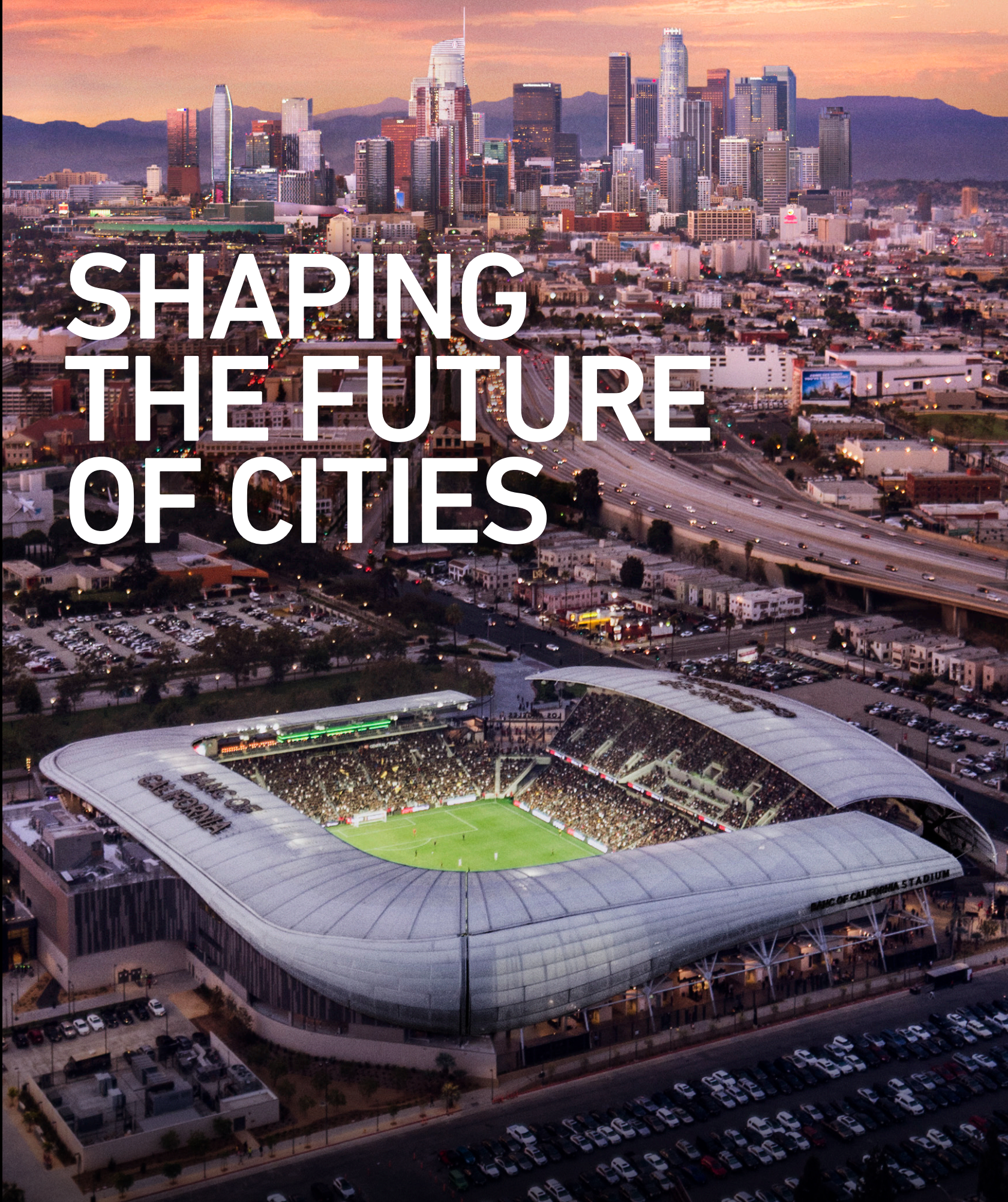


Gensler

DESIGN FORECAST

CREATED BY THE **GENSLER RESEARCH INSTITUTE**

SHAPING THE FUTURE OF CITIES





Shanghai Tower
Shanghai

INTRODUCING THE DESIGN FORECAST

Gensler is working across the globe to help clients imagine and build their future. As a creative partner, our design teams help organizations unlock value and potential opportunity, while at the same time helping our clients solve their most pressing challenges. Through that experience, we’ve observed that when our clients thrive, so do the cities that they call home. That is why this year’s **Design Forecast** is focused on cities, diving deep into trends from the Gensler Research Institute about the role of design in creating the places where people live, work, and play in cities across the globe.

Cities succeed and flourish because of their ability to attract diverse groups of people with a wide range of skills and perspectives. Today, urban areas contribute more than 80 percent of global GDP. That’s set to increase as **the world’s urban population will more than double by mid-century.**

The changes taking place in urban areas are accelerating dramatic changes in the built environment of cities. The adoption of the driverless car is altering the design of future buildings and taking our streets back for people; coworking is changing how developers and businesses are looking at their real estate decisions; and technology is changing the definition of retail, shifting from a focus on transactions to customer experience. In response to these changes, **design will need to put people back at the center:** the human experience will be the driving force behind resilient, livable cities.

In all of this we see enormous possibility—and responsibility. Gensler is committed to unlocking innovative solutions and strategies that will define the future of cities. **Our drive to constantly innovate is why we identify and study the global trends shaping design.** Design Forecast identifies more than 200 trends spanning our global practice. It is a dynamic tool to help clients make informed decisions. We invite you to use it as a platform for thinking about what’s next.



Diane

Diane Hoskins
FAIA
Co-CEO

Andy

Andy Cohen
FAIA
Co-CEO



HOW TO NAVIGATE THIS DOCUMENT

Design Forecast is a collection of more than 200 trends impacting design across the globe. We have organized these trends into three main chapters: Work, Lifestyle, and Cities. Each of these chapters is further organized by specific industry, and includes examples of how these trends have impacted our work with clients.

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DESIGN FORECAST

DESIGNING FOR THE HUMAN EXPERIENCE *IS* THE FUTURE OF DESIGN

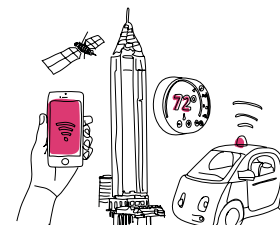
People are the one constant in this era of dramatic change. This historic confluence of change means that, as designers, we must rethink and reinvent how people experience every aspect of their lives and the places and spaces that they live in. The best experiences anticipate their needs, tap into their emotions, and engage the senses. More than ever before, there is an opportunity to create a better world through people-centered design.

We see five global forces that are impacting businesses, cities, and human experience around the globe: unprecedented demographic shifts, technology-driven disruption, rapid urbanization, climate change, and global volatility.



DEMOGRAPHIC SHIFTS

Major changes to the world around us create new challenges, and design needs to evolve to be responsive to these pressures. Global migration, rising gender equality movements, and an aging population are forcing civic and business leaders to come together to improve the human experience.



TECHNOLOGY-DRIVEN DISRUPTION

Technology is playing a bigger role in our daily lives as it becomes increasingly pervasive in places of work and leisure, and embedded in our buildings and cities. New technology is also disrupting traditional business and city planning models. Putting people first is critical to unlocking tech's potential.



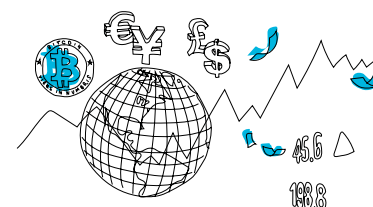
RAPID URBANIZATION

With over half of the world's seven billion people living in urban areas today, the trajectory of cities will determine the trend lines of human experience across the globe. Smart cities could help us finally find solutions to the most difficult aspects of urbanization: crime, homelessness, elder care, child care, transportation, unemployment, disease, CO2, inequality, and resilience.



CLIMATE CHANGE

Design has a tremendous capacity to help create sustainable, resilient, and healthy communities. With more than two billion people poised to move to global cities by 2050, the demand for new buildings will rise—and the way we design, build, and operate them will be one of the determining factors in our global efforts to address climate change.

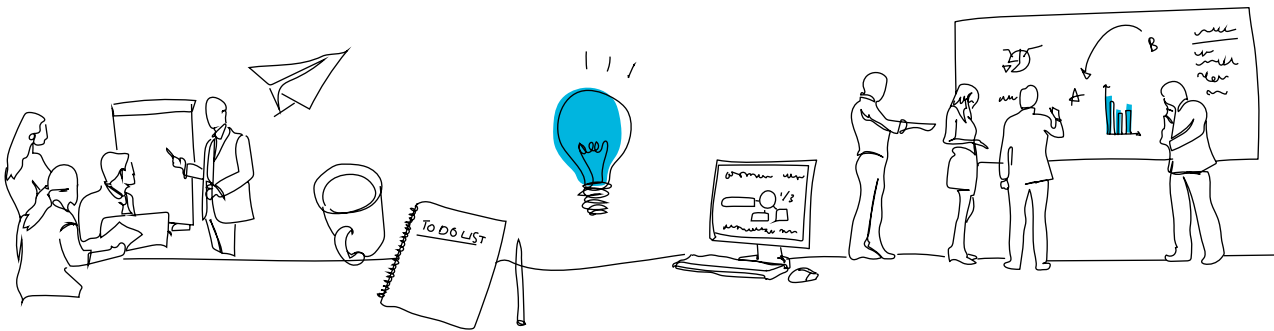


GLOBAL VOLATILITY

The economic and political orders that defined the past era are under pressures of change and adaptation, and so are our clients. Emerging regional disparities, often reactions to globalization, will underscore the importance of local relationships and design strategies. But even as economic powers evolve, the global economy continues to concentrate in metropolitan areas.

TOP TRENDS IN **WORK**

The rising power of the individual and the ubiquity of technology are dissolving the work-life divide. Purpose and connection are increasingly important. People are living integrated lives; the workplace of the future must incorporate experiences to reflect this mindset. Organizations that understand what motivates their teams—what drives them to succeed and engage—will have the competitive advantage.



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TECHNOLOGICAL ADVANCES REQUIRE AN “ALWAYS IN BETA” APPROACH

Technology is advancing faster than humanity’s ability to adapt to it. Office buildings and workplaces must embrace the speed and continuity of change, experimenting and navigating uncertainties by piloting and testing. Organizations that anticipate disruption will be a step ahead of the competition, as they learn to leverage the opportunities that change offers.

COMPETITION FOR TALENT REMAINS TOUGH; GETTING TOUGHER

In the competition for talent, companies are struggling to attract and retain skilled employees. From 2017 to 2027, it’s predicted the US will face a shortage of 8.2 million laborers—the most significant deficit in the past 50 years. To succeed, organizations must put people first: investing in the individual, diversifying work spaces, and reinforcing a shared culture and mission.

EXPERIENCE WILL BE THE REASON PEOPLE COME TO THE OFFICE

When mass adoption of laptops and mobile phones untethered people from their desks, it also disrupted how and why people come into the office. Today, people come to work for the experience. The Gensler Experience IndexSM cites that while nearly 80 percent of executives rate employee experience as very important, only 22 percent reported their own companies as excellent at delivering a differentiated experience. To engage talent, the workplace must prioritize experience—it’s no longer just an option.

INCLUSIVITY DRIVES BUSINESS PERFORMANCE

As part of a business strategy, diversity and inclusion are often driven by the interests of customers and clients, but also by the well-being of professionals and their opportunities to achieve success. That means organizations must foster an environment where people feel comfortable having a dialogue not just about their similarities, but about the differences and uniqueness they bring to the table.

PEOPLE WANT TO BE WHERE THE ACTION IS; THAT’S IN THE CITY

Cities around the world are where the action is; and they’re growing at an unprecedented rate. Contributing more than 80 percent of global GDP, urban areas are where the innovation economy concentrates. They are also where talent wants to be. Companies are increasingly choosing to locate in cities too. The best of their workplaces will develop a synergistic relationship with their cities—leveraging existing assets for their employees, and providing amenities and creating local partnerships that benefit their bottom line and local communities. With the rise of the city, the workplace must integrate itself with its urban environment.

COWORKING IS IN—BUT NOT WITHOUT BRANDING AND CULTURE

Today’s businesses are adopting coworking platforms to forge synergies, spur innovation, and bring new ideas into play rapidly. As companies weigh the pros and cons of coworking, there are some critical considerations. First, it’s crucial to differentiate. Second, there’s no one-size-fits-all approach, and just offering generic space is not the answer. Third, design should be a differentiator. Successful coworking spaces are branded, hyper-personalized, and experience-driven—making people feel connected to the organization’s brand and culture.

WORKPLACE: FORECAST

To establish the future of the workplace, we must think beyond where we are today, anticipating where the world is headed. We envision a future where workplace design is directly connected to outcomes for people, environmental performance, and business intelligence. It begins and ends with your talent.

31_B & 4.8_B

By 2020, 31 billion devices and 4.8 billion people will be connected to the internet.
—Gartner, Inc.

IoT: NO LONGER A NOVELTY

We are entering an increasingly complex technology landscape in the workplace, and companies are grappling with which technologies to integrate and how to integrate them for maximum impact. The workforce is already accustomed to interacting with internet-connected devices: from their cars, to fitness equipment and vending machines.

Now, in a dizzying attempt to leverage the latest technology, companies are experimenting with connected screens, smart tables with built-in connectivity, electrical systems, cameras, infrared sensors, climate control, net-zero buildings, and lighting controls, with new systems coming online nearly every day. Organizations that harness this power—and are able to use their data in real time and without sacrificing the employee experience—will be more agile in our quickly changing world.

“Organizations will not only need to redesign work—they will likely need to redesign work environments to support this new kind of work.”

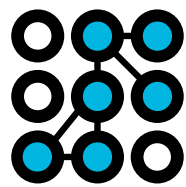
—Deloitte Review, “Navigating the Future of Work”

TOP TALENT VALUES BEING A PART OF THE URBAN CORE

As people, and work, continue to shift toward urban centers—and development trends create more urban experiences everywhere—workplace and amenity strategies will shift accordingly. The best workplaces will develop a synergistic relationship with their local communities—leveraging assets that already exist for their employees to use, and providing amenities or creating local partnerships that can benefit not just their workforce, but the local community too.

INTEGRATING TECHNOLOGY WILL YIELD BETTER EMPLOYEE EXPERIENCES

Technology continues to seep into every aspect of our lives, through the increased power and prevalence of personal technology that continues to integrate into spaces of all types. The Gensler Experience Index found that employees whose workplaces have the latest technology report a great experience 3.7 times more often than those whose workplaces do not have the latest technology. Additionally, those who are empowered to “unplug” throughout the day are 1.5 times more likely to report a great experience.



3.7x

Employees whose workplaces have the latest technology report a great experience 3.7 times more often than those without.
—Gensler Experience IndexSM

4x

Experiential organizations have 4 times higher average profits and 2 times higher average revenues.
—Gensler Experience IndexSM

COWORKING REQUIRES BRAND REINFORCEMENT

There's no denying coworking is on the rise. No longer a place reserved for small businesses, startups, and freelancers, the perks of coworking spaces appeal to more and more large corporations that are moving their employees into those spaces. Although capital costs may seem reduced if workspaces remain as is, companies will risk losing strategic opportunities to reinforce their brand, culture, and corporate mission in their one-size-fits-all environments.

Technology
Legal
Consumer Goods
Foundations, Associations + Organizations
Government + Defense
Media
Financial Services
Energy
Sciences
Management Advisory

CONNECTION TO MEANING MATTERS

In the war for talent, connecting employees with the mission, purpose, and meanings behind their work is imperative for retaining and growing a world-class organization.

PRIORITIZE EMPLOYEE EXPERIENCE & EFFICIENCY

Three factors influence employee experience at every organization: culture, technology, and the physical workplace. Finding the sweet spot is paramount; people come to work for the experience.

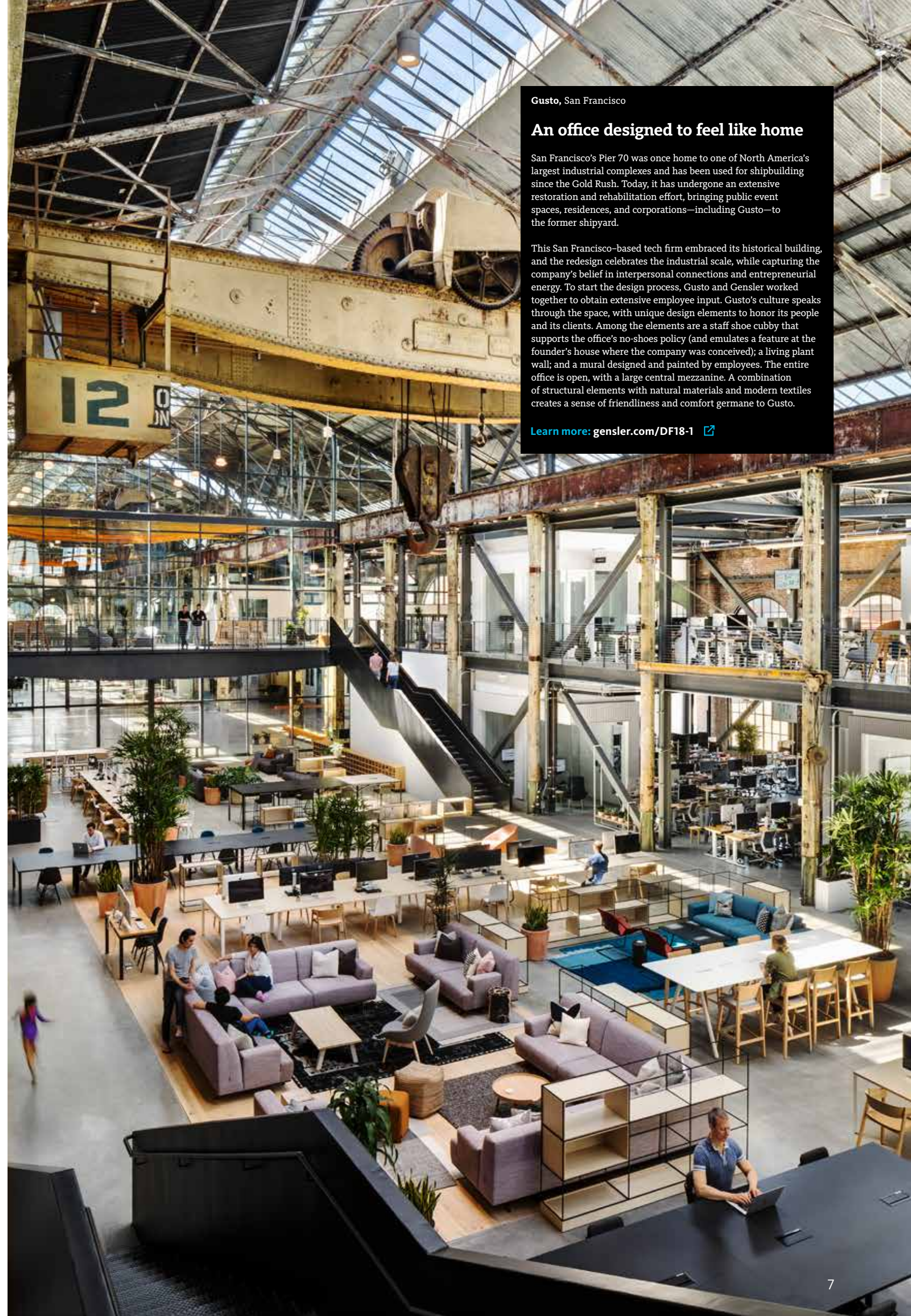
Gusto, San Francisco

An office designed to feel like home

San Francisco's Pier 70 was once home to one of North America's largest industrial complexes and has been used for shipbuilding since the Gold Rush. Today, it has undergone an extensive restoration and rehabilitation effort, bringing public event spaces, residences, and corporations—including Gusto—to the former shipyard.

