

We always look ahead. For 2016's Design Forecast, we challenged ourselves to look out 10 years.

Design shapes the future of human experience to create a better world. This credo is the basis of our Design Forecast. For 2016, we asked our global teams to consider how people will live, work, and play in the cities of 2025. Their insights will give our clients an insider view of the issues design will confront in the next decade.

Finding opportunities requires insight and imagination. Our newly opened Shanghai Tower speaks to how we help our clients reframe the present to meet the needs of tomorrow. Design is how we do it. It makes insight actionable, creates meaningful innovation, and calls a thriving future into being.





Andy Cohen, FAIA, IIDA

Shanghai Tower, Shanghai on the cover: The Tower at PNC Plaza, Pittsburgh

Olane

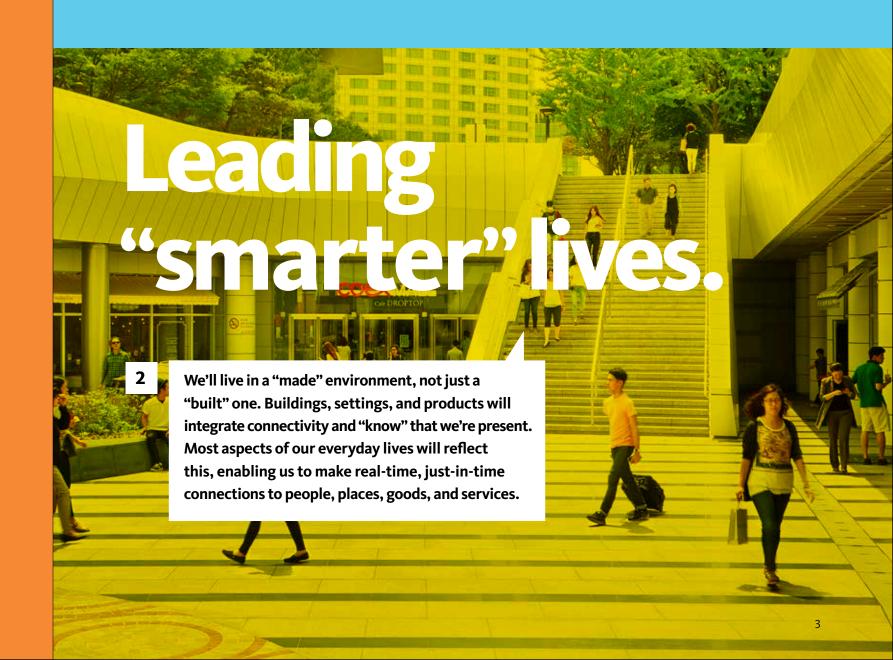
Diane Hoskins, FAIA, IIDA, LEED AP

Metatrends shaping the world of 2025.

Looking across our markets, we see six metatrends that will transform how we live, work, and play in the next decade.

Embracing our iHumanity.

Digital will be such an integral part of daily life that we'll leverage it much more fully. We'll accept how it interacts with us, consciously feeding its data streams to make our lives better. Our iHumanity will be a shared, global phenomenon, but different locales and generations will give it their own spin.



Designing both time and space.

Hungry for experience and hooked on ultraconvenience, we won't tolerate "dead time," whether it's long commutes, less-than-seamless transactions, or places devoid of interest. Design will reflect the reality that people will expect everything to justify their time commitment.

Urbanity, not Just urbanization.

Urbanity creates an abundance of human networks to drive urban economies. To support new lifestyles, real estate will innovate its forms and means. Walkable, transitserved hubs that offer a rich, dense mix will absorb new growth. Many of them will be in former suburbs.

Cities as Innovation Engines.

Look for the emergence of *neo* industrial cities that support thriving digital/artisanal maker cultures. Consumers will expect to co-create the goods and services they purchase. Makers—including freelancers and robots—will look to cities to provide tools and settings to speed innovation.

Resilience

sets scale.

In times of disruption, cities bear the brunt—
disasters, epidemics, and security threats. They
will take the lead in managing this, but citizens will
play a role, armed with data and a mindset tuned
to wellness, safety, and resilience. Smart cities will
engage them and give their local efforts scale.





Community Forecast

Contemporary life's disruptions and opportunities form the working agenda for cities and their community-facing institutions and infrastructure.

iHumanity is redefining livability.

No journey, treatment, or curriculum is fixed, as digital tools and open resources encourage people to shape their experiences and own their destinies. As they reclaim their cities, people are redefining livability with sharing and wellness at the core. The growing capacity for personalization continues to generate the kind of disruption that challenges tradition's sclerosis and high cost.

New priorities give resilience a new math.

Resource shortfalls spur across-the-board rethinking to increase supply, temper demand, and prevent waste. Pollution, sea-level rise, and other manmade and natural threats to community life lead to a "new math" about priorities. How resilience is defined will vary, but investing in it is seen as a communal responsibility.

Growing complexity demands synergy.

Proximity is less of a requirement as remote medicine, education, and convening ramp up. At the same time, research, practice, and education are increasingly combined, implying more integrated facilities. Crossing boundaries is necessary in a complex, distributed, and interconnected world. Collaborative synergy that generates holistic solutions is widely valued, and communities of practice that deliver it will thrive.

Creativity is fueling an urban revival.

Grassroots artists and artisanal activity, leveraging low rents, meld with startups to revive depressed neighborhoods. For cities, accommodating them is a challenge, but also a necessity to reap cultural and economic benefits. Look for companies and institutions to step in where rents are high to provide shared workspaces that spur innovation. Urban agriculture has similar benefits as a means of community-building.

Adaptability and versatility are the norm.

Community life evolves through trial, error, and new solutions. If a key part of the system falls short, there's an app for that. If public space isn't available, curbside parklets pop up. Large venues will support intensive and varied use, orchestrating smaller settings that activate the city as a whole. Low-tech, mobile venues will well up around them—creating micro-markets for entrepreneurs and quickly-deployed platforms for spontaneous local events.

Work

Workplace Forecast

Liberated from old constraints, prepared to go where their talents are best supported, an urban workforce will reshape work and its settings.

Making choice and connection higher priorities.

As organizations adapt to accommodate workers' personal devices, a customer-like mindset will transform internal business processes. Faced with this new imperative, companies will encourage their people to use these devices to connect to each other and to their customers and markets. They will also offer people more options as to where and how they choose to work.

A new ethos gives rise to new types of space.

The emphasis on making and prototyping, along with the rise of a project-centered workforce, will change the nature of workspace and how it's provided. Look for the emergence of just-in-time settings designed to support the activities of fast-moving, constantly changing teams. A workforce that's detached from organizations will also make "third places" more important in cities.

Engagement is the new differentiator.

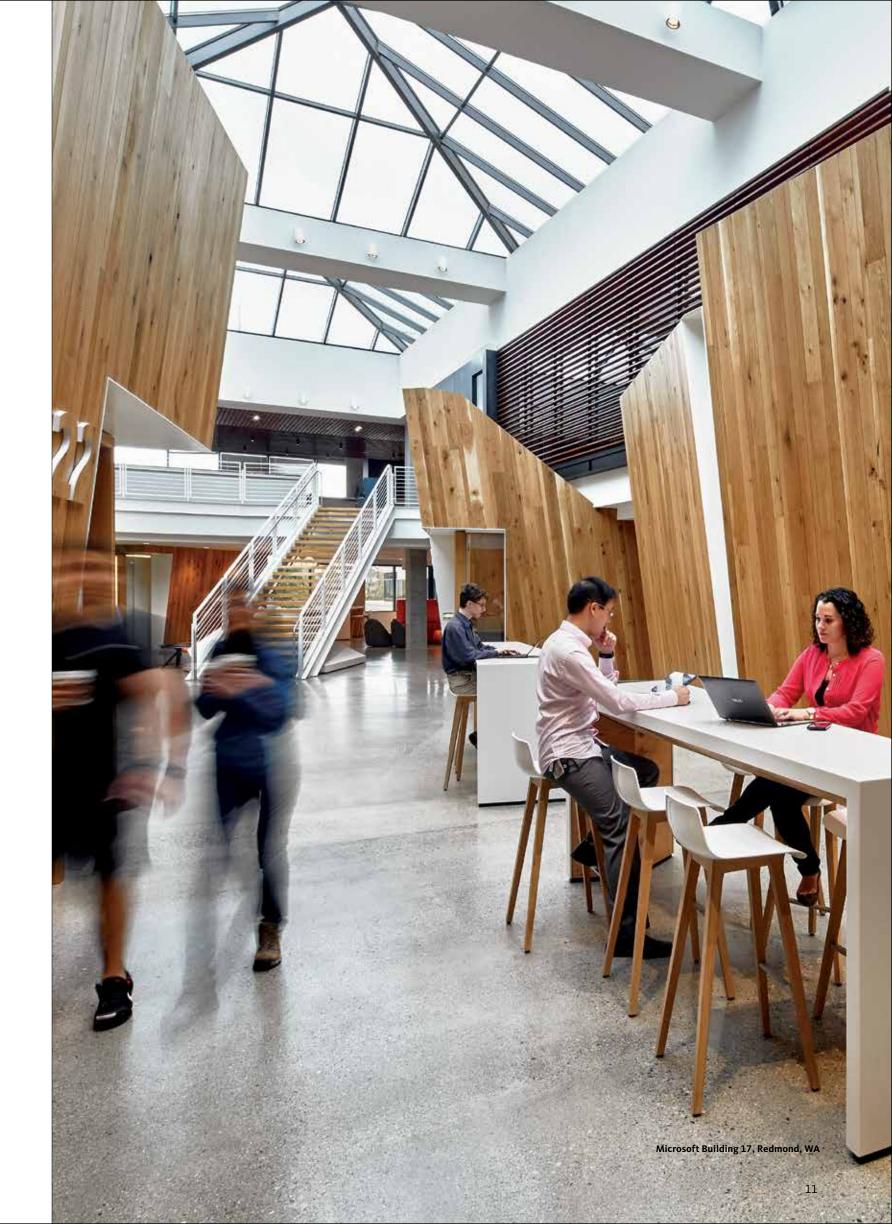
Rising expectations for engagement among customers, organizations, and teams will spur the growth of "open" collaboration spaces that welcome outsiders, including autonomous teams. They especially will want to work across organizational and professional boundaries, so they will gravitate toward settings that engage them as full participants and support their direct interaction.

Day-to-day work is blurring time and space.

Top performers will become experts at managing states of flow as they shift gears between complex, work-related problems and lifestyle pursuits. As everyday habits change, uniform workplace solutions will go by the wayside, replaced by a collage of settings and approaches that help people transition from mode to mode within dense marketplaces of spatial variety.

It's time to get serious about wellness.

New tools will allow people to monitor not just their personal wellness, but also the health of their work settings. In response, organizations—including building owners and managers—will have to take wellness seriously. The issue reaches deep into workplace culture, prompting the expectation for health-supportive options, both on-site and in the neighborhood.





Play

Lifestyle Forecast

Leisure's need for a customer experience that's real, authentic, and seamless is a challenge for tech/media integration.

Settings are responding to one's own reality.

Environments will automatically welcome and respond to an individual's likes, dislikes, and desires in overtly personalized ways. Artificial intelligence, wearables, geo-location tools, biometrics, and predictive technologies will anticipate consumer needs based on user behaviors and preferences, offering tailored messaging and curated experiences that can augment and enhance human expertise.

The nuances matter more in identifying consumer types.

Traditional consumer categories are less meaningful as generations blur, but regional differences persist. At the same time, demographics still serve an important purpose. With improved segmentation tools, demographics—along with psychographics and ethnography—are telling a more holistic story. To stay relevant, brands will need to focus on specific consumer types or habits.

Peer-to-peer: Sharing is the new owning.

App-driven sharing platforms continue to disrupt established businesses, from hotels to retail stores. Peer-to-peer marketplaces facilitate renting, sharing, and borrowing, rather than owning or purchasing. Consumers seeking real-time, communal, meaningful experiences are prioritizing access over ownership, driving the focus away from personal space toward community and collaboration space.

Having leisure close at hand commands a premium.

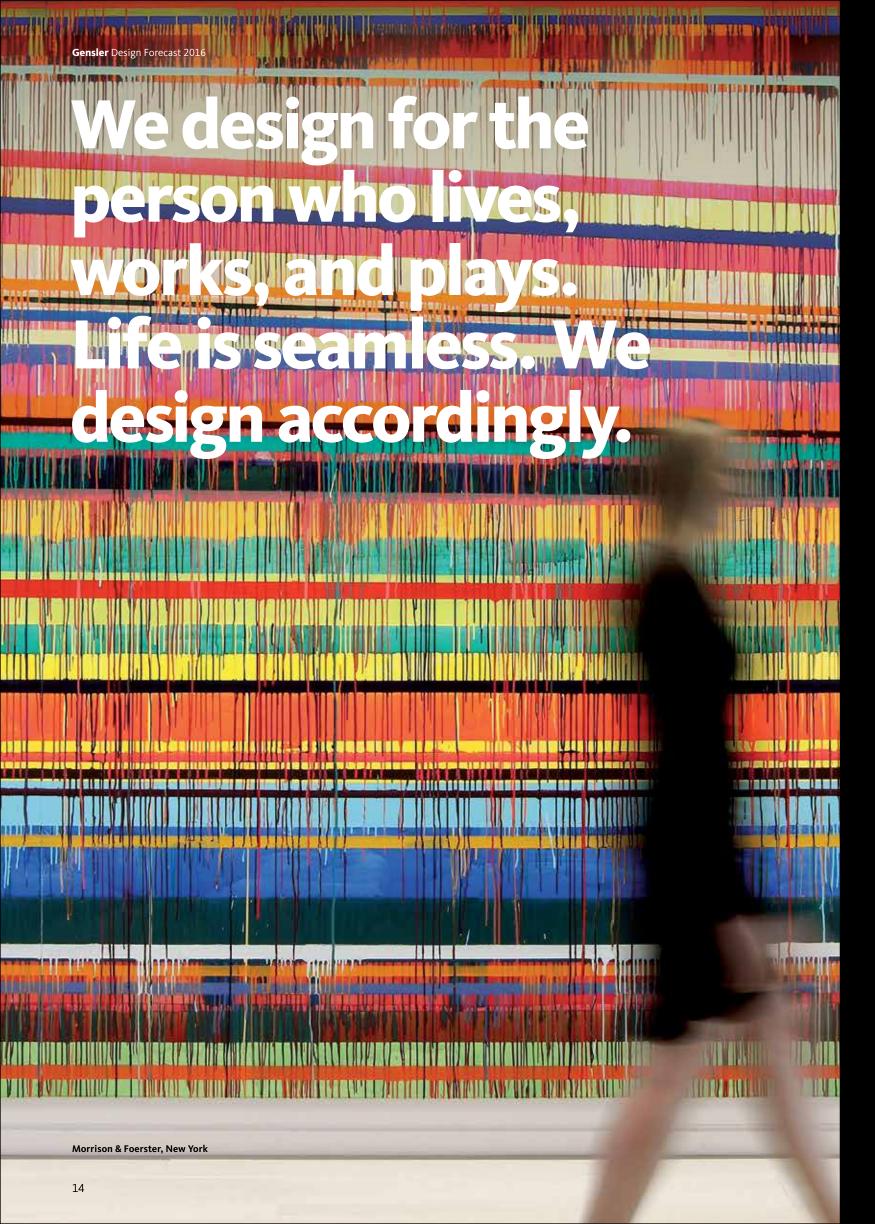
As work and life become increasingly integrated, particularly in the US and Asia, people are willing to pay a premium for places, products, and services that will give them back their time. Live/work environments will change as people embrace an ultra high-convenience lifestyle that lets them shift easily from work mode to leisure-focused activities.

Customers seek out destinations that matter.

Transit-oriented destinations will grow. Mixed-use developments will become the norm, but they will take a more compact form. With compactness and density comes an active street life. Whether for health, environmental, or economic reasons, people are walking, biking, and shifting from cars to public transit to shorten commutes and avoid the hassles of parking.

Online-to-offline: Consistency is critical.

