in vertical transportation, sustainability, and building safety and security.

TALL BUILDINGS IN CONSTRUCTION

Confidential super-highris China



Xiamen Shimao Cross-Strait Plaza Xiamen



KAFD World r Trade Center Riyadh



TALL BUILDINGS ON THE BOARDS

Four Season Hotel Tower



Fairmont Austin Hotel



Nanjing World Trade Center Nanjing



National Bank of Abu Dhabi Abu Dhabi





Mixed Use

TREND **27**

Everything comes in combination

The necessity of mixed use is such that even specialists in single-use development look for ways to introduce it in their own projects or capitalize on it in the adjoining district. The value it brings, even in suburban towns, has as much to do with social connectivity as destination value. Transit is often in the mix, but the mix is richer, denser, finer-grained, and more dynamic and unpredictable.

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Mixed use takes new forms

Asia and the Gulf will lead the way in doing mixed use at a mega-scale, integrating complex programs that weave form and experience together to attract the newly affluent. Mixed use will be seen as an invitation to experiment, rethinking the urban realm as a "curated" place that caters to different lifestyles and demographics to stay active and attractive on a 24/7 basis.

PICKING UP LOCAL CUES

More and more, location is shaping the character and form of mixed-

above: River Oaks District, Houston below: Shimao Shenzhen Qianhai Canal



Hospitality

TREND

29

Demographically driven expectations

The potential clientele for hospitality is driven and differentiated by demographics. While younger Western travelers use apps to forego hotels, their parents are still drawn by perks and wellness. As the guest profiles change, so do the choices. Cohorts gather—for business or pleasure. New to the scene are the emerging middle classes, whose hotel brand loyalties may be formed at home.

TREND

30

Medical and wellness tourism

As people shop the world for medical procedures, it's likely these procedures will be offered as an all-inclusive package. Also on the horizon are resorts that combine wellness with recreation and other diversions, allowing people to recuperate and recalibrate. Tying these resorts to wellness programs back home could make hospitality brands a player or strategic partner in the healthcare market.









Brand Design

31

Toward the co-created brand

Access to technology and instant information gives people almost unlimited choices. They can curate their experiences based on evermore-specific personal preferences and the influences of social networks. To stay relevant and engage consumers meaningfully, brands will need to develop collaborative platforms that let people play the role of co-creators.

32

Brand ubiquity, brand simplicity

Brands confront a multiplicity of ways to reach consumers. This is prompting them to adopt holistic approaches that tailor the connection and make it seamless. If it's overdone, consumers may tune out. Feeling bombarded, they turn to brands—especially the local, ephemeral, and bespoke ones that limit the noise and focus the interactions on what really matters.





how they interact—in person, online or via other channels.

above: Pinnacle Foods, Parsippany, NJ below: Hilton Grand Vacations, touchscreen interface design left: Lucifer Lighting monograph









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Sports & Recreation

33

Hospitality and interactivity

In order to attract the premium guests, stadiums and arenas are providing more exclusive hospitality environments for those fans and sponsors. Providing spaces for sponsors to entertain is an important part of the package. For high-end fans, the club is a critical amenity, providing distinctive experiences such as close-up views of players taking the field or oncourt time during warm-ups.

34

A fast-changing sports landscape

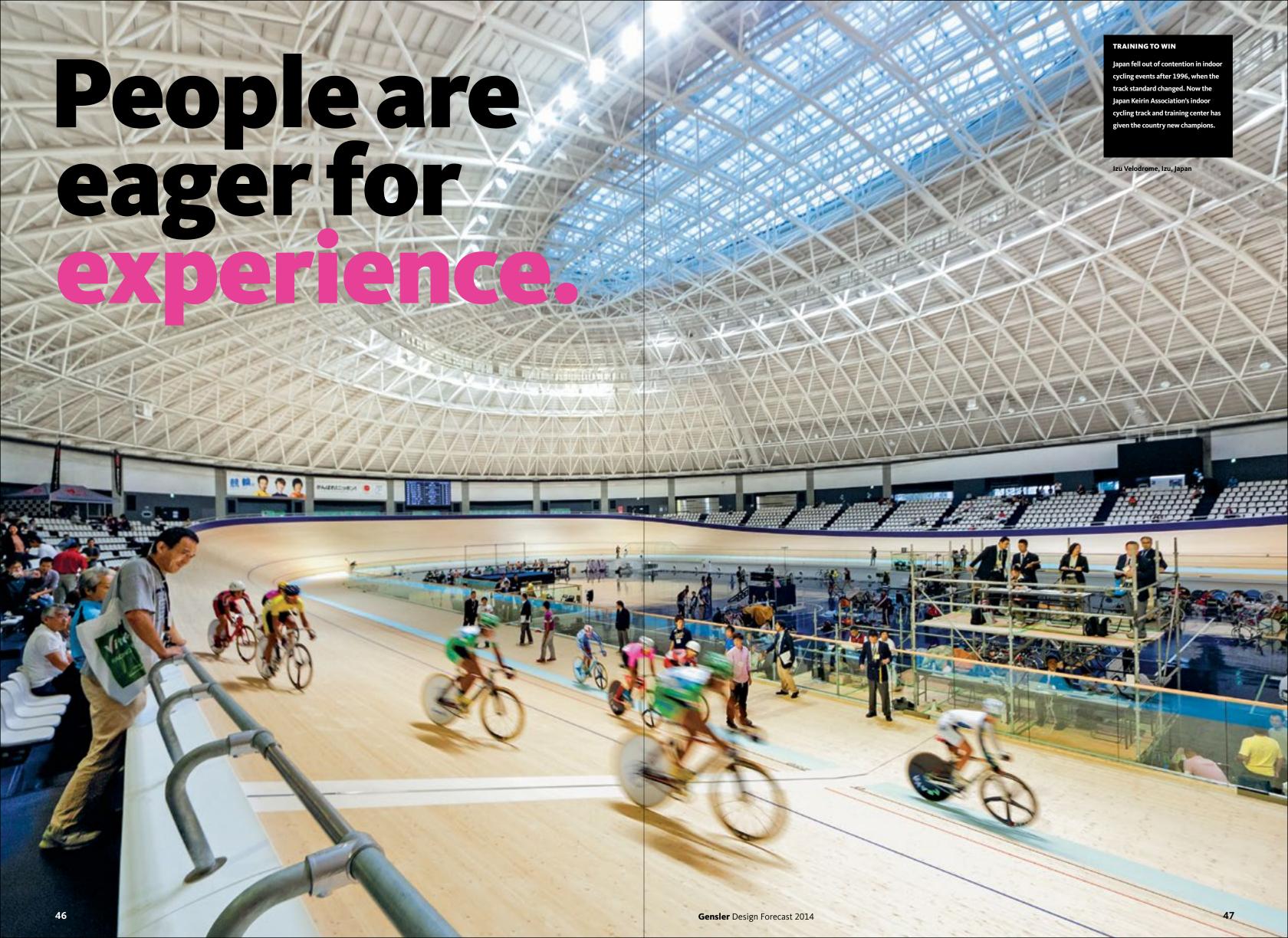
Increasingly, teams are competing with the convenience of largescreen TVs at home. In response, stadiums and arenas are adding large-screen HD displays, interactive technology, WiFi, expandedbandwith cell service, and fantasy stats to enhance the fan experience. Stadiums designed for one sport are generating new revenue by adding events on the field or in special hospitality spaces.



