Gensler

Design Forecast
2015

Top Trends Shaping Design

A building type in transition
The Workplace Revolution 3.0
Multiple sources of innovation
Redefining the idea of "campus"
Looking for differentiation
A fast-evolving workplace
Engines of vitality: vertical cities
Staying agile in a volatile world
Looking for differentiation
Retail's new worldliness
Meeting a burgeoning need
Entertainment has to connect
Making change management work
Relevance is leasing power
Taking an experiential approach
Doing more with less
Picking up the pace of change
Cities Designed for the 21st Century
It's about the brand
Still a studio at heart
Embracing new realities
Doing more with less
Multiple sources of innovation
Secure, urban, and collaborative
Maximizing return on experience
Making change
work
Strategies to help revenues grow
Urbanization drives mixed use
Looking for differentiation
Airports take the next step
It's about the brand
A building type in transition
Entertainment has to connect
It's about the brand
Embracing new realities
Building the Future on Tech's Big Bets
Tech is
Retail's new worldliness
At the Top of the Agenda
Strategies that help
Picking up the pace of change
Still a studio at heart
Mixed Use Takes Over
Tech is impacting real estate
A healthcare paradigm shift
Maximizing return on experience
Entertainment has to connect
Secure, urban, and collaborative
Embracing new realities
Meeting a burgeoning need
Communities as ecosystems
New Cohorts, New Markets
A building type in transition
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Urbanization drives mixed use
Doing more with less
Staying agile in a volatile world
Airports take the next step
Mobile, engaged, and future-proof

A watershed year, 2015: the sweep of change ahead will accentuate the positives of an urban, connected planet. The trends we see point to a future that will be amazing. As designers, we're excited!

Art Gensler founded our firm 50 years ago on the premise that great design drives higher performance. Five decades on, we take it as gospel. With 2015 shaping up to be a watershed year for our clients, large and small, design will matter even more.

This year is significant because the world is making a transition. Digital natives are starting to emerge as the leaders who will take us into the future. Their perspectives on how to use technology and mobility will redefine work and the workplace.

Healthcare and education are being reinvented. Wellness and resilience are getting widespread attention, not least because of the global threats posed by epidemics and climate change. Urbanization is leading to new city forms, denser yet more livable.

The world is on the cusp of breakthroughs made possible by innovation, urbanization, and global connectivity. Realizing them won't be easy: 50 years in business give us a healthy respect for the difficulties. Yet our experience also speaks to design's power to clear away obstacles and produce the game-changing solutions that society depends on to make progress.

It takes insight and strategy to reach a better future. Design helps to envision it, test and refine it, and then scale it up. This is our territory, whatever its application. Our global knowledge of cities and regions means that we understand the transitions they're going through from the ground up. We know how to give ideas and strategies tangible and potent form.

The future is multidimensional. Innovation and opportunity will come from all over. To work effectively across the time zones, we're adding leadership and infrastructure to our network. To complement our China hub in Shanghai, a second one in Singapore serves our five offices in Southeast Asia. Abu Dhabi anchors the Middle East, while Mexico City adds a third office in Latin America. We've built a global platform for a globalized world. Last year, we delivered innovative design in 72 countries.

Our 50th anniversary is a milestone. What Art Gensler set in motion is today the partner of choice for a world of clients. A prosperous future is their and our priority. Design is the means. As designers, we're excited! The opportunities are amazing!
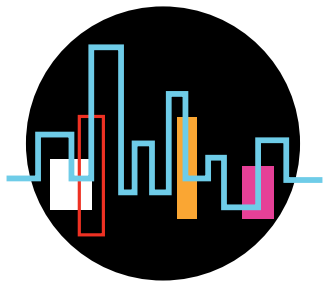
David Gensler
Co-CEO

Andy Cohen, FAIA, IIDA
Co-CEO

Diane Hoskins, FAIA
Co-CEO

The future is already visible as big themes that resonate with today's thought leaders.

URBANIZATION

Cities Designed for the 21st Century

As the world becomes more urban, cities and their metropolitan regions will face growing pressure to plan, invest, manage, and govern more effectively. Innovation will be the rule as cities look for more impactful approaches that are both pragmatic and affordable. As each city develops new solutions around its specific situation and conditions, it will contribute to a global revolution in urban development. So the time is ripe for cities to leave 19th-century infrastructure and technologies behind, and embrace new systems, materials, and means suited to the 21st century.

WORKPLACE

The Workplace Revolution 3.0

In 1900, Frederick Taylor applied factory methods to offices. Around 1990, the first workplace revolution challenged that vision. The second revolution took it further, leveraging mobility. The third will rethink the nature of work itself as social media and business networks mesh. How talent is supported, how teams connect—these issues challenge current work patterns and settings. Trends like coworking speak to this, but next-gen solutions will have to scale up. Office real estate will be a more integral part of mixed use as work's links to place converge with complementary activities.

TECHNOLOGY

Building the Future on Tech's Big Bets

Technology's potential to leapfrog the past will be even more apparent as big bets like self-driving cars and digital wallets gain currency. As technology raises the stakes, businesses will race to exploit its capacity to disrupt. They'll do so because consumers demand it and firms fear competitors will get there first. The human dimensions are design's territory—considering the implications, looking beyond the attraction of the shiny new thing, and integrating tech's capabilities to pay off its transformational promise.

RESILIENCE
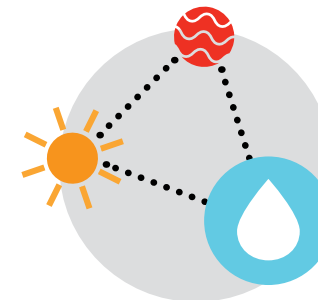
At the Top of the Agenda

Resilience is the design problem par excellence. At every scale—from coastlines and watersheds to regions, cities, and towns—more is understood today about the different factors that contribute to it. The challenges ahead are complex, but it's society's biggest opportunity—an urgent set of problems that need holistic design thinking, active management and stewardship, and a willingness to cooperate for the common good. If we get it right, prosperity and a high quality of life will follow. So we can't afford to get it wrong.

DEVELOPMENT
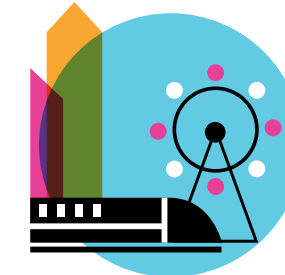
Mixed Use Takes Over

The world is embracing mixed use. It takes two forms: high-density urban districts that are transit-served and alive with activities; and urban centers outside the core with similar characteristics, but at a lower density. Both share an interest in urbanity that reflects a hedge-your-bets desire for the flexibility to rebalance over time. Mixed use avoids the sameness of all-at-once by orchestrating difference. It stays fresh by curating the offerings and 24/7 events. The goal is to attract the best tenants by creating amenity-rich, transit-served destinations.

GLOBALIZATION
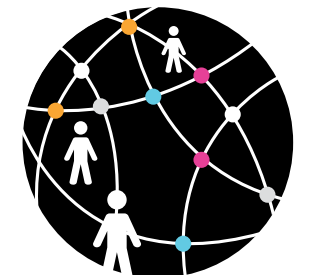
New Cohorts, New Markets

Demographics predict where things are headed. In the US, the Millennials are equal in numbers to the Boomers. Versions of generational change are playing out elsewhere. In China, for example, the "Young Old," retired but still active and affluent, will impact the markets for housing and travel. China's emerging middle class, another growth area, makes up in volume its still-moderate buying power. These cohorts are moving targets. Design strategies that keep up with them will increasingly draw on good data and strong analytics.

WORKPLACE

New workforce generations are giving the workplace revolution renewed life, more urban and mobile.

WORKPLACE TREND

The future is urbane

The suburbs-versus-cities debate about work's preferred locations masks how both are densifying around transit and encouraging people to leave cars behind and walk or bike. Wellness and resilience figure in this shift, but the bigger issue is the need to mix uses to attract the best tenants and enhance their performance. Pairing work with other activities adds urbanity and amenity, and makes development easier to finance.

WORKPLACE PRACTICE AREAS

A CLOSER LOOK

WORKING LONGER

40% of US workers surveyed are still working at age 65, compared with 20% ten years ago.

YOUNG WORKERS, NEW VALUES

Approaching 78 million in the US and soon to be the largest cohort in India and China, Gen-Yers stand out as the most urban, multicultural, and transient of all generations. In 2015, they will become the majority in the workforce.