Virtual/real convergence implies a holistic user experience. A unified online/offline experience will yield virtual stores and hypermarkets, interactive stores, and click-and-collect retailing models. Fueled by virtual and augmented reality, as well as by consumers' desire for real-world experiences, brands will develop immersive, multisensory services that engage on a visceral level.



The future is holistic. So are we.

Depth of expertise, broad experience, and global reach are table stakes. It's what you make of them that matters. Designing a world of possibilities for our clients and communities sets Gensler apart.

Live

Work Play

Lifestyle Sector

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Arts & Culture

Catalyzing community

Digital display and interactivity, including new developments like VR (virtual reality) headsets, figure in the presentation and interpretation of arts and culture. The trend is to balance digital interactivity with flesh-and-blood presence. Greeters, guides, docents, curators, and greater back-of-house visibility help connect visitors to institutions. If "edutainment" is in question, experience and dialogue are not.

Museums are creating cultural moments outside their walls—at real places in the community that make the visitor experience richer and more relevant. To be seen as cultural hubs, they are also diversifying their programs, often with outside partners, and giving rise to new hybrid, pop-up, and virtual venues that provide public antidotes to the daily grind. In the process, art, architecture, and the user experience interact and merge in unexpected ways. These convergences increasingly include the urban environment as well.

The web has also given rise to specialist cultural organizations that can attract—and connect—geographically broad audiences. This will spark the growth of bespoke museums and centers built around a singular vision, collection, or person. Larger institutions are often cosponsors. Like universities in their research partnerships, institutions have to manage collaborations carefully to avoid blurring their mission with others' agendas.

Social resilience is a specific concern of cultural organizations. By engaging their broader community and partnering with other groups, they can build the social cohesion that is the foundation of resilience. Sustainability is important—in Mexico, for example, environmental responsibility is part of many museums' brands, consciously expressed in their design.

below: The Science of Spirituality, Lisle, IL right: Tienda de los Museos del Banco Central, San José, Costa Rica







above: Confidential data and operations center, Shanghai

Critical Facilities Housing the Cloud

Cloud computing and smart devices, including houses and cars, are the main factors behind strong demand for data centers. To meet this demand, larger players are entering the market with multilocational programs. Along with growth comes change. The old mantra of reliability at any cost is giving way to lower-tiered, often smaller facilities. Pervasive cybersecurity issues are being met with command centers and operation centers to monitor and safeguard networks and backbone infrastructure. Regulatory changes—for US utilities, for example—make this a priority.

Data center technical innovations include using fuel cells, the only form of energy that consumes zero water, for storing energy and providing backup power. Wireless innovations that increase the capacity and quality of existing networks will make it easier to meet demand without relentless growth in facilities. Using graphene, a superconductive material, in processors will cut their energy consumption and heat generation, leading to even denser data centers that require less power.

People are curious about the critical facilities that underpin our digital connections. That's why some companies are letting people see and interact with their facilities as part of their brand expression.

Aviation & Transportation Travel gets an upgrade

As the passenger-focused goal of delivering a holistic travel experience takes hold, it will shift the emphasis from lowering costs to growing revenues by improving service. This will take in speed, ease, and efficiency, as well as comfort, amenity, and connection. To step up their role as connectors—between communities, regions, and with the world—airports are forging stronger relationships with their cities. They're also asking, together with the airlines, "What is a world-class experience?"—a question that they need to pose constantly to keep pace with the industry.

More robust fast transit systems, like trains, will make travel easier between the city and the airport and bring them closer together.

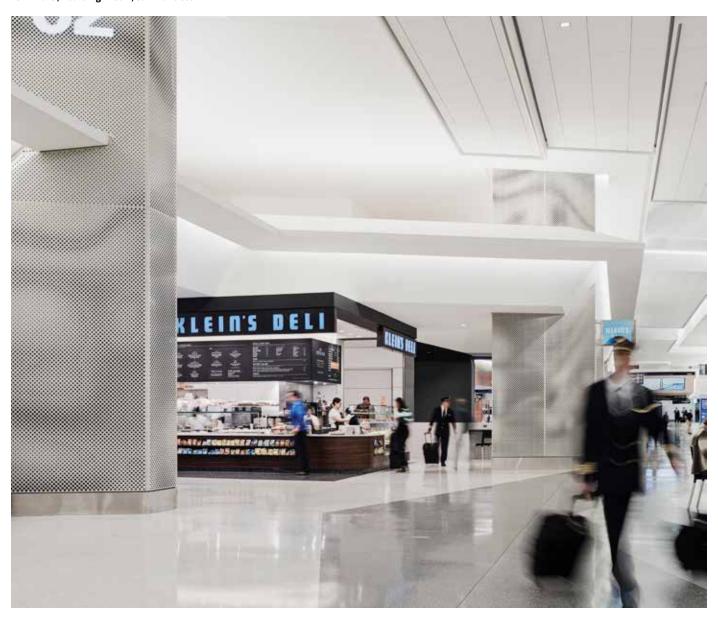
As they align more with hospitality, airports also draw on and reflect the best of what their cities have to offer—cuisine, retail, arts, and culture. Letting people move seamlessly through and beyond the airport, their smart devices handling the checkpoints and transitions, is the immediate future.

Where transit capacity lags behind demand, augmenting what exists will be the first priority. Automatic control systems will allow rail networks to handle more and faster trains. Apps will let passengers time their journeys and pay for all of it—including car and bike sharing—with their smart devices. On the horizon are driverless trains that can run closer at a higher average speed.

Transit hubs and corridors are the linchpins of mixed-use districts. Their value as portals and destinations points to multipolar cities—characterized by numerous compact, walkable centers that will shorten commutes and cut traffic congestion.

As de facto retail centers, airports and transit hubs are subject to consumer trends that decouple looking, buying, and delivery. Different kinds of retail spaces may be the outcome, as cash and carry is supplanted and experience becomes the main attraction.

below: San Francisco International Airport Terminal 3, Boarding Area E, San Francisco



22 23





above: Meixi Lake Exhibition Center, Changsha, China

Convention Centers

Building on the city's drawing power

By looking beyond "the box" and adding a range of facilities, convention centers will deliver the city as a venue, recognizing that it's the real draw for convention goers. This destination-focused approach may require new partners and ways of operating, but it gets around cost and space constraints that might hinder expansion and upgrades.

Breaking out of the box also makes it easier to open up centers and give them a new urbanity and humanity. This is a trend for museums too, consciously connecting themselves and their amenities to urban walkways and neighborhood attractions, and outdoor views, as part of the scene. As more airports become gateways for

national and global travelers, cities are upgrading convention centers to first tier. This is part of these cities' efforts to revive downtowns and build synergistically on the growing number of events and attractions around their convention centers.

Austin is a model, extending its SXSW live music festivals into a larger program of tech and innovation gatherings that attract an international following. In this scenario, it's less about a convention center, more about creating a district that can cater to the locals, but can also scale up to accommodate surges of out-of-town visitors when the episodic big events and conferences pull them in.

Health & Wellness

Well-being is the new global currency

Health consumers will self-direct their own wellness, reaching out to a range of providers. Work and leisure time already take in wellness, catering to consumers' preferences to have personal care built-in or close at hand, and walk-in or app-scheduled. Self-diagnostic tools will support people's collaboration with their doctors and allow them to evaluate the health of their home and work settings too.

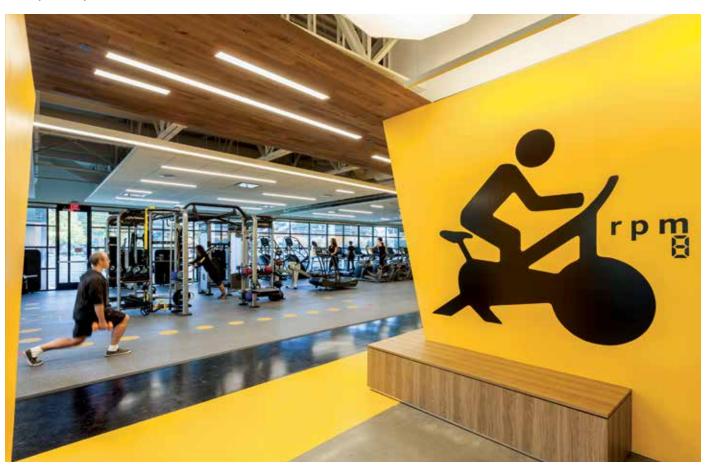
Providers continue to build alignments between medical centers and small practices, changing how services are delivered and promoting consolidation. House calls and community-based clinics are being revived as the new model, while big regional centers are opening branded specialist clinics in local markets. As the real cost of services is clarified, providers will turn to development and ownership models that make financing easier and deliver a higher return on real estate investment.

Artificial intelligence will change health and wellness into a daily lifestyle pattern. People

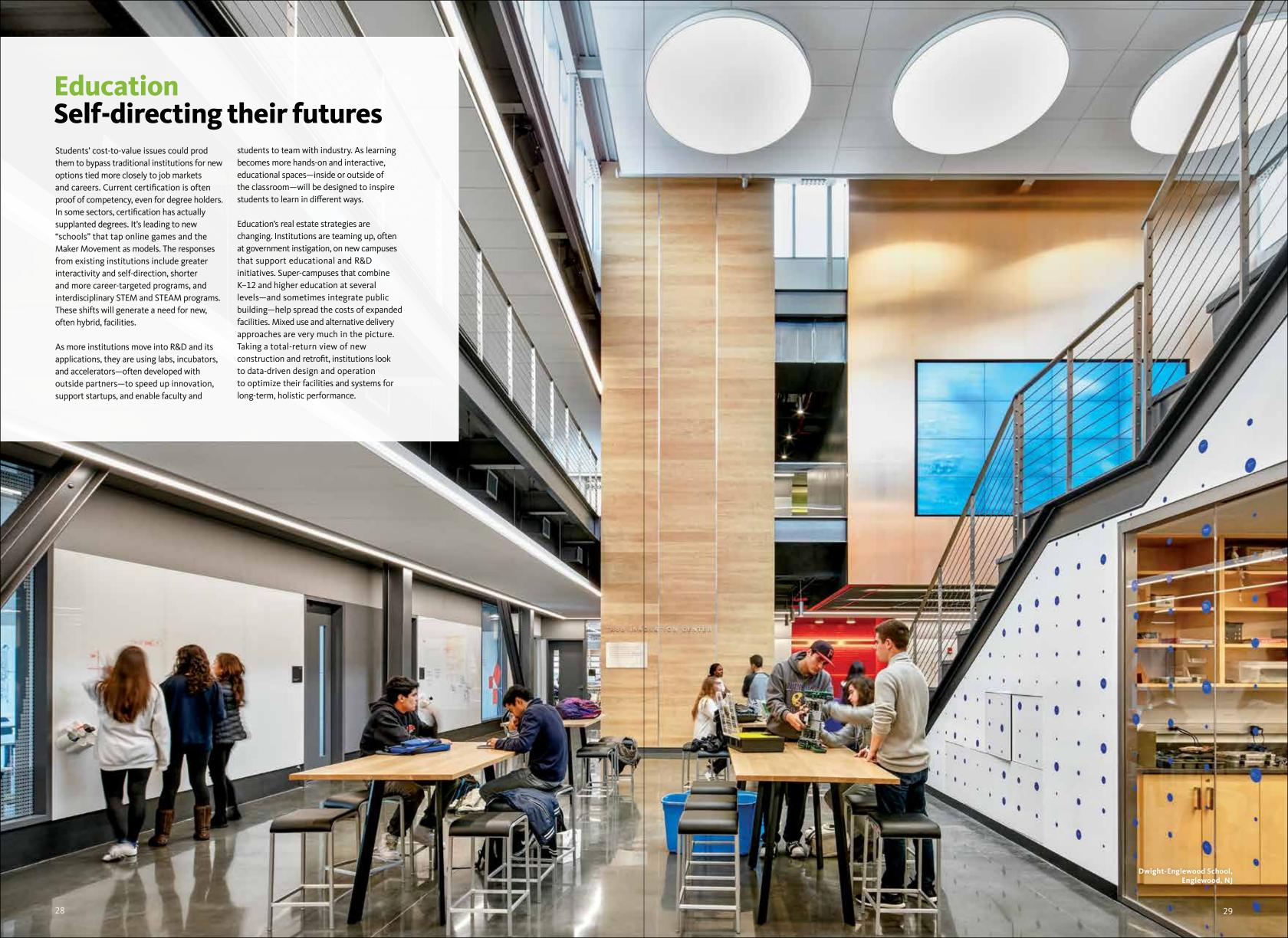
already turn to the web for immediate advice, while apps prompt them to stay healthy. In the near future, remote sensors will monitor them and communicate with their providers. As these options proliferate, inpatient hospitals and clinics will focus on serious health issues—using computers to aid diagnosis and design personalized therapies. Remote consultation is growing, and VR devices may extend the medical team's reach. Labs are automating analysis and using apps to speed results to medical teams and patients.

The hospital of tomorrow might resemble the research lab of today, where boundaries between research, education, and clinical care disappear. As part of this network, the hospital will develop a new civic role that focuses on community health and well-being integrators, helping patient-consumers navigate the new structure.

below: SymFit at Symantec, Mountain View, CA



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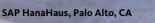
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The Tower at PNC Plaza, Pittsburgh

Proximity makes collaboration and innovation easier.





Professional Services Firms

A shift to higher-value work

Professional services firms will strive to be more complete business advisors to their clients, providing higher-value services while delivering traditional services more efficiently. Their work settings will have to serve a broader range of work modes and specialists. These high-performance spaces will help attract the best people. Clients will be attracted too.

The billable talent in these firms will increasingly be deployed to client sites, using the hub office as an anchor more than an office. These hubs will be technology-rich open plan environments. As artificial intelligence takes over parts of their workload, professionals will shift to high-value work, which the workplace will integrate and support.

Independent contractors are another matter. While their working lives are more flexible, on-demand may mean low pay, irregular hours, and job insecurity. New categories of employment will emerge—not full-time employees, but not self-employed either.

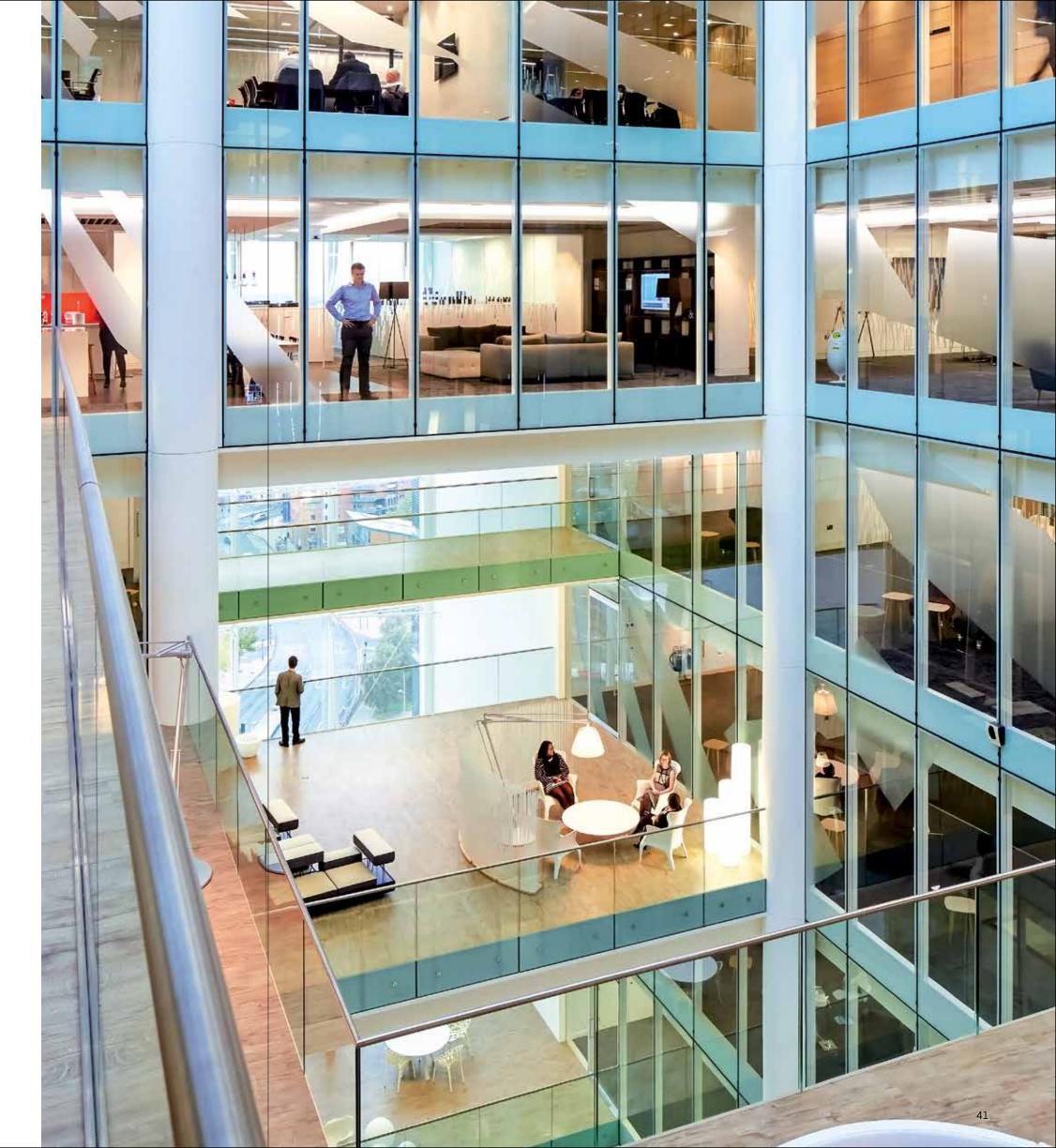
In response, careers and work settings will change. Some law firms may emerge as "brands" rather than firms.