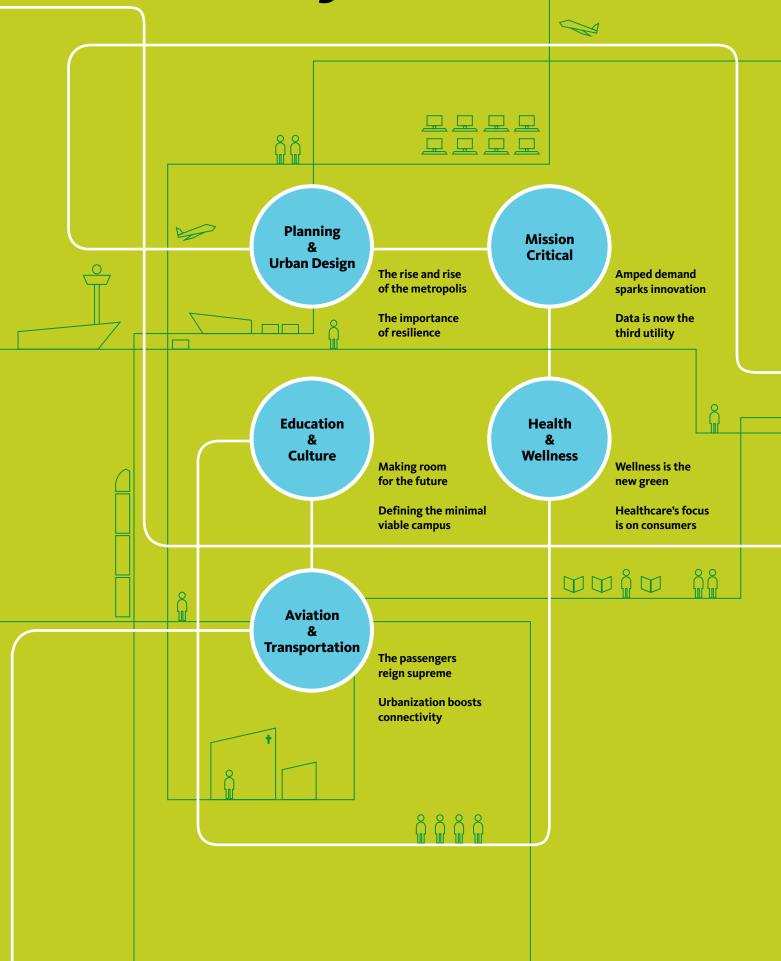
above: Shenbei Arena, Shenbei, China below: Farmers Field, Los Angeles

ANCHORS OF URBAN DISTRICTS





The Future of Community



Looking for new approaches.

The Community sector is in a major transition. Economic and demographic shifts put the status quo in question. The altered landscape is prompting renewed investment, a hunt for savings and efficiency, and a new openness to innovation. Two trends stand out.



The urbanization of the planet puts the spotlight on metropolitan regions.

We're entering an age of cities. Even where growth is slow, the trend is toward compact, dense, walkable cities that can support modern infrastructure. Metropolitan regions will gain importance as resilience becomes a critical issue for their dominant cities. Managing growth in a larger sense will be on many of these cities' agendas as they invest in airports, transit, healthcare, education, and housing.

A more active and equal relationship will change settings and behaviors.

The old relationship saw people as passive receivers of community services. Now people have more choices. Factors like accessibility, accountability, and affordability count. For their part, communities need people to step up, to do things that used to be done for them. As the relationships change, communities are rethinking their settings in order to engage their communal "customers" as active partners.

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Planning & Urban Design

TRENE

35

The rise and rise of the metropolis

Growing urbanization means that metropolitan regions are the engines of the wider economy. They have to balance the demands of the future with the realities of the present, and contend with very different challenges. Planning for a metropolis will mean engaging with it over time, influencing the short term with a longer-term perspective. It will also require a global toolkit.