This San Francisco-based tech firm embraced its historical building, and the redesign celebrates the industrial scale, while capturing the company's belief in interpersonal connections and entrepreneurial energy. To start the design process, Gusto and Gensler worked together to obtain extensive employee input. Gusto's culture speaks through the space, with unique design elements to honor its people and its clients. Among the elements are a staff shoe cubby that supports the office's no-shoes policy (and emulates a feature at the founder's house where the company was conceived); a living plant wall; and a mural designed and painted by employees. The entire office is open, with a large central mezzanine. A combination of structural elements with natural materials and modern textiles creates a sense of friendliness and comfort germane to Gusto.

Learn more: gensler.com/DF18-1



Work Sector > Workplace >

TECHNOLOGY

TECHNOLOGY WILL DEMAND THAT DESIGN RUN DEEPER

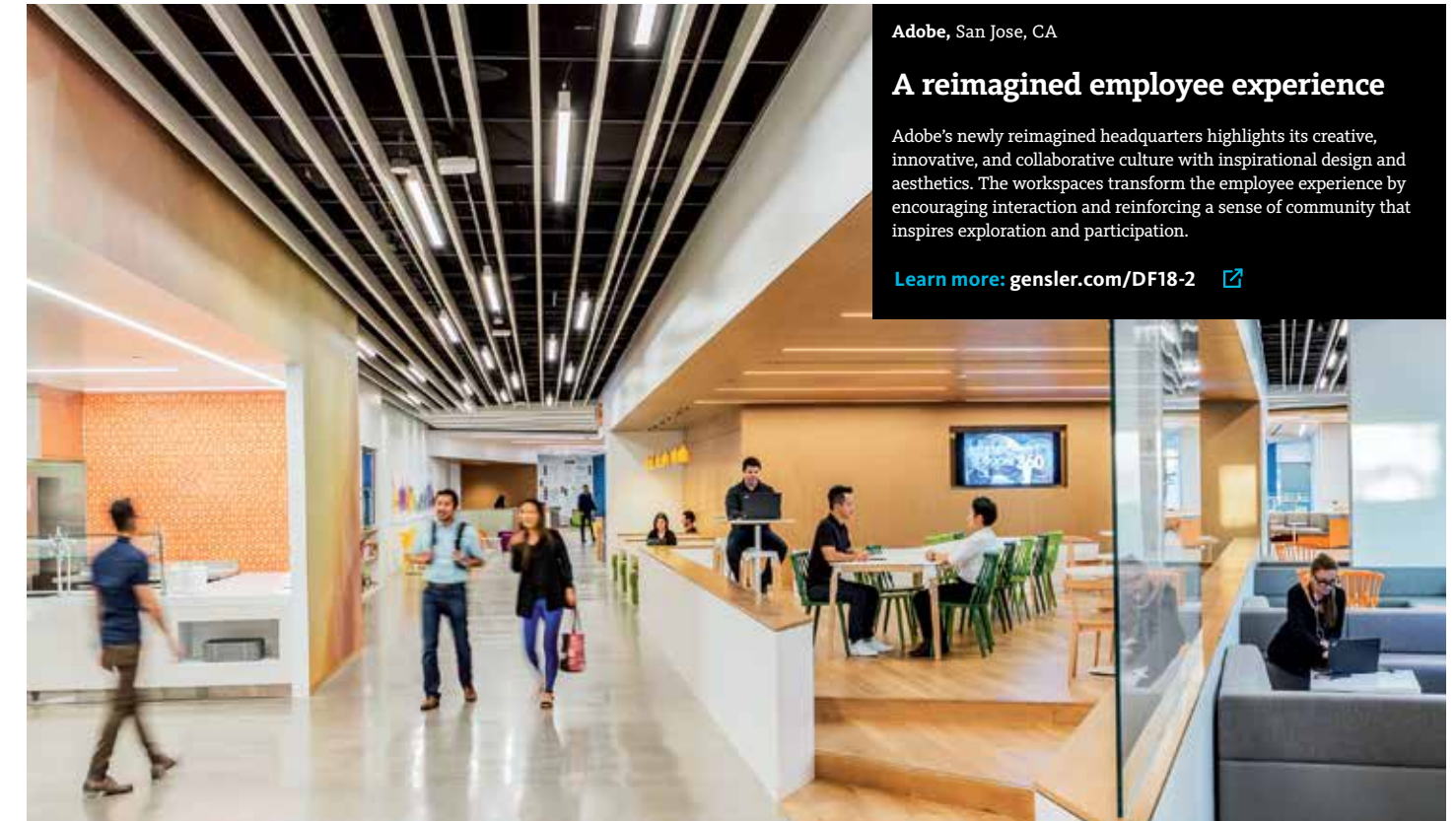
We know that the technology sector will continue to break boundaries, creating new challenges as it solves them. This time, tech will demand that design run deeper through its communities, buildings, and experiences. Optimizing the physical workplace to support new methods of working, to attract and retain talent, and to enhance the human experience are some of the strategies tech firms are doing to foster innovation.

DIVERSITY AND INCLUSIVITY ARE FUNDAMENTAL

Technology companies must foster an environment of authenticity and openness, as teams perform better when individuals bring unique ideas to the table. Developing an inclusive culture is important for any organization, particularly when business depends on the value created by the expertise of its people. Dynamic workplaces that encourage employees to move, adapt, and adjust the space to suit their needs can reinforce inclusive policies.

COWORKING SERVES AS A TOOL TO NAVIGATE CHANGE

In an industry where unpredictable growth is the name of the game, coworking has become an essential element to navigating constant change. People in tech spend less time at their assigned locations than non-tech workers, which correlates to the high innovation of their companies. In 2005, tech workplaces dedicated 89 percent of space to individual desks. Today it's 25 percent, and by 2025, individual desks may not exist.



Adobe, San Jose, CA

A reimagined employee experience

Adobe's newly reimagined headquarters highlights its creative, innovative, and collaborative culture with inspirational design and aesthetics. The workspaces transform the employee experience by encouraging interaction and reinforcing a sense of community that inspires exploration and participation.

Learn more: [gensler.com/DF18-2](https://www.gensler.com/DF18-2)



Instagram
Menlo Park, CA

Microsoft, Dublin, Ireland

Neighborhood zones cater to all work models

For its new headquarters, Microsoft wanted to break down barriers and find new ways of working to empower employees, optimize operations, and engage customers, while uniting 2,000 employees of 72 different nationalities into one integrated location. Taking a human-centric approach, Microsoft created a design concept called Microsoft Island, which maps out how employees—varying in roles from developers, who may gravitate to the caves and mountain to seek peace and quiet; to salespeople, who arrive at the harbor to engage with visitors; to business support professionals, who huddle around the campfire to share information in social hubs—interact with the space. With people, environment, technology, and curation as core principles, the space connects everyone and everything—to strengthen relationships, build community connections, and fuel innovation under the new “One Microsoft” vision.

Learn more: gensler.com/DF18-3



Work Sector > Workplace >

LEGAL

LAW FIRMS BECOMING MORE AGILE, FLEXIBLE

According to the Gensler Research Institute, offices in top law firms are only 50 to 60 percent occupied on any given day as lawyers travel and work remotely. Firms that implement office-sharing programs, or even free-addressing, realize a more dynamic and efficient working environment.

FOR LAWYERS, INNOVATION IS ABOUT HAVING OPTIONS

Providing a balance of work settings within the office that gives employees the choice of when and where to focus, collaborate, and socialize as needs dictate results in a high-performance workplace. The Gensler 2016 US Workplace Survey shows a 12 percent increase in employee satisfaction when employers offer this choice.

DOING MORE WITH LESS

As rents and occupancy costs continue to rise, law firms are focusing on becoming more efficient by adopting alternative workplace strategies. The challenge all law firm leaders face is to thoughtfully balance business (efficiency) decisions with cultural (experiential) drivers. To do so, firms are typically leasing less space while accommodating more lawyers.



Work Sector > Workplace >

CONSUMER GOODS**EXPERIENCE CENTERS
PROVIDE CONSUMER INSIGHTS**

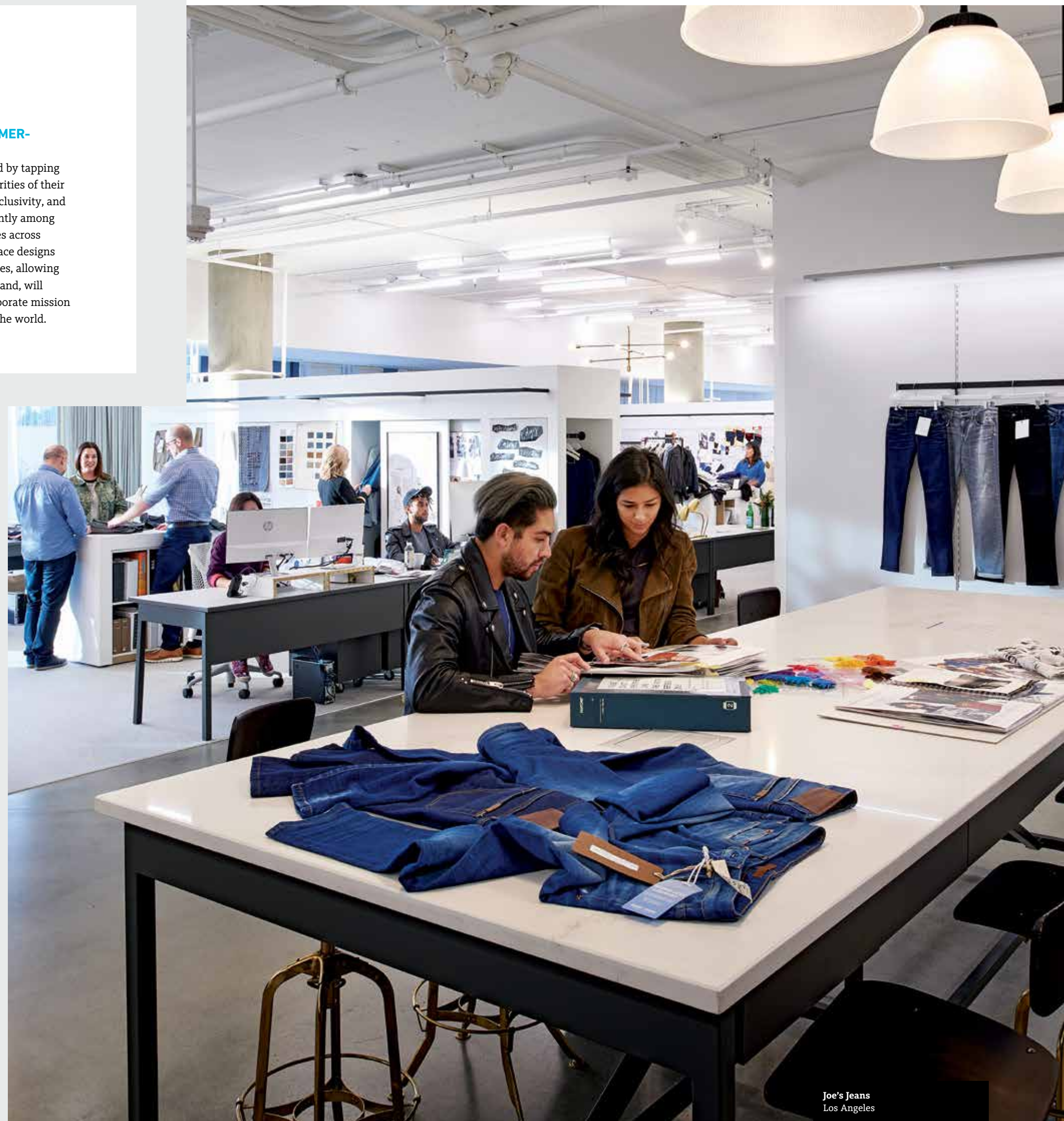
Customer experience centers—increasingly embedded alongside corporate offices—serve as laboratories, where companies refine their brands and how they relate to their target customers. According to *Forbes*, last year the top objective for 75 percent of executives was to improve customer experience. On-site experience centers provide first-hand and actionable consumer insights.

TAKING CUES FROM RETAIL

Workplace design, particularly in the consumer goods market, will learn from the retail sector, strengthening face-to-face product development and innovation. Analog is still extremely important for consumers and a company's employees. Although adopting a “mobile-first” strategy is key to connecting with future customers, an omnichannel strategy—one that bridges physical and digital worlds—is necessary to succeed.

BUILDING A CUSTOMER-CENTRIC CULTURE

Brands can only succeed by tapping into the values and priorities of their customers. Diversity, inclusivity, and knowledge are consistently among the most valued qualities across all generations. Workplace designs that promote these values, allowing employees to live the brand, will better reinforce the corporate mission and its contribution to the world.





Hyatt Global Headquarters, Chicago

A hospitality-infused headquarters

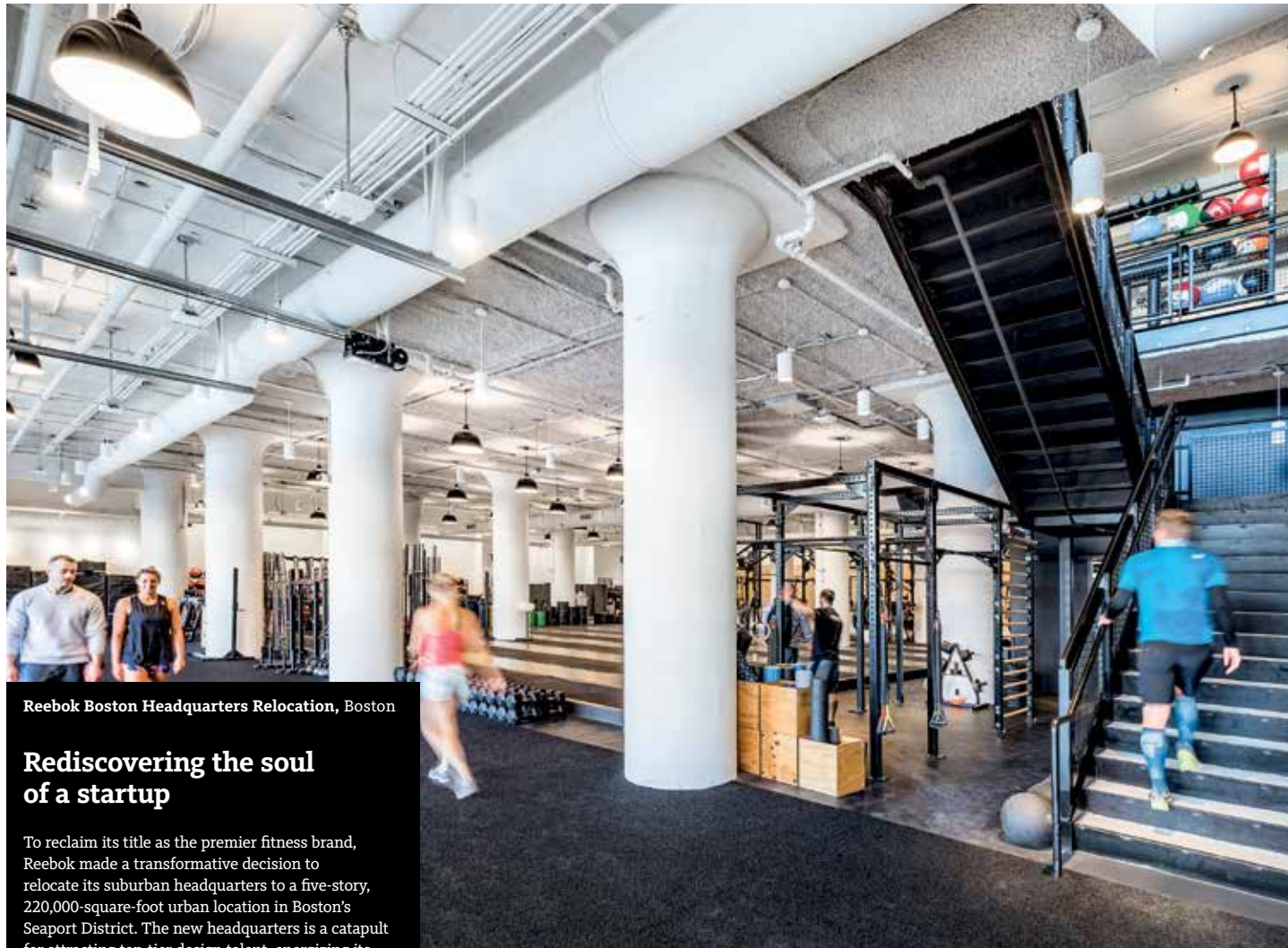
Hyatt's new global headquarters, the Hyatt Hub, brings the Chicago-based hospitality corporation's colleagues together under one roof. With the creation of countless opportunities for connection and innovation in their workplace, the worldwide workforce more effectively integrates with Hyatt HQ—nurturing a shared culture.

Just as Hyatt is unscripting their hotels, this new headquarters frees employees bound to a traditional work environment. The design ensures a new experience for Hyatt employees, in a way that meets their needs and supports the way they work. No more “one size fits all.” In customized WorkSuites, the best attributes of private offices—privacy, the ability to meet on demand, and a sense of ownership—combine with the best attributes of open plan environments—flexibility, camaraderie, and lateral awareness—in a new model workplace strategy. Connected with a monumental brick stair, the WorkSuite floors are paired with localized, social, and collaborative hubs that provide neighborhood-level interaction with sweeping views of the Chicago cityscape.

Hyatt's new headquarters—The Hyatt Hub—prioritizes interdisciplinary thinking and collaboration to invigorate its distinctive brands.

Looking at the employee experience through the lens of the guest experience and inspired by the intertwined legacies of the Pritzker Architecture Prize and Chicago's architectural heritage, Hyatt's new headquarters floats above the confluence of two branches of the Chicago River as a new urban landmark. The buzzing, active coworking lounge, complete with customized food and beverages offerings, serves as a community hub—connecting the work floors above to the heart of the company's culture. It's the new, hospitality-infused front door for Hyatt.

Learn more: gensler.com/DF18-4



Reebok Boston Headquarters Relocation, Boston

Rediscovering the soul of a startup

To reclaim its title as the premier fitness brand, Reebok made a transformative decision to relocate its suburban headquarters to a five-story, 220,000-square-foot urban location in Boston's Seaport District. The new headquarters is a catalyst for attracting top-tier design talent, energizing its innovation and maker culture, and amplifying its global brand visibility with a community focus.

An activity-based workplace

To support a stimulating creative culture and to fulfill its mission to become the fittest workplace in the nation, the new headquarters features a shift to an activity-based workplace with unassigned seating for all, including product design and development teams.

Fostering product innovation

Reebok's workplace reflects the evolution of its brand, celebrating its heritage, laying the groundwork for its continuing success, and better positioning the brand for an even brighter future. Design studios and showrooms are directly adjacent to the maker space and labs, where products are prototyped, tested, reimaged, and customized to respond to the increasing speed to market.

Drawing on the creative energy of the city and Reebok's "craft" influence, this new workplace attracts talent to the innovation community by supporting next-generation design thinking.

Living the brand

Visible at street level, transparent garage doors showcase Reebok employees working out in the industrial two-story gym as brand-in-motion, offering Boston's widest range of wellness programs. A gym membership costs \$75 per month for Reebok employees, though the fee is cut by \$7.50 each time an employee uses the facility—an incentive to work out at least 10 times per month.

Learn more: [gensler.com/DF18-5](https://www.gensler.com/DF18-5)



FOUNDATIONS, ASSOCIATIONS + ORGANIZATIONS

THE FUTURE WILL BE DRIVEN BY PURPOSE

One of the key findings of the Gensler 2016 US Workplace Survey is that employees in this sector are four times more likely to attribute job satisfaction with organizational mission rather than compensation. Purpose-driven space ensures that users are practicing what they preach. Just as organizations seek to advance justice, create resources, and advocate for others, the people who do the work must feel advocated for and valued for their time and passion. It's making sure mission is built into the everyday experience.

FINDING MEANING IN EVERYTHING

Employers—in every sector—must reimagine themselves not as enforcers of productivity, but enablers of meaning. Today, meaning is found in everything: from where products are sourced, to corporate positions on public conversation, and inclusive policies, to name a few areas that employees and consumers value when making a choice about engagement. Employers can use storytelling in brand, design details, and programming to reinforce meaning in the built environment.