Traditional boundaries between work, home, and community will blur. Influenced by hospitality and residential design, professional services firms will provide their staff with social space and choices about how they use the workplace. Greater insight into work processes and the human experience of working will help to fine-tune workplace design and strategy to increase productivity, creativity, and job satisfaction.

To counter mobility's impact on collegial knowledge-sharing and mentoring, large professional services firms will establish centers of excellence for specific areas of expertise to incubate talent, share learning, and develop solutions faster.

below: Howard S. Wright, a Balfour Beatty company, Seattle right: Wragge Lawrence Graham, Birmingham, UK









Not-for-Profit

Making the mission more visible and transparent

As the public sector leans on not-for-profits to fill gaps in its own services, the challenge of handling the increased load can prompt their consolidation and new partnerships. Shared facilities is one solution, comparable to the way holding companies collocate individual brands that share supports and amenities, but keep their individual identity. Coworking spaces is another option—and a way to increase collaboration and innovation.

To attract talent with limited resources, notfor-profits are making their reason-for-being more visible and personally empowering. The example of startups is relevant, given their "on-a-mission" cultures and work settings that telegraph purpose. The design implications of this connection between culture and place are real and important, as scrutiny from donors and the media goes with the not-for-profit territory. Bad publicity can disrupt funding and hamper missions, so the transparency of their operations is essential and needs to be reflected in the design of the workplace.

Buildings and settings that welcome community involvement are also valued, not least because donors favor not-for-profits with strong grassroots.

opposite: City of Hope Rivergrade Office, Irwindale, CA below: American Psychological Association Headquarters, Washington, DC





above: Stylex NYC below right: Tuohy WorkStyles bottom right: "Link" by FilzFelt

Product Design

Products get smarter and craft returns

Product design isn't just about the visible world of things, but also about the invisible world of interactivity that extends them, makes them "smart," and melds them into everyday experience. The "made environment" encompasses all of this holistically, adding up to user experience (UX) that feels right and enhances our iHumanity.

The Internet of Things will make products smarter in how they interact with us and with each other. They will be both autonomous and fully integrated and interacting with networks that connect them to people and the world. The ability of smart products to support shared use and self-manage maintenance and the ordering of supplies may change consumer attitudes toward ownership.

The revival of craft resembles the Arts and Crafts Movement of the late 19th and early 20th centuries. Craft in the 21st century is a counterpoint to digitized life. People want to find personal meaning in products by linking them to their makers, artists, and artisans. They look for evidence of craft as handwork. In parallel, there is a renewed interest in making, often with the ambition of finding markets for handmade goods. By emphasizing local production as a sign of authenticity, small-scale producers are enjoying wider appeal.





Consumer Goods

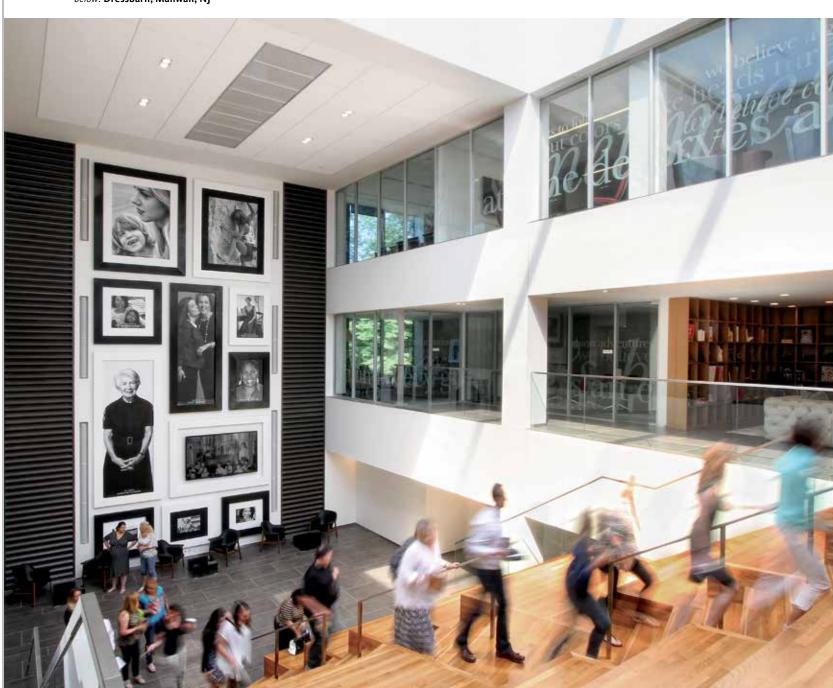
Bringing the walls down to promote collaboration

Developing, testing, and selling consumer products are no longer seen as silos, so the physical boundaries between these activities are eroding. Coworking, the maker movement, and team-based medicine are precedents for how to accommodate hands-on, collaborative practices in the workplace. Artificial intelligence (AI)—both people-to-products and the Internet of Things—will play into this by streamlining work processes and deepening the understanding of consumer engagement.

As consumer products companies invest more heavily in social and behavioral research to assess their markets and steer product

development, there's an increasing need for internal advisors and analysts whose backgrounds now range far beyond the fields of expertise that have traditionally been tapped. They include specialists such as mathematicians, meteorologists, economists, academics, and post-gender psychologists. Accommodating them is now a workplace issue, as the focus shifts toward creating spaces to support these specialists.

below: Dressbarn, Mahwah, NJ



Media

Supporting realtime convergence

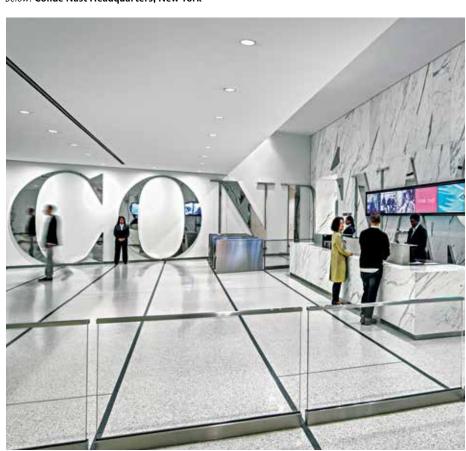
The media workplace puts a strong emphasis on the speed and agility of production, not least because of the unpredictability introduced by new devices and channels, and the fast-changing tastes of audiences that self-direct and self-identify. Media facilities need to accommodate this.

Gamification—the teamwork that online games now require to be competitive—is being adopted elsewhere to heighten engagement, solve problems faster, and create shared experiences. Meanwhile, online games are a huge business, attracting a fan base that could literally fill stadiums for their championship matches. To grow and compete, gaming companies will adopt the most progressive space design strategies

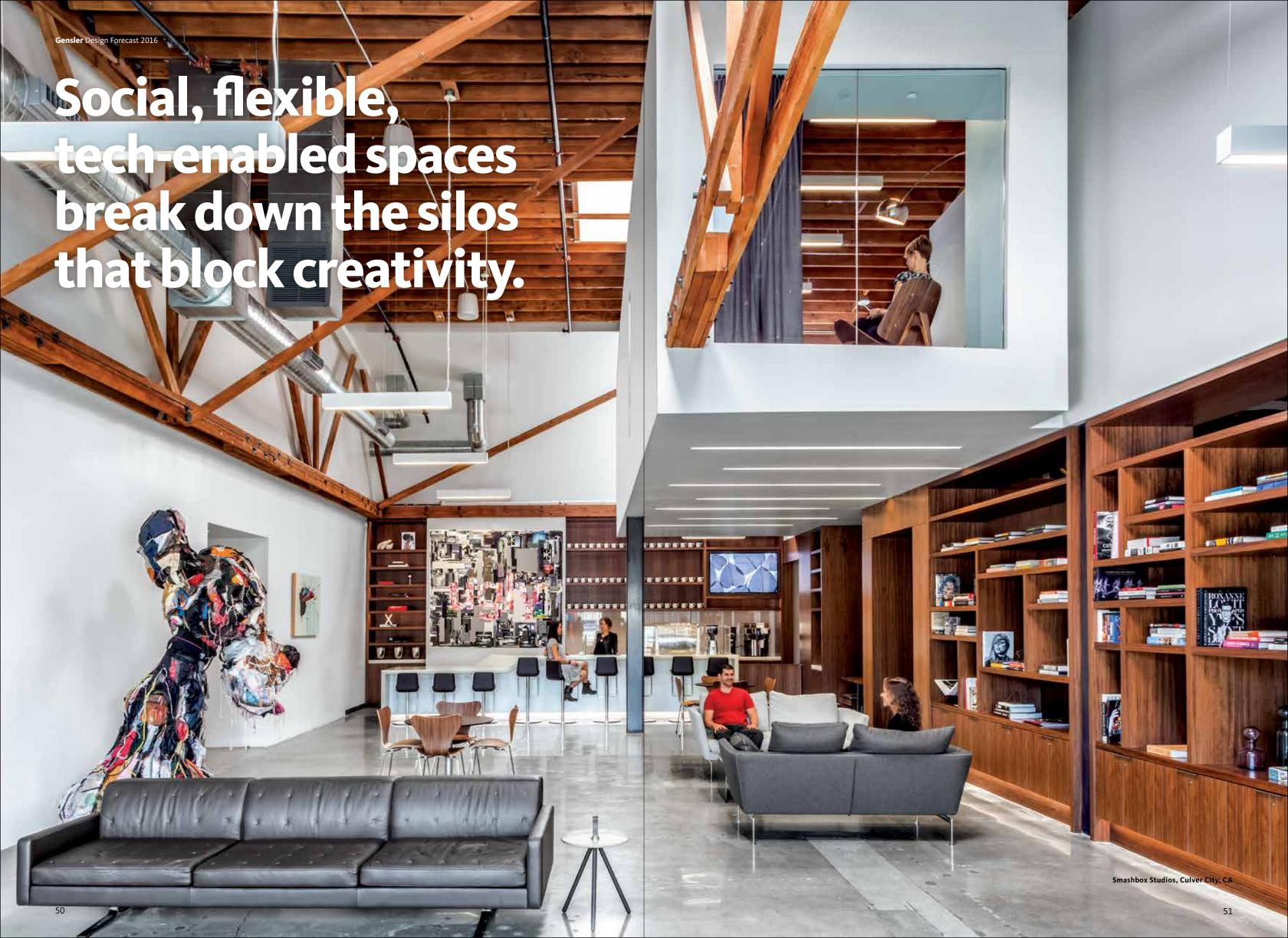
of the media and technology sectors. Spaces that are flexible yet tailored, communal yet individualized, tech-heavy yet human-centric will enable rapid innovation.

This revolution is ongoing; iPhones are now part of the equipment mix. VR—virtual reality—is a wild card that gives rise to the creation of immersive experiences. Integrating the digital and the physical is one way to do it, and VR is another. But media tend to converge, pulling disconnected strands together to compel attention. As the strands multiply, convergence demands more: silos come down, innovation ramps up.









Financial Services Firms

Disruption leads to reinvention

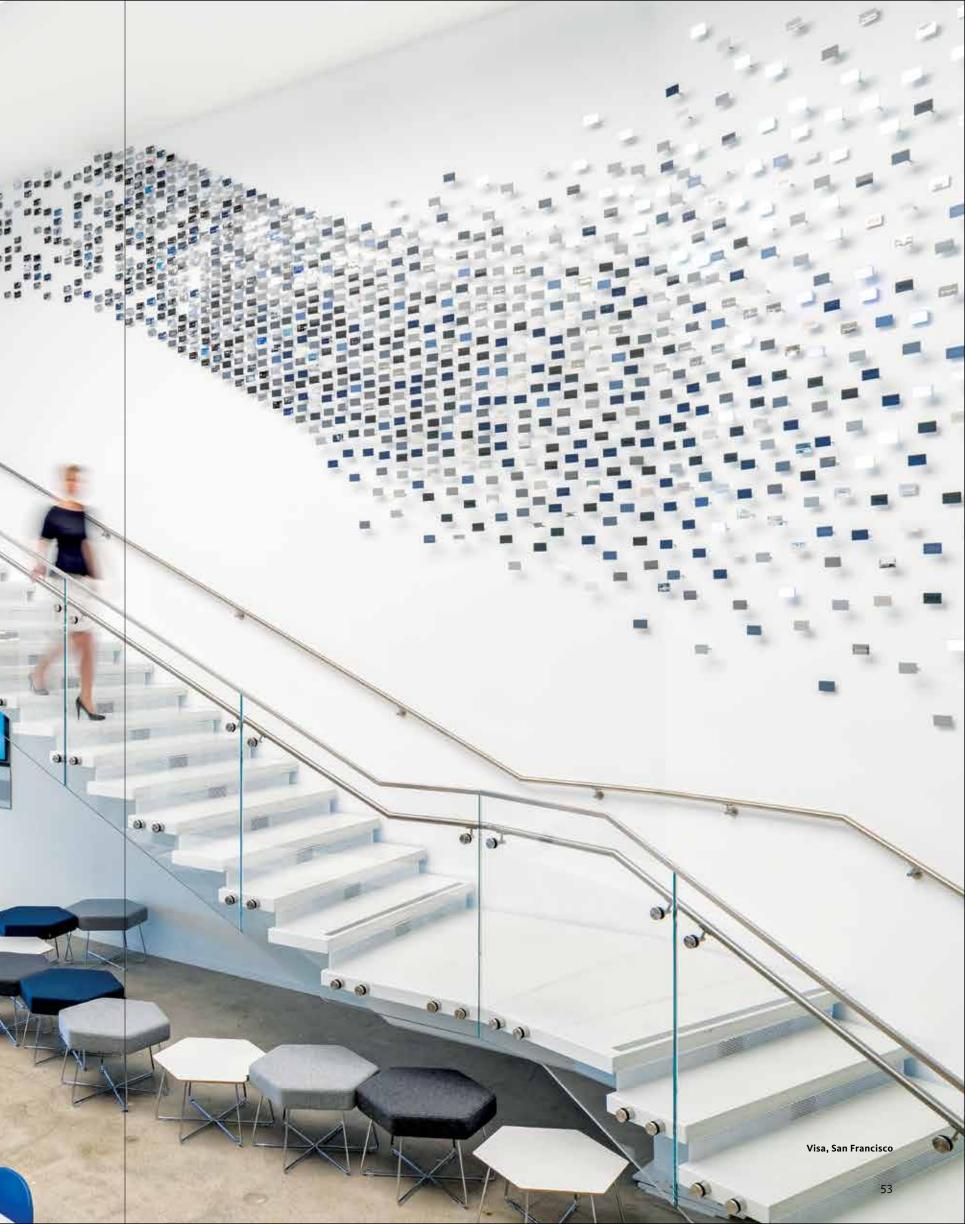
A strong sense of mission and purpose, focused globally and/or on a specific community, will have greater importance to financial services firms and their employees. This will impact both physical and digital space. Look for the sector to begin emulating the tech sector in its efforts to provide high-end amenities and compete for the very best talent.