URBAN DENSIFICATION

54%

of the world lives in urban areas.

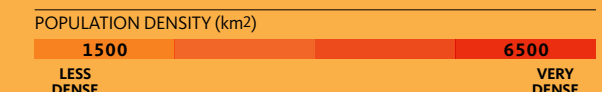## LIVE/WORK IN THE URBAN CENTURY

THE APPEAL OF PROXIMITY

As the population and density of cities increase, so does the appeal of proximity. Aside from shorter commutes, proximity implies a balance between work and life.

LOS ANGELES
15 mil
avg. commute time: **33** mins.

NEW YORK CITY
20.5 mil
avg. commute time: **39** mins.

LONDON
9.5 mil
avg. commute time: **37.5** mins.

SHANGHAI
22 mil
avg. commute time: **50.5** mins.

POPULATION DENSITY (km2)
1500 — LESS DENSE
6500 — VERY DENSE

70%
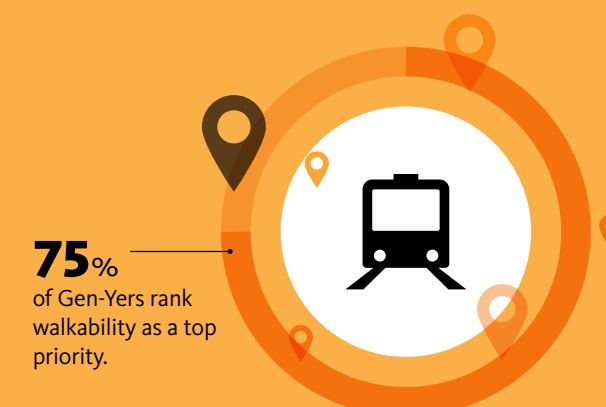of the world's population is expected to be urban by 2050.

SETTINGS THAT ENGAGE

65%

of companies' average health-related costs can be attributed to absenteeism. Engagement and wellness-focused workplace design can help reduce it.

TIED TO TRANSIT

Gen-Yers are more likely to live in walkable areas, to relocate if it means a shorter commute, and to use car-share options.

75%
of Gen-Yers rank walkability as a top priority.

Corporate Campuses

TREND
01
Redefining the idea of "campus"

Location is a bigger issue today as companies weigh their workplace needs against the preferences of a workforce that's in flux. Vertical campuses and repositioned large-floorplate industrial buildings in the urban core will have an edge with Millennials. Yet the traditional corporate campus persists, reflecting the importance of "everyone under one roof" to boost productivity. Whatever the location and format, campuses will promote wellness, as well as integrate smart technology to increase building performance. But often they'll do more—adding complementary, even community-serving uses and amenities, and melding non-office and office work together to drive innovation. The form campuses and buildings take helps forge a strong identity to reinforce corporate culture.

SUBURBIA TRANSFORMED

Growth pressures downtown are
having ripple effects in the suburbs.
In places like Tysons Corner, Virginia,
the extension of the metro area's
transit network and new interest in
mixed-use development are creating
urban centers on the fringe.

Tysons Tower, Tysons Corner, VA
opposite: **Finance Centre Tower,
Manila**

Commercial Office Building Developers
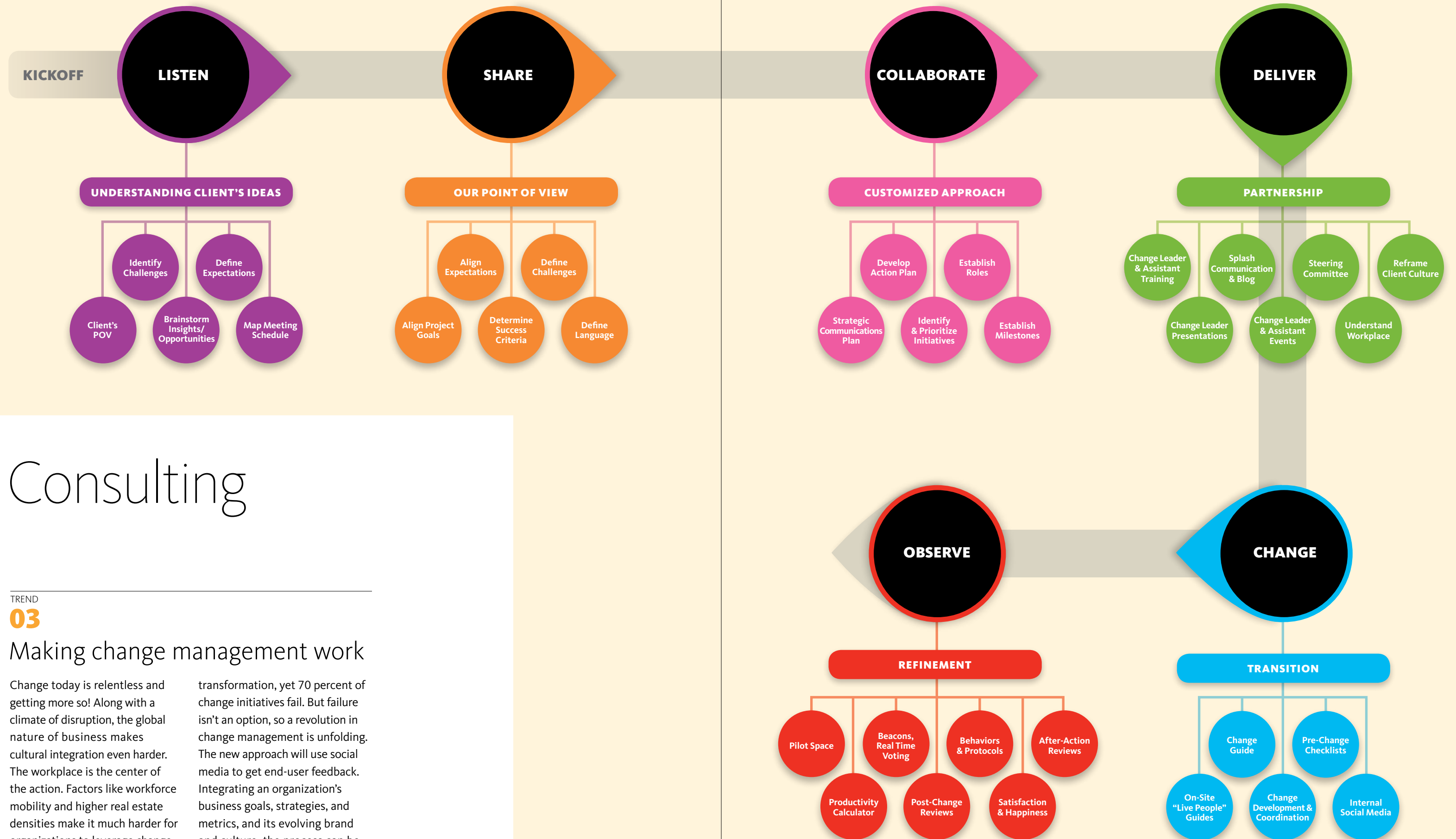
TREND

02

A building type in transition

Developers are transforming
the commercial office building
model. They're focused on their
tenants' need to recruit a younger,
more creative and collaborative
workforce whose preference for
buildings that map to its values
puts a premium on sustainability,
wellness, loft-like spaces, and
locations that are active, transit-
friendly, and walkable. As this
suggests, another big shift is

that office buildings are less of a
stand-alone real estate product
and more a part of mixed use. In
some cases, the mix still takes the
form of towers combining uses in
a vertical format. More often, it's a
richer composition that combines
different scales, and blends the
program imaginatively to promote
the kind of informal interaction
that generates higher retail traffic
and evening and weekend activity.

TRANSFORMATIONAL CHANGE

is guided by business goals, strategies, and metrics, and grounded in evolving brand and culture.