TREND

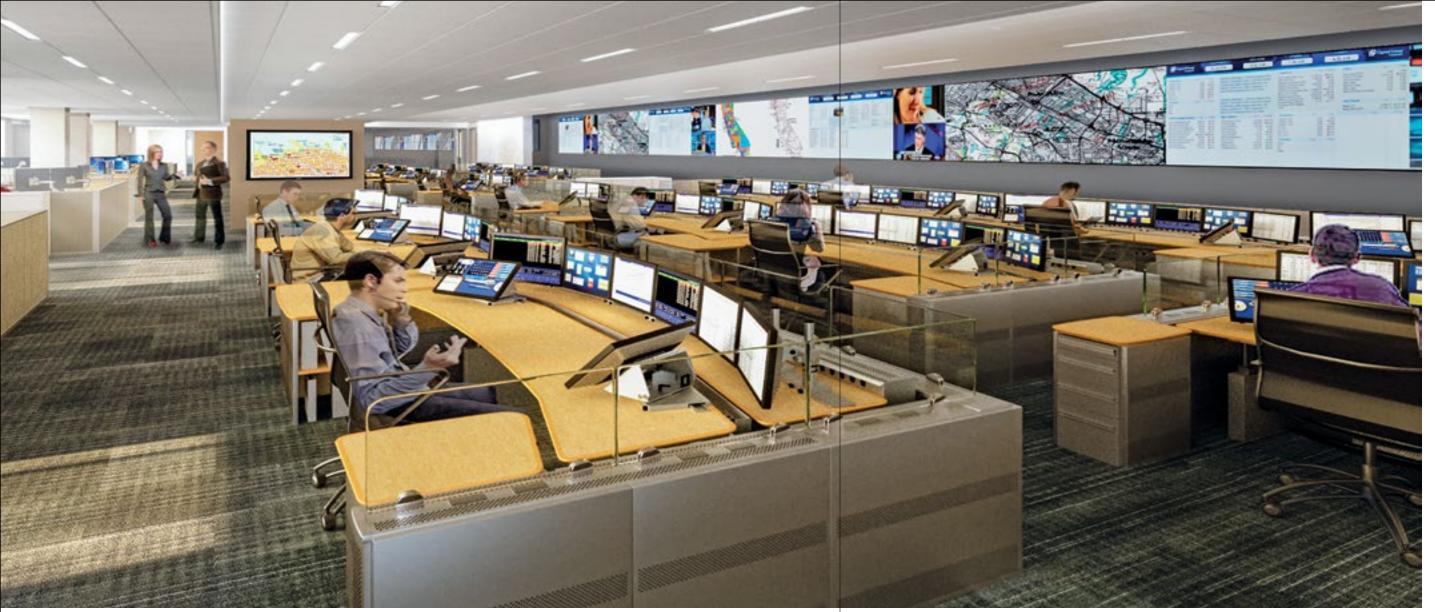
36

The importance of resilience

As metropolitan regions become more populous, planning for their resilience will be a priority concern. The elements of resilience will vary but are likely to include public safety and security, continuity of infrastructure and services, and—higher up Maslow's scale—the raw material of competitiveness and quality of life: access to culture, education, entertainment, and recreation.







THE FUTURE DATA CENTER

The latest data centers are integrated with other functions and designed to fit seamlessly into larger workplace settings. In the age of Big Data and cloud-based content, these facilities are efficient, streamlined prototypes for information sharing.

left: Distribution and transmission control center, San Francisco Bay Area, CA below: Technology company briefing center, Silicon Valley, CA

Mission Critical

TREND

Amped demand sparks innovation

Surging demand for bandwidth is reshaping many data centers.
Search-engine and social-network providers use multiple locations to achieve redundancy, designing for an 18-month server upgrade cycle and faster replacement of support systems. In urban areas, locating data centers close to customers will grow as service providers convert existing buildings into colocation data centers.

TREND

38

Data is now the third utility

Data is fast becoming a utility, like power and water. Access to digital information is emerging as a basic human need. Proliferating wireless services and devices, which tap into increasingly complex, largely cloudbased content, are driving a huge demand for bandwidth. Meeting it with network infrastructure and data centers will be high on the list, especially for emerging economies, as infrastructure priorities are set.



Education & Culture

TREND

39

Making room for the future

Many cultural and educational institutions are becoming more interdisciplinary in nature. They are also moving from formal and structured programs and spaces to ones that are more informal and open-ended. These changes require a new generation of buildings and settings that are both more flexible and better able to accommodate a broad range of activities with a greater intensity of use.