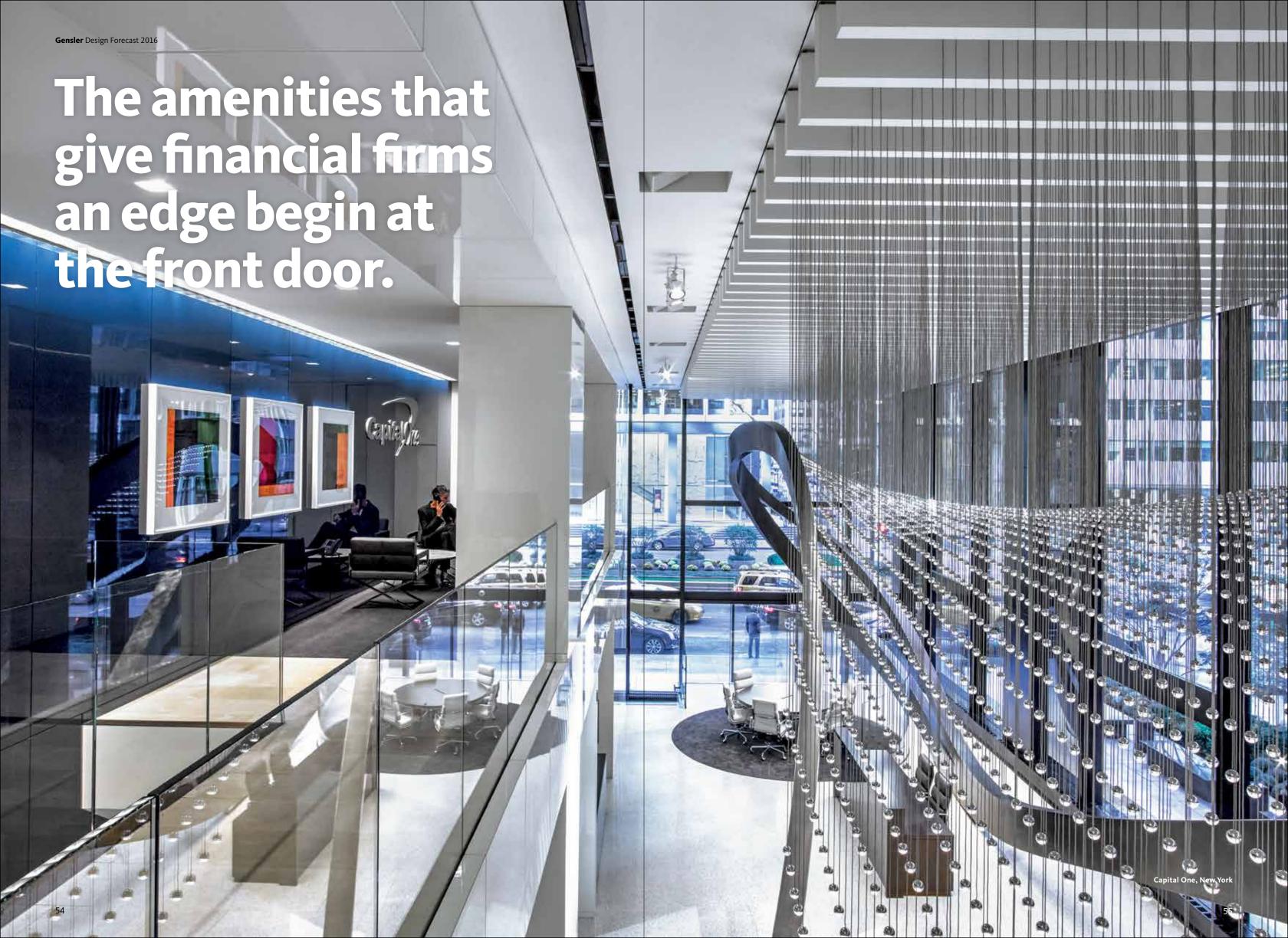
In addition, retail and private banking (or wealth management) will reinvent the customer experience to make it more individualized, while at the same time improving the virtual banking experience, especially on smart devices.

Competition is growing, as alternatives to traditional consumer banks crowd into their space. This will push the newcomers and

the legacy brands to differentiate themselves. How they will do so is an open question, especially for large banks that have to cover multiple regional and demographic markets. The task is easier when the focus is sharper, but even then, the constant evolution of technology can quickly disrupt those plans.

As technology simplifies transactions—or cedes them to artificial intelligence—the potential for disruption will only grow larger. But this also creates openings for the sector to take the lead in developing technology to support its activities. Growth of this part of the business is already gaining momentum with the rise of tech-like work settings and the tendency of financial tech accelerators to collocate with their clients.







above: G.T. "Mickey" Leland Federal Building, Houston opposite: Prince Jonah Kuhio Kalanianaole Federal Building and U.S. Courthouse, Honolulu

Government

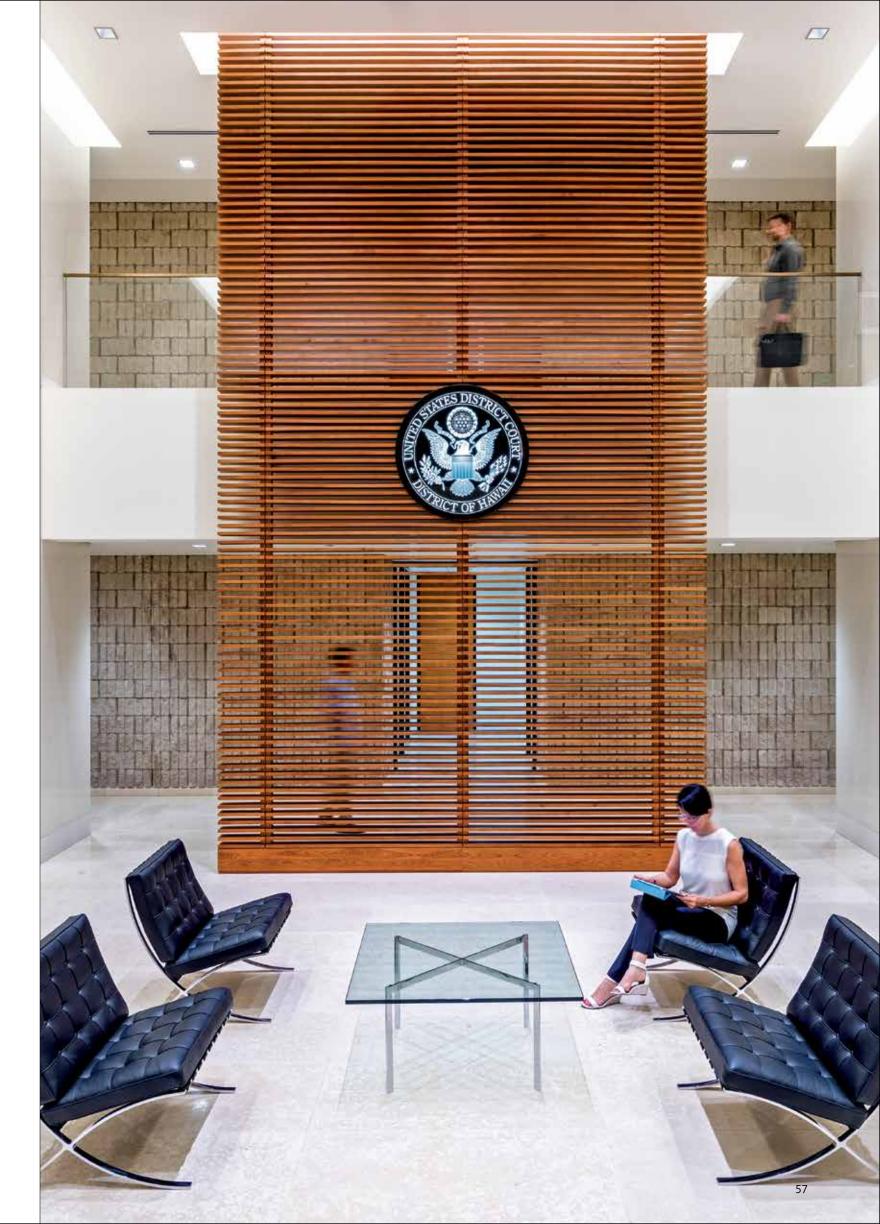
Cost-effective, welcoming, safe, and state-of-the-art

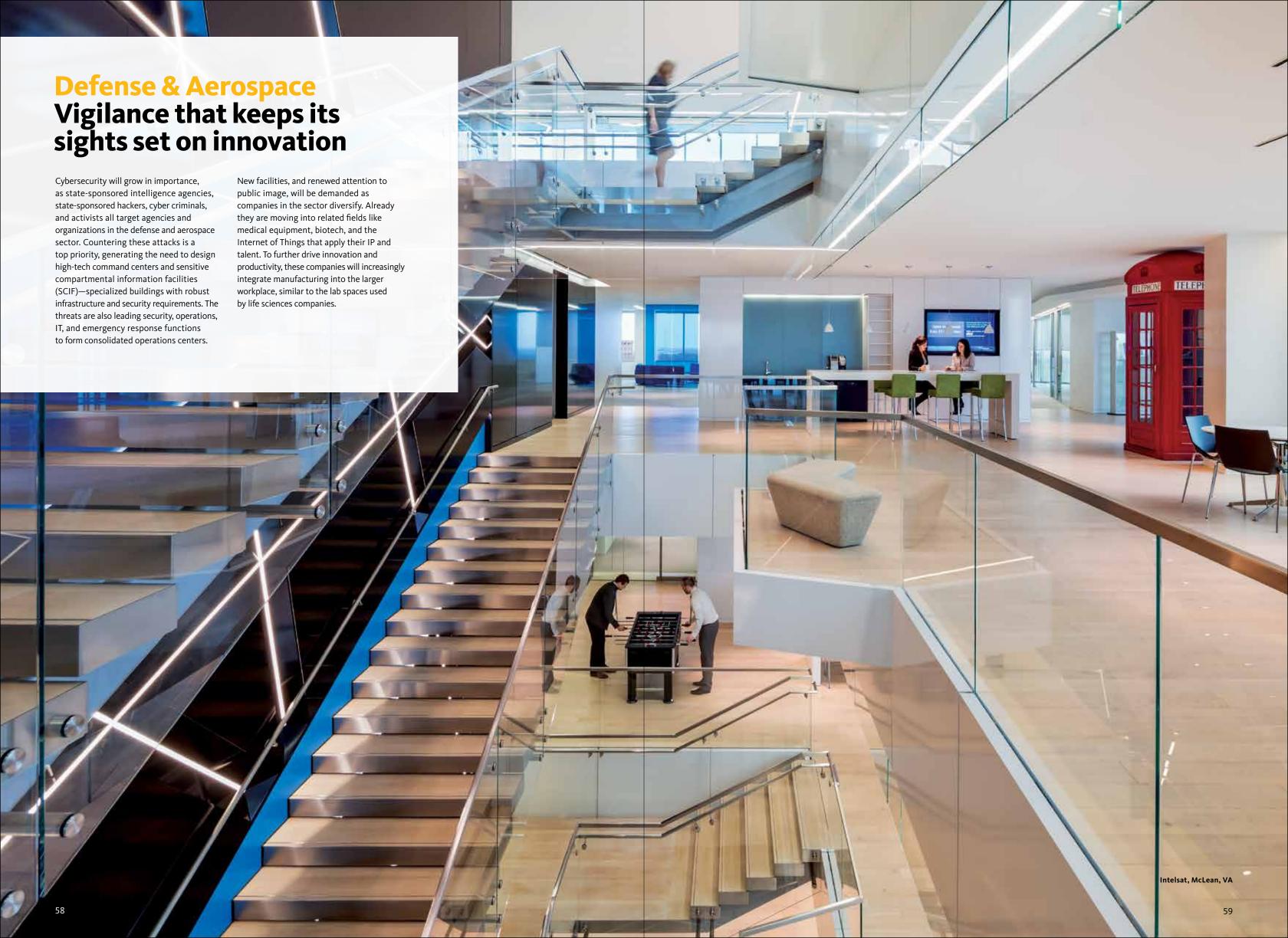
"Retail" government services will migrate online, reducing the need for staff and brick-and-mortar facilities as even the most heavily serviced constituents obtain services through digital channels. Seeking greater efficiency, government may resemble healthcare by consolidating some functions into central hubs, while placing others closer to the communities they serve. Often this will happen in private-sector facilities, blurring the public-private boundary.

To enhance security, physical barriers will be augmented and potentially supplanted by active, technology-enabled surveillance that allows for a welcoming environment yet

protects government buildings and workers. As their sophistication grows, these systems will detect, deter, and counter security threats—including drones—beyond the site boundaries of the building.

In addition, governments will shift to design-build and public-private partnerships to develop and operate their facilities without losing sight of goals for resilience, wellness, and productivity. End-user involvement in planning and robust change management will increase employees' satisfaction with the facilities they occupy.







Life Sciences

Blurring the lines, emulating tech

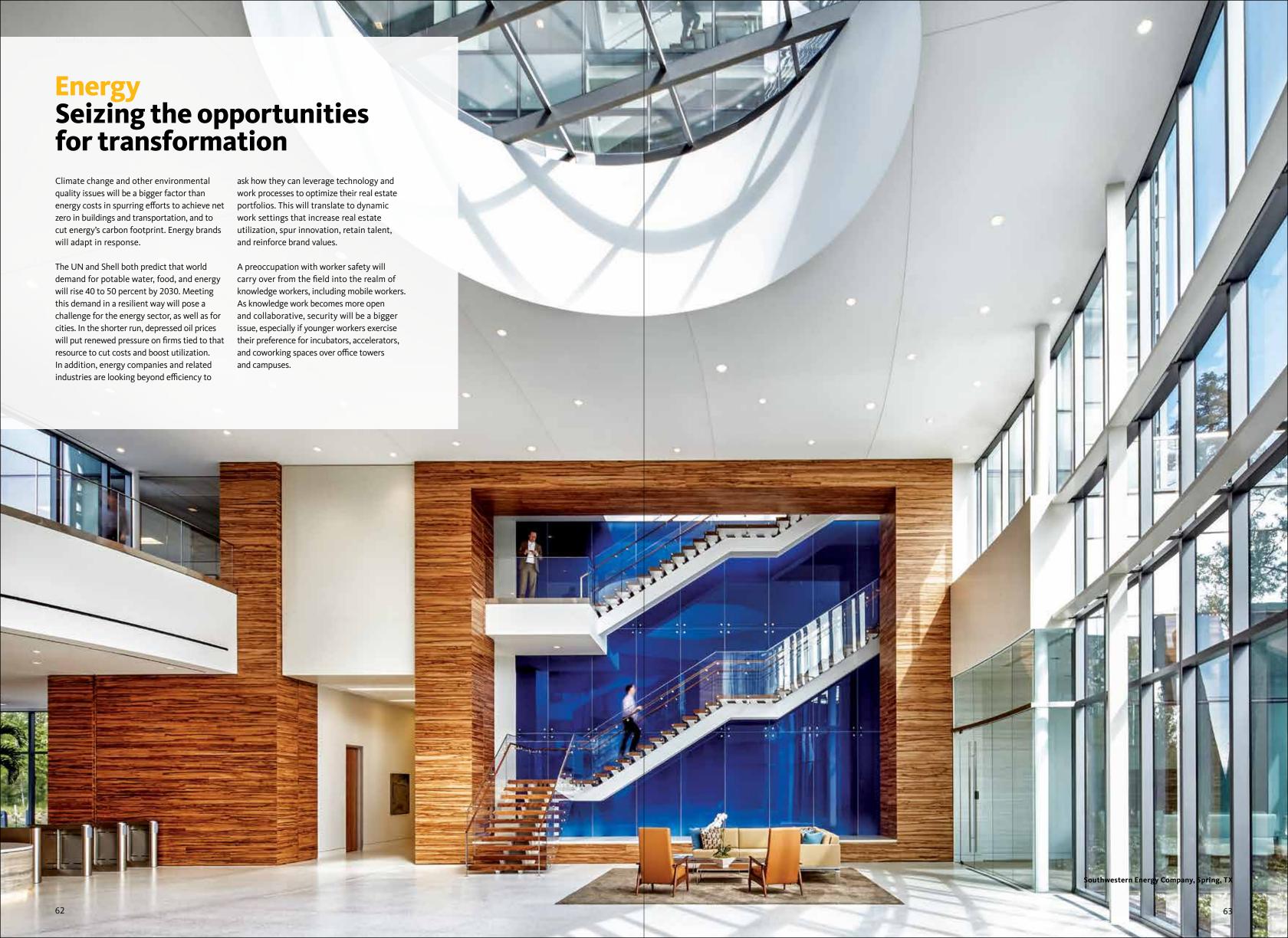
Precision medicine—therapies that consider patients' genetic and physiological traits by integrating new diagnostic and treatment tools—is reshaping the field and its facilities, blurring the lines between life sciences and healthcare. As smart devices link precision medicine to patient-consumers, artificial intelligence will handle a growing number of lab procedures. Lab settings are also being transformed by ever-smaller equipment. These ultra-flexible spaces can be collocated with non-lab functions to support teamwork and speed development and execution.