The Honor Foundation, Courtesy of Alexandria Real Estate Equities, Inc. San Diego

GOVERNMENT + DEFENSE

CELEBRATING CIVIC PRIDE THROUGH DESIGN

Government buildings have long served as community anchors, stimulating development in surrounding areas and instilling a force of stability in the community. In disruptive times, look for government agencies to celebrate civic pride and a sense of place through design excellence. Reinforcing the mission of the agency through design excellence, environmental graphics, and digital displays boosts employee engagement and innovation.

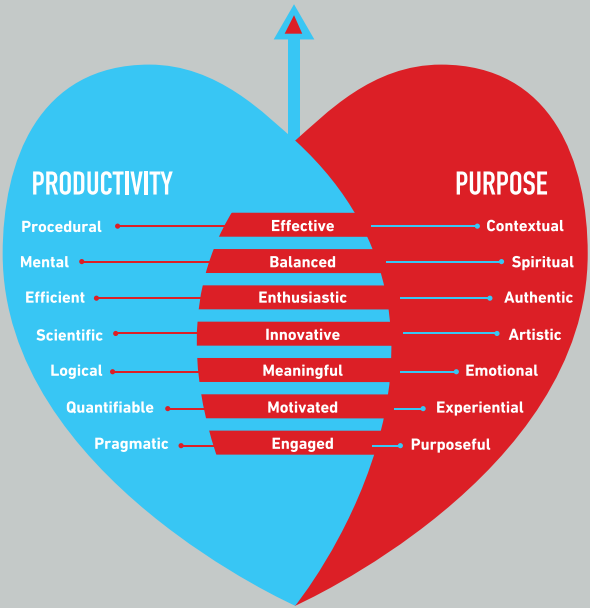


New Embassy of the State of Kuwait, Design Competition Washington, DC

INSIGHTS FROM THE GENSLER RESEARCH INSTITUTE

Meaningful Workplace Design

Employers must reimagine themselves not as enforcers of productivity, but as enablers of purpose. Employees with a strong connection to their work are more innovative and find greater purpose.



Download the white paper: [gensler.com/DF18-6](https://www.gensler.com/DF18-6)

Work Sector > Workplace >

MEDIA

CREATING CONTENT 24/7

Content creation has been democratized. Thanks to smartphones, YouTube, and a host of other digital tools, now anyone can create content. Given this shake-up in media, media companies are looking to create content any time, any place, and any way they can. That means the entire workplace must be designed as a platform for content creation, where tailored material can be produced at a moment's notice, including for informal and open spaces.

INVITING THE AUDIENCE IN

The competition for eyeballs is growing more intense. That's why some media companies are looking beyond the screen to connect with audiences. They're welcoming the public in, offering engaging environments and brand experiences. From innovation spaces to auditoriums, environments that tap into today's culture of sharing and collaboration help to sustain key audience connections.

LEGACIES WILL EVOLVE

It's easy for a media company to lose sight of its identity given today's challenges: acquisitions are driving storied brands to change, the boundaries of media and technology are blurring, and shifts in audience behaviors and demographics are spurring new engagement strategies. But there's real value in celebrating brand legacy. The most innovative media companies' workplaces showcase their history even as they embrace a more digital and open mode.



The Culver Studios
Culver City, CA



Sony Entertainment Pictures
Los Angeles



21st Century Fox
New York



Netflix, Hollywood, CA

New media ushers in the next golden era

Rapidly evolving business models and new technologies are facts of life in the media industry. That's why it's key that media workplaces are able to be easily re-tailored to accommodate whatever changes come over the horizon. No one wants to tackle an expensive renovation every few years because industry shifts continuously render a space obsolete.

In its new space in the ICON building at Sunset Bronson Studios in Hollywood, Netflix worked with Gensler to design its workplaces to respond to its rapid growth, collaborative culture, and an unprecedented pace of change.

Upon entering the 15-story campus, team members and visitors are greeted with floor-to-ceiling, wall-to-wall digital displays showcasing Netflix's newest content. The constantly changing content celebrates the efforts of its production teams while reinforcing the company mission. The bright entry also hosts a large coffee bar that employees and guests are welcome to enjoy.

The workplace is designed to directly support Netflix's unique culture: one that is laser-focused on helping its people to achieve excellence.

In work areas, measures such as adjustable workstations can be quickly reconfigured or moved, along with power outlets and AV that are equally mobile, to allow people to tailor their spaces as needed. A large central staircase spans the 2nd to 14th floors, creating a dynamic central axis of activity for the media giant. Along the stairs, individual small pantries are built into each floor, with every other floor housing an espresso machine, to promote casual collisions.

The vertical campus responds to trends that are playing out across the media industry, and in the work sector at large. Collaboration is paramount. The increased focus on user engagement and experience, across all platforms and spaces, has opened up new design opportunities for media.



Work Sector > Workplace >

FINANCIAL SERVICES

TECHNOLOGY REDEFINES FINANCIAL SERVICES ROLES

Artificial intelligence (AI) is permeating the workplace, displacing traditional financial services roles, while creating new tech-focused jobs. This new and diverse talent pool values collaboration, transparency, and a more casual environment.

MARKET SHIFTS DEMAND MORE AGILE WORKPLACES

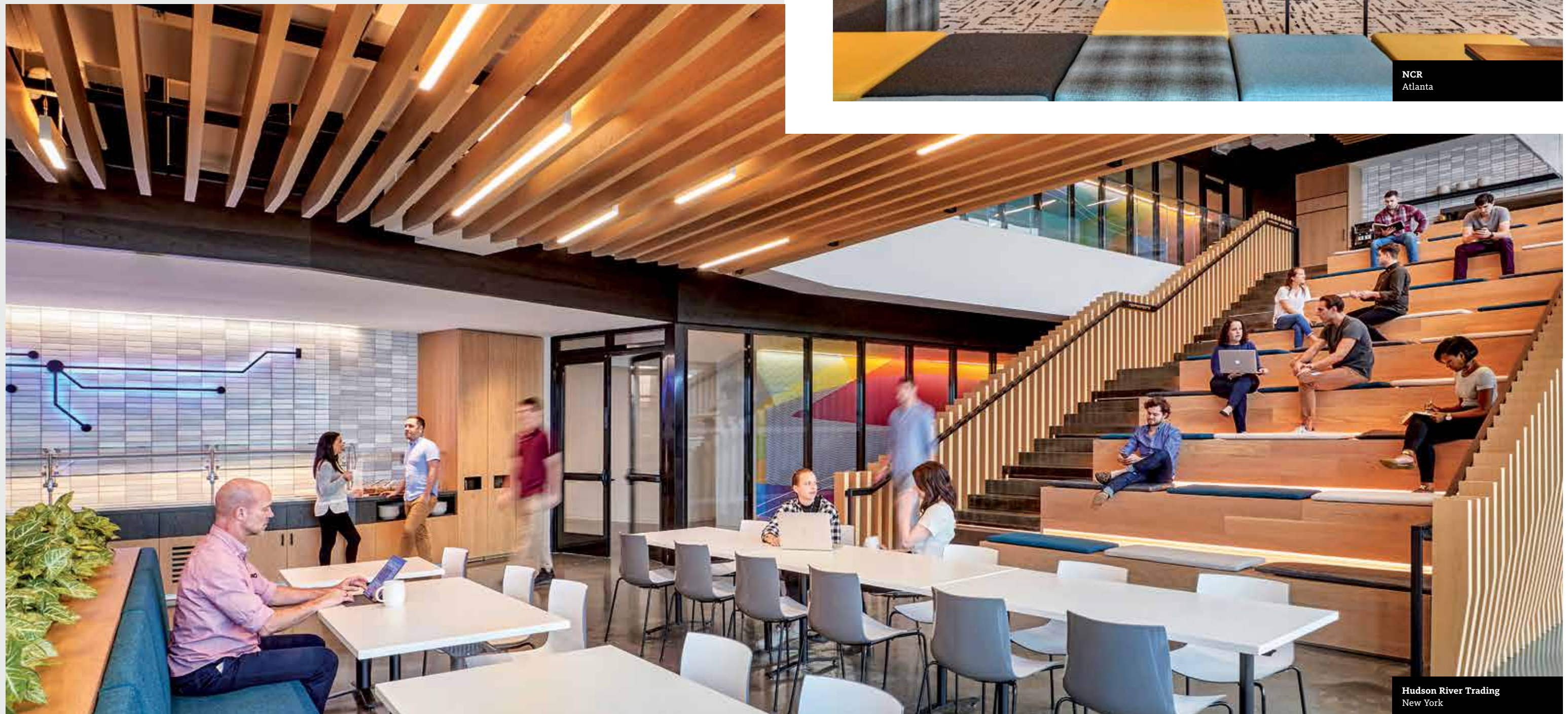
Global economic power centers are shifting toward emerging markets. Financial services firms must adapt to cultures, customer preferences, and consumer values in each local market. Expect to see additional flexibility in the built environment in order to support a dynamic workforce.

DISRUPTION LAUNCHING NEW ERA OF INNOVATION

Financial services firms are facing unprecedented competition from nontraditional competitors, unleashing disruption and innovation equally. To meet this, firms are building out innovation centers, incubation labs, and analytic centers to develop new products and services that meet consumer needs in new, seamless ways.



NCR
Atlanta



Hudson River Trading
New York



Work Sector > Workplace >
ENERGY

**FOCUSED ON CULTURE
AND ENVIRONMENTAL
STEWARDSHIP**

Like all other sectors, energy companies are feeling the squeeze for top talent. Demographic shifts mean that employees are expressing concerns—and ideas—about the role of energy companies in society. Energy companies stand to gain from their people's passion. Innovation and workplaces that support it are fundamental to attracting talent.

**AMENITY SPACES REFLECT
NEW ENERGY**

To convey their commitment to leading technology and engineering, energy companies need to be equipped with world-class facilities. Energy campuses today are designed to provide all the tools and resources to foster improved employee collaboration, creativity, innovation, and well-being.



Work Sector > Workplace >
SCIENCES

**LOOKING BROADLY TO BUILD
COMMUNITY, INNOVATION**

To catalyze innovation, reduce overhead, and accelerate speed to market, research organizations are developing new types of partnerships. Technology has enabled multidisciplinary research and development teams to be geographically dispersed, and even outsourced. Space types and ways of working are evolving to bring physical and virtual networks together effectively. These partnerships will help shape the next model of innovation. For that, physical and digital connections are essential.

**AI IS HERE TO AID—NOT
REPLACE—RESEARCHERS**

The promise of AI is in recognizing patterns within unfathomably large data sets that could not possibly be processed by a single scientist. But only people turn data into insight. Collaboration between bench scientists and computer scientists is accelerating the discovery process, as well as reconfiguring how employees interact with space. Space design is anticipating advances in robotics and automated scientific processes, and integrating technology to communicate with collaborators around the globe.





The Boston Consulting Group
New York

Work Sector > Workplace >

MANAGEMENT ADVISORY

INNOVATION IS THE DELIVERABLE

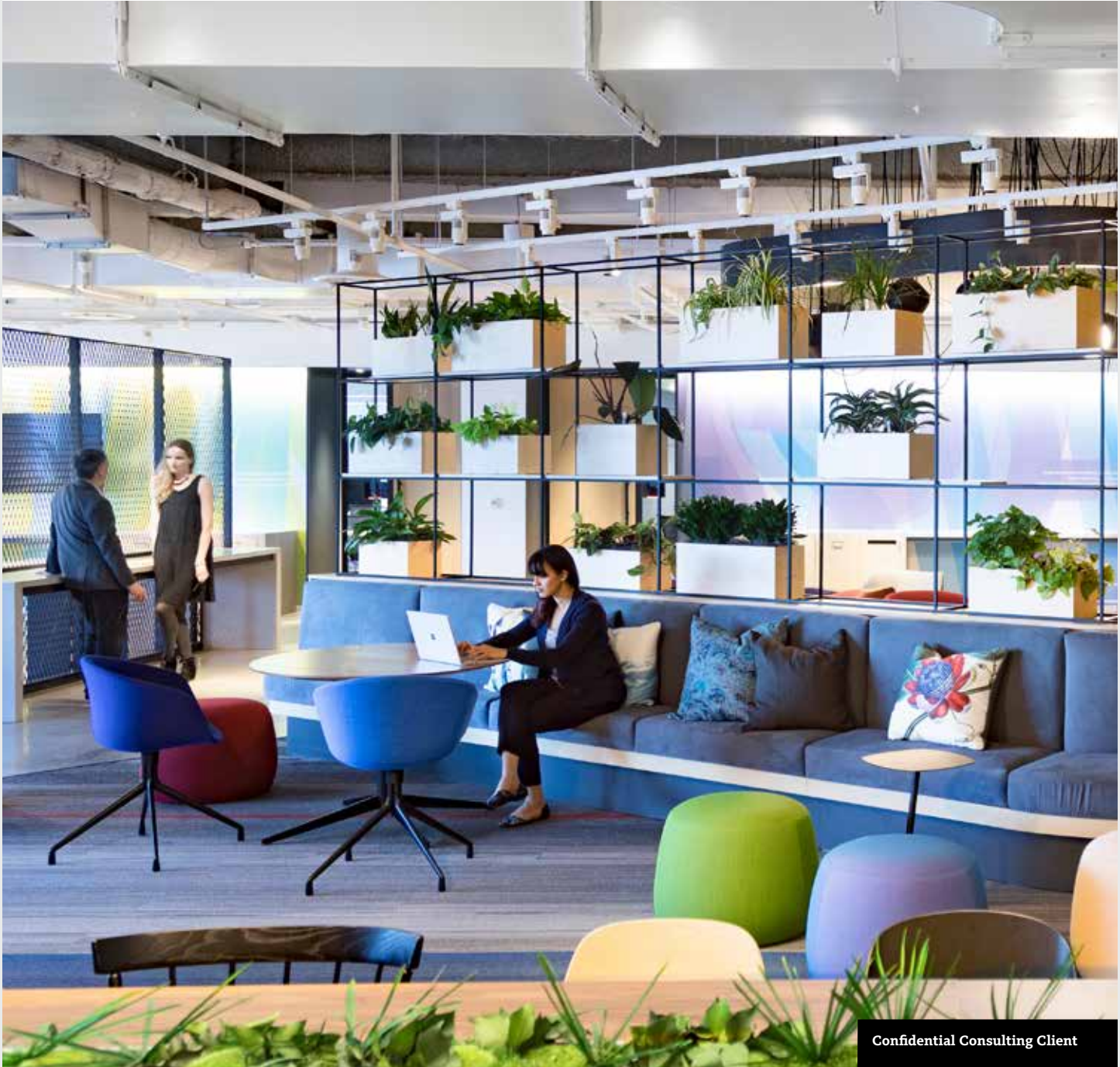
The drive to increase results through innovation is directly tied to the work environment, as shown by the Gensler 2016 US Workplace Survey. Supporting a wide range of behaviors whose ebb and flow is not entirely predictable means design should be as agile as possible, adaptable without requiring additional hard construction or acquisition of new furniture.

TAILORED EXPERIENCES BUILD COMMUNITY, ENGAGED INDIVIDUALS

To build a binding team that reinforces a strong client-focused energy, the workplace must engage directly, and on a more personal level. Tailored client and staff experiences drive higher levels of service. Culture manifests itself through its people and can be reinforced and humanized by borrowing from the sensibilities, systems, and services often found in hospitality environments rather than corporate typologies.

DIFFERENTIATION REQUIRES AN EMOTIONAL CONNECTION

The highly competitive nature of the marketplace for talent drives the need to make the workplace a differentiator. This creates an imperative for a “wow” moment: a deliberate design that evokes a visceral emotional connection with both staff and clients. These moments may be graphic or a dramatic volume that inspires and generates wonder. Creating a design that communicates and infuses the workplace will engage employees, clients, and the community at large.



Confidential Consulting Client

PRODUCT DEVELOPMENT: FORECAST

Great products start with great insights, and great insights are powered by a broad perspective. Workspaces today need to empower the whole person, creating environments and product solutions that benefit the worker's physical, emotional, and psychological well-being and support an organization's success.

QUIETING THE NOISE IN THE OPEN OFFICE

As more workspaces adopt an open plan, they need to provide spaces for collaboration as well as concentrated, heads-down work. Sound is a big issue, but products can work harder to mitigate noise in the open office, offering individuals respite from many of the issues experienced in the open office, or allow people to quietly collaborate among their peers.



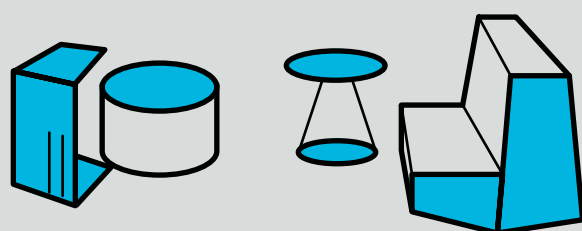
DESIGNING FOR AN INCLUSIVE ENVIRONMENT

Universally accessible spaces that respond to the needs of the greatest range of users will be thought through to the smallest detail, and the best design solutions will maximize inclusivity with no sacrifice to aesthetics. Even pulls for custom cabinetry can be designed to be beautifully minimal while remaining operable without pinching, wrist twisting, and simultaneous hand and finger manipulation.

ABOUT GENSLER PRODUCT DEVELOPMENT

Product solutions to support workplace innovation

Our product development practice works with manufacturers and clients to create products that respond to how workers work now. By exploiting new materials, the latest technologies, and evolving needs, we design a variety of highly functional products that enable innovation.



Meet the practice: [gensler.com/DF18-7](https://www.gensler.com/DF18-7)

“Because our design solutions are rooted in our industry-leading global workplace research, we can deliver designs that support how people do their best, most productive work at the office.”

—Andy Cohen, Co-CEO, Gensler

MEETING THE NEEDS OF A CHANGING WORKPLACE ECOLOGY

As the workplace continues to shift to reflect the diversity of ways people work, products need to address end users' changing needs in ways that allow for customization of space. When we control for the factors that are most important to individual workplace performance, any space type can be highly effective.

There are four key elements to consider for creating an optimal work environment:

Flexibility: Space planning solutions should allow organizations and individuals to create environments for both concentrated work and cross-functional collaboration.

Residential Sensibility: A unique combination of materials offers choice of styles—from detailing to a spectrum of fabrics, textiles, and work surfaces.

Configurability: Configurable components allow businesses to design branching systems with versatile work zones—as well as reconfigure the same product suite into traditional benching layouts with ease.

Enhancements: Integrated enhancements permit customization such as free-standing carrels that create zones for concentration, or height-adjustable work surfaces and privacy screens that enable personalization of workstations.

A COMMON LANGUAGE HELPS SPEED TO MARKET

Project time frames are shrinking, and older properties are being refreshed to address newer ways of working and design trends. To reach the speed to market, bridges need to be formed between industries. Creating platforms that promote a common language will help designers make more effective decisions when specifying products and materials, without sacrificing design intent or adding lead times.



Humanscale Summa



Stylex



PBA



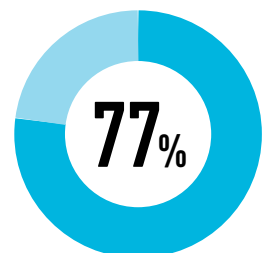
Umbra

CONSULTING + REAL ESTATE SERVICES: FORECAST

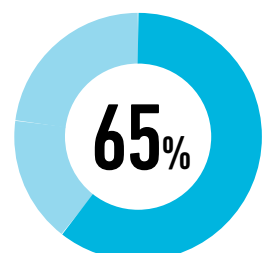
Research-driven thinking will help organizations improve performance and gain competitive advantage through thoughtful design. This process should embrace both physical environments and human experiences, putting people at the center. In the digital age, data is the key to creating meaningful differentiation.

SOCIAL NETWORKS INCREASINGLY CRITICAL TO A GREAT WORK EXPERIENCE

Culture and community are important drivers of a positive work experience. The Gensler Global Workplace Survey finds that the most innovative employees report socializing at work up to three times as much as other employees. To support building these connections, some companies are experimenting with apps that enable colleagues to connect over shared interests.