TREND

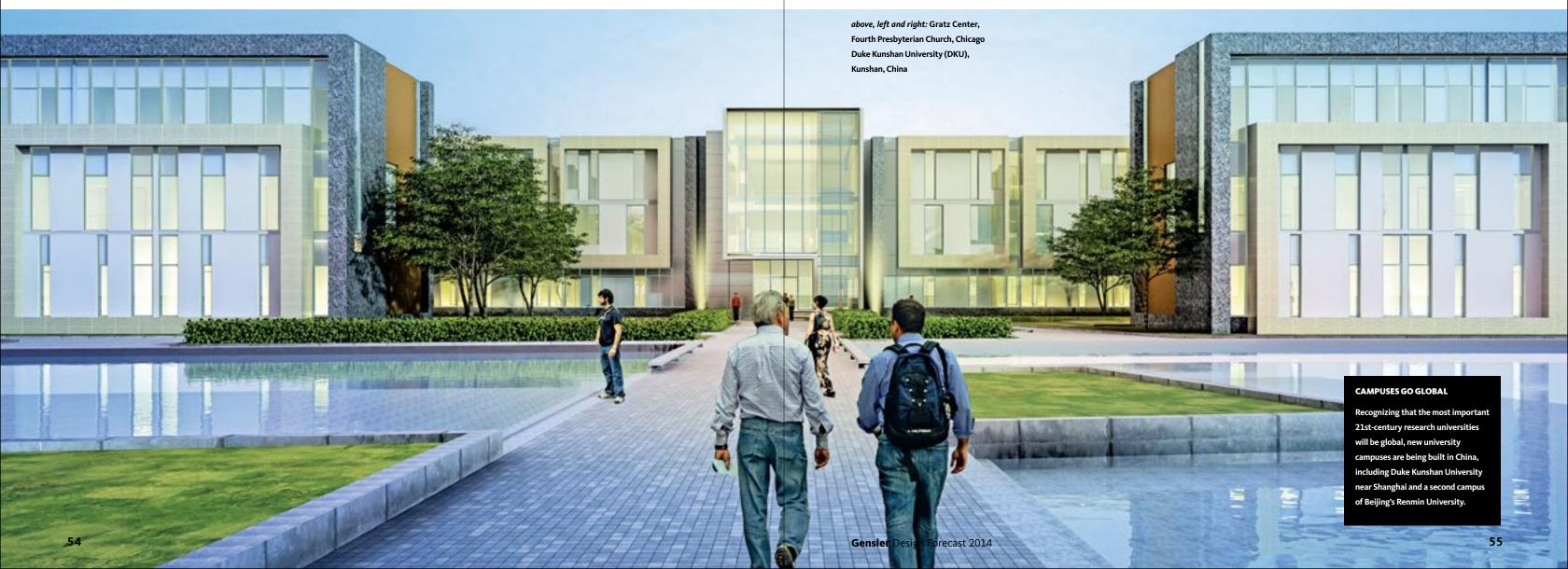
40

Defining the minimal viable campus

Faced with new competitors, programs, and teaching methods, higher education is raising basic questions about the role and nature of the campus as a place (its size, character, and purpose) and about the time spent there (how much, where, and how). Established and new institutions are asking how much "place" they need, particularly outside the traditional campus and for those that never had one.









Health & Wellness

TREND 41

Wellness is the new green

Growing awareness of how the patterns of daily life contribute to and work against personal health is starting to reshape a great many of the settings in which people live and work. Communities of different types will take a greater interest in nudging their constituencies toward healthier lifestyles, with design playing its part in addressing a wellness agenda in the built environment at every scale.

TREND 42

Healthcare's focus is on consumers

America's Affordable Care Act is indicative of healthcare's proconsumer shift. Health insurance providers are opening retail spaces and kiosks, while medical clinics are popping up in pharmacies and supermarkets. Medical centers are moving outpatient units into the community, close to the people served, leaving inpatient surgery, specialist care, and trauma to be more centrally provided.



Aviation & Transportation

TREND
43

The passengers reign supreme

People want their airports back. In a post-9/11 world, their desire for more pleasurable air travel will compel airports to cater to passengers' varied needs and wants. New levels of comfort and calm will elevate the total experience. Airports will look beyond aviation, finding inspiration in hospitality, entertainment, retail, and brand design to meet passengers' raised expectations.

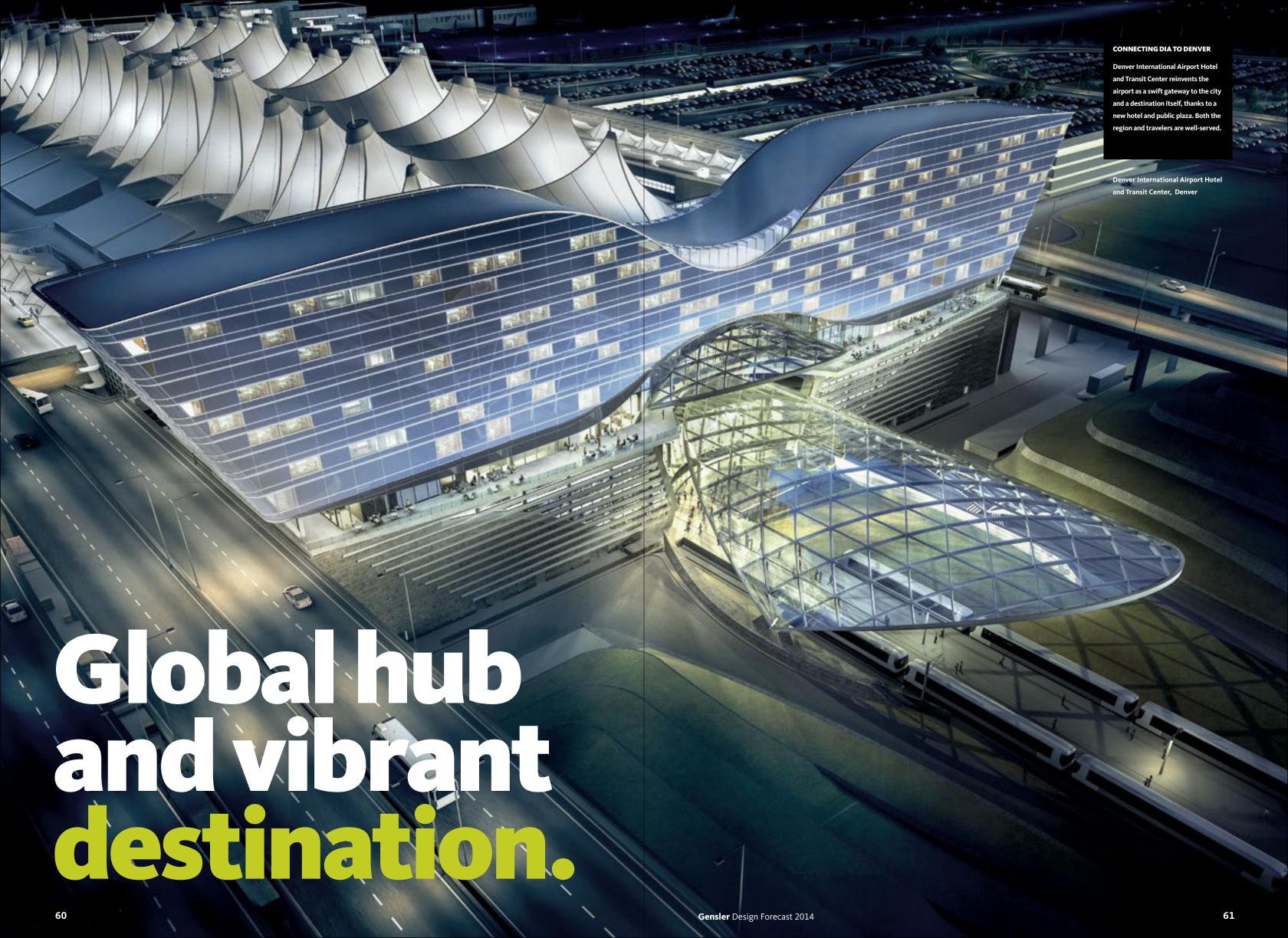
44

Urbanization boosts connectivity

As rising urbanization increases density, regions will push for greater connectivity. Airports will be the global portals of metropolitan and intercity transit systems, including high-speed rail. Airports will be destinations and urban centers in their own right, spurring a host of new uses that can leverage their strategic importance as a converging point—the longforecast airport city.