KICKOFF

LISTEN

UNDERSTANDING CLIENT'S IDEAS

- Identify Challenges
- Define Expectations
- Client's POV
- Brainstorm Insights/ Opportunities
- Map Meeting Schedule

SHARE

OUR POINT OF VIEW

- Align Expectations
- Define Challenges
- Align Project Goals
- Determine Success Criteria
- Define Language

COLLABORATE

CUSTOMIZED APPROACH

- Develop Action Plan
- Establish Roles
- Strategic Communications Plan
- Identify & Prioritize Initiatives
- Establish Milestones

DELIVER

PARTNERSHIP

- Change Leader & Assistant Training
- Splash Communication & Blog
- Steering Committee
- Reframe Client Culture
- Change Leader Presentations
- Change Leader & Assistant Events
- Understand Workplace

OBSERVE

REFINEMENT

- Pilot Space
- Beacons, Real Time Voting
- Behaviors & Protocols
- After-Action Reviews
- Productivity Calculator
- Post-Change Reviews
- Satisfaction & Happiness

CHANGE

TRANSITION

- Change Guide
- Pre-Change Checklists
- On-Site "Live People" Guides
- Change Development & Coordination
- Internal Social Media

Consulting

Making change management work

Change today is relentless and getting more so! Along with a climate of disruption, the global nature of business makes cultural integration even harder. The workplace is the center of the action. Factors like workforce mobility and higher real estate densities make it much harder for organizations to leverage change to realize their vision of the future. They have to achieve that kind of transformation, yet 70 percent of change initiatives fail. But failure isn't an option, so a revolution in change management is unfolding. The new approach will use social media to get end-user feedback. Integrating an organization's business goals, strategies, and metrics, and its evolving brand and culture, the process can be tailored to ensure a successful and transformative outcome.

Devon Energy World Headquarters, Oklahoma City, OK
opposite: **Halliburton, Houston**

"Safety, recruitment and retention, and corporate culture round out the top three concerns for energy companies."

Energy

TREND
04

Staying agile in a volatile world

The energy industry understands volatility. Energy firms navigate the world's markets, regulations, and tax regimes. They contend with mergers, acquisitions, and spinoffs. Technology evolves and so do they. In a volatile world, agility is prized, so the future energy workplace will be flexible, adaptable, and fit to the purpose. Intensively used, the workplace embodies a no-waste ethic. So it's efficient, but it's also sustainable and healthy. For the sector, one organizational imperative is to align: one brand, mission, purpose, and workforce. Another is to deliver: supporting knowledge sharing, teaming, and a culture of innovation and "get it done." The energy industry is a pioneer in working the global/local terrain, staying agile and connected while attending to the bottom line.

Consumer Products

05

It's about the brand

Consumer products firms have always lived their brands. In the past this meant focusing on the products, but now they're shifting to the customer lifestyles their products complement. There's an emphasis on customer touch points. The idea is to invoke the customers in the space so their influence is felt in relation to evolving the brand and products. There can be an artisanal aspect to these companies. Others identify with where the products are sold or to the ambiance they suggest. Including these touchstones can be helpful to people's creativity, so finding them referenced in the workplace isn't unusual. That immersive context cements an emotional tie with the brand and products that promotes customer empathy and the innovations that keep both relevant and fresh.

UNEXPECTED PLACES

Consumer products companies are experimenting with physical settings to foster innovation and improve speed-to-market. Inspiration comes from unexpected places, so there's a mix of quiet/loud, dark/light, and serious/playful spaces.

Bacardi, Coral Gables, FL
opposite: Philips headquarters, Somerset, NJ

Real Estate Owners & Managers

06

Relevance is leasing power

The mantra of real estate owners and managers is market relevance. That means active management of the assets, investing to attract the most desirable tenants and support new cohorts of end users. The Millennial generation and its creative employers are looking for the play of imagination in the buildings they inhabit. Both expect spaces that can be reshaped on the fly to suit their changing needs. Both want amenities that cater to their social nature. Both like things urban, but there are many ways to provide it. All of this points to a rising tide of buildings that will be repositioned, rethought, and upgraded. Literally every building type is in play now, including towers in the downtown core. Tapping new technologies and systems makes the remaking cost-effective and ROI-attuned.

RENEWED AND REPURPOSED

Repositioning older buildings is a big market in US cities like San Francisco, where building stock is limited. Converting industrial warehouses into modern, vibrant workspaces that foster creativity and innovation lures new tenants.

888 Brannan, San Francisco

Technology

07

Tech is impacting real estate

Tech companies of all stripes run at a faster pace than many other sectors. Their planning horizons fluctuate, so the ability to turn on a dime is crucial. Making sense of this at different stages in a tech company's evolution is an ongoing challenge. It leads to surprising twists and turns. Some companies like large-floorplate campuses to get everyone under one roof and boost productivity; others lean toward urban vertical campuses to attract talent. Tech is fixated on metrics, so it wants real-time building data. Tech disrupts, so it's questioning how buildings work. That means rethinking their performance and exploring innovations like untethered power. Tech is wide open to change, so it's prepared to support a range of work styles that include making and thinking.

EMBRACING DISRUPTION

Whether they're on suburban campuses or in urban hubs, tech companies embrace disruption, encouraging employees to express their personality, adopt work styles that suit them, and "hack" their workspace to meet evolving needs.

Motorola Mobility headquarters, Chicago
opposite: **Facebook headquarters, Menlo Park, CA**

50%
of new office construction is in tech markets.

New kinds of work need dynamic new spaces.

Defense & Aerospace

08

Secure, urban, and collaborative

Security is a given in this sector, but the companies will be under greater pressure to find the best employees, balance work modes, and broaden their locational options. Urban areas with transit access and a mix of nearby amenities are in play, adding a layer of security requirements for the owners and developers of buildings catering to the sector. Also reshaping the workplace for these companies is their need to align engineering and product fabrication with each other and with broader business goals. This will help them get to market faster without compromising product quality. Facilities need to support cross-team collaboration and let teams reshape the workspace to meet their evolving needs. Analyzing workflow in human terms will be key to their design.

A SYNTHESIZED WORKPLACE

Whenever manufacturing has to interact with other work activities, acoustical separation is an issue. Creating office space within a larger space yields physical separation, while still allowing visibility and interaction among staff.

Boeing, Renton, WA
opposite: **Bell Helicopter Flight Simulator, San Diego**

STATE OF THE ART

Government agencies are stepping up their game and homing in on modern, sustainable office buildings that are cost-efficient, utilizing the latest technologies while meeting security, sustainability, and workplace design mandates.

Federal agency offices, Rockville, MD

Government

TREND
09
Doing more with less

In the US, government at every level is looking for ways to provide services at lower cost. Following the lead of the federal government, its regional and local counterparts are implementing new workplace standards, integrating mobility strategies, and streamlining their portfolios by consolidating at a higher workplace density. They're also reducing operating costs by embracing sustainable, high-performing design and systems. To address the limits of public-sector budgets, governments will increasingly be partnering with private-sector developers, facility managers, and other providers. While competitively chosen, these partners will be brought into projects earlier as advisors on portfolio strategy and state-of-the-art workplace requirements.