Life sciences companies and universities are emulating the tech sector in setting up incubator and accelerator spaces to support

startups, and innovation centers to get R&D to market faster. Interdisciplinary "matrix teams" are emerging, with combinations of real/virtual and insider/outsider participation. In addition, life sciences companies are gravitating toward the mixed-use "science villages" that can be found in life sciences hubs in the US and the UK, as well as in Singapore. They are a focus of investment in other East Asian countries and in the Middle East, often in conjunction with universities.

opposite: Pfizer, Tokyo below: Alexandria Life Science, San Diego





Consulting

New capabilities, new challenges

Analytics allows data to be sifted in real time, algorithmically, generating insights that enhance personal experience at the places where people live, work, and play. Designers will tap these findings to understand user needs. As data gathering is integrated into the settings themselves, people's presence in them will generate real-time data points.

The rising numbers of freelance and contract workers will have a design and operational impact as organizations seek to integrate them. Likewise, given the ubiquity of the mobile workplace, people will expect to maintain such primary workplace values as health, engagement, brand, and work mode support—wherever they choose to work.

The need for geographically distributed teams within global organizations to work together effectively is complicated by language and cultural differences. Giving collaboration tools real-time translation capability could help. Automation, which may prove to be both a boon and a threat to workers, is an emerging issue that will grow in importance in the next decade.

below: Schuchart Construction, Seattle, shown with Gensler's award-winning Observe iPad app, which links activity data directly to floor plans.





above: Sunset Media Center, Hollywood, CA

Landlord Services Remixed for revenue enhancement

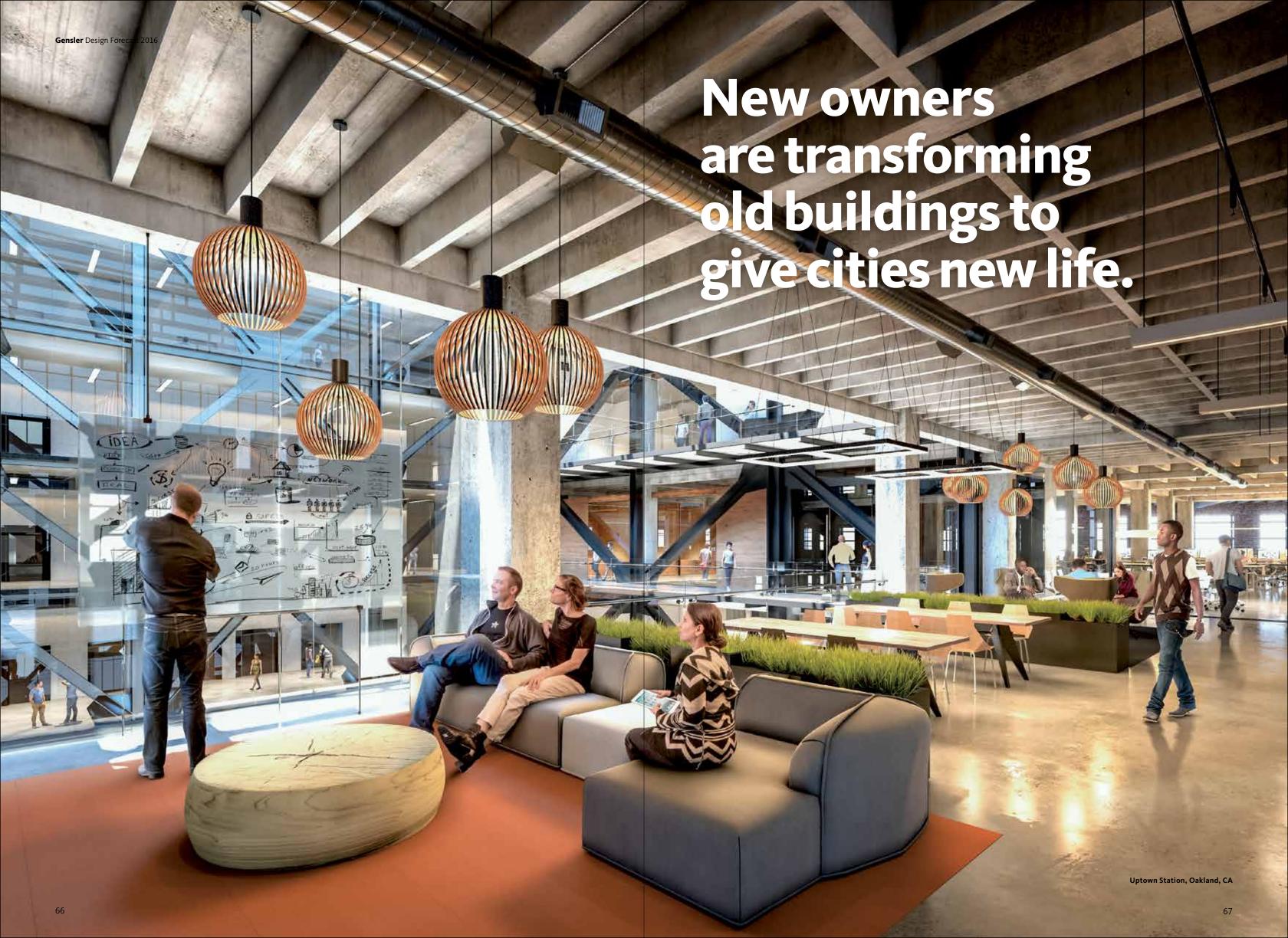
Landlords are turning to prebuilt, ready-to-go office space to meet tenant demands faster. Emerging workspace-on-demand platforms that "share" third-party properties the way other platforms share rides and beds will cater to tenants wanting shorter stays. As virtual reality technology catches on, it may supplant real walk-throughs as the way tenants evaluate multiple properties.

Amenities and services will be a bigger sales point for office buildings, with lobbies and other public areas taking cues from hospitality and residential properties—creating new revenue opportunities for owners and managers by adding coffee shops, restaurants,

retail, conference centers, concierge services, and more. Also look for them to offer expanded amenities to individual tenants, managing tenant-branded facilities and providing services tailored to their staffs.

As this suggests, owners understand that their office buildings are part of mixed-use districts—or need to provide that mix where it's missing. Integrating settings and activities that draw evening and weekend traffic, and opening up lobbies and terraces to encourage synergy with the neighborhood, will raise the destination value of both office buildings and their immediate districts.

4 65



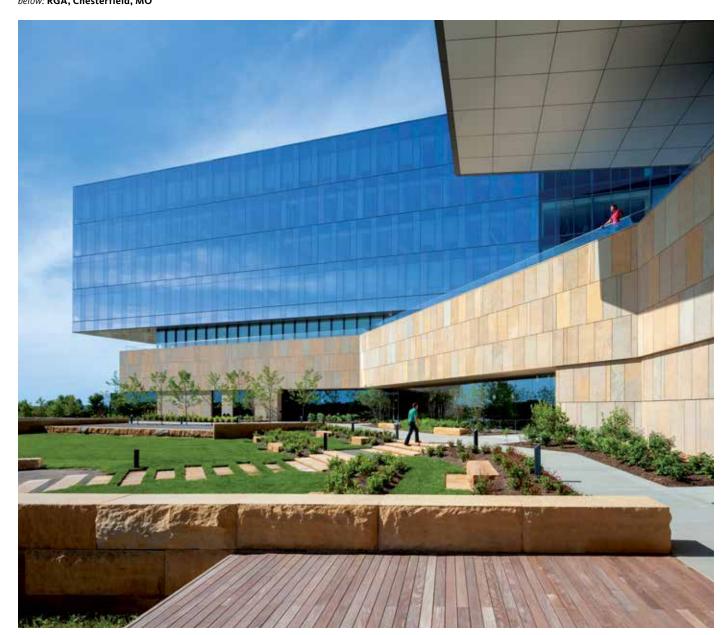
Commercial Office

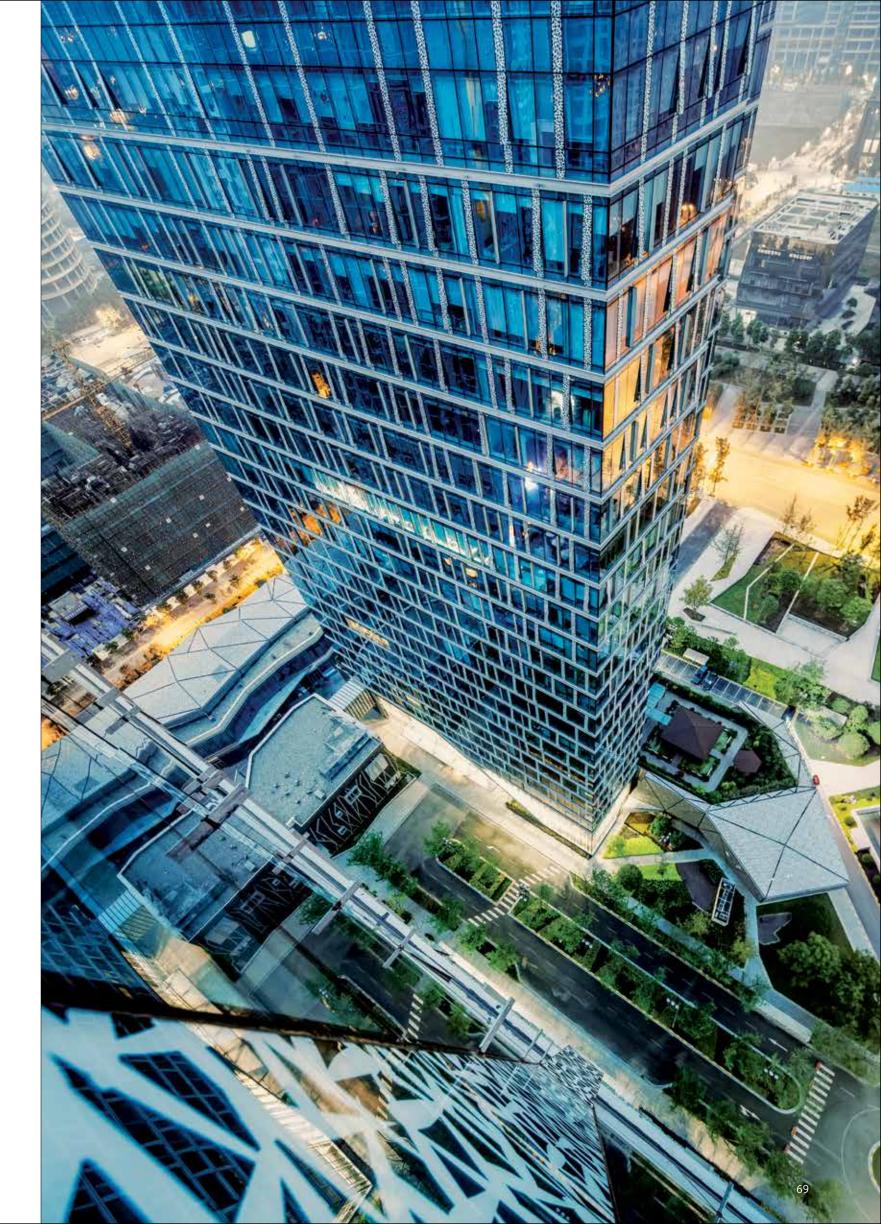
Building Developers Empowering a new workforce

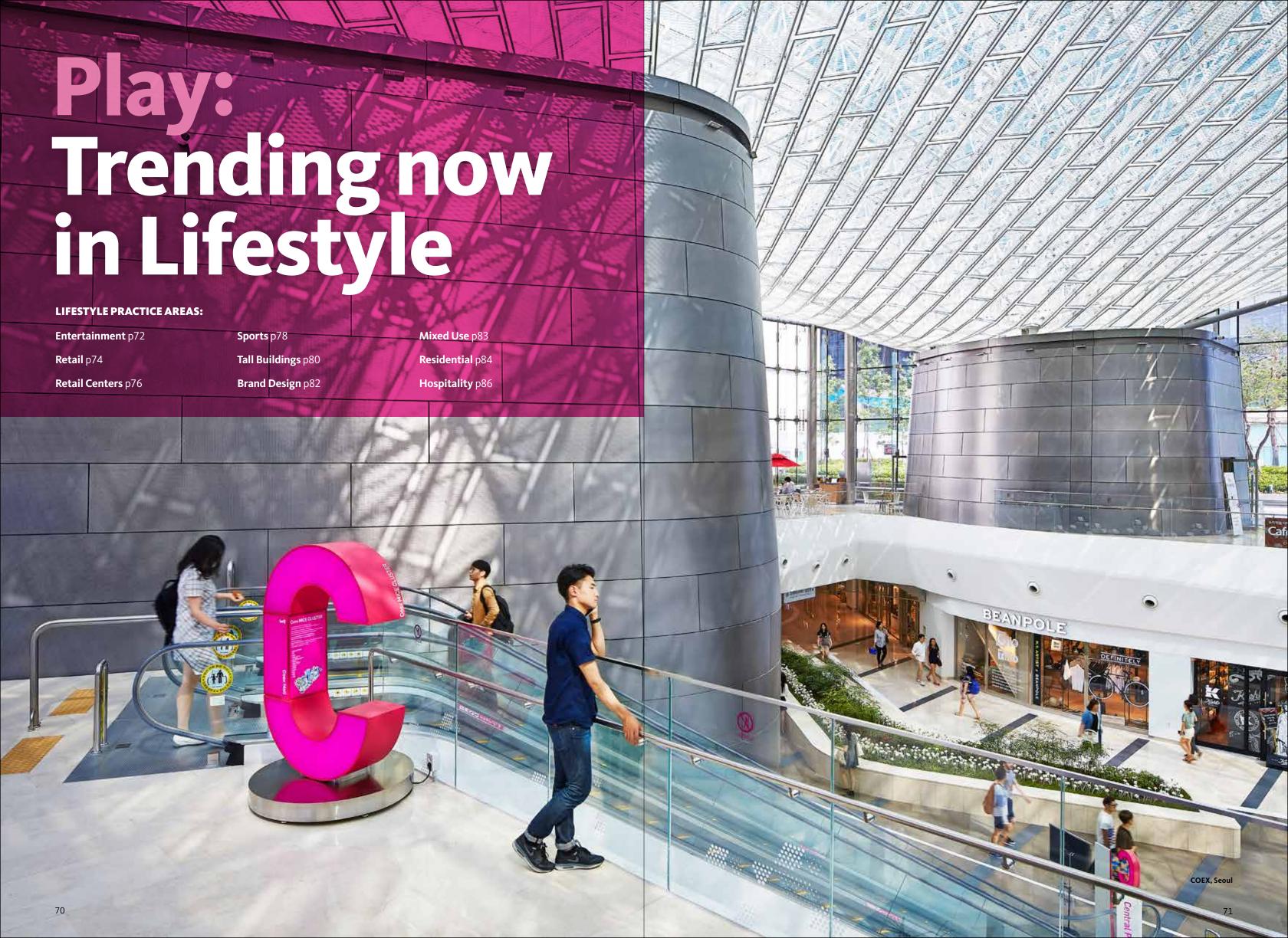
As workers gravitate toward social settings, apart from home and work, new and repositioned "office buildings" will make room for them. Openness and connection to adjoining buildings and districts will gain importance. As mobile workers switch between office space and "third place" alternatives, owners and developers that focus on transit-served, mixed-use districts may have an edge in attracting them.