Annual Report 2014

Our expanded Gensler team now includes 4,000 people in 16 countries on five continents. This dynamic network supports our global growth and puts our people in the places our clients want us to be.



Roard of Director

from left: Robin Klehr Avia, Scott Dunlap, David Gensler, Dan Winey, Carlos Martinez, Joe Brancato, Julia Simet, Rob Jernigan, Andy Cohen, Diane Hoskins

Gensler's financial performance reflects the value our people deliver to clients every day.

Thanks to our consistent worldwide growth, we have opened new locations in Mexico City, Philadelphia, and Sydney. Our 4,000 professionals serve our clients from 46 different cities. With their help, we delivered projects in 81 countries and increased our revenues to a record high. Financially strong and debt-free, we contributed \$34.5 million in deferred compensation to our employees through our ESOP, profit-sharing plan, and international pension plans.

Our financial performance makes possible increased strategic investments in our research and professional development programs, along with constant improvements to our designand-delivery platform and systems. These ongoing initiatives reflect our firm's long-standing commitment to our clients and our teams. We measure our success by their success.



Robin Klehr Avia, FIIDA Chair of the Board



Financial Report

\$802m

Total revenue for the year—setting a new record high for the firm.

100%

Gensler is fully employee-owned through direct shares and our ESOP.

10-Year Financial Results (Revenue in million USD)



Top Recognition in 2013

#1

Gensler is a leader among the world's architecture and design firms. Here's how we ranked in our industry in 2013.

Architectural Record—Top 300
Architecture Firms

#1 Firm Overall

Building Design—2014 World Architecture 100 Most Admired Firms

#1 US Firm, #4 Global Firm

ENR—Top 150 Global Design Firms #1 Architecture Firm

ENR—Top 500 Design Firms #1 Architecture Firm

Interior Design—Top 100 Giants

#1 Architecture Firm

#1 in Corporate Office

#1 in Retail

#1 in Transportation

#1 in Government

#1 in Cultural

VMSD—Top Retail Design Firms of 2013

#1 Firm Overall





Firm Highlights. In a banner year, we've expanded our global footprint, won headline projects, and added new practice areas. Our projects and people kept winning awards. Here's a summary of recent accomplishments.



Research Program Yields New Insights

In 2013, we funded 29 active research studies conducted by internal teams from many practice areas. With the publication of our upcoming *Gensler Research Catalogue (above)*, we will share the results of 40+ R&D projects that reflect our commitment to innovation. Among them is our 2013 U.S. Workplace Survey, a milestone for our research program, showing that the ability to balance focus and collaboration via strategic workplace design is key to innovation and success.

New Super-Highrise Breaks Ground in China

Gensler celebrated the groundbreaking ceremony for a new super-tall tower in one of China's richest cities. The mixeduse project for a confidential client will include over 5 million square feet of retail, office, hotel, and residential space. Drawing on traditional Chinese cultural elements, the building will create a new landmark for the city. Gensler's design, chosen through an invited competition, extends the firm's reputation for innovation in super-tall buildings. When completed, the tower will anchor its district with a vertical city component that adds density and urbanity.



Gensler nourishes a culture of innovation, and recent office renovations for Gensler DC (above left) and Gensler Newport Beach (above right) encourage collaboration and experimentation.

DC, Newport Beach Unveil New Offices

In June, Gensler Washington, DC celebrated its 30th anniversary with the opening of its renovated office space. The renovation provides new community meeting space, a prominent street-front entrance, a café, and a new fabrication lab as a platform for innovation. In October, Gensler Newport Beach unveiled its new workspace, which incorporates principles based on Gensler's workplace research.

Shanghai Tower Tops Out

Gensler marked a milestone in August with the topping off of the 121-story Shanghai Tower, the tallest building in China and the second-tallest in the world. The project leveraged the Shanghai hub, local talent, and a multidisciplinary global team. "There is no way a building of this size, complexity, and significance can be built without the collaborative spirit a firm like Gensler can bring," said Art Gensler .



"Blight to Bright" Wins SXSW Place by Design

Gensler's proposal for more resilient streets for New York City, part of Gensler's Town Square Initiative, won the Sustainable Innovation Award at South by Southwest Eco's Place by Design competition. "From Blight to Bright" is designed to transform underutilized spaces into community assets.



Reimagining Cities: Advancing in Year Two

To address the global trend of increasing urbanization and reenergize the role of public space, Gensler launched Reimagining Cities, a decade-long initiative. In year two, the firm invited its designers to offer their observations and visions of the future of work in the city. Co-CEO David Gensler spoke about

the initiative at *The Atlantic*'s New York Ideas Forum. "The glories of open space and the town squares they inspire are big and small and endless," Gensler said in a *Fast Company* blog post that outlined the challenges population growth poses for cities and how architects can respond.



above: Gensler's conceptual redesign for Pershing Square in Los Angeles

London Meets Kuwait

During an official visit to Kuwait, London Mayor Boris Johnson joined our client, Mohammed A. Alshaya, and Gensler's Chris Johnson for a tour of The Avenues, Kuwait's largest shopping destination. Gensler designed the 900,000-square-foot Phase III, which added more than 400 stores and 40 cafés and restaurants.



from left: Mabanee Chairman Mohammed Alshaya, Mayor Boris Johnson, Gensler's Chris Johnson

Gensler #1, Most Admired

For the second consecutive year, Gensler held the top position on *Architectural Record*'s Top 300 Architecture Firms list, which ranks companies according to architectural revenue. The firm's total revenue eclipsed \$800 million for the first time in its 48-year history. "We're seeing design innovation driving our growth," said Co-CEO Diane Hoskins. Gensler also ranked among the top five most admired practices in *Building Design*'s 2014 World Architecture 100, announced in December. Our industry peers voted Gensler the #1 US firm and fourth among all firms from around the world.