Media

10

Still a studio at heart

The media sector is in growth mode as the hunger for digital content surges. A proliferating array of channels, venues, and distributors makes the creation cycle shorter and shorter. The technology is getting smaller and smarter, shifting the work itself from the equipment-heavy context that's still the sector's image, but this is a creative industry with an attitude that's true to studio traditions: Media work is fluid, intense, and highly collaborative. Media workspace will be open, amenity-filled, flexible in relation to new technologies, and capable of being scaled up fast for growth. Fans are important for this sector: online game creators' global fan base fills stadiums for their annual championships. While fans won't crowd their workplace, they may expect to be welcomed there.
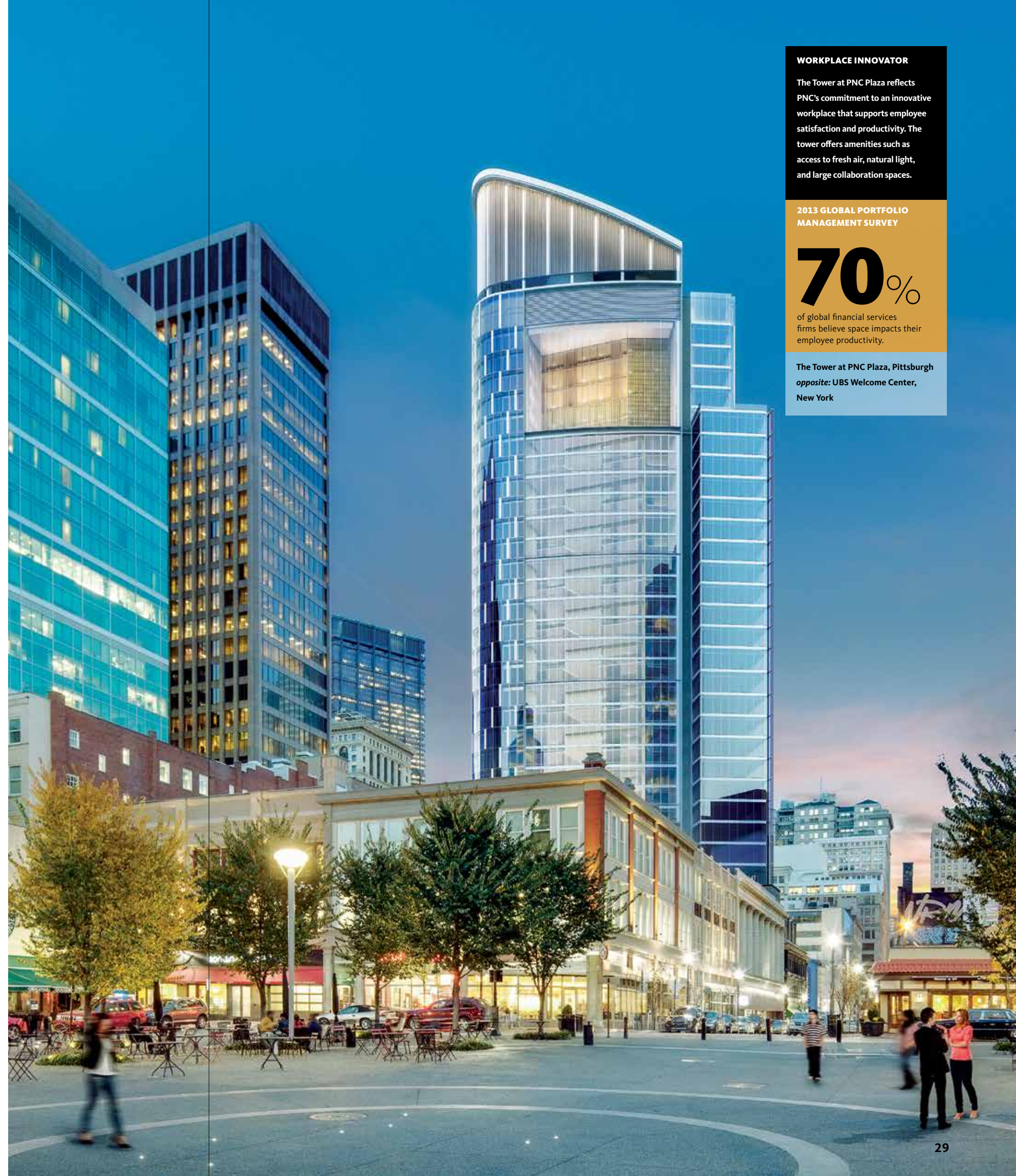
Financial Services Firms

TREND
11
Embracing new realities

As financial services shifts to apps and other digital interfaces with customers, the sector is seeing growth of tech and digital innovation teams. Especially in tech-centric cities, competition for the best and brightest is intense. When the work is collaborative, the teams need workspace that's atypical of the sector generally, but maps well to the desire of younger employees for settings that inspire creativity. The need to make protocols and policies more transparent in finance is leading US firms to embrace open plan. With the right features, it lets people "scan the room" and interact spontaneously, but also access spaces with privacy when needed. Asia's limited stock of Class A buildings means activity-based work settings are necessary to accommodate future growth.

2013 GLOBAL PORTFOLIO MANAGEMENT SURVEY

70%

of global financial services firms believe space impacts their employee productivity.

The Tower at PNC Plaza, Pittsburgh
opposite: **UBS Welcome Center, New York**

Teamwork lets firms work at a global pace.

THE HARVARD GLOBAL EDUCATION CONFERENCE

CO-HOSTED BY

600 LEADERS IN EDUCATION

PARTICIPATION FROM LARGEST EDUCATION COMPANIES
INCLUDING PEARSON, HOUGHTON MIFFLIN HARCOURT,
AND HOLTZBRINCK PUBLISHING GROUP

Professional Services Firms

Mobile, engaged, and future-proof

To increase real estate efficiency, professional services firms will continue to reduce space. This high-performance workplace will consist of a variety of settings that provide choice and balance among work modes. Technology will be an enabler of communication and mobility wherever work happens. The office will be the focus of face-to-face engagement with clients and colleagues. Future-proofing will be a high priority, with greater flexibility to accommodate head-count shifts and evolving work styles cost-effectively within the same footprint. Coworking space is on the horizon for professional services firms with creative sector clients and a Millennial workforce. Coworking can be a catalyst for inspiring and supporting the kind of spontaneous interaction that generates and speeds innovation.

RECONFIGURABLE SPACE

Future law offices will be smaller, adaptable, more collaborative, and technology-rich, as evidenced in "Redesign Law," Gensler's exhibit for the 2014 Association of Legal Administrators Conference. For more, visit www.redesign-law.com.

Morrison Foerster, New York

Product Design

13

Multiple sources of innovation

The current revolution in materials and fabrication methods will push products in new directions. So will tech developments that improve the qualities and metrics buyers value. An important product design focus will be on prototypes that can be tailored to specific markets without undue expense. Yet those markets are a growing source of ideas for new products. Large cities in particular serve as micro-markets for products, with an outsize influence on consumers elsewhere. As such, they function as innovation hubs. This is why firms are locating their innovation labs where the action is, rather than closer to home. As the Internet of Things gets traction, products will be "in conversation" with other products and systems, and with companies that maintain, repair, or replace them.
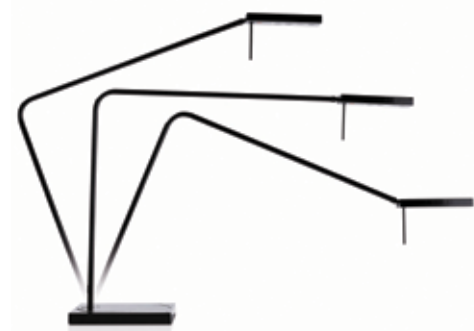
Luxo

HBF

Martin Brattrud
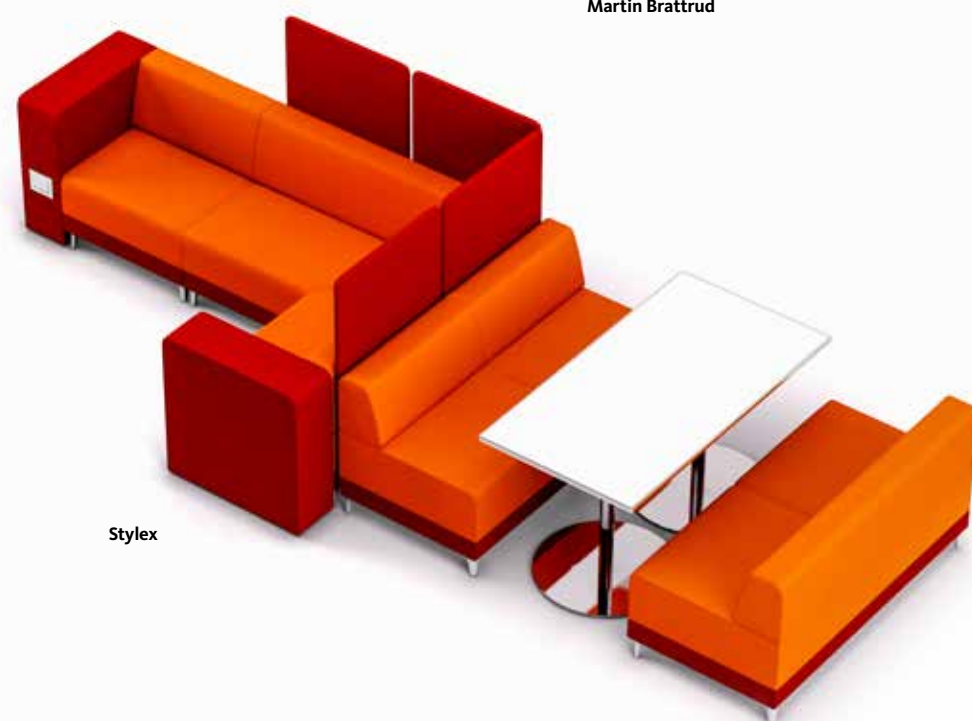
Stylex

Leland

Leland

Leland

Datesweiser

HBF

Halcon

DESIGNING FOR THE END USER

As strategists and designers, we work with manufacturers to bring a unique, experiential, user-based perspective to product design. Our growing catalogue of products reflects our knowledge of end-user trends across sectors and borders.