The demand for workplace flexibility will be reinforced by buildings that let organizations, teams, and individuals shape space on the fly. Faster adaptability will be the norm, and buildings will reflect this in form, structure, interior volume, façades, and services. Space will become more democratic as flatter, innovation-hungry organizations embrace agile, autonomous teams that are directly accountable for their results.

opposite: AVIC International Financial Center, Chengdu, China below: RGA, Chesterfield, MO









Entertainment

Audiences co-create the show

Digital culture has bred a generation of consumers who expect speed, interactivity, and a world of choice, but also more engaging, humanized brand connections. Entertainment destinations will integrate smart devices, apps, and wearables into their experiences to make them both personalized and inviting.

Entertainment venues offer customers the potential for immersive settings that deliver authentic, collective, real-time experiences for families, couples, and individuals to share and remember. Consumers want to direct all of this, to be the storytellers—even as they need the venues to make it come together. Handling this relationship shift is entertainment's challenge and opportunity.

Co-creation is evolving beyond customization, engaging the appetite for involvement. This will mean opening up key experiential processes to a wider audience—not as a passive, mute "suggestion box," but as active participants in shaping the venue and the activity.

Cultural relevance is a source of pride for domestic consumers, as well as a growing part of global consumers' entertainment offerings. With continued growth of the new middle class, there will be an increased appetite for domestic tourism. Emerging markets proudly display and export their local cultural identity through re-created symbols, lifestyles, and traditions.

left and below: Hyundai Card Music Library + Understage, Seoul



Retail

Anticipating the customer

Great products (and experiences) blend seamlessly into our daily lives. Even if it's hard to articulate why, our senses are deeply attuned to—and can even feel anxious about—anything that doesn't "feel right." This will shape aesthetic, interactive, and product design, as well as the retail settings where they often converge. As the global market for the Internet of Things is expected to reach \$1.7 trillion by 2020, according to research firm IDC, connected devices—from coffeemakers to thermostats—should seamlessly converse and work together.

Consistency in online-to-offline experience is critical as online-only brands establish a physical presence. As digital and physical merge, retail stores are rebranding as community outposts. Digital touchpoints, such as virtual or augmented reality, offer different types of in-store experiences that younger consumers crave.

Store environments will become increasingly personalized to anticipate and respond to customer expectations and individual preferences, through smart merchandise fixtures, predictive technology, and customer concierges that offer consumers VIP treatment. Technology will redefine the fashion industry as smart clothing can track the wearers' biometric data and adapt to their location or event.

Geolocation technology will have a major effect on when and where unexpected experiences take place. Delivery times will become faster and more efficient. These experiences will continue to evolve and get smarter, catering to individual preferences. Similarly, artificial intelligence (AI) helps retailers understand customers and anticipate their needs. Cognitive computing takes this a step further, accelerating, enhancing, and scaling human expertise.

right: El Palacio de Hierro Polanco flagship store, Mexico City below: Microsoft Fifth Avenue flagship store,





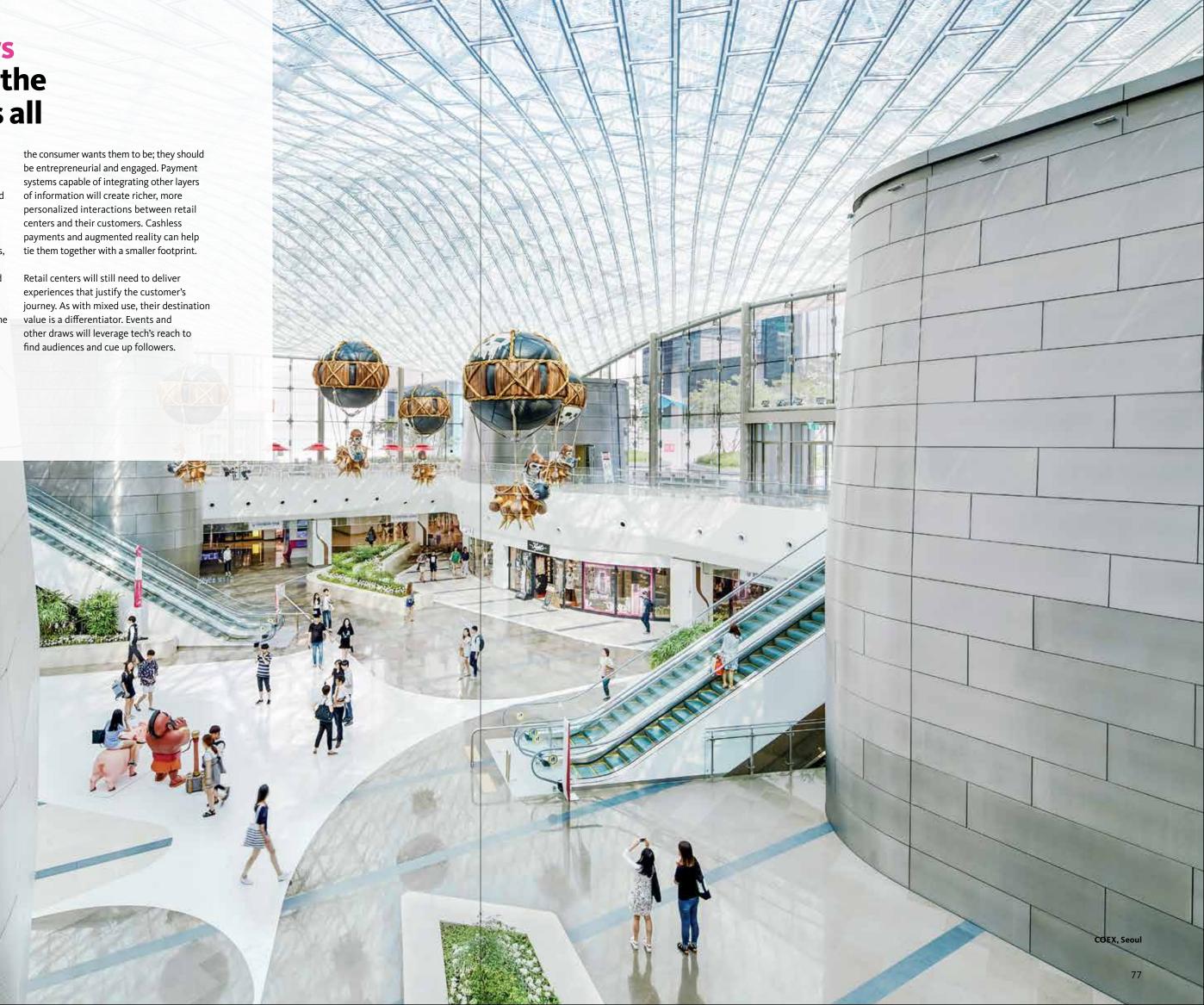
Retail Centers Tech yes, but the

Tech yes, but the destination is all

Urbanization is driving small neighborhood store strategies like Walmart Express, City Target, Home Depot, and others. It's also accelerating the growth of neighborhood lifestyle shopping villages and small independent shops in urban areas.

As retail centers expand into urban markets, they're increasingly catering to tech-savvy customers. With every mall, store, and brand sitting comfortably in consumers' pockets (on smartphones), successful retail centers will play by that mobile, 24/7 playbook. At the same time, they'll use that playbook to identify shopping patterns and preferences.

In order to thrive, retail centers must proactively embrace technology to be accessible whenever and wherever





Sports Amplifying the fan experience

Sports venues are becoming ever more interconnected. Environmental immersion takes this to the next level, creating opportunities for interactive engagement. Venue-specific tech offerings, from augmented reality photo zones to push-notified promotional opportunities, transform spectators into active participants.

Stadiums are the next frontier for wearables, generating infinite opportunities for product customization and collectibility for fans, and revenue advantages through promotions and analytics for teams. A single wearable device can act as your ticket, room key, fast pass, map, crowd flow monitor, and credit card.

While in-stadium technology will help support a more flexible, customizable fan experience, the collective passion found on game day generates a genuine, locally diverse experience that cultivates pride and ownership, and makes attendance worth it.

The desire for authenticity and tailored experiences will propel the next generation of venues, which will avoid the generic and celebrate the local. Whether it is an immersive, interactive, or collective social opportunity, existing venues will need to continually adapt to the changing economics of each sport, by providing the end user with a more authentic, tangible experience.

left: Los Angeles Football Club Stadium, Los Angeles below: Oakland Athletics Hohokam Stadium,



Tall Buildings The new realities of vertical living

Tenants' long-term needs are driving tall building design, with an inside-out approach supplanting iconic form making. The increasing use of split, offset, and perimeter cores in new towers reflects this. These core arrangements offer greater flexibility in adapting buildings to future requirements, and make it easier to introduce interior stairs and atria that connect tenant floors and provide daylight and natural ventilation.

Façades are no longer for weather protection only; they are an integral part of a tower's strategy for reducing energy use and increasing human comfort and amenity. Double skins have given way to truly usable interstitial spaces. Nanotechnology will make skins more environmentally responsive. New materials will also reduce the weight of façades while improving their performance.

Digital design, fabrication, and logistics will speed start-to-finish times for tall buildings. They will also set the stage for increasingly automated systems testing, calibration, and operation, enabling faster, better-supported tenant occupancy.

Vertical living offers opportunities for densely populated cities to accommodate growth, and Asia will continue to lead the charge. But the market for tall buildings is expanding as Chinese and other offshore investors and developers are moving into overseas markets, including Europe and the United States. Residential towers are a fast-growing category in these markets. Transit access and a mixed use program (or proximity to those uses) will be crucial to achieve sustainable urban living.

opposite: Shanghai Tower, Shanghai below, left to right: KAFD GCC Bank Headquarters, Riyadh, Saudi Arabia; Suzhou Zhongnan Center, Suzhou, China; One Museum Place, Shanghai; KAFD World Trade Center, Riyadh, Saudi Arabia











Brand Design Shared and participatory, but individuated

Infinite choices, socioeconomic diversity, globalization, inclusiveness, and on-demand access will give rise to "micro-brands" that express affinities and values, rather than broader appeals to demographic or geographic segments. As the world becomes more subdivided, brands will need to respond by becoming more specific, customized, and targeted. Buoyed by passion for their customer segments, brands can build strong communities through shared beliefs, such as individual empowerment and social awareness.

Saving and carving quality time will be front-of-mind for consumers. People are willing to pay a premium for products and

services that give them back their time. This could take on a service component, as in a concierge or virtual personal assistant. Designers can respond by creating multifunctional elements and experiences. Places where one can entirely "unplug" and escape digital life will become the ultimate luxury-living experiences.

To reach time-strapped consumers, brands will seek to create new types of experiences: real-time, one-time-only; shared, but individuated; and participatory, rather than imposed. Ritualistic experiences provide places to connect with like-minded fans.

melissamccarthy

below: Melissa McCarthy brand identity and guidelines











above: 5th & Broadway, Nashville

Mixed Use Adding density to enhance

Younger generations, including Millennials, often choose where they will live before they consider their careers. As a result, live/ work environments are being redefined. Mixed-use developments will be designed to "flex" in this regard. Residential and office spaces will need to be better designed to coexist and create 24/7 settings.

The next generation of infill projects will be in the typical industrial "ring" or "band" that separates the urban core from suburbia. This new form of infill will develop along transit nodes. It will require a new point of view and design vocabulary regarding scale and the incorporation of open/green space with an urban-like walkability.

In some economies, the opportunity for urban renewal, revitalization, and redevelopment has never been greater. Mixed use will be the go-to choice to do more with less in urban areas by maximizing land values through activation—adding density to enhance, rather than disrupt, the city's existing fabric. Respectful rehabilitation becomes the norm as overbuilding proves to be less sustainable. Old is the new "new."

Residential

Embracing new lifestyles

Within the next 10 years, the continued trends of urban and suburban densification and global urbanization will have changed the residential landscape in larger markets and will be under way in smaller markets.

Fueled by the sharing economy and the cost of personal home ownership, communal housing will become acceptable to residential segments like post-college adults, single parents, and the elderly. The community arrangement offers financial and social benefits. Community-based offerings, such as cohousing, provide affordable housing solutions for seniors, younger renters, and entrepreneurs, who may tend to embrace opportunities for relationship building and casual connections. A menu of amenities are shared among cohabitants, but can also be reserved.

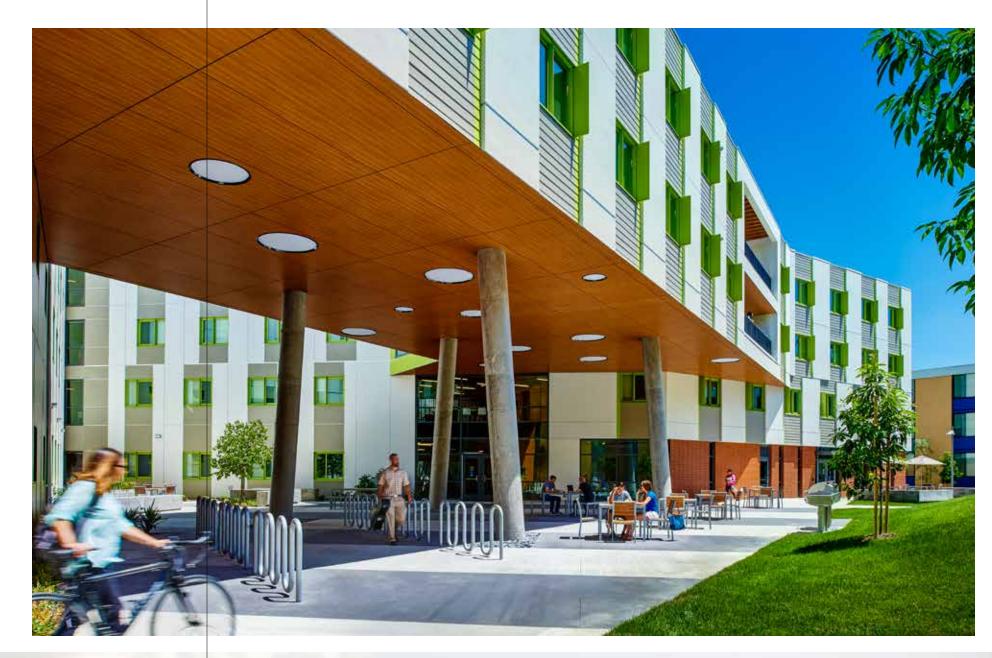
Renters and buyers in urban markets want options supporting convenient, mobile, and social lifestyles. Changes in work style and lifestyle will increase the need for part-time housing as people with mobile lifestyles seek places that pair the conveniences of a hotel

with the comfort and familiarity of home. In response to these changes, mixed-use developments are increasingly introducing a housing component. Many new "residential" projects include office, retail, and hotel uses on a single block. With their smaller floor plates, older downtown office buildings are ideal for residential conversion.