Gensler Fellows Honored

The International Interior Design Association named Gensler principals Jim Williamson and Judy Pesek to the 2013 IIDA College of Fellows, the association's most prestigious honor. Principal Ken Sanders was named a 2013 Senior Fellow of the Design Futures Council for his leadership in advancing design, design solutions, and the design profession.







clockwise from above left: Judy Pesek, Jim Williamson, and Ken Sanders

Growing a Global Platform

Our talent development network kept strengthening our capabilities to work all over the world. The Gensler University 2013 Global Leaders track charged emerging leaders with exploring how the firm can grow client relationships in new, non-US markets. One team targeted Mexico City, where we recently opened an office. Additionally, our 2013 NextGen program enlisted early-career professionals from Bangalore, London, Shanghai, Tokyo, and across the US to accelerate their emergence as leaders. We shared knowledge globally through another talent development program, Gensler Exchange, which places Gensler staff outside their home regions to gain an understanding of global markets and returns them home more firmly rooted in the global community of practice.

Advocating for Resilient Cities

With catastrophic floods, fire, drought, and storms on the rise, it's time to prepare for these events, rather than simply react to them, Gensler's Rives Taylor wrote in *Urban Land*. Taylor's article, "Minimizing Risk in an Era of Resilience," featured two Gensler case studies: Martin Luther King Medical Center Campus in Los Angeles and Springwoods Village in Houston. Gensler's Lewis Knight reiterated the importance of investing in a sustainable future at *The Atlantic*'s 2013 Washington Ideas Forum.





Gensler principal and design director

Collin Burry was inducted in *Interior*

Design magazine's Hall of Fame, in

recognition of work that has won

60+ design awards for projects such

as Apple, Nike, Pixar, and Gensler's

Gensler Talent Recognized

were recognized by Airport Business

magazine's "40 Under 40" for 2013.

Architects Matt Johnson and Ty Osbaugh

recipients in the nation to win the 2013

AIA Young Architects Award.

corporate headquarters.

Collin Burry

above: Incheon International Airport's Terminal 2 integrates advanced technologies that make it a model of sustainability

Top Awards 2013

In 2013, Gensler won more than 150 design awards, including regional, national, and international awards.

Architectural Record—Good Design Is **Good Business**

Devon Energy Center, Oklahoma City, OK

Boutique Magazine—Most Experimental Hospitality Projects of 2013

Alexander Hotel, Indianapolis, IN

Communication Arts—2013 Design Annual Pinnacle Foods, Parsippany, NJ

Contract Magazine 34th Annual Interiors Awards

22squared, Atlanta, GA

Contract Magazine Healthcare Environment Awards—Health and Fitness

Horizon Blue Cross Blue Shield, Mount Laurel, NJ

IIDA Interior Design Competition— Corporate

Calvin Klein Jeans, New York, NY

Interior Design Magazine Best of Year-Office: Firm's Own

Gensler Washington DC, Washington, DC

Interior Design Magazine Best of Year-Office: Mid-Size

Hyundai Capital Operations Center, Atlanta, GA

International Property Awards, Asia Pacific—Best Office Development, Philippines

World Place, Manila, Philippines

SARA 2013 National Design Awards About.com, New York, NY

VMSD 2013 Retail Renovation of the Year Neiman Marcus, Bal Harbour, FL

Incheon Airport T2 Breaks Ground

In September, Incheon International Airport in Seoul, South Korea, broke ground on Terminal 2, a 72-gate, 7.4-million-square-foot terminal we're creating as part of the HMGY Consortium. When complete, the terminal will effectively double the airport's size and boost its role as a key asset to Korea's economy. In a Wall Street Journal feature story, Gensler's Keith Thompson explained how Gensler's design for the new terminal can contribute to passengers' well-being. "It's a large international terminal, yet it will be very intuitive to navigate and present unique experiences like the vast interior gardens," he said.

Burry Inducted in Hall of Fame Top Media 2013

Gensler's projects and people garnered global media coverage in 2013, including feature stories in these news outlets.

Bloomberg

FAST @MPANY













METROPOLIS















Andrew Caruso

Los Angeles Times

Curbed NY selected Gensler's Eric Tan as one of the 2013 Curbed Young Guns, and Gensler's Andrew Caruso was among 15









gServe: Making a difference in the communities we serve. Through our gServe program, we support philanthropic opportunities and socially conscious design efforts across our locations.





above: Gensler volunteers engage students in a session to envision the "library of the future."

Designers, Students Envision "Library of the Future"

Gensler New York partnered with an elementary school in Long Island City, P.S. 112, to redesign their library as part of a partnership with City Year, a national organization that helps build exceptional leadership skills in young adults who are dedicated to fighting the national high school dropout crisis. The team had a visioning session with students to vision the "library of the future," followed by an in-office charette to create a design solution tailored for student needs.

Affordable Housing for the Developing World

In India, Gensler has partnered with WorldHaus to provide affordable housing—ranging from single-family residences to infill slum housing, cluster housing, and neighborhood communities—at a starting cost between \$2,000 and \$5,000. Constructed with local building materials and labor, the structures are affordable and easy to assemble and take 10 to 15 days to put together. "It's one of the cheapest construction techniques in India," said Gensler's Diwakar Chintala. Gensler and WorldHaus staff visit each site, speaking with homeowners to assess their needs and aspirations. What began as a single prototype has evolved into more than 150 units in design or construction.



Partnerships Spur Results

By establishing a broad network with more than 100 nonprofit organizations such as Canstruction, DIFFA, Habitat for Humanity, IIDA, United Care, We Care, and more—gServe amplifies outreach activities and creates new opportunities to foster relationships with like-minded partners and clients. We undertake pro bono work across our industry sectors and locations, from creating a pop-up store for Goodwill Industries to designing shade structures for an outdoor urban farm. We also reach out to support our neighbors in times of distress. Gensler matches staff donations for major disaster relief efforts, such as Superstorm Sandy and Typhoon Haiyan.