Of the most innovative people, 77 percent have fun at work.
—Gensler Workplace Survey, 2016SM



Of the most innovative people, 65 percent socialize at work.
—Gensler Workplace Survey, 2016SM

DISRUPTION REQUIRES NIMBLE REAL ESTATE STRATEGIES

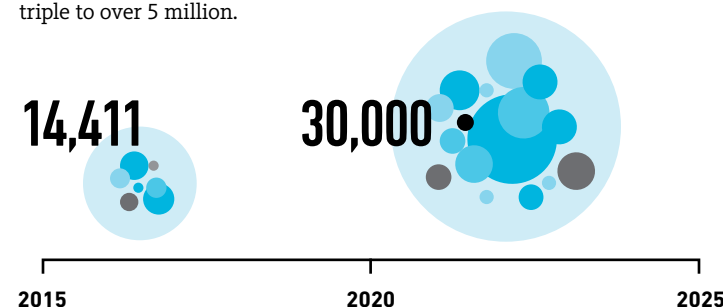
The average life span of companies in the S&P 500 is expected to drop to just 14 years by 2026, according to Innosight. With so many companies restructuring, shrinking, and merging, nearly every resource must become more flexible—including real estate.

“Research suggests that more than 30 percent of high-paying new jobs will be social and ‘essentially human’ in nature.”

—Deloitte, “Navigating the Future of Work”

A SPIKE IN COWORKING SPACES

Global coworking spaces will grow from 14,411 in 2017 to over 30,000 in 2022. The number of worldwide coworking members will nearly triple to over 5 million.



—Global Coworking Unconference Conference

SMART BUILDINGS CRITICAL TO WORKPLACE EXPERIENCE

Workplaces are increasingly designed for how people connect to their environment through mobile and wearable technology, as well as the intelligence gathered from the sensing and data that these technologies enable. As more utilities in the built environment are connected to one another through the Internet of Things (IoT)—screens, sensors, mobile phones, cameras, and elevators—the experience of place is increasingly about the ways that software services can tailor environments and empower people. The most successful places are immersive, connected, and intelligent.

PARTNERSHIP, TRANSPARENCY ESSENTIAL PARTS OF CHANGE MANAGEMENT

Most change management programs fail, perhaps because they focus primarily on communicating information. Success is more likely through initiatives that require active co-creation and engagement.

60–70%

Organizational change efforts fail 60 to 70 percent of the time.

—Harvard Business Review

ENGAGED EMPLOYEES ARE CORE TO YOUR BUSINESS

Having an engaged workforce is a core business strategy. Yet only 32 percent of employees around the world report that they are engaged at work. Organizations need to look beyond physical space to build a culture and provide opportunities for personal growth.

ABOUT GENSLER CONSULTING + REAL ESTATE SERVICES

Strategies for the Workplace in “Beta”

Intelligent systems, new types of building software, and sensors are allowing for unprecedented connections between people and the places they live and work. Our Consulting and Real Estate practices integrate and apply software, data, and intelligence to activate place and empower people and organizations to innovate.

Meet the practice: gensler.com/DF18-8

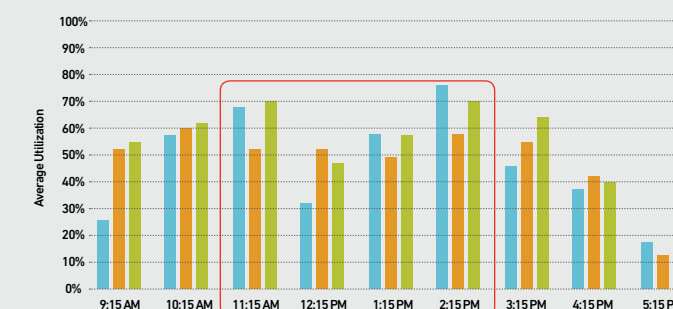
Those who **used standing desks** more responded more positively about their workstation.

12% higher workstation satisfaction for those with standing desks vs. those without.



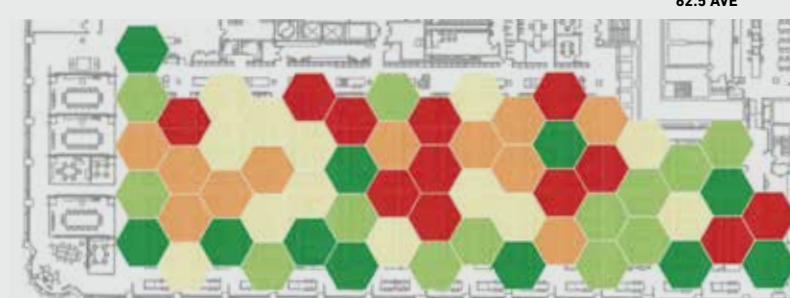
Peak Utilization

The peak utilization of personal desks occurs between 11am and 2pm. This kind of data allows design to match use patterns and save on space.



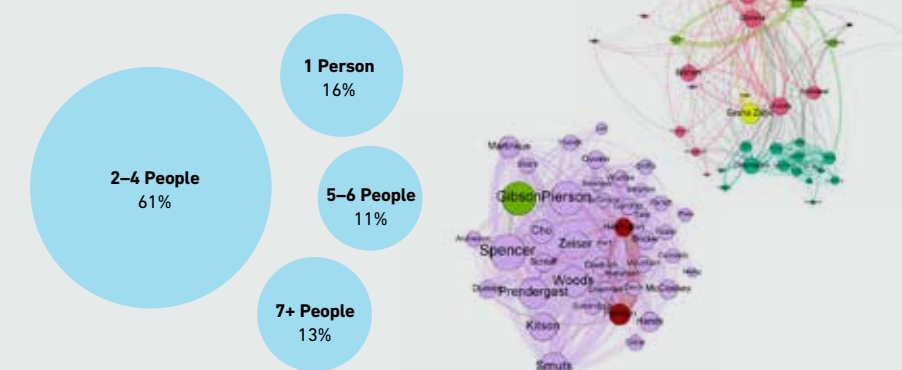
Location within Office

People who sit along the window are more satisfied with their workstation than those in the center of the office.



Meeting by Size

Conference rooms, huddle rooms, and informal meeting rooms are used most often by groups of two to four people.



Work Sector > Consulting
+ Real Estate Services >

CONSULTING STRATEGY

COWORKING A PLUS—BUT ONLY WHEN DONE RIGHT

Coworking is disrupting the real estate industry as the two primary players—developers and coworking providers—shape the landscape. Organizations that invest in creating customized coworking spaces will reap the benefits of having a more engaged workforce that is tied to its mission and purpose.

DESIGN WILL FOCUS ON HUMAN CONNECTIONS

We have all the tools and technology to connect and collaborate efficiently, yet we struggle to connect and collaborate effectively. Has all this great technology begun to cost us valuable human connections and interactions? Now, more than ever, work environments play a critical role in fostering these human connections.

Work Sector > Consulting
+ Real Estate Services >

REAL ESTATE SERVICES

HARNESSING DATA

Global clients are driven by an enormous influx of data to inform innovation and drive their businesses. According to *Forbes*, the world will create 180 trillion gigabytes of data by 2025—an 18-fold increase from 2015. To optimize their operations, companies will need to expand their capabilities to harness and interpret their internal workplace data.

GRADED ON WELL-BEING

Well-being is a key metric applied to employers. Yet, the Global Wellness Institute reports that only 25 percent of people believe their company offers a wellness program out of a concern for staff well-being. The rest question their employer's motives. To prove their support for the well-being of workers, employers need to show how much they value the people, not just the space they work in.

Development
Build-to-Suit
Tall Buildings
Landlord Services

OFFICE BUILDINGS: FORECAST

In an era when anything is possible, and change is certain—if not ubiquitous—the office buildings sector has positioned itself on the leading edge of responding to shifts in consumer behavior, technology, and the power of urbanity. Developments that successfully navigate and plan for these shifts will come out on top.

MAKE IT A DESTINATION

By crafting a tenant strategy that mixes live/work/play, developers are able to create walkable, 24/7 neighborhoods and increase land value, no matter the location. Day-to-night programming can draw in the community, which in turn ups the cool factor—and value—of the building.

24/7

Experience-rich, 24/7 development creates high-value neighborhoods.

EMBRACING DISRUPTIVE CHANGE

“The future is here—it’s just not evenly distributed.”

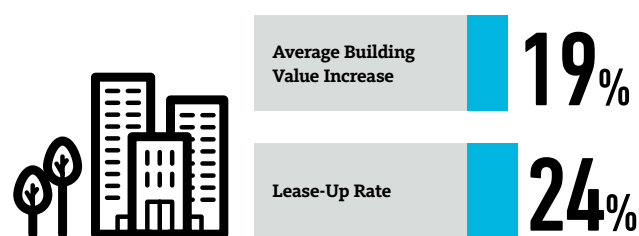
—William Gibson, Novelist

For building owners and operators, rapid advances in technology have the power to transform portfolios. From AI and IoT to no-rope elevators and autonomous vehicles, planning for and leveraging tech will be a differentiator in creating better human experiences.

GREEN BUILDINGS = HIGHER RETURNS

Green buildings have proven to be more valuable assets than conventional buildings, with a global average value that is up to 19 percent greater than their peers. Sustainable buildings record a 19 percent increase in ROI and a 24 percent faster lease-up rate.

—Ernst & Young, 2017 and USGBC, US Green Building Council, 2015



AUTONOMOUS VEHICLES WILL TRANSFORM OFFICE BUILDINGS

Owning a car may soon become a thing of the past. Though mass adoption of autonomous vehicles (AVs) is likely years away, developers should be thinking about and designing new projects with them in mind.

10M

By 2020, there are predicted to be 10 million self-driving cars on the road.
—Forbes, 2017

The Gensler Research Institute predicts autonomous vehicles will completely change cities. Building form will change radically as design is dictated less—or not at all—by parking requirements, which will decrease dramatically. AVs don’t need to park, allowing garages and parking lots to be repurposed. Additionally, developments will see more expansive drop-off and pickup zones and more active pedestrian-oriented entry areas. The lobby design of the future will focus on delivering great first impressions, welcoming visitors into a new age of interactive building design.

INCORPORATING COWORKING

Tomorrow’s talent demands connectivity. Large, open floor plates provide a more connected, collaborative environment that reinforces a common culture and fosters innovation. The addition of coworking space in office buildings is one response to how organizations lease and use corporate real estate.

AN AMENITIES ARMS RACE

2x Developers are one-upping each other to find the latest amenity. Barbershops, concierge services, and pet-sitting are just the beginning. Keep up or lose the edge in attracting ambitious tenants—and their talent. The Gensler 2016 US Workplace Survey found that innovators have two times more access to amenities than non-innovators.

WHY NOT MAKE IT DYNAMIC, MIXED-USE?

Tenants favor buildings that combine a mix of uses and make access to transit, food, retail, and recharge easy. And there’s no reason to go homogeneous anymore. The dynamism of shared space supports greater connection and convenience.

Johnson Controls Headquarters Asia Pacific, Shanghai

Smart buildings essential to future of smart cities

The Johnson Controls Headquarters Asia Pacific in Shanghai is a leading example of design innovation, sustainability, and smart technology. The new headquarters helps break down silos for increased collaboration among departments, improves talent retention, and includes spaces that promote employee well-being. The multidisciplinary design of the headquarters allows it to be a place where employees, engineers, product developers, and clients collaborate and further Johnson Controls’ growth in China and the Asia-Pacific region.

Learn more: gensler.com/DF18-9



Riverwalk Tower
Tampa, FL

Work Sector > Office Buildings > **DEVELOPMENT**

ANTICIPATING THE RISE OF DRIVERLESS

Autonomous vehicles will drastically change the urban landscape and developers are recognizing their oncoming impacts. Convertible parking—parking that can be converted to other purposes without major design interventions—along with expansive drop-off and pickup zones are design solutions developers can implement in their buildings today to prepare for these changes.

CUSTOMIZED TENANT EXPERIENCES ARE NOW AN EXPECTATION

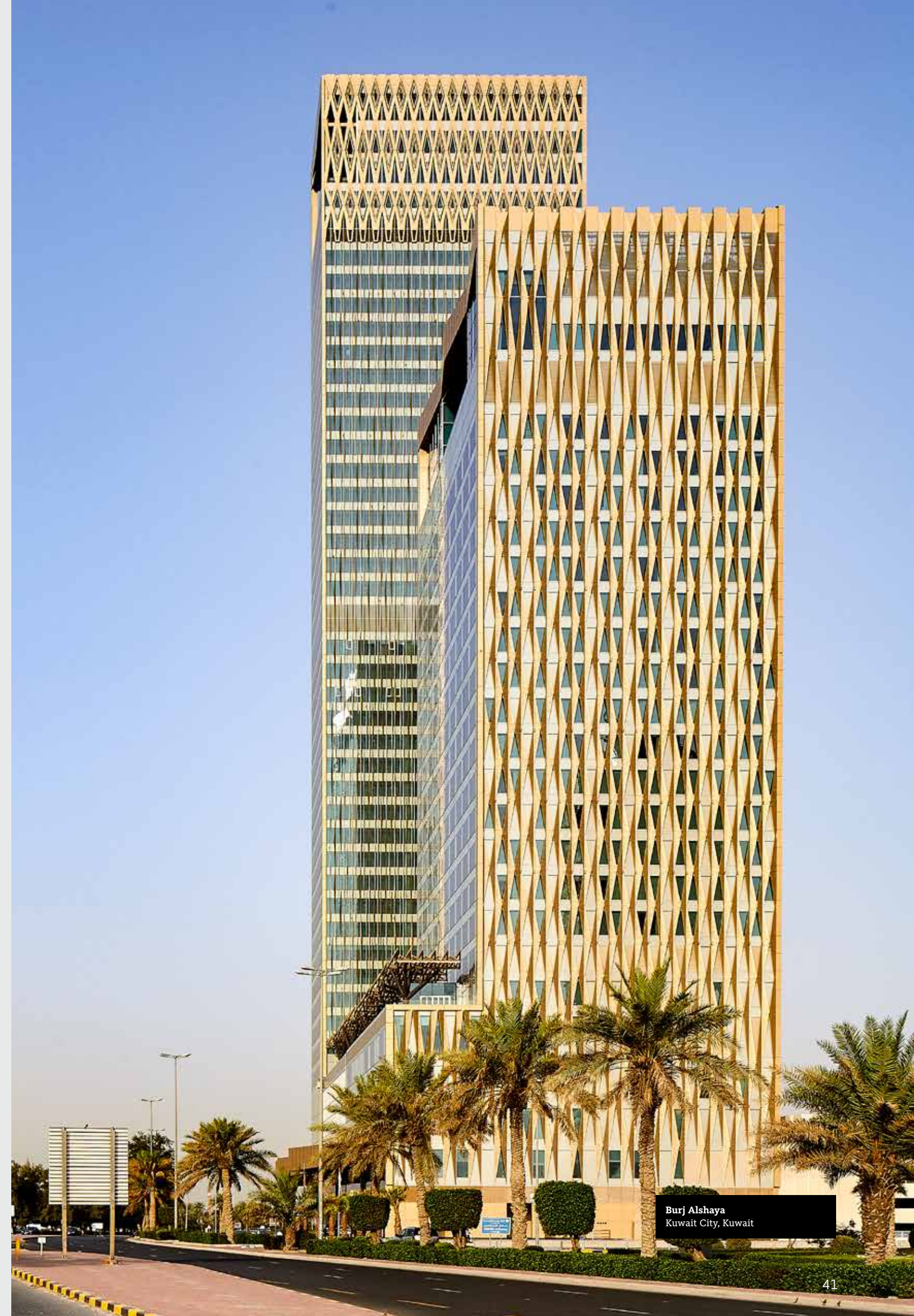
With IoT, cloud-based apps, and human sensors, tenants can directly tell the building what they want, when they want it, and where they want it. Not only does this lead to greater system efficiencies and reduced operating costs in buildings, it can lead to improved well-being and productivity.

BUILD IN THE THIRD PLACE FIRST

The next generation office building will draw employees back to the office. Mobility will remain an important part of work, but the value of face-to-face remains undisputed. On-site spaces that support a variety of work modes—including social—create dynamic developments and yield longer-term tenants.



110 Park Avenue
Florham Park, NJ



Burj Alshaya
Kuwait City, Kuwait

BUILD-TO-SUIT

OPTIMIZE MOMENTS TO REINFORCE THE BRAND

Companies are adapting the changing nature of work by refocusing on what really drives talent: the opportunity to be part of something meaningful. To win the war for talent, a strong expression of organizational brand can help foster a strong culture of innovation that will attract employees and allow them to thrive.

URBANITY ATTRACTS—AND RETAINS—TOP TALENT

Today, urban dwellers outnumber rural dwellers worldwide for the first time in history. Companies are increasingly recognizing the importance of being where the talent wants to be—in cities. Shifting sites closer to transit hubs and urban areas brings corporations closer to top talent, universities, and business partners.

HIGH-PERFORMANCE BUILDINGS = HIGHER-PERFORMING EMPLOYEES

Planning for adaptable infrastructure and flexible design will enable continuous evolution in usage, purpose, and performance of custom buildings. Future corporate campuses should encourage occupants to be more physically, mentally, and socially engaged. The Gensler Workplace Survey shows that a healthy employee is three times more productive than an unhealthy one.



Mercedes-Benz USA
Headquarters
Sandy Springs, GA



Johnson Controls Headquarters
Asia Pacific, Shanghai



E. & J. Gallo Winery
Dry Creek Building
Modesto, CA

NVIDIA Headquarters, Santa Clara, CA

Innovation requires bringing people together. How do you get 2,500 people to collaborate?

Innovation is the lifeblood of the technology industry and depends on strong collaboration, including serendipitous collisions between unlike ideas. As companies become successful and expand, those collisions tend to become less frequent, because as the teams grow, so do their buildings, resulting in siloed work groups and less innovation. Tasked to capture the soul of the company and optimize the creative and collaborative work environment, the design team leveraged a triangular geometry—an iconic symbol for NVIDIA and the tech industry—that reinforced the fundamental building block of the company’s core technology.

The new NVIDIA headquarters is a campus in one building. With only two work floors, connection between these floors is enhanced by a variety of oversized staircases that also can be used as places for spontaneous interaction and exchange of information. The central core of the building—its “heart”—is where all amenities, conference rooms, and restrooms are clustered, drawing together all the building’s inhabitants multiple times each day. Here, the main entrance and reception area greet people as they arrive from below-grade parking. High above this central core is a mezzanine of lounges and relaxation spaces—a social environment that doubles as an alternative workplace and another opportunity for natural collaboration.

Designing for the “soul” of an organization starts with understanding its people.

The new NVIDIA campus focuses squarely on the needs and habits of the people who use it, with a thoughtful design that enhances the working styles, personal experience, and culture of its industry-leading workforce.

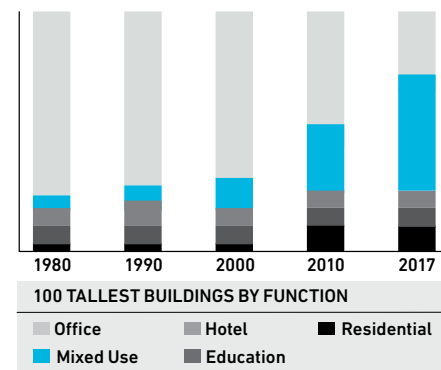
Learn more: [gensler.com/DF18-10](https://www.gensler.com/DF18-10)



TALL BUILDINGS

MULTIPURPOSE BUILDINGS ARE THE FUTURE

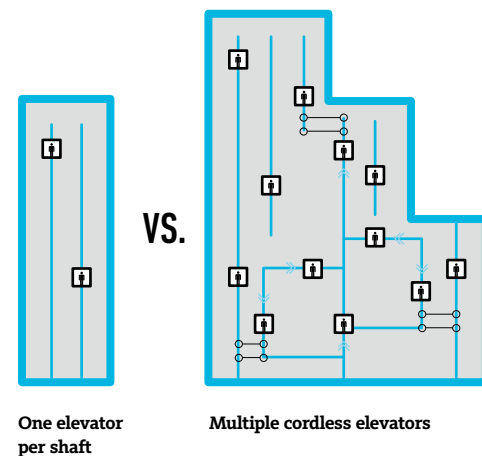
Single-use office buildings are monoliths of the past. To maintain relevancy and high occupancy, tall buildings must adapt to a continually changing mix of uses. No longer is a tower a single use for the entirety of its existence.