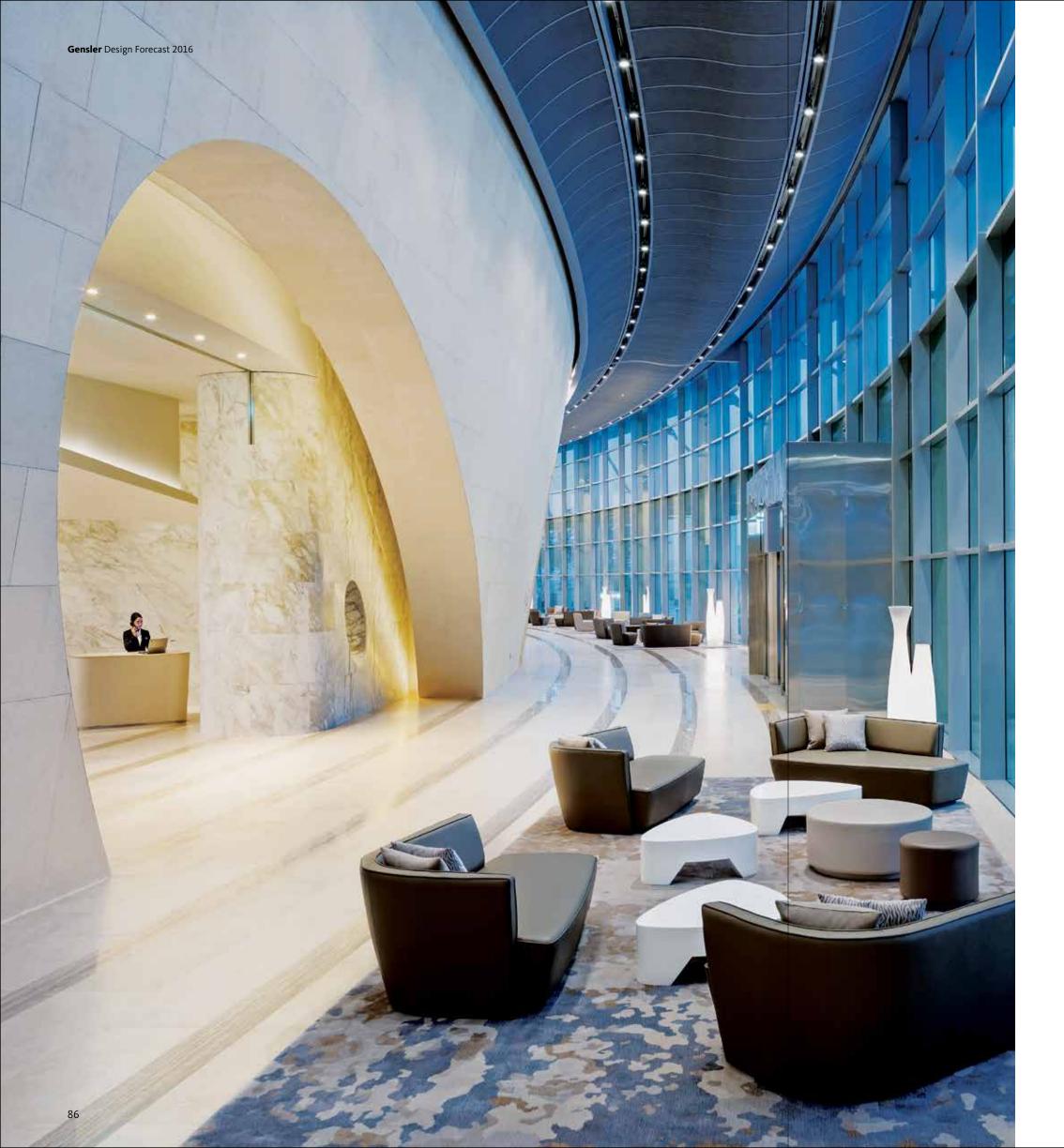
The suburb isn't dead, but it craves the advantages of city living. That's leading to an emerging residential market, the "uburb," midway between the city and the suburb. Some large employers are collocating with them to tap their housing, amenities, and transit accessibility.

Across global markets, there's a need for new types of informal and formal settlements. Developing countries have special concerns; for example, secure land tenure, economic stability, and safe and sanitary conditions. While governments, NGOs, local landowners, and contractors cooperate, informal settlements still occur. These makeshift dwellings also need schools, places to work and gather, and access to services.

right: Biola University Blackstone Residence Hall, La Mirada, CA below: 3D Printed House Prototype







Hospitality Catering to next-gen travelers

While traveler segments over the past decade were primarily classified by business versus leisure, the next generation of traveler classifications will be more focused on travelers' behavioral patterns and expectations. Hotel providers can cater to each group's distinct needs and characteristics—from cultural purists and ethical travelers to reward hunters and social capital seekers. To better serve these new segments, hospitality brands are developing places for "members"—people with strong affinities—revamping loyalty programs and creating exclusive experiences to bond with and grow their clientele. They're creating club-like spaces that appeal to lifestyle categories and behaviors, rather than demographics, allowing people to come

together based on the brands they affiliate with and the experiences they want to have. Hyperpersonalized, bespoke packages satisfy guests' desire to collect new skills and authentic, immersive experiences.

Technology is also redefining hospitality. Location services offer added value to guests with mobile apps that recognize preferences and offer membership benefits, mobile room key technology, and check-in/checkout services. In-room handheld devices that provide complete control of the guest environment will become the norm in midto upper-scale markets.

left: Hyatt Incheon, Incheon, Korea below: Westin hotel and transit center at Denver International Airport, Denver







In our 50th year, we surpassed the \$1 billion revenue milestone for the first time. Our global reach opens new possibilities for us and our clients—leveraging our size, scope, and expertise to drive innovation, creativity, and design excellence.

A Message from the Board of Directors

We achieve a high level of inventiveness and creativity because of our tremendous diversity and scale. With 47 offices around the world, we draw from many points of view and support a dynamic environment where ideas multiply faster and cross-pollination is richer. We look at design holistically, which sets us apart. With deep roots in architecture, interior design, and planning, we examine every project through many lenses—inside-out, outside-in, integrated, and branded.

Our record-setting revenues give us the ability to reinvest in our global platform—supporting world-class research, talent development, design delivery, and the futures of our 5,000+ professionals to provide the best service and outcomes for our clients. We're financially strong and debt-free, contributing \$45.7 million in deferred compensation to our employees through our ESOP, profit-sharing, and international retirement plans. Our local offices keep us nimble, but in combination they give us a scalability that allows great things to happen.

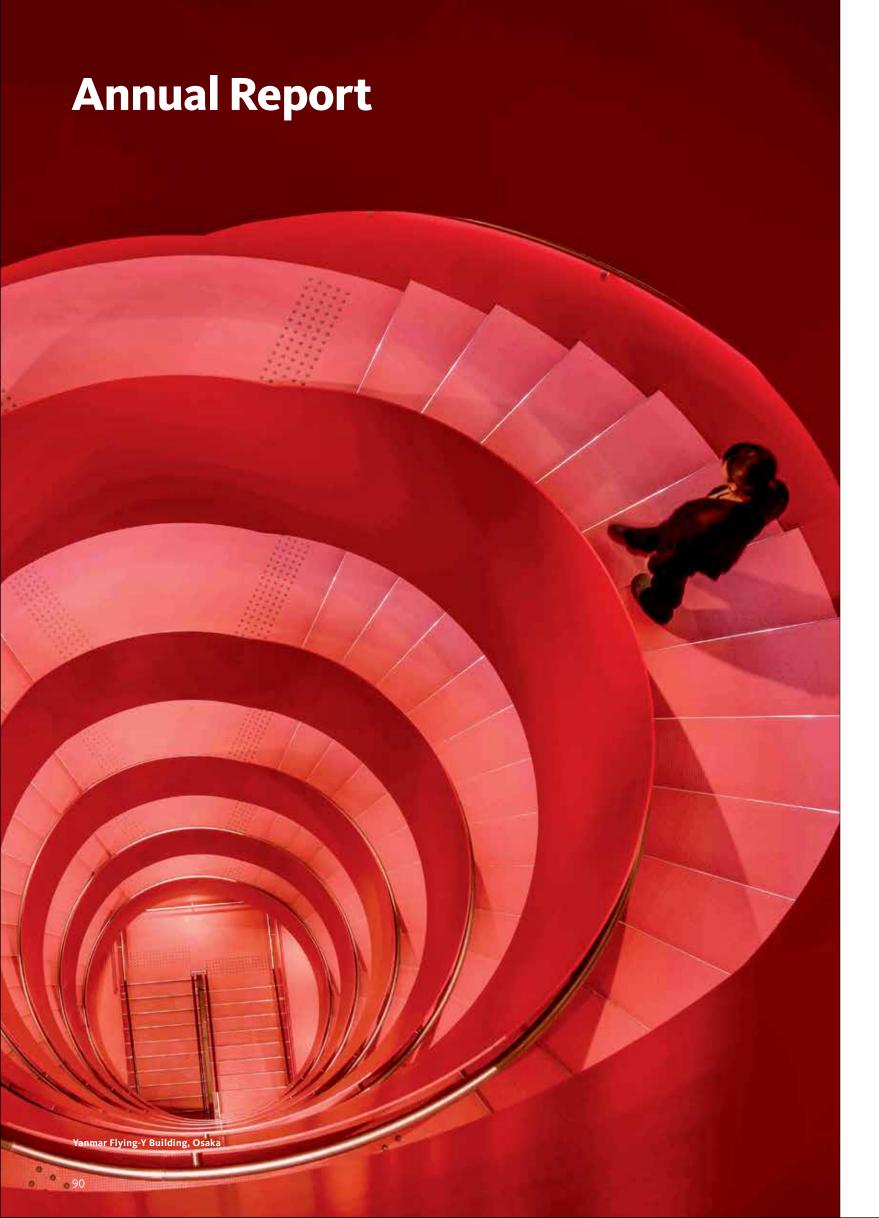


Diane Hoskins, FAIA, IIDA, LEED APVice Chair of the Board



Board of Directors

from left: John Adams, Judy Pesek, Julia Simet, Jordan Goldstein, Diane Hoskins, Joe Brancato, Andy Cohen, Ray Shick, Robin Klehr Avia, Dan Winey



TOP RANKINGS

Backed by great clients, we continue to earn industry recognition year after year.

Architectural Record

2015 Top 300 Architecture Firms: #1 Firm Overall

VMSD

Top Retail Design Firms of 2015: #1 Firm Overall

Record Building Design+Construction2015 Giants 300:

#1 Architecture Firm

- #1 BIM Architecture Firm #1 Data Center Architecture Firm
- #1 Green Building
 Architecture Firm

#1 University Architecture Firm

ENR

2015 Top 150 Global Design Firms: #1 Architecture Firm

Gensler is a leader among the world's architecture and design firms. Our standing among peers and our industry awards reflect the value we deliver to clients every day.

FINANCE REPORT

We've broadened our services to 31 areas of practice, with total revenues for the year setting a new record high for the firm.

\$1.075b

Interior Design

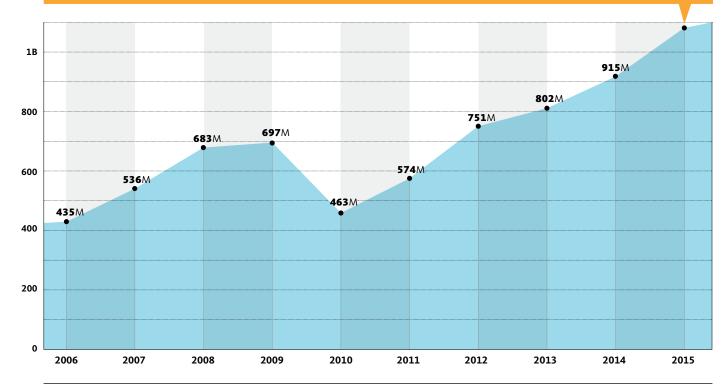
Building Design

2015 Top 100 Giants:

#1 Architecture Firm

#1 Most Admired Firm

2016 World Architecture 100



\$**45.7**m

Contributions to US and international retirement plans (USD)

100%

Gensler is fully employeeowned through direct shares and our ESOP

A BANNER YEAR FOR DESIGN AWARDS & RECOGNITION

Shanghai Tower, The Tower at PNC Plaza top best of 2015 lists

Shanghai Tower is featured in Wired magazine's round up of "Amazing Architecture That Captivated Us in 2015." Architectural Digest highlighted the tower in the "Seven Buildings That Are Redefining Architecture." Architectural Review credited the tower's "ambitious architecture that sets the building apart from all others."

The Tower at PNC Plaza is among Architectural Digest's "Beautiful Eco-Friendly Office Buildings in the World." The tower "redefines the urban highrise headquarters typology and raises the bar for forward-thinking companies using architecture as a means to inspire and enable great work," said Gensler principal and design director Hao Ko.









Interior Design's 'Gensler 50'

Interior Design dedicated its November 2015 issue as a special commemorative tribute, cover to cover, recognizing Gensler's 50th anniversary, "Gensler 50."

Architectural Record—Good Design is Good Business

McCann, New York, NY

Association of Legal Administrators—2015

"ReDesign Law: Office of the Future"

CODAworx—2015 CODAawards Morrison & Foerster, New York, NY (Commercial)

Contract—**2015 Best of NeoCon**Tuohy WorkStyles (Best of Competition)

IIDA—2015 Best Interiors of Latin America & the Caribbean

Teatro El Triciclo, San José, Costa Rica (Entertainment) Tienda Museo de Oro, San José, Costa Rica (Retail) IIDA—2015 Global Excellence Awards
Hyundai Card Music Library + Understage,
Seoul. South Korea (Entertainment)

IIDA—Healthcare Interior Design

Town Hall Apartments, Chicago, IL (Community-Based Service Facilities)

India Retail Forum—2015 IRA Awards Most Admired Retailer of the Year Raymond Ready to Wear, Bangalore, India (Innovative Concept)

Interior Design—Best of Year Awards

Hyundai Capital Street, Seoul, South Korea (Beauty) Grove by Sixinch (Green Innovation Tuohy WorkStyles (Furniture: Contract/Case Goods)

Interior Design—MakeItWork Awards

Hyundai Card UX Lab, Seoul,
South Korea (Tech Office—Small)
Tech 101 Environmental Marketing,
San Francisco, CA (Graphics)
SymFit at Symantec, Mountain View, CA
(Gym/Yoga Studio)
Hyundai Capital Europe, Frankfurt, Germany
(Staircase)

Stinson Leonard Street, Kansas City, MO (Staircase)

London First—2015 London Planning Awards: Best Conceptual Project The London Underline, London

New London Architecture—New London

Awards 2015
UBM. London (Office Interiors)

Nikkei Inc. and New Office Promotion Association—2015 Nikkei New Office Award CBRE Headquarters, Tokyo, Japan

Citi Shinjuku, Tokyo, Japan Edelman Japan, Tokyo, Japan Yanmar Headquarters, Osaka, Japan

Retail Design Institute—2015 International Store Design Awards

Harman International Flagship, New York, NY (Digital Integration Innovation) Holly Hunt Showroom, Dallas, TX (Brand Spaces) Timbuk2, Chicago, IL (Sustainability Innovation)

Society of American Registered Architects—2015 Celebration of Architecture and Design

Condé Nast Headquarters, New York, NY

Gensler DESIGN EXCELLENCE AWARDS 2015



Gensler Design Excellence Awards Raising the bar for design, showcasing our best work.

Now in its 16th year, the Gensler Design Excellence Awards (GDEA) program helps set a standard to which all our design teams can aspire. Within the firm, it creates a buzz about design, raises awareness of our top projects, and generates conversations about design in dozens of Gensler offices around the world. At the early stages of the review process, each region of the firm evaluates eligible projects. Then a shortlist of the very best work, about 130 projects, is critiqued by a jury of industry experts, who make the final choices and share their insights via a live broadcast to the entire firm.

Of the 30 submissions selected in 2015 for an award or honorable mention, two were separated from the field as "Best of Show"— Condé Nast Headquarters in New York and Hyundai Capital Europe Headquarters in Frankfurt, Germany. The remaining projects highlighted a broad cross-section of the firm's work, ranging in scale from a collection of 32 logos to a neighborhood plan for Shanghai.