Tuohy

HBF
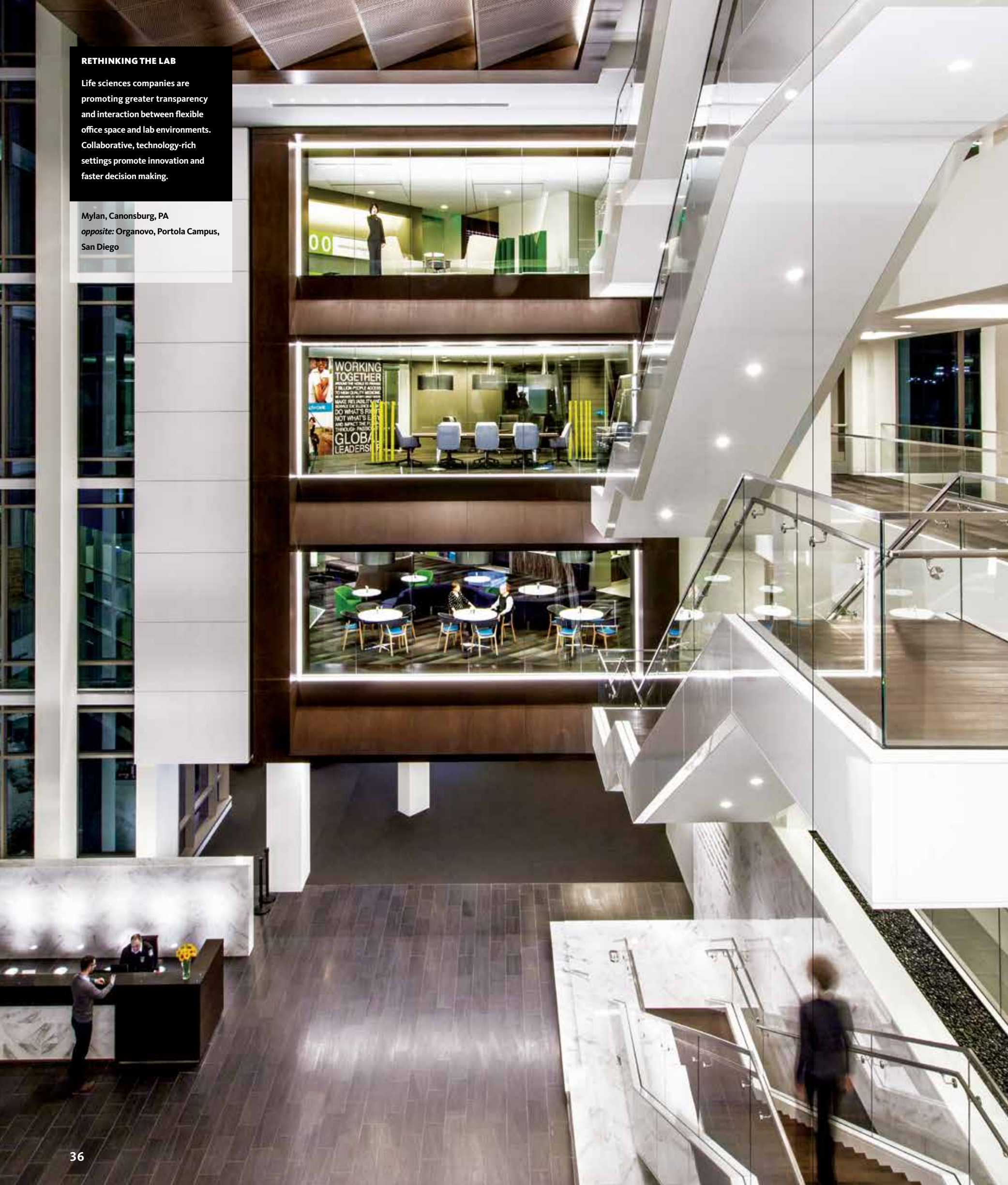
Life Sciences

TREND
14

A fast-evolving workplace

Technology is transforming the life sciences workplace in significant ways. For example, it is making lab spaces more modular and flexible. Traditional labs are being supplanted by technically complex workspaces that support the latest scientific advances. This is freeing researchers to form interdisciplinary teams and collaborate synergistically with different types of scientists.

Companies and institutions are competing for an emerging generation of researchers who prize creativity and want to make a meaningful contribution to society. The trend in life sciences is to integrate the methods and means of advanced research with the qualities of place that spark connection and interaction among researchers, locally and globally, so innovation happens faster.

Innovation depends on exchanging ideas.

COMMUNITY

Clients across this sector are breaking with tradition. The hunt is on for new models and new partners.

Community Redux

When it comes to community, tradition outweighs innovation in the public's mind. But things are changing. Airports and transit led the way, reinventing terminals and stations around new aircraft and faster trains. Now, others are joining in, invoking change in sometimes radical ways in order to give their missions and mandates new and potent life. The values haven't changed, but the ethos is strongly future-positive.

COMMUNITY PRACTICE AREAS

Bonus Content

More on Community visit
gensleron.com/2015-design-forecast

THE NEW LIFESTYLE OF AGING

As the most affluent demographic, Boomers still represent a powerful market. As they age, they won't be "seniors" in the old sense of the word.

2050: % OF POPULATION OVER 60 YEARS OLD

USA
27%

EU
35%

JPN
43%

LOOKING FOR QUALITY OF LIFE

1.0 mil

people worldwide move from rural to urban areas every week. But people are also leaving large cities for a higher quality of life. Whether large or small, sustainable cities have the strongest Millennial draw.

BETTER CARE SAVES MONEY

Multidisciplinary healthcare ranks as the #1 priority of consumers surveyed.

35%

anticipated cost reduction due to better healthcare coordination.

INCUBATING INNOVATION
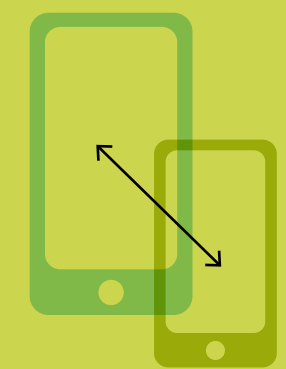
To bridge the innovation gap, universities are partnering with industry to form hybridized incubator spaces.

37% of incubators focus on technology

47% are in urban areas

54% are mixed use

4.1%
growth in annual passenger traffic for the next 20 years.

24 OF 30 BUSIEST US AIRPORTS

experience major holiday-style crowding 2.5 times the normal passenger volume at least one day per week.

FINDING YOUR WAY
Wayfinding is essential, especially as airports get busier. The ability to easily get in and out of the terminal, know where and how to check in, and locate the gate are key factors in a positive travel experience.

$**71.3**b
is the estimated backlog of airport projects to be completed by 2017.