—Council on Tall Buildings and Urban Habitat

ELEVATOR INNOVATIONS ADVANCE BUILDING HEIGHTS

The future of tall buildings will rely on ropeless elevator technology that will enable limitless advances in height, direction, creativity, and flexibility. Moving up, down, side-to-side, and without height limitations, this technology enables unprecedented possibilities in the architecture and design of buildings, increasing rentable area of typical supertall towers by up to 20 percent.



KAFD World Trade Center
Riyadh, Saudi Arabia

LANDLORD SERVICES

COWORKING INCREASES VALUE

As real estate developers continue to battle for fully leased assets, landlords are increasingly adding spec and coworking suites to respond quickly to tenant demands. Turnkey solutions that support brand are critical to “always-on” agility.

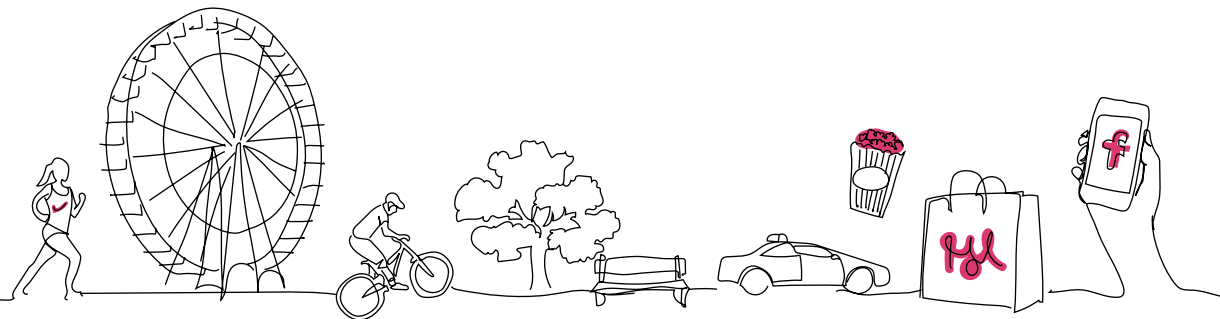
BREATHING NEW LIFE INTO OUTDATED BUILDINGS

With large stocks of obsolete buildings in established urban centers, the potential to transform these into valuable revenue generators is limitless. Gensler Analytics estimates there is more than 185 million square feet of office space in the US alone that would qualify for repositioning.



TOP TRENDS IN LIFESTYLE

A visibly compelling space is no longer enough to contend with changing consumer habits and lifestyles. Experiential offerings can entice people to physical venues, but brands need to think beyond single-purpose spaces—and consider human needs and behaviors to craft an engaging, holistic experience that extends across multiple touchpoints.



LIFESTYLE

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Residential p. 54	Integrated Resorts/Gaming p. 63	DIGITAL EXPERIENCE DESIGN p. 76	RETAIL p. 82
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	Sports Facilities p. 68		Service Retail Environments p. 86
	Convention Centers p. 70		Department Stores p. 87
			Food + Beverage p. 88

SINGLE-USE SPACES ARE BECOMING OBSOLETE

As people live integrated lives, no one is using spaces in a single way. Single-use venues are being replaced with synergistic, hybrid destinations; multi-use districts; and places for 24/7, 365-day interaction. Great brand experiences respond to and engage with people in multiple modes—whether they’re completing a task, socializing, discovering, or being entertained. All kinds of spaces require ultimate flexibility.

FRICTIONLESS, SEAMLESS DESIGN BECOMES UBIQUITOUS

Everything is becoming anytime, anywhere, anyplace—people want immediacy and unlimited access to products, content, and entertainment. As technology permeates every aspect of our lives, it’s become more ubiquitous and invisible, enabling frictionless travel, food, and entertainment experiences. Cross-channel consistency is key: spaces need to provide seamless experiences that guide people through complexity with the same level of personalization across channels.

TRANSITIONING TRANSIT CREATES OPPORTUNITY

Demand for transit-oriented developments is increasing as transit-adjacent sites create growth centers and maximize pedestrian activity. Autonomous vehicles and ride-sharing services will transform how we utilize real estate. There’s a big shift away from parking to forecast what gets put in its place—in the interim and the future. These changes will impact land use, security, drop-offs, and lobby configuration, while yielding new sources of revenue.

CONVENIENCE IS A DIFFERENTIATOR

As time becomes an increasingly valued asset, convenience is a differentiator: consumers are willing to pay a premium for places, products, and services that give them back their time. Clear navigation, easy-to-use technology, and value-added services support people’s high-convenience lifestyles. Experiences no longer start on the property; engagement with consumers, guests, and fans starts outside the venue, anticipating their needs by providing hospitality-like services, prebooking facilities, and programmed spaces at every step.

DATA-DRIVEN INSIGHTS YIELD HYPER-PERSONALIZED INTERACTIONS

New technologies—from algorithms to big data—empower brands to treat customers as individuals. Digital technology provides flexible, scalable, and more personalized experiences for multiple user groups, while customer service is being transformed via AI-powered assistants and concierges. Data analytics heighten interactions and provide greater insights into people’s preferences, allowing brands and businesses to target with accuracy—giving users what they want, when they want it.

CONSUMERS GAIN CONTROL, SHAPING BRANDS’ IDENTITIES

Social media and mobile platforms amplify consumers’ voices and give them more control. The buying public now shapes a company, impacting how products are created and brought to market, and influencing brands’ identities. From the maker movement to crowd sourcing and user-generated content, consumers are co-creators. Digital technology and data analytics provide a direct conduit between companies and consumers, accelerating delivery, services, and transactions.

Entertainment
Residential
Senior Living

MIXED USE: FORECAST

Mixed-use environments unlock the possibilities of a diverse, urban lifestyle and breathe new life into cities. The key lies in activating the voids between buildings where social interactions reside, and integrating these intangibles to create developments that elevate the human experience.

THE SUBURBAN SHIFT: LESS AUTO-DEPENDENT, MORE CONVENIENT

Suburban shifts toward city centers are producing a less auto-dependent culture while creating mixed-use opportunities with greater density. These residential shifts drive mixed-use developments toward districts in cities that have been largely forgotten or ignored. Millennials and baby boomers are relocating to urban cores, seeking more compact, walkable, and less auto-dependent lifestyles. Even in the suburbs, people are looking for an urban experience. Successful developments will include human-scale, mixed-use, transit-oriented places that foster a meaningful sense of community.

FUTURE OF BUILDING SPACE: ADAPTABLE, SUSTAINABLE

Mixed-use buildings come with an inherent need to be future-proofed. Making buildings convertible and sustainable is key to their longevity.

“Those who are positioned to bring mixed-use assets into communities will reap strong benefits for the long-term.”

—Adam Robinson, founder and president, Pacifica Group

THE INTEGRATED WORKPLACE IS THE NEW STANDARD

The future of the workplace incorporates a great diversity of uses in one place. The single-purpose workplace is a thing of the past.

Office tenants were willing to pay higher rents in a mixed-use than in a single-use office development.

—Journal of Property Investment & Finance

COMMITMENT TO PUBLIC SPACE IS KEY

As neighborhoods densify, users demand better and more engaging public spaces. Great placemaking commands a premium and enhances property values. According to the Gensler Experience Index, public spaces support the widest range of activities, with more unstructured time than anywhere else. They're reported as ideal places for reflection, inspiration, and unplugging—all activities associated with a better experience.

GREAT PLACEMAKING = HIGHER PROPERTY VALUES

1.5x

People who visited public spaces designed for inspiration rated the spaces 1.5 times higher on exceeding expectations.

—Gensler Experience IndexSM

TRANSIT EQUATES TO SAVINGS

16%

Residents in transit-rich neighborhoods spend 16 percent less on transportation than those in exurban neighborhoods.

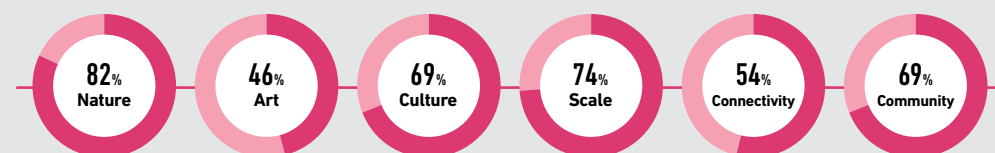
—CityLab

INSIGHTS FROM THE GENSLER RESEARCH INSTITUTE

Activating the Spaces In Between

In a multiyear study, Gensler investigated an overlooked aspect of China's current mixed-use development paradigm: the spaces in between. From outdoor cafés to pocket parks, these are spaces with elements whose value is not easily measured, yet their inclusion can generate projects with positive returns while building a sense of community. The research aims to create a framework for great urban places across the globe.

Percent of survey respondents who consider the following public space amenities as important elements of spaces in between:



Download the white paper: [gensler.com/DF18-11](https://www.gensler.com/DF18-11)



The HUB on Causeway, Boston

Reenergizing a neighborhood

On the site of the original Boston Garden, this mixed-use development adjacent to TD Garden will provide a new city gateway, anchor the neighborhood, and be a notable addition to the Boston skyline. Conceived as a new urban hybrid, this vertical urban district with office, residential, and hotel towers will house a vibrant retail streetscape, premium entertainment, dining, and live events—redefining the idea of a neighborhood community hub and creating a 24/7 destination.

Learn more: [gensler.com/DF18-12](https://www.gensler.com/DF18-12)

Lifestyle Sector > Mixed Use >

ENTERTAINMENT

IP-BRANDED DESTINATIONS GET PLAY

Leading companies are increasingly extending their intellectual property (IP) and brand into the built environment—from attractions and theme parks to resorts and retail environments. By creating IP-branded destinations, owners can attract and grow new audiences, retain visitors, and strengthen their value proposition.

NEW FORMS OF ENTERTAINMENT SUSPEND REALITY

New technologies such as virtual and mixed reality, and artificial intelligence are enhancing traditionally passive forms of entertainment, providing immersive experiences that bring stories to life while allowing brands to interact more directly with consumers.

THE POWER OF LIVE EVENTS

Despite a surge in on-demand, at-home viewing, live events remain viable. In some ways, digital technology has made live content even more profitable. According to Deloitte, live events are forecast to grow collectively by \$5 billion, to \$146 billion in 2018. As consumers increasingly value experience over ownership, live participatory events can prolong and deepen engagement.



FivePoint Amphitheatre by Live Nation
Irvine, CA



Nassau Veterans Memorial Coliseum, Uniondale, NY

A revitalized revenue generator, driven by live events

After extensive renovations, the iconic Nassau Veterans Memorial Coliseum has been transformed into a new entertainment-focused experience, with a focus on live events. With revamped event space entries, concessions, a beer garden, VIP lounge, and backstage areas like the new Artist Quarters, the venue provides guests and performers with a best-in-class arena. Rebranded as NYCB Live: Home of the Nassau Veterans Memorial Coliseum, it is estimated to have generated more than \$137 million in new spending by patrons and created more than 1,300 jobs, many of which have been filled by local residents.

Lifestyle Sector > Mixed Use >

RESIDENTIAL

INCREASING DENSITY AND EFFICIENCY

Urbanization is creating new models for living at all scales and life stages, from college students to retirees. The need for dense, high-rise housing will increase in urban areas, while the demand for small, efficient micro apartment unit types is also rising.

MAKING HOUSING AFFORDABLE

Emerging models such as modular, prefabricated units, micro apartments, and communal housing enliven environments and enhance communities by addressing unmet needs. Scalable housing interventions offer innovative solutions to reduce chronic homelessness.

BLENDING LIVING, WORKING, AND LEARNING

Residential buildings are increasingly becoming mixed use. With remote and freelance work rising, live/work spaces blur the lines between work and leisure. By utilizing shared space, coliving/coworking spaces, communal apartments, and student housing focus on the social experience and cut costs.

Landmark Apartments, Los Angeles

Embracing density through high-rise urban living

This new 34-story high-rise residential building will add desirable housing for a growing Los Angeles. Landmark Apartments offers residents many of the amenities and conveniences that make vertical, high-density, luxury urban living attractive: a new public park, swimming pool and pool deck overlooking the city, a fitness center, lounge, recreation room, and underground parking and bicycle storage. This new building in Brentwood will become a significant feature on the cityscape that will enhance the surrounding neighborhood.

Lifestyle Sector > Mixed Use >
SENIOR LIVING

REDEFINING ACTIVE AGING

As people age, they are staying in or moving into cities in increasing numbers. Seniors crave flexible, mixed-use, active aging communities with easy access to transportation, healthcare, and amenities. Connectivity, choice, independence, and wellness can increase quality of life and “active” life expectancy.

DESIGNING INCLUSIVE COMMUNITIES

In the US, 84 percent of city dwellers want to live in a community with a diverse population, with “a mix of different age groups,” according to real estate investment trust Welltower. Aging cities offer opportunities for brands to innovate, from smart home devices for accessible living to autonomous vehicles that can address mobility challenges.

A POWERFUL CONSUMER FORCE

Sixty-plus urbanites remain one of the strongest consumer forces. Baby boomers outspend other generations on consumer goods and services by an estimated \$400 billion, according to Gensler’s research on design strategies for active aging.



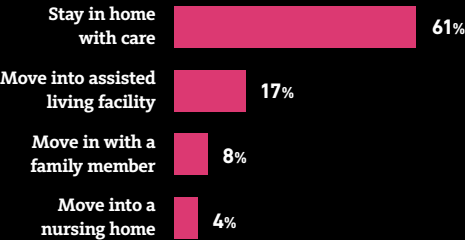
Fountainview at Gonda Westside
Playa Vista, CA

Fountainview at Gonda Westside, Playa Vista, CA

A connected community for active aging

Fountainview at Gonda Westside, a retirement community located in a multi-generational neighborhood in Playa Vista, is designed to transform the experience of senior living into an active community for independent living. The healthy aging campus offers residents an array of amenities, electronic health resources, opportunities for socializing, and an urban lifestyle—with walking paths and easy access to restaurants, retail, and recreation. As a Continuing Care Retirement Community, it offers 176 independent living residences, 24 assisted living and memory care apartments, and an off-site nursing facility in close proximity.

Most older adults want to age at home.



—Pew Research Center

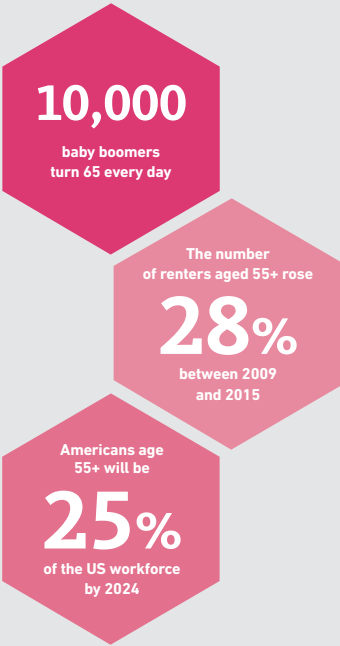


INSIGHTS FROM THE GENSLER RESEARCH INSTITUTE

BoomTown: Gensler’s Ageless Community Model
How can our existing paradigm for our communities evolve to not only guarantee quality of life, but also support the changing lifestyle choices of all Americans, including those over the age of 70?

Gensler’s ageless community model, BoomTown proposes a mixed-use, intergenerational, urban community, based on the idea that smart design and holistic planning can thoughtfully integrate senior living spaces into existing communities.
—Gensler Research Institute, “Building BoomTown”

Learn more: [gensler.com/DF18-13](https://www.gensler.com/DF18-13)



Hospitality
Integrated Resorts/Gaming

HOSPITALITY: FORECAST

As guests' expectations evolve, they demand authenticity, personalization, seamless travel, and on-demand functionality. Successful hospitality environments provide tailored, unique experiences that impart loyalty and create lasting value for hotel owners, developers, operators, and brands—from luxury hotels to restaurants and casinos.

NEXT-GEN GUESTS TAKE CONTROL

Advances in technology are driving hotel guests to take more control over their entire travel experience. To cater to next-gen guests, hotels should offer technological solutions at each stage of their journey—from mobile check-ins, to robotic concierges, to apps that allow guests to order food, arrange transportation, and manage their entertainment. To be resilient and enhance customer service, hotels should adopt the latest technology, whether it is mobile, smart card, or in-room product innovation.

16%

Sixteen percent of guests used digital devices during at least part of a hotel visit.

—Deloitte, "The Changing Guest Experience"

"Even in the face of new technology, evolving customer preferences, and new competitive threats, hospitality will require a human touch."

—Deloitte, "The Hotel of the Future"

WELLNESS EVERYWHERE ENVIRONMENTS ARE THRIVING

Guests are looking to rejuvenate and maintain their healthy lifestyles while traveling. Hotels now provide wellness architecture, on-site fitness, silent spas, healthy food, medical recovery rooms, and in-house nutritionists.

\$3.7T

The global wellness industry is a \$3.7 trillion market.

—Global Wellness Institute

\$800B

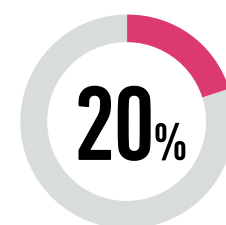
Wellness tourism is predicted to exceed \$800 billion by 2020.

—Global Wellness Institute

THE GROWTH OF "WE" SPACE

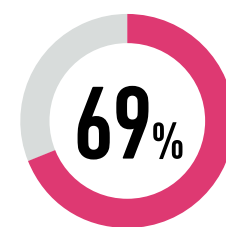
With guests seeking real-time, communal experiences, hotels are providing smaller, no-frills guestrooms, allowing for expansive, dynamic lobbies and public spaces that appeal to social travelers. Some hoteliers are joining the micro-hotel movement, especially in urban centers. The demand for small, efficient micro units is on the rise—with rooms as small as 65 square feet—creating more space for communal, multifunctional areas to conduct business and socialize.

THE BLUR BETWEEN BUSINESS & LEISURE



Of leisure travelers, 20 percent also did business-related activities during their hotel/resort stay.

—Gensler Experience IndexSM: Hospitality



Of business travelers, 69 percent also did leisure-related activities during their hotel/resort stay.

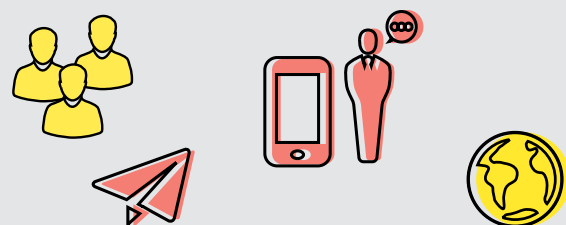
—Gensler Experience IndexSM: Hospitality

INSIGHTS FROM THE GENSLER RESEARCH INSTITUTE

The future of Airbnb and Hospitality

Airbnb has upended the hospitality industry. Will it influence future trends in design and operation?

By focusing on three major topics—urban planning and design, hospitality, and sociological implications—the Gensler Research Institute explores the effects of the sharing economy more broadly, and what it means for urban communities. How will the hospitality industry respond, and what is the potential impact for regulations?



Download the white paper: [gensler.com/DF18-14](https://www.gensler.com/DF18-14)

ITC One Hotel & Sapphire Residences, Colombo, Sri Lanka

A model of vertical urbanism

As urban populations swell, the hospitality industry is leveraging the vertical plane to enhance the guest experience and generate additional revenue. Located on the coast of Colombo, Sri Lanka, ITC One Hotel & Sapphire Residences is a luxury hotel and residences project at the heart of the capital city, which will open its doors in 2021. Drawing inspiration from Sri Lanka's rich history, the project incorporates local architectural elements and vernacular practices. A sky bridge connecting the hotel and residential towers acts as an amenities deck with a swimming pool and jazz lounge—optimizing the vertical space between adjacent towers.