Academy Reactivates a Shuttered School

Following the closing of 11 schools in the Dallas Independent School District, Gensler developed a process for repurposing closed schools, launching a pilot intervention at the shuttered N.W. Harllee Elementary School. Gensler reinvented and reopened the school as a Summer Leadership Academy for low-income youth. "This was an opportunity to jump in and help our city reestablish vibrant places where holes in the urban fabric had opened," Gensler's Ted Kollaja said in Fast Company. The pop-up neighborhood center within the abandoned building is a model for reuse of unoccupied buildings that can be applied to other unoccupied schools across the US.



Gensler **Principals**

To lead our firm, we have assembled an exceptionally strong and talented team of professionals. Our global leaders are committed to nurturing our people and our one-firm firm culture. Every day, their collaborative, can-do attitude takes on the challenges and exceeds the expectations of our clients around the world.

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M. Arthur Gensler Jr., FAIA, FIIDA, RIBA

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Ahu Dhahi Tareq Abu-Sukheila

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Dubai

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Newport Beach

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Singapore

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Theresa Sheils, AIA, LEED AP Timothy Taylor, AIA John Thomann, AIA, JIDA, LEED AP loanne Weston, LEED AP BD+C James Williamson, FIIDA, LEED AP ID+C

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Gensler Clients

Our clients come first in everything we do. They are our source of inspiration. Good design emerges from understanding their challenges and translating them into opportunities for innovation. We anticipate the global shifts that impact our clients' businesses, always striving to leverage design's ability to elevate the everyday.

Ares Management LLC

Arias, Fábrega & Fábrega

Arizona State University

Arthur J. Gallagher & Co.

ASCO Power Technologies, LP

ASATSU-DK INC.

Ashland, Inc.

Astra7eneca

A.T. Kearney

Atinum E & P, Inc.

Atlanta Tech Village

Atlanta Ventures

Atwood Oceanics

Aurora Bank FSB

Avanade Inc

Avaya Avision Young

Avanti Press, Inc.

AIX Armani Exchange

AXA Real Estate

Aurora Oil & Gas Limited

Austin Community College

Auto Star Vehiculos S.A.

AT&T

ATK

Asset Strategie

Artisan Partners Limited Partnership

Arizona Public Service Company

Arista Networks, Inc.

Argo Inc.

ARK Group

Arper SPA

Current Gensler clients, taking in every market sector and a planet's worth of cities and regions.

1st Financial Funding and Investmen 1199SEIU United Healthcare Workers 16 Chestnut, LLC 16M, LLC 20th Century Fo 500 Woodward LLC 5718 Westheimer Road Investors LI The 614 Company 99 Sudbury

A9.com, Inc. AAA Northern California, Nevada & Utah Aafaq Holding LLC Abacus Abbott Laboratorie Abdali Mall Company Abdul Latif lameel Co., Ltd. Abercrombie & Fitch About.com Abt Associates Abu Soma Development Compar Acacia Research Group The Academy of Television Arts & Sciences Acadian Asset Management LLC Accelergy Corp. The Ackerberg Group Acosta, Inc. Adage Capital The Adam Corporati Adams and Reese LLP Adams Golf Adidas Group Adler Planetarium & Astronomy Museum Administradora Jockey Plaza Shopping Cente Adobe Systems Incorporated ADP, Inc. Advance Realty Advanced Ice Cream Technologies/Bardot Advantage Sales & Marketing Advent Software Inc. Advocate Health Care A/E/C Systems 97 Aerojet Rocketdyne Aetrex Worldwide, Inc. Affiliated Engineers, Inc. A.G. Spanos Companie AHBL, Inc. AIMCO Air Canada Air Liquide USA LLC Air National Guard Air New Zealand Airbnb. Inc. Airgain, Inc. Airports Authority of India Akamai Technologies Akerman Senterfitt AKF Group LLC Akin Gump Strauss Hauer & Feld LLP Akridge Akzo Nobel Inc.

Al Futtaim Real Estate

Al Ghurair Group

Al Jazeera Network Al Khozama Management Company Alamo Tovota Alexander Toyota Alexandria Real Estate Equities, Inc. Alfa Tech Consulting Enterprises Alfieri LLC Aliaxis Latin-American Services AlixPartners LLP All Web Leads, Inc Allegis Group, Inc. The Alliance for Sustainable Colorado **Alliance Partners** AllianceBernstein LF Allsteel Inc Alorica Alpargatas S.A. Alpinvest Partners The Al-Rai Real Estate Co., W.L.L. Altier Cooper Altivia Corporation Altschuler and Compan Alzheimer's Associatio AmazonFresh LLC Ambulatory Surgery Center at West Ave American Airlines Corporate Real Estate American Arbitration Association (AAA) American Assets, Inc. American Century Investment American College of Cardiology American Express American Gas Association American International Group, Inc. American Journal Experts American Psychological Association American Red Cross in Greater Chicago American Red Cross in Greater New York Amerimar Net-Works Management Ameripath Ameriprise Financia Amerlux LLC

Amherst Holdings LLC

Amtrust Realty Corp.

Anadarko Petroleum Corporatio

Anhui Qiantang Investment Co., Ltd

Anaheim Capital Partners LLC

Anderson Automotive Group

The Andrews Companies

Annie E. Casev Foundation

Annunciation Orthodox School

Anthony Mason & Associates

Andrews Kurth LLP

Antara Polanco

Apollo Group

AppExtremes

Apple Inc.