2015 GDEA RECIPIENTS

Community

Lynn University International Business Center An' Kang Yuan Neighborhood Plan Songhu-Sanmen Road Pedestrian Bridge

Lifestyle

COEX
La Rinconada Stadium
Interior Design 30 on 30
Hyundai Card Music Library +
Understage
3D Printed House

Workplace

Condé Nast Headquarters
Hyundai Motor America
Headquarters
Warner Music Group Globa
Headquarters
Cushman & Wakefield
Gensler Oakland

Hyundai Capital Europe Headquarters Samsung Meatpacking District SymFit at Symantec Tableau West Dock Wired Magazine Editorial Office

Best of Show

Condé Nast Headquarters Hyundai Capital Europe Headquarters

Margo Award

Vistamar Phase 2 Royal Caribbean Entertainment Production Studio at FIU Samsung User Experience

Make a Difference Award

Cambridge Elementary Project
Color Corps



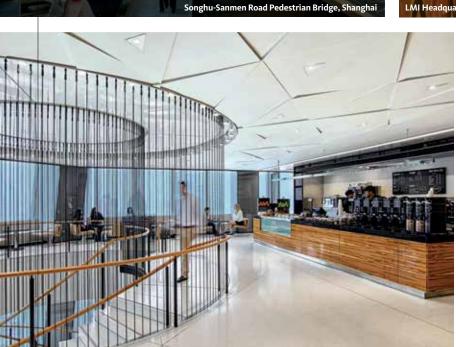




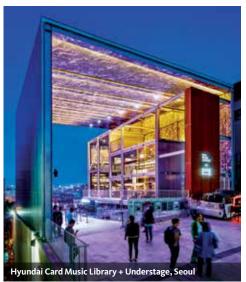












2015 GDEA Jury



Carlos Salcico CMO & Marketing Direc El Palacio de Hierro



Founder and Chairman, Venables Bell & Partner



Editor-in-Chief,
Architectural Record



Executive Vice President/ CEO, IIDA



Ted Tanner
Sr. Vice President of Re



Cindy Allen Editor-in-Chief, Interior Design



Geeta MehtaAdjunct Professor of
Architecture and Urban
Design, Columbia University



rlando Diaz-Azcuy ounder, Orlando Diaz-Azcuy esign Associates







Gensler Research+ Innovation Awards Celebrating the spirit of invention and exploration.

Gensler fosters a culture of research that fuels invention, experimentation, prototyping, and creative problem-solving throughout the firm. The Gensler Research + Innovation Awards (GRIA) program, through an external jury, evaluates and celebrates firmwide and projectbased research and innovation projects. The program sparks discourse and debate about research and innovation, while serving as a forum to engage our industry colleagues in dialogue to develop a more focused point of view that better serves our clients' needs.

Of the 140 submissions, 74 went to the jury. Seven Research and six Innovation submissions won awards. Two were recognized as best in their category: Evolution of Workplace in India as "Best of Research" and Design Strategist Development (DSD) Program as "Best of Innovation."

2015 GRIA RECIPIENTS

Research:

From Data to Place

Tokyo Olympics Navigation Infrastructure Knowledge Accelerator for Building Materials Microsoft SMSG Global Research Government Relations in Emerging Markets

Published Research: Ambient Learning Best of Research:

Evolution of Workplace in India

Lighting Design Performance Toolset La Rinconada Stadium

Generative Data Visualization for Confidential Financial Services Client

The Tower at PNC Plaza Local Craft

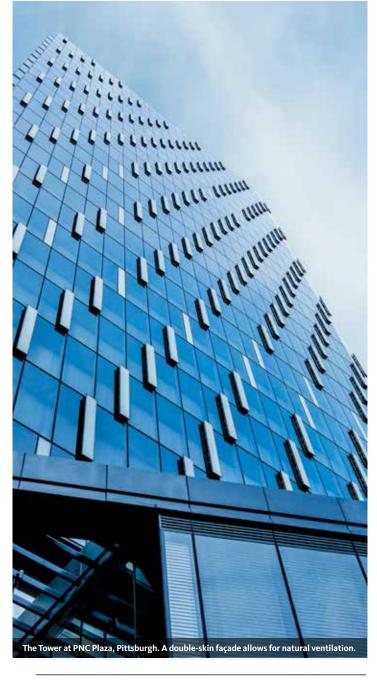
Design Strategist Development (DSD) Program











2015 GRIA Jury



Strategy & Community













Florida State University





Gensler Research

We fund a myriad of research studies that generate new knowledge and inform our design strategies.



Design firms are built on intellectual capital, so we make a substantial investment in research to grow our knowledge.

The findings maximize the impact of our design strategies, offer solutions to issues of pressing need, and elevate the conversation with our clients. This year, Gensler funded 33 research projects conducted by internal teams across our global offices and practice areas. These grants supported a diverse range of studies including a look at the future of museums, a de-ruralization toolkit for rapidly urbanizing economies, research on the adaptive reuse of medical facilities, and more. To share our findings, in 2016 we will release the second edition of the *Gensler Research Catalogue*, highlighting the work of hundreds of professionals around the world.

Recognition of our research efforts is an important benchmark. We received a 2015

IDEA Award from the Association of Legal Administrators (ALA) for "ReDesign Law: Office of the Future," a research collaboration between the ALA and Gensler that produced a pop-up legal workplace exhibit and website (redesign-law.com). In the UK, our vision for improving the public transit experience in London—dubbed The London Underline—was awarded Best Conceptual Project at the London Planning Awards. Gensler proposed transforming the outdated tunnels of London's subway system into safe and inviting paths for bicyclists and pedestrians.

One of our most compelling 2016 research initiatives is the Experiential Design Index, a new process we're envisioning to assess consumers' behaviors, values, and emotions, and connect those factors to physical spaces. We are benchmarking brands that are best known for delivering exceptional customer experiences, and have launched roundtables with clients to explore key dimensions of consumer dynamics and design responses.



Workplace Survey 2016

New findings indicate that one in three employees are in workplaces that balance focus and collaboration effectively—up from one in four in 2013.

The 2016 US Workplace Survey will capture responses of 4,000 office workers to build on findings of previous Workplace Surveys. In addition, we will conduct a new UK survey and our first Asia survey, polling workers in six Asian cities. We will also launch a refreshed, redesigned Workplace Performance Index® (WPI) to create a more experiential pre- and post-occupancy evaluation tool for clients. Nearly 190,000 respondents have completed the WPI, making it arguably the largest repository of knowledge on workplace effectiveness.



Anticipating the future of "hackable" cities

One of our global teams examined how office buildings—and urban districts—will morph to accommodate the changing demands of work. Looking at 20 cities, they studied how existing structures can be reconfigured, or "hacked," to house a diverse mix of uses and a range of tenants. Several scenarios speculated how underused building stock can be transformed into new workplaces, especially as office buildings are transformed from single-use to mixed-use projects.



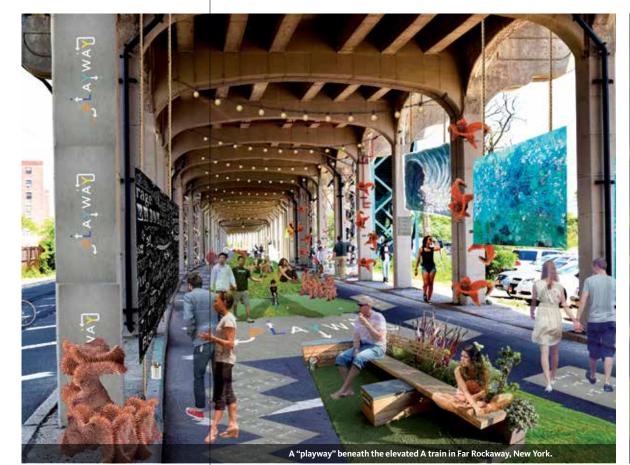
Making a Difference Gensler is committed to creating positive impact through socially conscious design and civic engagement.

We are a global network of designers and advocates working to help our communities through volunteerism, service, and pro bono work. We use design to make them healthy, resilient, and inclusive.

As a firm, we address resilience at all scales. In 2015, Gensler debuted The Tower at PNC Plaza in Pittsburgh, which set a new benchmark as one of the world's greenest skyrises. We believe the next opportunities in sustainability lie in resilient communities and net-zero design. Projects such as Glumac's Shanghai office, which is pursuing certification as Asia's first Living Building Challenge project, and PNC Bank's Net Zero energy branch in Fort Lauderdale, Florida, address larger goals of climate neutrality and long-term sustainability.

Resilience is also about strengthening communities, economically and socially. It's about future-proofing—making communities durable so they can thrive. As designers and residents, we help shape our cities' urban fabric. We use design as a catalyst to reimagine public spaces and transform our neighborhoods—whether we're engaging neglected communities with urban design in Baltimore or partnering with Rockaway Waterfront Alliance and Design for America to re-envision the future of Far Rockaway in New York City, a neighborhood devastated by Hurricane Sandy.

Through partnerships with like-minded organizations such as ACE Mentor Program of America, City Year, IIDA, and Project Color Corps, Gensler amplifies impact, supports underserved youth, develops design solutions, and mentors future generations. In our projects and our everyday work, Gensler creates positive, enduring change.

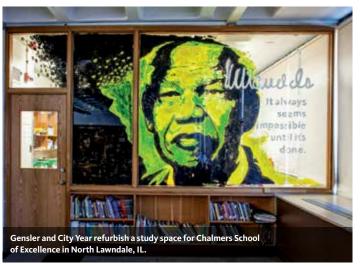


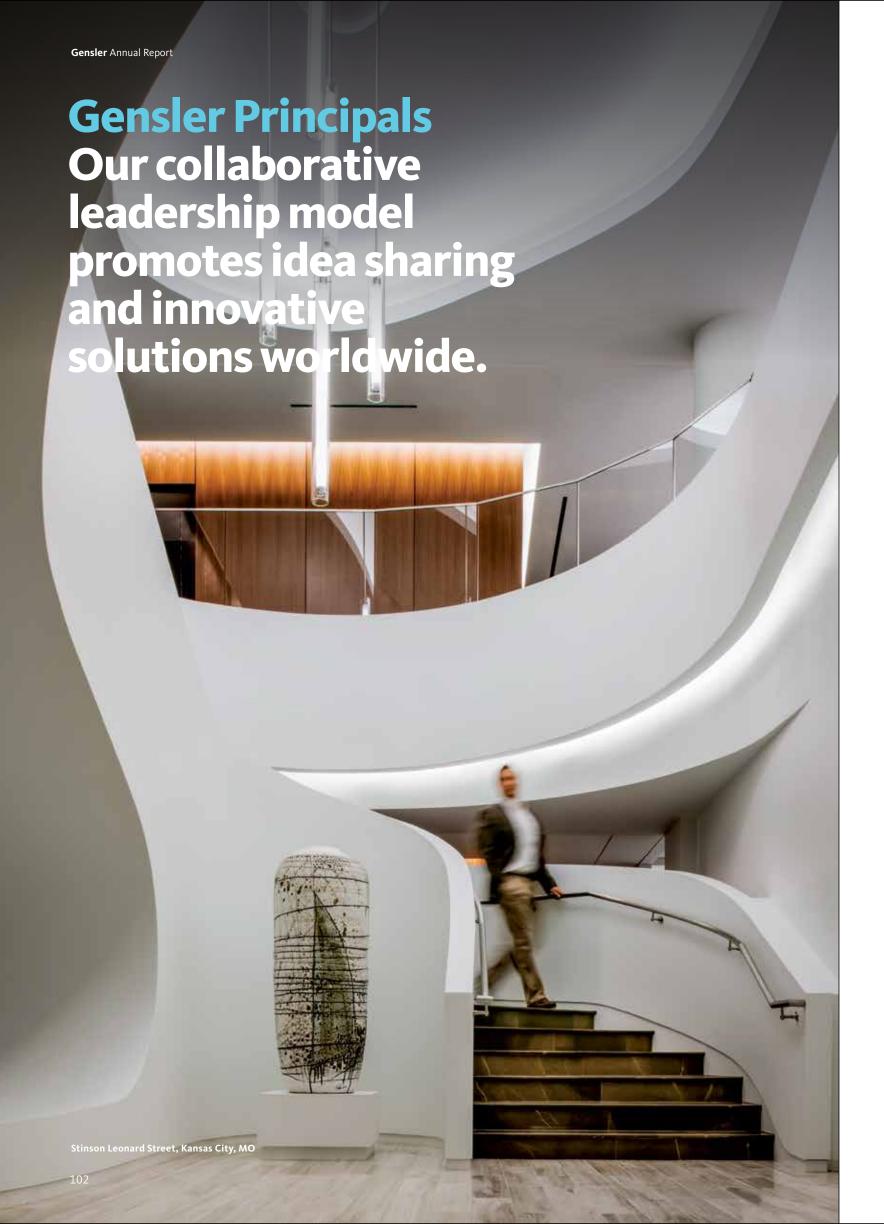












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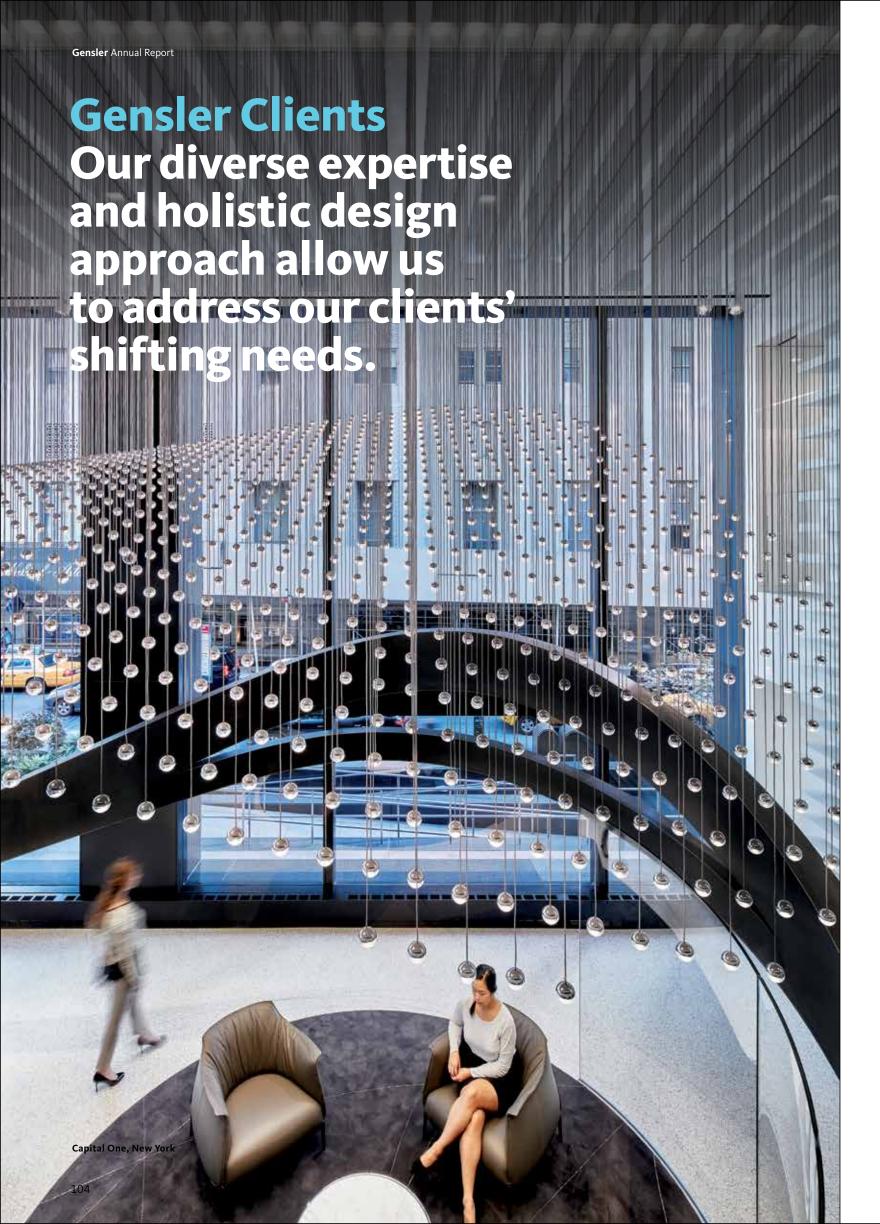
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