Learn more: [gensler.com/DF18-15](https://www.gensler.com/DF18-15)

Four Seasons Hotel Kuwait at Burj Alshaya, Kuwait City

Drawing from local context and regional tradition

Located within Alshaya Incorporated's new two-tower, mixed-use development on Kuwait City's skyline, the Four Seasons Hotel Kuwait at Burj Alshaya is a contextual building with a distinct Kuwaiti feel. With a design concept developed around a regional architectural tradition of "Mashrabiya," a carved wood latticework window treatment that offers solar control and air circulation, the design responds to the local climate, while also enhancing guests' privacy. Through this regional architectural tradition, the building represents the local environment, as well as the Four Seasons brand.

The 22-story hotel, located within the 140,000-square-meter project, is linked to an office tower through a connecting podium, which provides various amenities, including two ballrooms and an expansive pool terrace. The building strives to create an aesthetic and functional continuity, identifying and distinguishing itself from the surroundings, responding to the climate, while also enhancing the experience of guests, hotel visitors, and office tenants.

Learn more: [gensler.com/DF18-16](https://www.gensler.com/DF18-16)





Lifestyle Sector > Hospitality >

INTEGRATED RESORTS/GAMING

INTERNATIONAL GROWTH, INTEGRATED AMENITIES EVOLVE THE INDUSTRY

Changes in gaming laws are opening new markets in Asia, including the thriving Macau market. Meanwhile, emerging markets in Africa, Asia, and Europe are expanding toward integrated resort models to capture a larger audience. Integrated resorts that offer non-gaming amenities are the new resort paradigm, where non-gaming amenities can bolster a resort's revenue and increase value with adaptable day-to-night programs.

CASINOS DRAW NEW DEMOGRAPHICS WITH SKILL-BASED GAMES

Over the next three to five years, more skill-based games will be introduced on the gaming floor that will offset games of pure chance. Recognizing the purchasing power of millennials, who seek more social, competitive gaming interfaces, casinos are introducing gaming zones on casino floors that house virtual reality games and gambling machines that offer video game-like elements to increase player interaction.

DIGITAL EXPERIENCES ELEVATE THE GUEST JOURNEY

A guest journey can be elevated through the digital experiences that one encounters within a gaming environment. Operators are incorporating technology into their physical spaces to help create memorable and interactive experiences. But technology should be integrated in a way that allows guests to customize and enhance their own experience—not detract from it. If used successfully, technology draws next-gen players.



SPORTS + CONVENTION CENTERS: FORECAST

Sports venues and convention centers can activate communities, generate revenue, and reposition urban areas as regional destinations. Demands for new technology, better service, and more amenities are constant drivers for venue owners and operators. Successful facilities create holistic experiences for attendees and return on investment for owners and developers.

TECHNOLOGY DELIVERS SEAMLESS CONVENIENCE

With digital technology and improved connectivity, fans are now active participants who connect with their favorite teams and players in real time. To meet user demand for seamless convenience and entice fans to leave their living rooms, venues must respond by offering better ticketing flexibility, immersive VR experiences, and multi-screen activation.

\$85^B

Goldman Sachs predicts that the AR/VR market will be \$85 billion by 2025.

HARNESSING DATA TO BOOST PLAYER PERFORMANCE

Sports teams and owners are harnessing the potential of wellness, biometric feedback, tech monitoring, and access to richer personal data to support players in optimizing their performance. Data can also be used as a tool for more focused targeting for sponsors.

SECURITY EXTENDS BEYOND INFRASTRUCTURE

As large venues become target-rich environments, the scope of security is extending beyond building infrastructure to look at mass gatherings of people. Security provisions at sports facilities and convention centers have been inconsistent. Sports organizations are incorporating extended secure zones and using facial recognition, digital ticketing, and ID tracking to identify people inside and outside the venue. The new measure of engagement includes safer environments.

FANS AT THE CORE

Fans must be the priority when establishing financial and experiential targets in venue design. To offer unique, personalized experiences, the line is blurred between fan, player, and hospitality spaces—providing exclusive, direct access to players, coaches, and the field.



More than 50 percent of major US pro league venues feature one or more fan zones with a dedicated footprint.
—PwC Sports Outlook, 2016

“Across the country, in more than a dozen cities, downtowns are being remade as developers abandon the suburbs to combine new sports arenas with mixed-used residential, retail, and office space back in the city.”

—Keith Schneider, New York Times

RISE OF GLOBAL ESPORTS

Data mining technology, and the potential for real-time analytics, is creating a new level of fantasy sports.

\$1 BILLION

The eSports market is expected to reach close to \$1 billion in 2018, and revenue should continue to grow as eSports complements traditional events.
—Deloitte 2018 Global Predictions

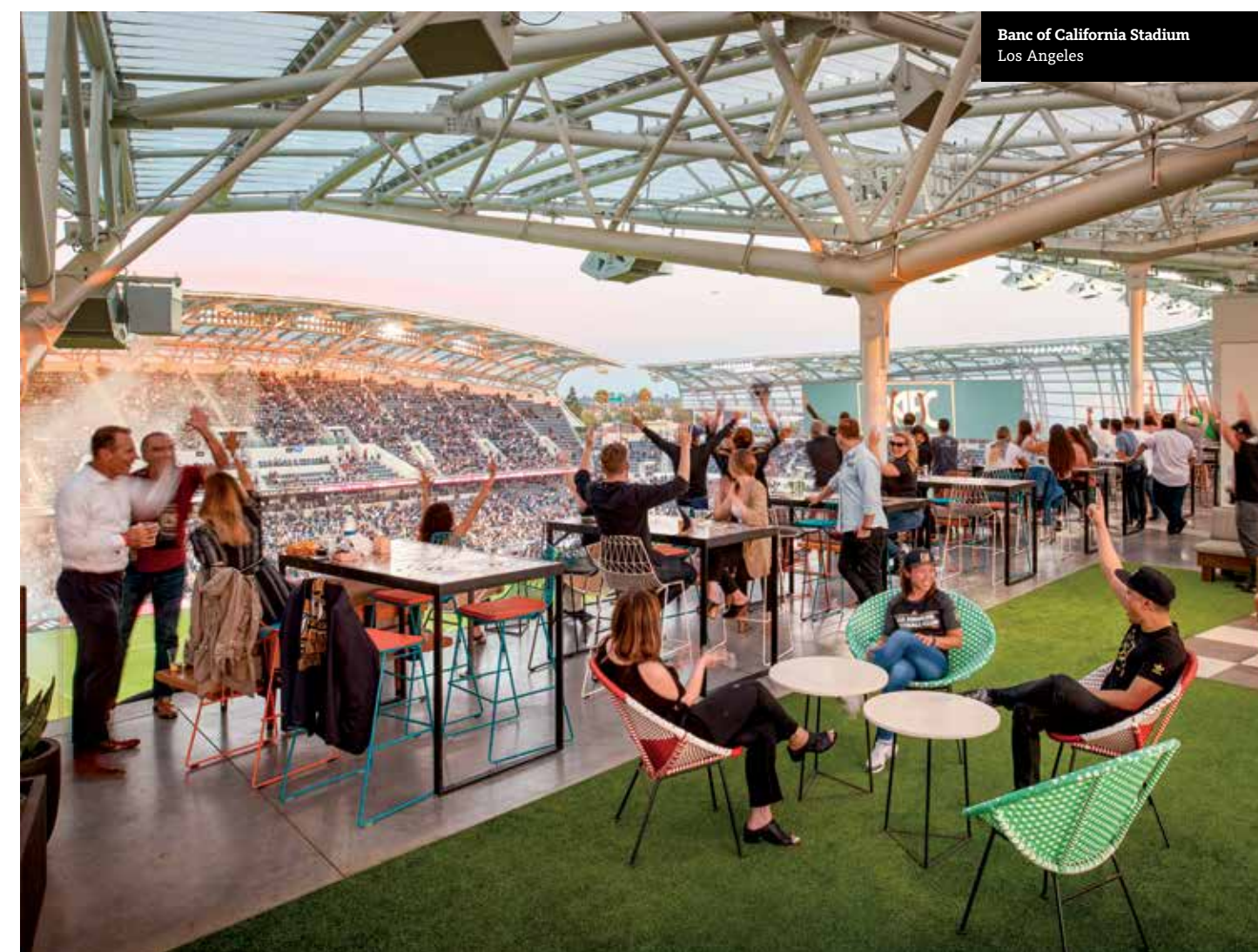
VENUES AS URBAN CATALYSTS

Flexible, multipurpose venues can house year-round activity, creating additional revenue opportunities and spurring hospitality and retail development. Sports facilities and convention centers offer brand connection to the city, acting as a catalyst and anchor to revitalize urban neighborhoods. As developmental opportunities shift away from remote, rural facilities to urban centers, less parking will be needed around venues.



“I’m proud to welcome our new team to this spectacular new stadium, where Angelenos can be a part of the next chapter in MLS history.”

— Los Angeles Mayor Eric Garcetti




Banc of California Stadium
Los Angeles

Banc of California Stadium, Los Angeles

A new benchmark, and a year-round destination

With extensive amenities and views of downtown Los Angeles, Banc of California Stadium sets a new benchmark for the premium Major League Soccer experience, creating a year-round destination that is active on game days and non-game days alike. A European-style soccer experience gives fans greater intimacy with players, getting them closer to the action. A 22,000-seat stadium for Major League Soccer's latest expansion team, the Los Angeles Football Club (LAFC), anchors the larger complex that includes 37000 square feet of new development, including a restaurant, food hall, team store, and rentable private party terrace. The project serves as an anchor along the Figueroa Corridor, promoting economic development and revitalizing the community.

Learn more: gensler.com/DF18-17 





Louisiana Tech University
Joe Aillet Stadium Renovations
Ruston, LA

Lifestyle Sector > Sports + Convention Centers >

SPORTS FACILITIES

**FINDING THE BALANCE
BETWEEN PLAYER AND FAN**

New venues are blurring the lines of connectivity between players and fans. These spaces must be a supportive and secure environment for both, creating adjacencies between locker rooms, the field, and clubs as an exclusive perk.

**INTEGRATING WELLNESS AND
PERFORMANCE INTO VENUES**

Sports venues are incorporating wellness into physical spaces to provide comfort, sanctuary, and enhanced player performance. The potential for wellness and real-time analytics on performance can be used as a recruiting tool to entice players.

**ADVANCED TECHNOLOGIES
INFORM REAL-TIME DESIGN**

As stadiums and facilities are constructed or reimagined, sports organizations are using the latest in virtual and augmented reality technology to inform design, visualize results, and gain approvals—in real time. The ability to be in a venue, even if not physically, enhances the fan experience.



The Star / Dallas Cowboys
Headquarters
Frisco, TX



Texas Tech Football Locker Room Renovation, Lubbock, TX

The modern locker room, reimagined

At the college level, the locker room is a vital recruiting tool. The newly renovated locker room inside the Texas Tech Football Training Facility accompanies a new players' lounge, state-of-the-art lighting system, and 60-inch HD televisions throughout the facility. These facilities offer hospitality-like amenities and personalized experience for student-athletes.

Lifestyle Sector >
Sports + Convention Centers >

CONVENTION CENTERS

GOING VERTICAL

In response to urban densification, convention center design and development is going vertical. These “urban friendly” facilities minimize the building’s footprint, reduce travel distance for patrons, and maximize access to outdoor public spaces.

THINK “DISTRICT”

The district surrounding a convention center plays a large role in how meeting planners evaluate cities and venues competing to host shows and events. A good choice of destination is crucial to attract attendees.

A PRIVATIZED APPROACH

Some convention centers are embracing a privatized approach to catalyze economic development outside urban centers, where accommodations, meeting space, entertainment, dining, and shopping are offered in a closed, hospitality-centric campus.

National Centre of Conventions and Congresses
San José, Costa Rica

A beacon for sustainability

As the country’s first convention center and a vivid example of Costa Rica’s commitment to sustainability, the National Centre of Conventions and Congresses will attract thousands of visitors and locals. Costa Rica prides itself in pioneering eco-tourism, and this 15,000-square-meter facility seamlessly integrates sustainability and natural rainforest-like landscaping. Endemic tropical planting and extensive bio-swales in the parking areas reduce rainwater runoff—a critical consideration for site design in any tropical environment. Inside the main 5,000-square-meter event hall, daylight harvesting solar tubes illuminate translucent fabric sails, providing a unique aesthetic that connects visitors to nature. With other sustainable features, such as energy-efficient lighting, bioclimatic design, and water reclamation, the convention center reduces waste and saves energy. This landmark project opens the country’s tourism industry to new possibilities.

“This project reflects the call of our country to create world-class, sustainable design.”

— Juan Carlos Borbón, Project Director, Costa Rican Tourist Board

Learn more: [gensler.com/DF18-18](https://www.gensler.com/DF18-18)

“During this presidency...we managed to make the Convention Center a reality, a postponed project that will undoubtedly boost the tourism industry, generating benefits throughout the national territory.”

— Luis Guillermo Solís, Former President of Costa Rica

BRAND DESIGN: FORECAST

Great brands connect with audiences on an emotional level. In an increasingly saturated market, brands should create seamless user experiences and unified brand impressions that define, inspire, and engage consumers.

EMBRACING USER-GENERATED CONTENT

Today's consumers wield the ability to shape a company's products and a brand's core identity. With the surge of peer-to-peer sharing and social media platforms, people are tuning out overly branded messaging and demanding authenticity. User-generated content can help companies build a loyal fan base and make people feel like they are an integral part of their brand. To stand out in a saturated marketplace, brands should develop a clear point of view, deepen their understanding of their users, and engage them as co-creators.

57%

More than half of consumers think that less than half of brands create content that resonates as authentic.
—Stackla

RISE OF MICROBRANDS

As the world becomes more fractured and subdivided, brands will need to respond by becoming more specific, customized, and targeted.

65%

Of the total US economy, 65 percent is driven by word of mouth.
—McKinsey

DEMOCRATIZATION OF INFORMATION

Digital tools deliver flexible, scalable, and more personalized experiences for multiple user groups. Deloitte Global predicts that by 2023, penetration of smartphones among adults in developed countries will surpass 90 percent and 5G networks will have launched in most developed markets, offering greater capacity and connectivity speeds. This heightened connectivity means that brands have an opportunity to reach a tech-savvy population of users across global markets.

247M

By 2019, the number of smart-phone users in the US is expected to increase to 247.5 million.
—Statista

THE EMERGENCE OF "LIFESPACES"

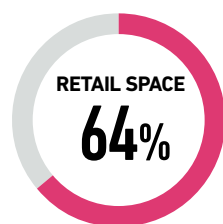
As people are living integrated lives, no one is using spaces in a single way. This has increased our appetite for "lifespaces," multimodal, aspirational environments driven by our innate desire to connect. According to the Gensler Experience Index, places designed to accommodate multiple activities—from working to socializing and everything in between—are far more likely to result in great experiences. Brands should prioritize multifunctional spaces that incorporate different types of activities.

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

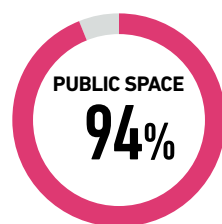
—Gensler Experience IndexSM

MOST EXPERIENCES ARE MULTIMODAL

Percentage of visitors who report doing more than one activity during a recent visit to the following space types:



of retail visitors do multiple activities while there.



of public space visitors do multiple activities while there.



of employees report doing non-work activities at work.

AUTHENTICITY AND TRANSPARENCY ARE KEY

New ways of building connection and community are redefining the role of brands. Today, branding is inextricably connected to a company's culture, values, and reputation. Consumers today believe that a brand's purpose is tied to its identity. They are asking for more transparent experiences to understand how brands are in service to consumers and employees. Transparency has become a brand asset—building consumer trust, attracting brand ambassadors, and forging authentic connections.

86%

For 86 percent of consumers, authenticity matters when deciding what brands to like and support.
—Stackla



Hyundai Card Studio Black
Seoul

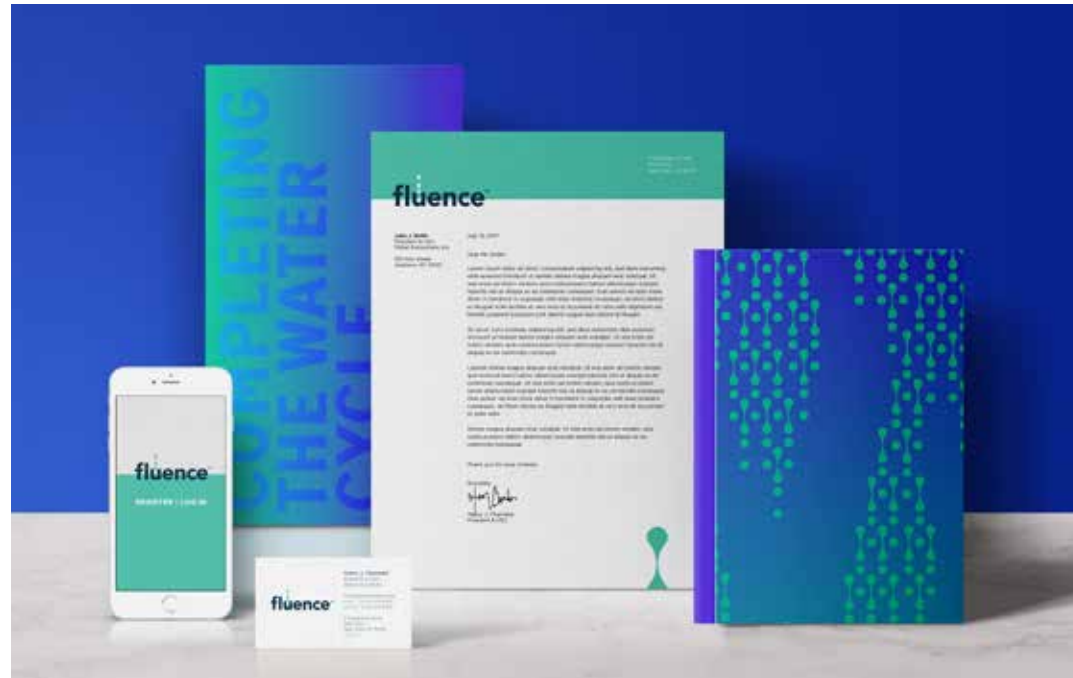


Hyundai Card Studio Black, Seoul

Celebrating an entrepreneurial spirit

Hyundai Card Studio Black, among the first coworking spaces and tech incubators in South Korea, celebrates the process of building a successful idea from scratch. The inspiration behind Hyundai Card's new brand was derived from the qualities and characteristics surrounding entrepreneurial startups—process-driven, flexible, and systematic. Using the concept of "the raw document" to reflect this entrepreneurial spirit, the brand identity and environmental graphics program includes graphic nodes to copy machine toner texture and stenciled graphics. Graphic elements are threaded throughout the space's signage, exposed walls, and thematic finishes.

Learn more: gensler.com/DF18-19



Fluence Brand Identity and System
New York



Verizon Global Headquarters
Basking Ridge, NJ



Burger Boy
San Antonio, TX



LinkedIn Headquarters
Chicago

DIGITAL EXPERIENCE DESIGN: FORECAST

As our lives continue to evolve with advances in technology, the built environment is becoming more integrated into our digital lives. People are seeking less friction between physical and digital experiences, creating opportunities for buildings, systems, and services to drive connections between people, places, and things. Digital experience design is deeply integrated into architecture and space design through immersive spaces, connected user experience, and intelligent buildings or environments.

PERSONALIZED RELATIONSHIPS THROUGH CONNECTED USER EXPERIENCES

Across workplace, retail, health-care, travel, sports, and entertainment, the best experiences are personalized to meet individual needs. Designing for personalized engagement across the complete customer journey—before, during, and after people engage with your environment—leads to new insights and game-changing opportunities.