ENVIRONMENTAL QUALITY IMPROVES THE EXPERIENCE
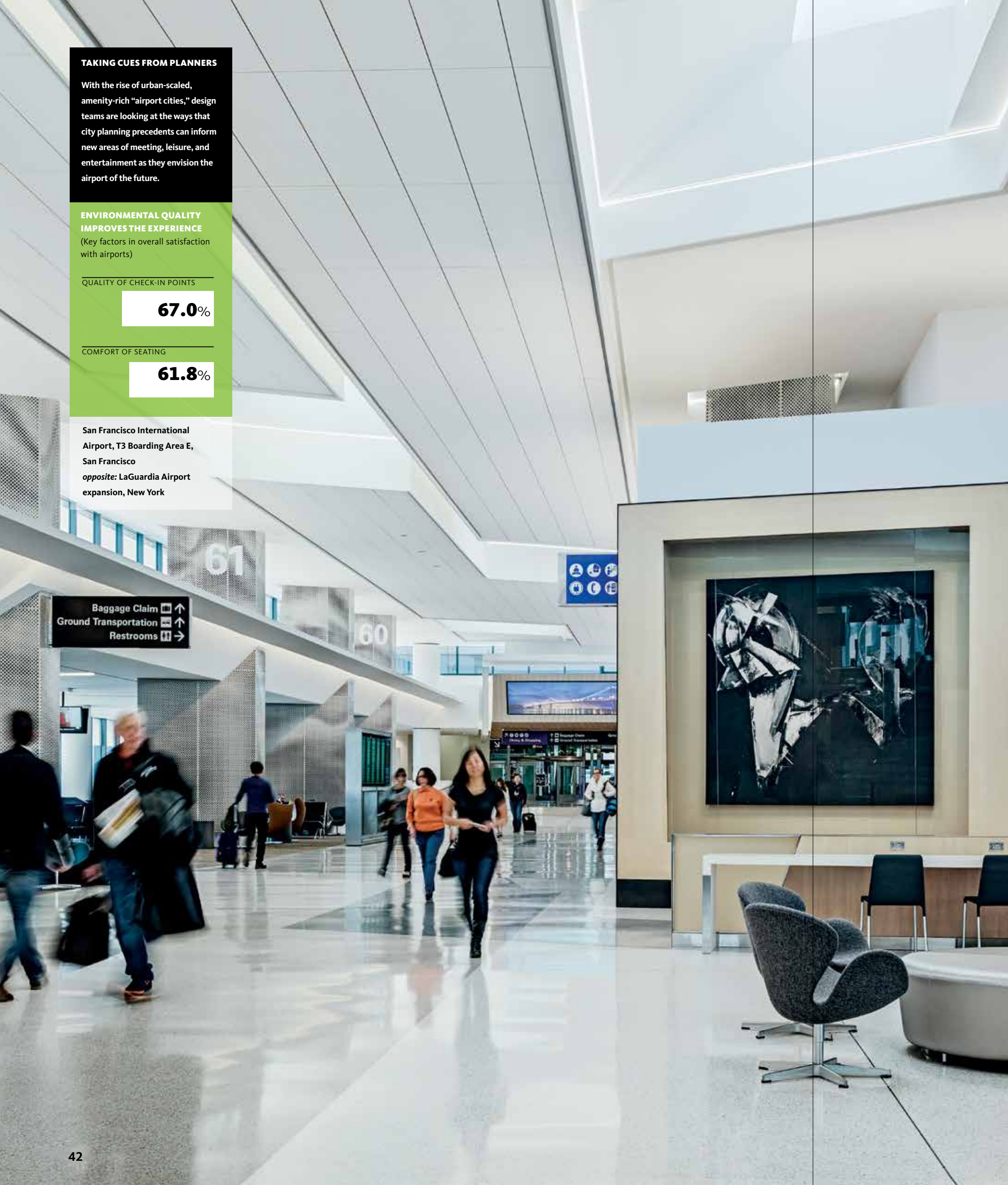(Key factors in overall satisfaction with airports)

QUALITY OF CHECK-IN POINTS

67.0%

COMFORT OF SEATING

61.8%

San Francisco International Airport, T3 Boarding Area E, San Francisco
opposite: LaGuardia Airport expansion, New York

Aviation & Transportation

TREND
15

Airports take the next step

Next-generation aircraft provide a growth opportunity for large, non-hub airports to offer direct international service, city to city, bypassing existing gateway hubs. They will grow. So will the global mega-hubs, competing head to head as leisure destinations with more than just great connections. Airport terminals will start giving less space to ticketing and more to airside retail and dining. Their arrivals sequence will take place on one level, celebrating the city and connecting directly to transit. While the terminals will be more compact, their revenue-generating spaces will increase. Primed by smart devices, the passenger experience will take cues from retail centers and hotels. Differentiating service levels will be more important to airlines in their airport facilities.

Education & Culture

TREND
16

Picking up the pace of change

For education and cultural institutions, change is in the air. The sector has its eyes open, drawing inspiration from other sources as it seeks to get greater and better use of its real estate. Looking beyond its core audience is part of this. Education and culture focus on learning as a lifelong activity. Making learning easier and faster-to-grasp leads to buildings and settings that are more flexible and participatory than in the past. Engaging people in active learning, making, and curating is an added dimension. Supporting innovation and the interdisciplinary programs that give rise to it is also important. While the buildings and settings are being reinvented, they're still valued as real places that enhance their campuses and communities. The design expectations are high.
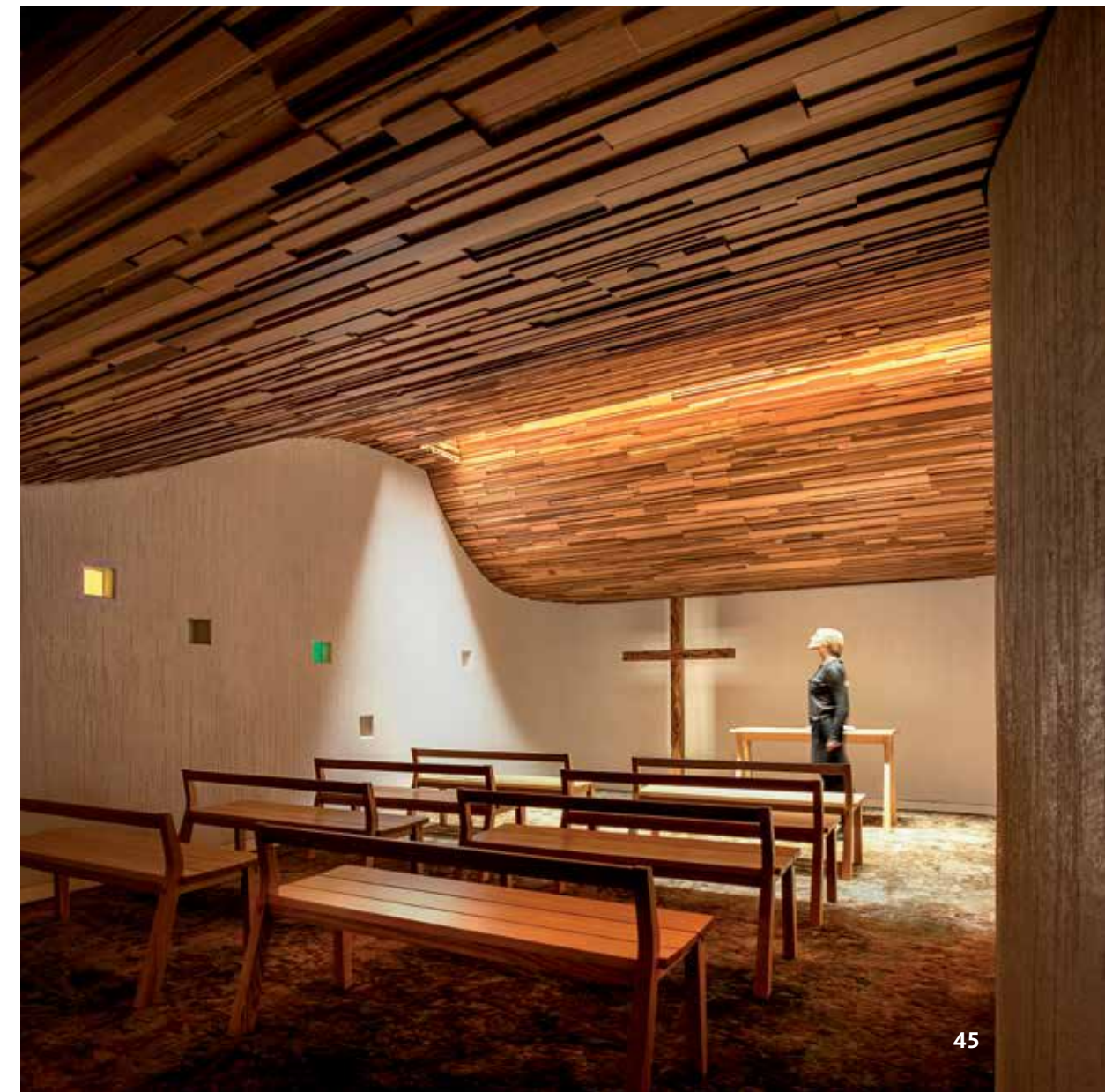
No surprise, education is experiencing big changes.

Health & Wellness

A healthcare paradigm shift

From providers to consumers, from organizations to individuals, healthcare is in the midst of massive change. Facing price competition for services, the industry is consolidating to share costs and grow revenues. New players are entering the market, including retailers. Demographic disrupters, like retiring Boomers, make older-affluent living and specialty clinics a bigger market.

Work-based wellness is moving into the healthcare space. There's also a move to a consumer model that gives people more choices, looks at health holistically as prevention, not just treatment, and focuses on individuals. A step further, personalized medicine integrates clinical innovations with tailored care delivery. The rise of specialty care facilities reflects this development.

CUSTOM-FIT TREATMENT

Tulsa Cancer Institute embraces many aspects of personalized medicine—where data-driven risk assessment and genetic testing, combined with improved diagnostic technologies and new therapies, tailor treatment to the individual.