ARAMARK

Arden Realty

ARDMS

Apache Corporation

Apple Ridge Apartments

Aquila Commercial LIC

Arcadia Group Limited

ArcLight Cinema Compa

Aragon Global Management LLC

ARAMARK Parks and Destination

AmREIT

AmSurg

В

Bacardi Baccarat, Inc. **BAI Century LLC Baird Capital Partners Europe** Baker & Hostetler LLP Baker & McKenzie Baker Botts Baker, Donelson, Bearman. Caldwell 8 Berkowitz, PC **Balfour Beatty Construction** Balyasny Asset Managemen Banco Itaú Bandujo Bangalore International Airport Limited Bank of America Corporation The Bank of New York Mellon BankUnited Banner Health **Banorte Securities Internationa** Baotou City Planning Bureau Barclays Capital Bare Escentuals Beauty, Inc. Barrack, Rodos & Bacine Barrett, Woodyard & Associates, Inc Base Management BASF Corporation Bausch + Lomb Baver AG BB Hotel Owner JV LLC **BBCN Bank**

BBVA Compass Bank The Beach Company **Beacon Capital Partners** The Beacon Institute for Rivers and Estuarie **Beckman Coulte** Behringer Harvard Beijing Advanced Property Co., Ltd. Beijing Architecture Design Institute Arthur Chapman Kettering Smetak & Pikala, Beijing Baohong Tiancheng Real Estate Development Co., Ltd Beijing Capital Land, Ltd. Beijing Damei Group Beijing Enterprises International Conference Metropolis Real-estate Co., Ltd. Astoria Federal Savings and Loan Association Austin Convention Enterprises Inc., Hilton

Beijing Heyu Real Estate Development Co., Beijing Tianshi Jiye Real Estate Development Beijing Tongzhou New Modernized International City Investment & Operation Co., Ltd. Beijing Vantone Industrial Co., Ltd. Beijing Xingtai Real Estate Development Co., Ltd. Beijing Zhonghe Jiye Investment Co., Ltd. Bellco Credit Union Benchmark Hospitality Internati Bentall Kennedy Bentley Prince Street Bergdorf Goodmar **Bering Straits Technical Services** Berkeley Research Group LLC Bernstein Companie Best Best & Krieger Best Buy Co., Inc. Bevcon I LLC Beverly Hills Gateway LLP Beverly Wilshire Ownership **BGC Shoken Kaisha Limited** Big Rock Partners LLC **BigMachines** The Bilak Companie Bingham McCutchen LLF Biola University Birch Street BIT Playhouse Bixby Land Company Bl's Restaurants Black & Veatch Corporation BlackRock, Inc. The Blackstone Group Blake, Cassels & Gravdon LLP Blank Rome LLP Blatteis & Schnur, Inc. Bloom Properties LLC Bloomberg L.P. Bloomin' Brands, Inc. Bloomsburg Carpet Blue Plate Restaurant Company BlueCrest Capital Management Bluestone Capital Partners BMC Software, Inc. BMS Management, Inc. BNC Mortgage BNP Associates, Inc **BNY Mellon** Bobrick Boeing Bolon Bond Companie



of the world's 10 biggest retail companies are Gensler clients.

Child Advocates, Inc.

The Children's Assessment Center

Booz Allen Hamilton, Inc Boson Real Estate Co., Ltd. The Boston Consulting Group Boston Pizza International Boston Private Financial Holdings Boston Properties, Inc. Boston Scientific Japan K.K. The Boulevard Group Boulevard Nightlife Group BP plc Bracewell & Giuliani Brazos Riverfront Development, Ltd. **BRE Properties, Inc.** BRE/Parc 55 Owner LLC The Breakaway Group Brenham Main Street Historical Preservation, BrickWorks Atlanta LLC Brighton Collectibles Bristol Group, Inc. Bristol-Myers Sauibb British Airways The Broad Art Foundation **Broadreach Capital Partners** Broadway Real Estate Services LLC BROE Group Broken Hills Proprietary, Inc. **Brookfield Office Properties Brooks Bell** Brooks, Pierce, McLendon, Humphrey & Leonard LLP Brooks Sports, Inc. **Brown & Streza** Bryan Cave LLP **Buch Construction Buchanan Street Partners Buckingham Companies**

Burr Pilger Mayer, Inc. **Burton Construction**

Bugsby Property

Burleson Cooke LLP

Burns & McDonnell

Business Roundtable

Bycor General Contractors

Burns DeLatte & McCoy

Bulfinch Congress Holdings LLC

Burger Construction Company

Buick

Burberry

C.A. Hull Co., Inc. The CAC Group, Inc. Cadillac Fairview Corporation Cadwalader Wickersham & Taft Caesars Entertainment CAHG **Calare Properties** Caliber Home Loans California Institute of Technology California Republic Bank Call & Jensen Calkwalk, Inc Calvin Klein Calvin Klein leans Cámara de Comercio de Bogotá Cambridge Health Alliance Camden Property Trust Cameron McKinney LLC

Canon Solutions America, Inc. Canvon Capital Advisors LLC Canvon Partners LLC The Capital Group Companies, Inc. Capital Metro Transportation District (Austin, Capital One Capitol Toyota Caplin & Drysdale, Chartered The CapStreet Group, LLC **CAPTRUST Financial Advisors** Cardinal Health, Inc. Caremark The Carlyle Group Carnegie Corporation of New York Carrabba's Italian Grill CarrAmerica Development, Inc. Cartier Casey and Richards Casey Family Programs **Cassidy Turley** CastleHill Partners Catellus Development Caterpillar Cathay Bank Cathay Pacific Airways Cathexis Capital CATIC Real Estate Cavlon CB&I CBRE ccrd partners CDM Smith CEB Cedars-Sinai **Celltex Therapeutics** Cengage Learning, Inc. Cenovus Energy, Inc. CenterCal Properties Centerpoint Energy Central Houston, Inc. Central Intelligence Agency Central Shoe Repair, Inc. Centrum Partners Century 21 Department Stores Century Development Cerberus Capital Managemen Certified Moving & Storage Co., Inc. CH2M Hill Chadbourne & Parke LLP Chagoury Group

Chanfine Real Estate Development Co., Ltd.

Chartis Insurance New Zealand Limited

Chatham Orpheum Theater Foundation

Chengdu Oriental Hope High Power Real

Chevron Business and Real Estate Services

Charles Company

Charming Charlie

Chenevert Architects

Cheniere Energy, Inc.

Chesterfield LLC

Chicago Cubs

Chengdu Forte Land Co., Ltd.

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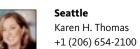
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