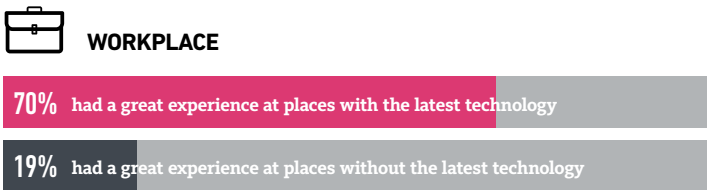
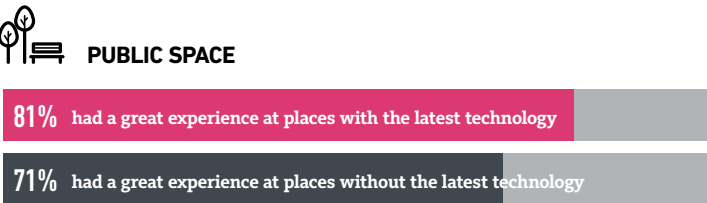
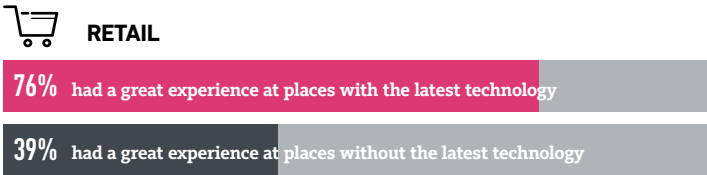
MIXED REALITY TAKES SHAPE

When advanced technologies like artificial intelligence, augmented reality, and IoT are integrated within buildings, they boost performance and engagement, reduce cognitive load, and automate repetitive tasks, giving users a more seamless and intuitive experience. AI services, augmented wayfinding, and virtual collaboration tools are an integral part of how we engage with people, places, and information.



Digitally enabled environments create new kinds of smart experiences.

When technology is up to date, visitors have better experiences:



—Gensler Experience IndexSM

TECHNOLOGY FORMS A STRONG IMPRESSION

According to the Gensler Experience Index, the presence of technology is a driver of a great experience, even if people don't interact with it directly. But technology for its own sake can miss the mark, particularly if content goes stale. Technology embedded in a space needs to contribute to the overall customer experience. If content or interactive technology can't be kept up to date, they're not worth having.

BRINGING MEANINGFUL INTELLIGENCE TO BUILDING SYSTEMS

As we gather richer data and apply machine learning, built environments will become more adaptive and deliver more tailored services improving how people live, work, and play. Intelligent personal devices and building systems will learn behavior and activity patterns, predict and adapt to demand, and customize experiences by bringing meaningful intelligence to people, buildings, and operations.

IMMERSIVE ENVIRONMENTS CHANGE BRAND PERCEPTION

Creating desirable brand experience means integrating physical and digital engagements into a seamless system that delights all the senses and enhances productivity. To succeed in a technology-driven world, brands have to behave less like marketers and more like exhibit designers—shifting from single-point digital interventions to creating interactive ecosystems that deliver a holistic customer or employee experience.



Delos, New York

Showcasing data through digital display

Delos, a wellness real estate and technology company and founder of the International WELL Building Institute and the WELL Building Standard, engaged Gensler to design its headquarters and a branded digital experience that illustrates its mission to employees and clients. The installations are expressed in real-time visual renderings as they educate and interact with guests and employees. Using its own workplace as a case study, sensors in the space provide real-time data related to wellness that is artistically expressed through responsive visuals in changing contours, colors, and graphics. The goal is to make the space educational while promoting the well-being of the people who inhabit it.

Learn more: gensler.com/DF18-20



RETAIL CENTERS: FORECAST

To thrive as next-generation retail destinations, traditional malls must reinvent themselves and fundamentally recalibrate the shopping experience. Their new hybrid model is amenity- and service-rich, leverages technology, promotes culture, and offers ample leisure and event activities.

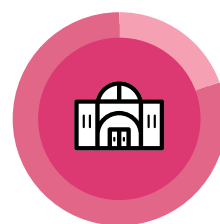
REVITALIZING THE MALL: CREATING THE NEW HYBRID RETAIL CENTER

The notion of shopping has changed—it's no longer just about product or a collection of stores. Consumers are browsing and purchasing 24 hours a day—anytime and anywhere. To respond, retail centers are evolving into hybrid destinations, breathing new life into the mix by bringing different uses together to maximize assets and stay relevant. As they reimagine themselves, malls will reshape their offerings, moving from a focus on apparel stores clustered around department store anchors to more diverse networks of non-apparel retailers, leisure and entertainment tenants, and event and pop-up spaces. As department stores consolidate too, mall developers will continue to see the value of these rich tenant mixes.



35%

Online sales will grow to 35 percent of all retail sales by 2030 from today's 17 percent.
—Credit Suisse



20%–25%

Between 20 to 25 percent of American malls are forecast to close by 2022.
—Credit Suisse

TRADITIONAL MALLS EVOLVE TO BECOME CONNECTED “SMART” CENTERS

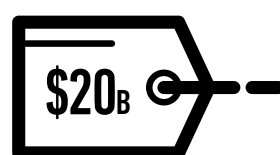
The mall is becoming the connected smart center: a fully connected network of backbone and infrastructure that controls mall music, building management, “smart” parking, and digital media. Instead of focusing on growth, retailers and retail centers should focus on providing a frictionless shopping experience. Westfield, for example, is addressing speed-to-market challenges through OneMarket, a retail technology network for AI-powered, data-driven shopping experiences.

“We have to integrate the same toolsets in a physical environment that Amazon has in a digital environment.”

—OneMarket President and Westfield Corporation Board Member Don Kingsborough, via PSFK

THE VIRTUAL MALL DRAWS NEXT-GEN CONSUMERS

While VR shopping is still maturing, some retail centers are using virtual assistants to engage shoppers through storytelling and guide them through the property. Retailers such as Chinese e-commerce behemoth Alibaba and UK fashion e-tailer Asos are developing immersive virtual shopping mall experiences, allowing users with VR headsets to walk through virtual shops, browsing and purchasing digital versions of products with real-time availability and pricing. Others are installing immersive VRcades, VR theaters, or VR experience centers to draw next-gen consumers. But technology alone isn't enough to produce a compelling customer experience; user-centric design is key.



Global consumer spending on AR and VR is forecast to exceed \$20 billion in 2021.
—International Data Corporation

EXPERIENCE IS A DIFFERENTIATOR

US spending dedicated to experiences has increased 70 percent, and nearly 80 percent of millennials would choose to spend money on an experience or event over buying an object, according to JLL. As the experience economy continues to expand, previously distinct categories such as art, gaming, retail, hospitality, and entertainment are expected to collide.

2020

By 2020, customer experience will overtake price and product as the main differentiator.

—Walker, “Customers 2020: The Future of B-to-B Customer Experience”

DESIGNING TIME, ANTICIPATING CUSTOMER NEEDS

Experience no longer starts on the property; it starts in people's homes, or in transit. Technology connects with customers beyond the property limits. Developers are investing in anticipatory services, providing hospitality-like amenities that anticipate and address today's high-convenience consumer needs.

The Avenues, Kuwait City, Kuwait

A retail city, and an exercise in placemaking

The Avenues, a retail concept in Kuwait City inspired by the world's most vibrant cities, is as much about placemaking as it is retail design. The Avenues is more than a mall: it's a retail city that positions one of the Middle East's premier retail centers as a lifestyle destination.

Learn more: [gensler.com/DF18-21](https://www.gensler.com/DF18-21)



Westfield Century City, Los Angeles

A “smart” center that delivers frictionless shopping

To update its flagship property and compete with online retailers, Westfield partnered with Gensler for the expansion and renovation of Westfield Century City. Working with Westfield Design and Kelly Wearstler, Gensler led a team of experts to transform the property into a retail destination. The property embraces local aesthetics, defying conventional big box archetypes.

RETAIL: FORECAST

Retail is no longer about products; it's about the relationship between a brand and its audience. Retailers should harness the power of content and space in equal measure to create experiences that maximize engagement. The result needs to be seamless, no matter the medium—online, mobile, social, virtual, or physical.

CROSS-CHANNEL
CONSISTENCY IS KEY

Retailers are combining mobile, brick-and-mortar, and e-tailing for a single, consistent experience across all channels. To thrive, brick-and-mortar stores should be programmed with the same level of targeting and personalization offered online. With new tools ranging from m-commerce and biometric payment to self-service checkout, the entire shopping experience should be seamless and frictionless. A unified, seamless customer journey is imperative: creating memorable moments at every touchpoint is an opportunity to inspire repeat business.

74%

Among customers in the US and UK, 74 percent are frustrated by inconsistent experiences across channels.
—Salesforce

ONLINE-ONLY RETAILERS
GET PHYSICAL

Online retailers are finding a home in brick-and-mortar stores. But as they make this transition, they need to seamlessly translate their brand to physical spaces. Meanwhile, physical retailers need to compete with e-tailers by giving consumers a reason to shop in person through personalized, engaging, and unique experiences that are fit for purpose.

DATA-DRIVEN INSIGHTS YIELD AUTHENTIC EXPERIENCES

With heightened consumer expectations for price, quality, and convenience, retailers are turning to data-driven insights to deliver personalization at scale, differentiate from the competition, and push new product development further. According to Forrester, investments in artificial intelligence and predictive analytics will triple as retailers work to convert customer data into personalized experiences. Real-time analytics provide actionable data that can drive bottom-line sales. More nuanced forms of customer profiling can improve experiences for all generations.

51%

By 2020, 51 percent of consumers expect that companies will anticipate their needs and make relevant suggestions before they make contact.
—Salesforce

81%

More than 80 percent of consumers want brands to understand them better and know when and when not to approach them.
—Accenture

“Sixty-two percent of shoppers still want to feel, touch, and see the merchandise in person.”
—Retail Dive, 2017

HUMAN + DIGITAL ENGAGEMENT:
AI TRANSFORMS THE CUSTOMER EXPERIENCE

Despite the need for faster delivery and service hastened by artificial intelligence (AI) and automation, consumers’ desire for personalized, human interaction remains a key factor in customer loyalty and repeat visits, and many shoppers still prefer to interact with a sales associate when visiting a store. Retailers should create more human interactions between automated processes and customers—artfully combining human and digital engagement. The convergence of in-store and digital data will create a new breed of highly connected sales professionals.

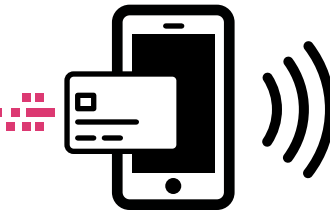
Consumer Products
Service Retail Environments
Department Stores
Food + Beverage

MAKE TIME MATTER

Consumers are willing to pay a premium for places, products, and services that give them back their time. Clear navigation, easy-to-use technology, and services that provide value support the high-convenience lifestyle of today’s consumers. Retailers need to get the basics right so consumers go beyond task mode to discover and explore.

SEAMLESS PAYMENT,
SEAMLESS SERVICE

The rise of mobile payments, cryptocurrencies, and RFID technology is streamlining the checkout process. Contactless payments are enabling seamless service, unmanned stores, and “grab and go” shopping, such as Amazon Go’s retail concept. These innovations are allowing retailers to cater to busy consumers’ appetites for efficiency and convenience.



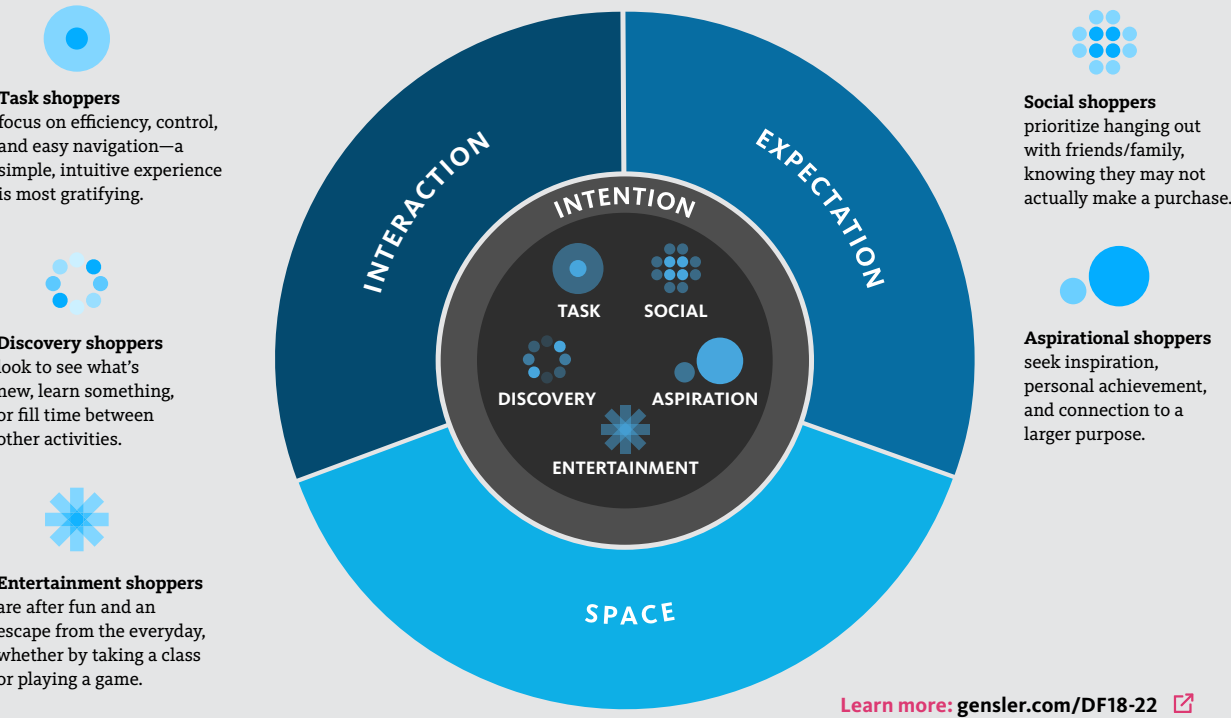
INSIGHTS FROM THE GENSLER RESEARCH INSTITUTE

The Gensler Experience IndexSM

The Gensler Research Institute set out to identify and quantify the elements of human interaction with design that create experiences that resonate.

Researchers conducted a series of ethnographic studies to gather insights about experience, followed by quantitative research that included a survey of 4,000 US respondents. Perhaps the biggest finding: design is a key differentiator between a good experience and a great one; it's the “x factor” that engages people's emotions and keeps them coming back.

The Gensler Experience Framework & Modes of Experience



Learn more: gensler.com/DF18-22

Key Findings Overview

The impact a store makes
Transactions can happen online, but emotional connection and engagement are best built in person. Brick-and-mortar stores offer an opportunity to humanize brands and create community, while also promoting and highlighting product quality and value in a way online retail still cannot.

It's all about the journey
Understanding and designing for the whole journey, and creating memorable moments that inspire and engage, are the foundation of great customer engagement. A unified and seamless customer journey is imperative—customer touchpoints should be additive and aligned.

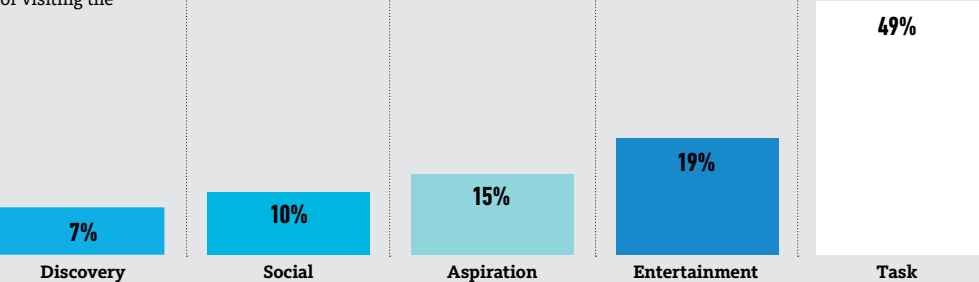
Every move counts
Consumers are armed with more information than ever today, and their expectations have never been higher. They expect in-store content, products, and technology to be fresh—and their experience suffers if they think it's stale. For optional items like curated content or interactive technology, if you cannot keep it up to date, it's probably not worth having.

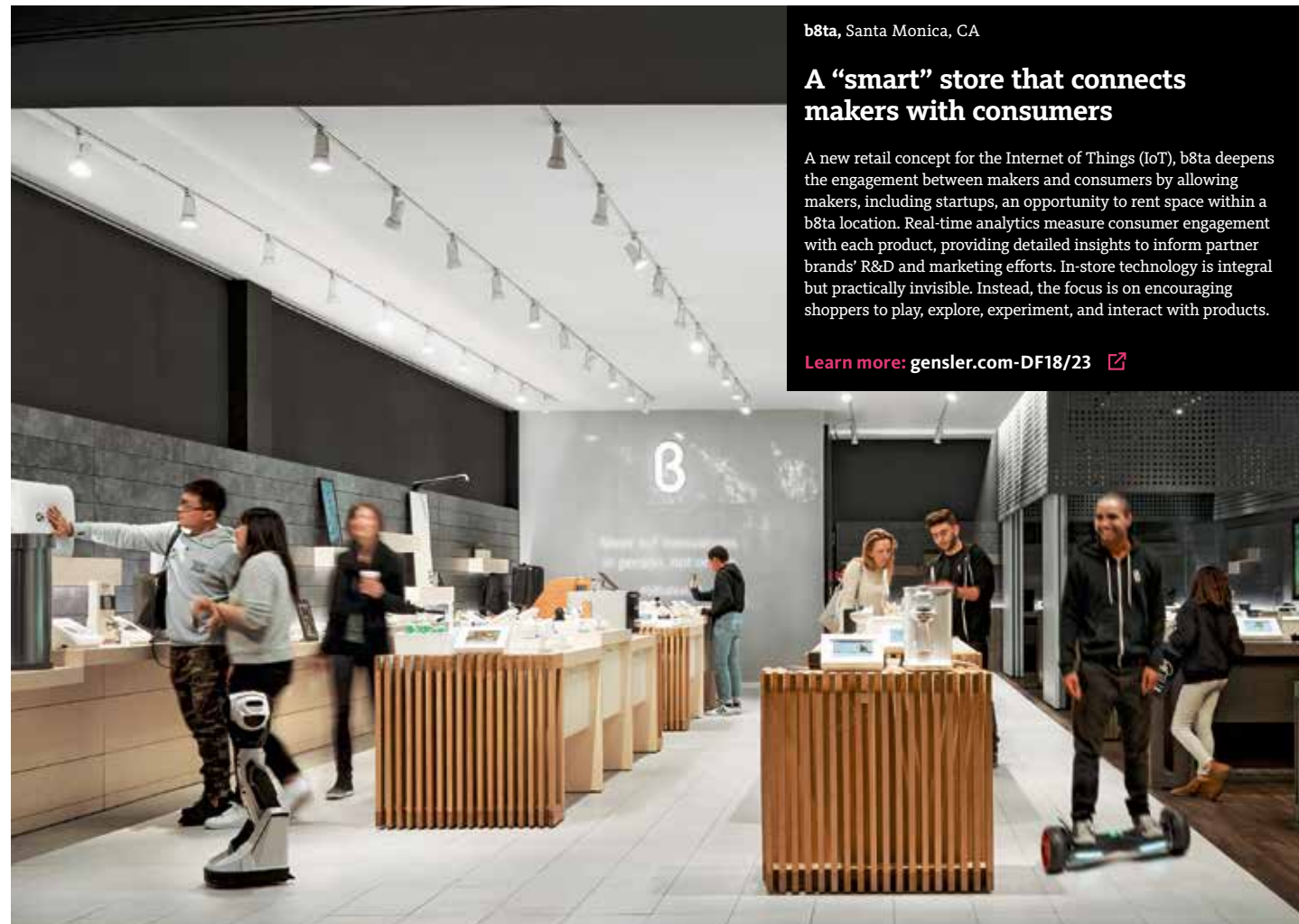
Embrace the blur
Retail spaces today are accommodating a wider and wider range of activities—and those that do are the most likely to offer a great experience. Stores can take lessons from great public spaces in this regard, which currently support the widest range of activities and offer the most highly rated experiences.