WORKING HEALTHIER

87%

of US employees believe wellness positively impacts work culture—up 10% from 2013.

Anadarko, Houston
above and lower left: Tulsa Cancer Institute, Tulsa, OK

Mission Critical

18

Meeting a burgeoning need

As organizations move to the Cloud and ordinary people make smart devices integral to their lives, data centers have to keep pace. With modularity, data centers can be up and running faster, with less cost. Future-proofing is crucial, so flexibility is essential. Changes in technology mean that data centers are more reliable and efficient, and cheaper and easier to fit with other uses.

That's important because they're starting to supplant university libraries and R&D facilities. They allow medical centers to go digital and, using supercomputers, to do the gene sequencing that cancer therapies demand. Their impact on diagnosis and treatment, and their role in reducing human error, make data centers indispensable. Their design quality is ramping up to fit into these new contexts.

ANTICIPATING CHANGE

Considering technology's rate of change, flexibility is key. Next-gen servers have unknown electrical and mechanical infrastructure needs, while power distribution and backup systems could change space requirements significantly.

Riverbed, San Francisco

Planning & Urban Design

TREND
19
Communities as ecosystems

The movement toward resilience is leading to a new understanding of cities as ecosystems. With that move come new models of how to plan them. When you think of a city as an ecology, questions of inputs and outputs matter. Cities are part of regions, watersheds, climate patterns, and population shifts. Fluctuations and anomalies are in the picture, since resilience depends on anticipating them.

This means that planning has to be more holistic and more agile. The model for planning large-scale development, the communities of the future, is the ecosystem. Nature builds evolving wholes with simple, distributed, flexible parts. Communities can do this too: achieving long-term resilience by planning their development or continued growth holistically— not apart from nature, but part of it.

LIFESTYLE

Place and experience are combining in new ways to redefine leisure for a new generation of customers.

LIFESTYLE TREND

The connected life

Untethered and self-directed, this is our human reality going forward. Yet we've never been more connected, navigating the world with digital prompts. Every foray into experience is loaded with content that's curated, diverse, and social. The settings, from the smallest shop to the densest, tallest urban district, attract and engage us in personal terms: "You matter," they seem to say. We like that.

LIFESTYLE PRACTICE AREAS

Bonus Content

More on Lifestyle visit
gensleron.com/2015-design-forecast

A CLOSER LOOK

VALUE-BASED RETAIL

82%

of Latin Americans polled said that brands should help improve people's well-being.

46%

think that brands truly work at doing so.

ENGAGING WITH BRANDS

49%

of consumers would let their buying behaviors be tracked, if it led to relevant offers. In the trade-off of data for personalized service, what counts is the social network embraced by a brand, and how the individual customers are looped into it.

RACE TO THE TOP OF SUPER-TALL

As buildings get taller, elevators are getting faster. At 18 meters/second, Shanghai Tower's elevator will set the record as the world's fastest.

18 m/s
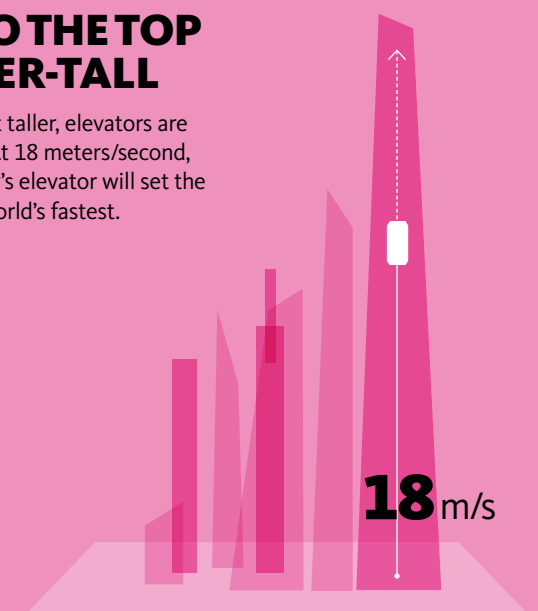
E-SPORTS TAKE TO THE REAL STAGE

FROM SOLO TO SOCIAL
Online gaming is emerging as a mega spectator sport, but one that needs venues tailored to the fans and players.

70+ mil

people worldwide watch e-sports every year.

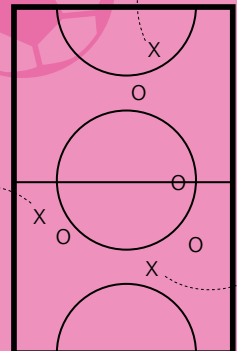### PASSIONATE ABOUT SPORTS: IT'S ALL IN THE CONNECTION

Sports brands sparked the highest level of emotion in our Brand Engagement survey. Of all the sports enthusiasts surveyed,

84%
of fans credit long-term connection for the importance of their favorite sports brand.

40%
buy a sports brand often because friends or family identify with it— so they do too.

76%
use or wear their favorite brand often because it makes them feel good.

HOSPITALITY REACHES OUT

New cohorts of travelers—including the newly affluent in China, India, and Latin America—are prompting hotel brands to expand into new regions and upgrade to meet rising expectations.

95% **SUSTAINABILITY**
95% of business travelers favor "green" hospitality.

50% **DEMOGRAPHICS**
50% of business travel revenue is generated by Millennials.

86% **RELATIONSHIPS**
86% of people surveyed acknowledge the positive impact of friendly service, signaling an opportunity for brands to differentiate.

SOCIAL RETAIL

Tech-savvy Latin America has the world's highest number of mobile cellular subscriptions—107 per every 100 people.

Given the social nature of retail in Latin America, retailers there connect with their customers using social media.
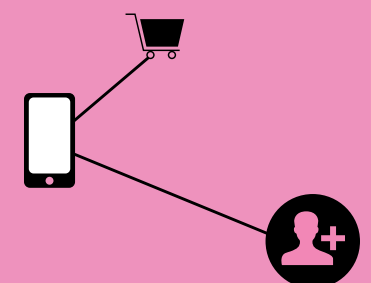
Retail Centers

20

Looking for differentiation

Instead of taking a "House of Brands" approach, retail centers are celebrating context by personalizing placemaking to their location and targeted demographic. The differentiator is engagement, connecting centers to their communities by curating content. Real-time data on shoppers' movements helps centers tailor the experience. As retailers' real and digital worlds converge, the browse/buy function is evolving. Shoppers go to stores, then buy online, or vice versa. This and instant access to information are disruptive, yet centers' conversion rates, sales, and revenues are rising. With less need to stock merchandise, store formats will get smaller, focusing on brand-building and catering to their customer communities.

Retail

Retail's new worldliness

The widespread desire on the part of national brands to push beyond their core markets means that established "legacy" brands will be competing on their own turf with new formats and offerings. For their part, legacy brands will continue their global push, often reinventing themselves in the process—both to be relevant to a new customer base and to move up market. Thanks to the Cloud, retailers will find that "no store is an island." Even the most craft-based or curated backstreet shop will be in conversation with the wider world. Retail is both local and much broader. Word of mouth, so important to sales, is part of the smartphone data that gives retailers the bigger picture. In time, that knowledge will reshape the stores around how customers really browse and shop.

A STRATEGIC SHIFT

Shanghai's Diesel Planet store integrates customized tailoring to set itself apart as an international brand. More and more, retail brands break out of their current image in new regional markets to target more affluent consumers.

RISING AFFLUENCE

64%

of the global middle class will live in Asia in 2030 (but account for 40% of middle-class consumption).

Diesel, Shanghai
opposite: **El Palacio de Hierro, Querétaro, Mexico**

Experiences are built on hands-on interaction.

Mixed Use

22

Urbanization drives mixed use

While urbanization will take many cities to higher densities, it will also spur development of urban centers across their regions. Mixed use is emerging as the "new normal" because it's proving to be a scalable solution to the need to use land intelligently. It creates real destinations that leverage transit, encourage walking and biking, and deliver urbanity and authenticity. So look for developers to move away from variations on limited real estate products and embrace new, hybrid programs and formats with greater flexibility to mix, curate, and deliver the cachet needed to attract the best tenants. Large-scale mixed use is likely to be generated by fast-growing cities, while others will focus on redeveloping what exists to preserve the authenticity of their urban fabric.

Entertainment

Entertainment has to connect

Entertainment projects start with a vision of the experience. Today, if the experience can't be shared in real time, it didn't happen. Sending friends photos and clips by phone reflects an active, expanded kind of engagement. The venues will be rethought around it. The goal is to connect with the audience before, during, and after the event so people are engaged and the ROI is higher.

So stand-alone entertainment venues won't be viable without the critical mass that variety and proximity generate. This points to integrated, immersive destinations incorporating theme-park gates, retail and dining, entertainment, and hospitality. Smaller centers can work if they tap the urban mix. Each needs a vision that gives it content and guides the design.

SUCCESS IN THE CITY

In sharp contrast to resort destinations, which tap a widely dispersed audience, urban entertainment centers can thrive on the critical mass of a large local population with disposable income.

The Axis at Planet Hollywood, Las Vegas
above: TV, Film, Wax Museum, Qingdao, China

New sponsored fan destinations, strategic graphics, giant HD video boards, and a high-performance sound system redefine the fan experience at FirstEnergy Stadium, creating a new intimacy and a tangible home-field advantage.

FirstEnergy Stadium, Cleveland

Sports & Recreation

TREND

24

Strategies to help revenues grow

While sports are often steeped in tradition, how fans engage with them constantly evolves. Meeting these changing expectations is the challenge sports venues face. Beyond the game itself, amenities in and around the venues give fans a sustained and individualized experience. Savvy franchises are growing revenues by tailoring their offerings to the convenience, comfort, and desires of a diverse fan base. VIP lounges, deluxe suites, and celebrity-chef concessions are part of the flavor of "being there," as are fantasy sports lounges and ample Wi-Fi access. Fans will spend more time and money for the added value. These new venues spark and anchor mixed use, and can host non-sports events to boost revenues before and after the games and in the off-season.

Brand Design

25

Taking an experiential approach

In today's ultra-connected world, everyone has a voice. Consumers engage with brands on their own terms. Word of mouth drives their decisions. Gensler research shows that engagement is fundamental to the rest of the brand equation: 94 percent of the time, a favorite brand will be recommended to family and friends. But the challenge for brands today is to cut through the chatter of a zillion conversations. It means that brands have to connect holistically, taking an experiential approach. While people can opt in digitally, real places and settings immerse them in messages, feelings, and information that align the brand with heads and hearts. Personally experiencing a brand means engaging with it emotionally so it's valued and becomes an intrinsic part of life.
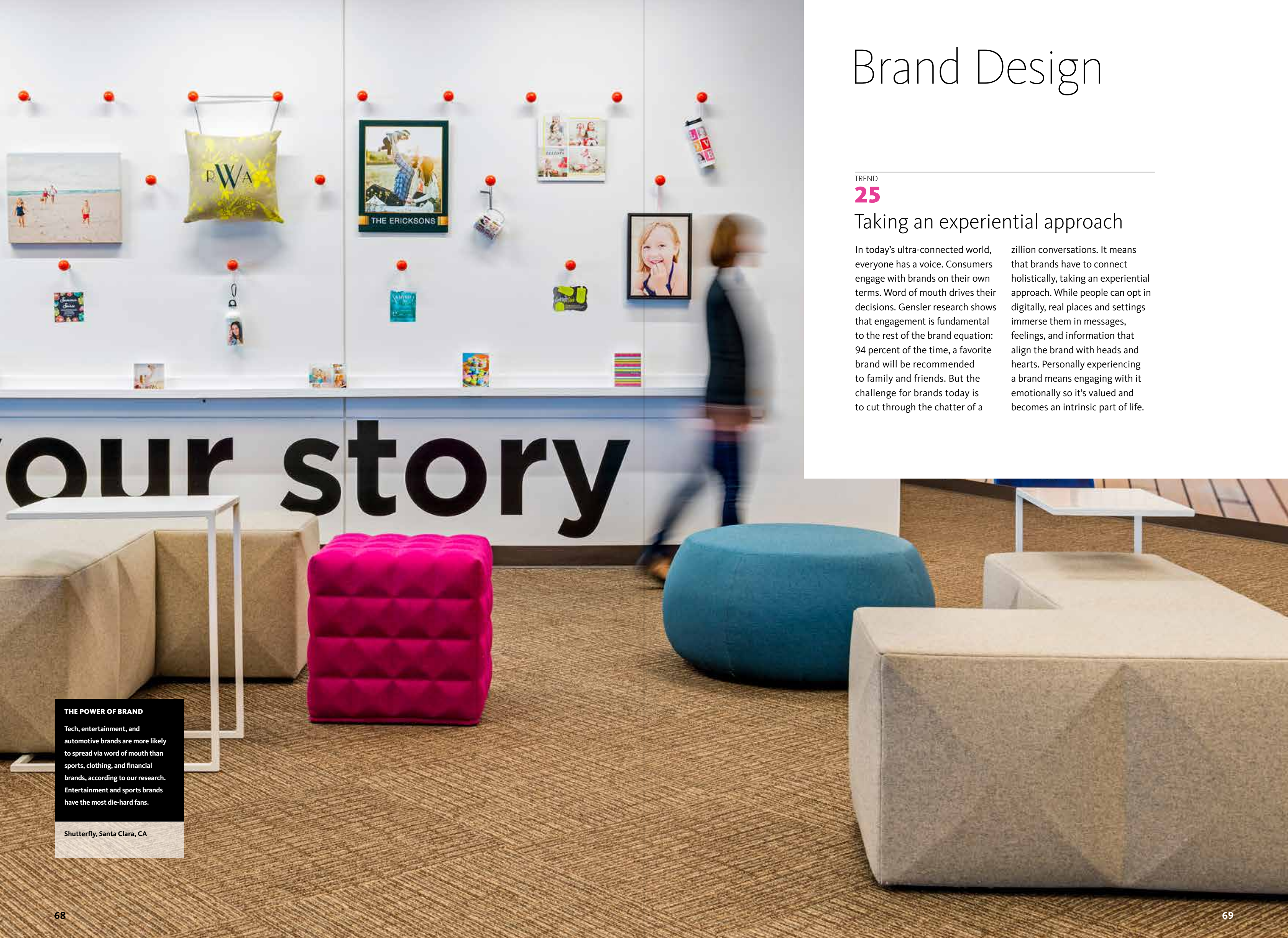
THE POWER OF BRAND

Tech, entertainment, and automotive brands are more likely to spread via word of mouth than sports, clothing, and financial brands, according to our research. Entertainment and sports brands have the most die-hard fans.

Shutterfly, Santa Clara, CA

Hospitality

26
Maximizing return on experience

People will pay more for an experience. That's increasingly true today as affluence is buoyed by a rising global middle class. To provide it, the hospitality sector is working overtime to be informal and welcoming. Where applicable, hotels are integrating local culture and inviting the community in. See-and-be-seen lobbies mix work, socializing, and relaxation. Travel trends, like vacationing with the extended family, are addressed. Hotels are often "home away," so they're making space and adding warmth. Well-being is a priority: fitness, healthy food, and wellness options are attractors. Sustainable is important to match with values. Hospitality brands know that guests engage with them before they arrive. By focusing on the relationship, they set the stage for residences and other products.

THE LOBBY REVOLUTION

Lobbies are changing fast. As check-in gets personal and tablet-based, the front desk is fading. Now lobbies are for working, served by Wi-Fi and furnished for small meetings or time alone. Lobby retail and lounges drive new revenue.

above: Grand Hyatt Incheon, Incheon, South Korea
opposite: ITC Colombo, Sri Lanka
below: Hilton Grand Vacations branding

Tall Buildings

TREND
27

Engines of vitality: vertical cities

The success of tall buildings will be measured by how well they attract and support tenants, and how well they fit with and enliven the city at their feet. Tomorrow's mixed-use towers will anchor districts that are diverse, walkable, and transit-served. Vertical communities will find a new synergy with activities on the ground, instead of ignoring them. They will help redefine the city as a place where density takes a richer form. Tall buildings' vitality also relates to their capacity to spur innovations in form, materials, and building systems. In overbuilt markets, high quality and performance are key to competitiveness. A new generation of towers that maximize ROI by reducing the cost of construction, fabrication, and operation is essential.

200 meters and taller

Four Seasons Mumbai Residences | 209 m
Mumbai, India

Burj Alshaya Headquarters | 209 m
Kuwait City, Kuwait

Hines Bohua Tower | 250 m
Shanghai, China

300 meters and taller

Xiamen Shimao Strait Towers | 300 m
Xiamen, China

KAFD World Trade Center | 303 m
Riyadh, Saudi Arabia

Suzhou Zhongnan Center | 729 m
Suzhou, China