Experience at any age
A focus on millennials may be sacrificing the experiences of older generations. Shifts toward more nuanced forms of customer profiling and engagement, and exploring new ways to save customers' time and effort, can improve experiences for everyone.

Shopping is still shopping
Ultimately, great experiences and “wow” moments only work if basic customer needs are met: intuitive navigation, easy checkout, lighting and product display, and great staff are all baseline. Unfortunately, many stores today are still missing the mark.

They are not just there to shop—
Respondents' primary reason for visiting the store by experience mode:





Lifestyle Sector > Retail >

CONSUMER PRODUCTS

REDEFINE THE METRICS OF SUCCESS

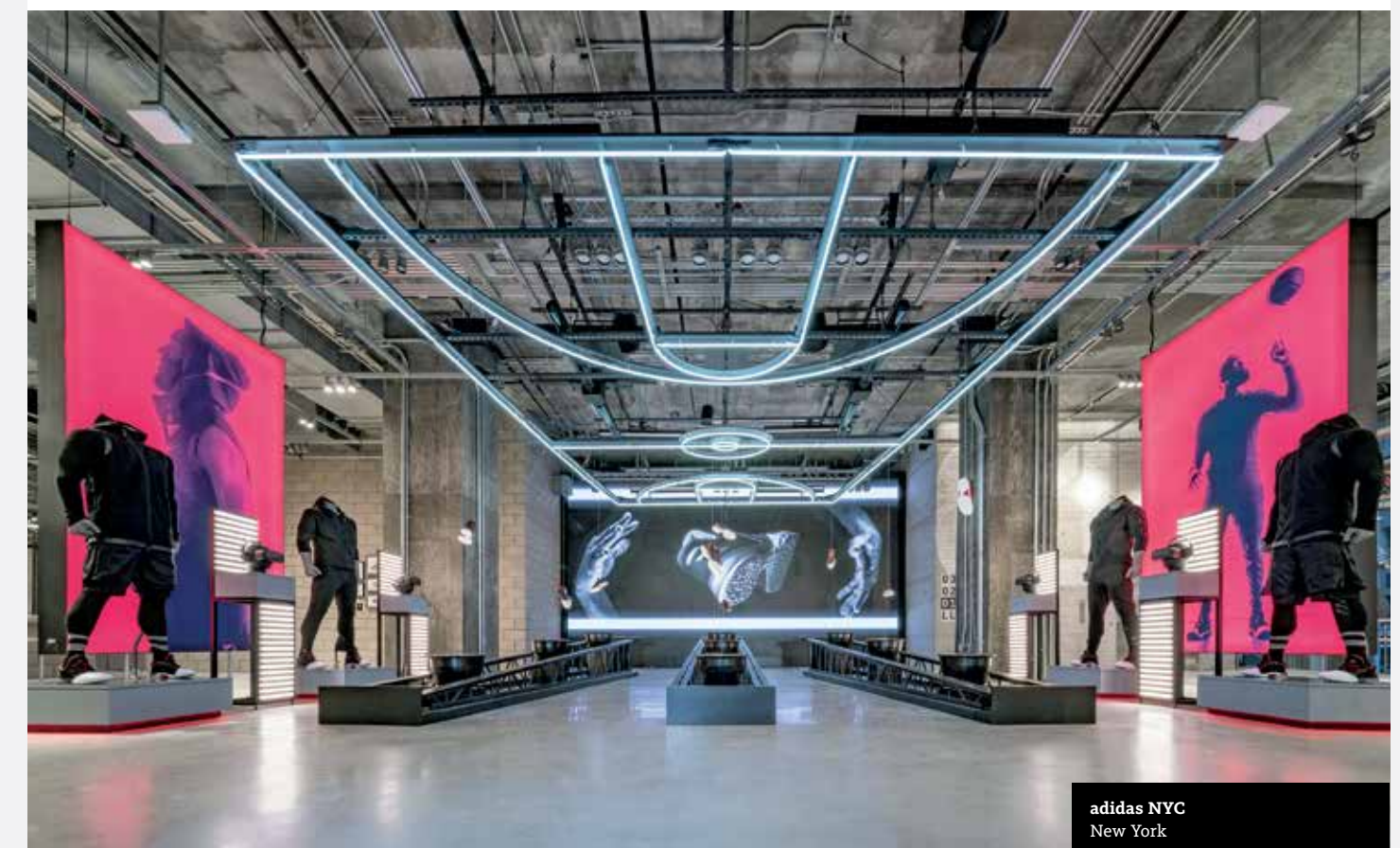
The days of only tracking footfall and year-over-year sales are over. The store is now a destination for the next-generation shopper. Measuring new types of engagement—beyond transactions—is a necessary part of understanding shifting consumer behaviors and demographics.

PLAY & STAY INSTEAD OF GRAB & GO

The consumption of experiences has outpaced the consumption of goods. The future of retail will encourage customers to play and stay, rather than grab and go. Programming and dayparting will be core to this customer engagement strategy.

LOCALIZED DESIGN CRITICAL TO GROWING GLOBAL BRANDS

With raised expectations of customer experience, brands that embrace locality will rise to the top. Localized, tailored brands are well-positioned to build deeper, meaningful experiences with their customers, while also providing a sense of community through their retail environments.





Comcast Studio Xfinity
Washington, DC

Lifestyle Sector > Retail >

SERVICE RETAIL ENVIRONMENTS

EMBRACING OMNICHANNEL

Physical retailers need to reflect a brand's values, merging the digital experience with a physical one. Mobile access makes shopping convenient, and successful digital integration allows for unique, personalized customer experiences. To reach younger generations, retailers should build a community of brand loyalists with a seamless transition from online to in-store service.

MORE THAN TRANSACTIONS: A CUSTOMER-CENTRIC APPROACH

While improving omnichannel is critical, in order to respond to the growing appetite for authentic experiences, retailers must go beyond omnichannel to provide a customer experience-centric approach. The store should be about human interactions, not transactions.

CONNECTING WITH GEN Z CONSUMERS

When it comes to shopping and brand loyalty, Gen Z is looking for real, authentic experiences, which can't happen without forging relationships. Studies show that 77 percent of Gen Z consumers in the US prefer to shop in a physical store. With the greatest intergenerational transition of wealth in US history anticipated, retailers need to focus on connecting with these young generations.

Lifestyle Sector > Retail >

DEPARTMENT STORES

BRINGING STARTUPS INTO SHOWCASE DIVERSITY

To target the burgeoning demographic of global urban consumers, big box retailers are welcoming startup brands into their spaces. These partnerships diversify product offerings while creating curated spaces that appeal to shoppers who are seeking a more local and personalized experience.

DIFFERENTIATION THROUGH SERVICE

In an era when social media and user-generated content are increasingly pervasive, service and authenticity are paramount. To differentiate themselves, retailers must shift their focus back to the customer experience. Offering environments for consumers to share positive brand experiences helps to build meaningful connections.

FOCUS ON COMMUNITY, MISSION A MUST

Consumers respond favorably to brands they conceive as socially responsible and contextually relevant. According to Nielsen, millennials and Gen Z consumers are more likely to buy from a brand that resonates with their personal values, and are willing to pay more for a product from a sustainable or socially conscious brand. When done right, in-store experiences can connect customers to a brand's larger purpose or mission.



El Palacio de Hierro, Polanco, Mexico City

Local artisans to local consumers

This department showcases artisanal brands local to Mexico City, offering customers an experience that is atypical for a traditional department store. As retailers are trying to find complementary uses to increase dwell time, locally resonant F&B spaces are becoming more prevalent as a way to engage visitors and celebrate local culture.

Lifestyle Sector > Retail >

FOOD + BEVERAGE

PERSONALIZED SERVICE AS A PRODUCT

Customers are increasingly placing higher scrutiny on price, convenience, and a personal touch. Mobile payments and delivery save time so that busy consumers in task mode still receive personalized service. These innovations are allowing food and beverage retailers to provide end-to-end personalized service—from customized menus to meal delivery and faster checkouts.

SUPPLY UNCHAINED: TRACEABLE TRANSPARENCY

Whether for food safety, nutrition, or environmental and social responsibility, consumers are demanding more transparency from retailers and brands about the lifecycle for the products they consume. To build authentic connections with consumers, brands are disclosing information throughout their supply chain. Technologies such as block-chain, RFID, and sensors can increase traceability and give consumers end-to-end visibility into how products are sourced, produced, and delivered.

EMBRACING TACTILE, MULTISENSORY DESIGN

Food and beverage retailers are engaging consumers through tactile reassurance, incorporating visual, sonic, haptic, and olfactory experiences into environments. Multisensory experiential dining options offer immersive entertainment to consumers, with sharable Instagram-worthy moments that surprise and delight. According to Stackla, 76 percent of people say they would share a positive food or beverage experience on social media.



Starbucks Reserve Roastery, Shanghai

An immersive experience that stimulates the senses

Introduced in December 2017, the Shanghai Starbucks Reserve™ Roastery marked the iconic brand's first venture overseas, bringing the Starbucks Reserve experience to an enthusiastic new audience in one of the world's most dynamic, inviting cities.

A fully functional roastery and retail showcase, Starbucks Reserve Roastery Shanghai brings together education, interactive experience in coffee culture, and a coffee roasting process unique in the Asian market. Here, the guests can experience the roasting process, learn about coffee and tea, and observe the meticulously trained staff prepare the delicious beverages for dispensation and consumption—and enjoy the sensory experience of it all. The careful programming has paid off; the queues at the doors that persist months after opening are proof of the level of engagement this project has sparked for the Starbucks brand.

Starbucks limits the number of customers inside the roastery to maintain a specific ratio to the staff. The carefully orchestrated coffee experience guarantees that customers are able to fully enjoy a variety of “engagement activities” as they sip together and shop. The design of the space itself stimulates interaction and inspires curiosity and delight. Conceived in partnership between Starbucks and Gensler, the immaculate spatial experience is formed through rich textures and quality finishes. The Gensler retail team designed several key pieces of the interior, including the complex ceiling system that creates an undulating rhythm to complement the space.

TOP TRENDS IN CITIES

Cities are epicenters of culture, ideas, and engines of economic and social capital. As the global population continues to shift to urban areas, that growth comes with great challenges—but cities also command the critical scale to address them. Resiliency calls for new strategies for creating the places where we live and work, and the mobility that links them. To cultivate smart density, design will embrace change in a holistic way to benefit and reinforce the whole community.



CITIES

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SMART CITIES BECOME MORE ADAPTABLE, RESILIENT

Adaptability is becoming a more complex and pressing issue. Increasingly, it will be a function of how smart a city is. “Smart” isn’t only about technology, but also how it is leveraged to connect people—and make their lives better and their communities stronger. Design is the vehicle for those connections. Doing so smartly requires the development of spaces and places are that high touch and loose fit, and able to connect individual experience with urban systems.

AS ENGINES OF INNOVATION, CITIES NURTURE A NEW MIX

Community institutions are finding new partners to extend what they do and to innovate faster. The mix is also changing. Industry and organizations with complementary activities collocate to increase utilization and spread costs. Density is crucial, but so is authentic placemaking for anchoring the knowledge networks and amenities a city hosts. Each building is an element of infrastructure within the wide context of a balanced, self-sustaining urban ecosystem. The old paradigm was about separate spaces for separate uses. Today, it’s about combining uses and integrating the spaces of life seamlessly.

CITIES TAKE THE LEAD ON CLIMATE ACTION; THEY DEPEND ON IT

Climate resilience, the capacity to adapt to change or spring back from disaster, is one of the most pressing challenges cities face. It is also our greatest opportunity. Meeting the challenge demands new strategies. Sharing data publicly is the first step in this direction—reporting pollution levels, for example, or documenting climate change so that we can improve our impact. Data helps us with the diagnosis. To respond, design will adopt a tactical, interdisciplinary approach that yields holistic reductions in climate impact.

THE POWER OF DIVERSITY GIVES CITIES VITALITY

As the world globalizes, it gets more diverse. It’s not only the mix of people, but the way that technology and culture combine to increase the variety of experiences available to us—impacting the ways we learn, treat ourselves, travel, and communicate. It’s also radically influencing the way we design space and plan cities. Diversity—of people, ideas, talents, and uses—is what makes cities vibrant and sustainable. That vibrancy and the opportunities available, in turn, draw people to urban centers and add to their appeal.

WELLNESS WILL BE THE NEW MEASURE

Making cities healthy is essential to urban planning today. There is no avoiding the research proving how planning impacts our health and quality of life—and how those in turn impact the quality of our cities. At work, holistic well-being is becoming a key metric for higher performing workplaces. Implementing wellness programs that encourage mental well-being, fitness, and outdoor access decreases sick days and boosts happiness and productivity. For the spaces in between, green spaces are on the rise, boosting the livability and health of our urban environments.

STRONG GROWTH WILL BE INCLUSIVE GROWTH

Rising inequality is an issue that comes to a head in cities around the world. And as cities urbanize, the inequality and the challenges connected to it become more severe—and costly. Mounting research shows how reducing barriers to economic gains and social inclusion benefit people and local economies. Recognizing this, cities and civic organizations are coming together to create pathways of inclusion and opportunity, and to ensure that cities are built for everyone. Data-driven smart cities will also help flip the frame of traditional top-down models.

URBAN STRATEGIES + DESIGN: FORECAST

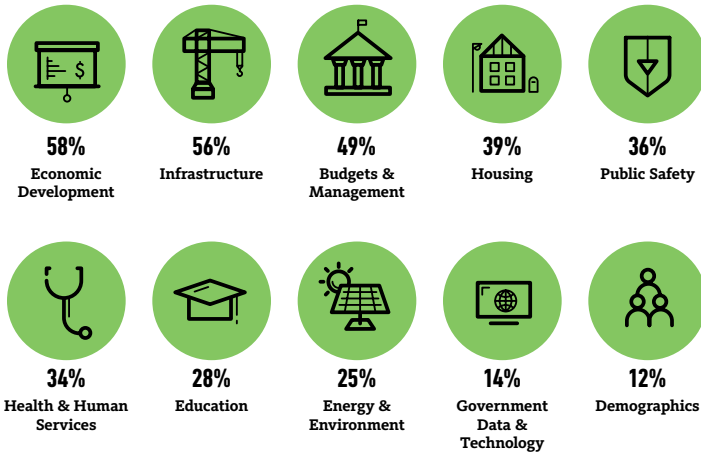
Rapid urbanization, demographic change, and the maturing digital age continue to challenge the spatial distribution of people and resources across our cities and the globe. Successful design creates places that are rooted in local culture while acting as a catalyst for socially sustainable urban transformation.

URBAN CENTERS DISCOVER NEW LIFE

As urban migration changes the dynamics of cities, many will face challenges in meeting the needs of their growing populations, including for housing, transportation, energy, and infrastructure. That's causing city leaders to examine how they can redevelop existing assets for new uses and people. Whether it's at block or district scales, a focus on providing smart, transit-rich density can unlock opportunity for new and longtime residents alike.

URBAN GROWTH AT A GLANCE

Top 10 issues affecting cities, according to mayors:



—National League of Cities

HEALTHY CITY PLANNING CENTERS ON THE HUMAN EXPERIENCE

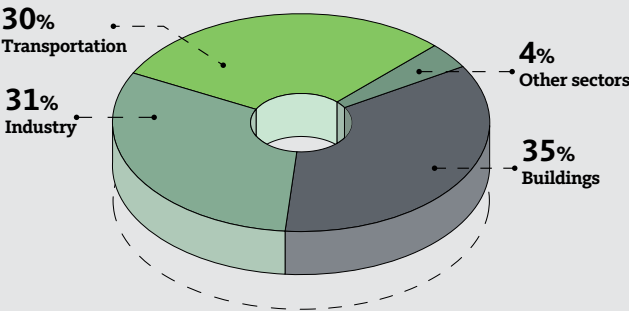
Health has become a major factor in urban and community planning, as research and public awareness about the link between them grows. As air quality, access to healthy food, and safe spaces for exercise become increasingly important to urban dwellers, cities are looking for ways to integrate these features into every environment. Design will focus on human experience, with a process guided by understanding and engagement to result in better health outcomes and increased levels of happiness.

INSIGHTS FROM THE GENSLER RESEARCH INSTITUTE

Climate Impact by Design

Impact by Design is Gensler's annual publication analyzing the sustainable performance of our work. In it, we provide a comprehensive look at the energy performance and the carbon impact of more than one billion square feet of our design work, a broad analysis of how new innovations in design, engineering, and technology are improving the sustainable footprint of the global built environment.

Energy Use by Sector:



—International Energy Agency

Download the white paper: [gensler.com/DF18-25](https://www.gensler.com/DF18-25)

“Smart cities have the potential to solve major problems and drive innovation, bringing people together to create thriving ecosystems.”

—Diane Hoskins, Co-CEO, Gensler

PLANNING SETS ANCHOR IN RESILIENCE

Changing weather patterns and the anticipation of global seawater rise are affecting how we plan sustainable places. Cities will be the most impacted by the weather events, migration, and resource scarcity projected for this century. Working together, policy and design can anchor city planning in resilience, which includes dimensions of security, culture, and behavioral change to measure how prepared a city is to bounce back from challenges.

MULTIMODAL CONNECTIONS CULTIVATE SIDEWALK CULTURE

We live our lives in motion, so for cities to really work, they must connect people with the places where they live, work, and learn. Diversifying transit options and enhancing their interface with the streetscape will be a major catalyst for that change. Railway and bus stations across the world will undergo major upgrades—updating transportation infrastructure and improving the user experience.

Cities + Communities
Transportation



Southbridge Redevelopment Plan, Chicago

Revitalizing urban environments through mixed-income housing

Located on Chicago's Near South Side, Southbridge will be a new mixed-income, transit-oriented development that blends retail, commercial, and residential development on a former public housing site. The plan introduces needed mixed-income housing, and serves as a gateway between the South Loop and the city's South Side neighborhoods.

Learn more: [gensler.com/DF18-24](https://www.gensler.com/DF18-24)



Wuhan Waterfront
Wuhan, China

Cities Sector > Urban Strategies + Design >

CITIES + COMMUNITIES

SUBURBIA GETS URBAN TOO

Millennials are increasingly moving to the suburbs, and urbanizing them as a result. Companies that once chose suburban locations are considering preferences for convenient, mixed-use, walkable places. Suburban office parks are becoming satellite downtowns, integrating work with other uses to generate urban character.

PLACEMAKING ACTIVATES COMMUNITY

Formerly in the realm of grassroots groups, placemaking is now being embraced by business-improvement districts, developers, and local governments. Placemaking combines built interventions and programming, and involves working with the community to tailor solutions to local needs and character.

SECOND CITIES SEE A RESURGENCE

Cost-of-living and livability have started to influence personal decisions about city selection. And smaller cities are realizing there is a niche for them to occupy, particularly in attracting companies and talent. Millennials are moving to these cities where they can afford the lifestyle they're after.



New Carrollton Transit-Oriented Development
New Carrollton, MD



Amtrak Philadelphia
30th Street Station
Philadelphia



Metro Design Studios
Los Angeles

Cities Sector > Urban Strategies + Design >

TRANSPORTATION

MOBILITY GETS REIMAGINED

The movement toward new forms of transportation, including autonomous vehicles, bike and scooter shares, and high-speed rail, impacts not just how we get around the city, but the very fabric of the urban realm. Transportation providers are also looking at leveraging existing assets, such as excess land, as a way to fund needed infrastructure improvements.

STREETS MADE FOR WALKING

Walkability is one of the most sought-after amenities, and alternative transit options make streets pedestrian friendly, while spurring development at the human scale. If reliance on cars diminishes—as is projected—narrowing roadways will give designers the space to create sidewalk cafés, parklets, bike lanes, larger drop-off locations, and pedestrian-focused spaces with wider sidewalks or places for the community to gather.

Education
Civic + Culture
Religious

EDUCATION, CIVIC + CULTURE FORECAST

Educational and cultural institutions form the foundation of our urban experience; they allow individuals to reach their full potential, neighborhoods to thrive, and society to prosper. To evolve, these institutions are looking to other fields to reimagine and integrate programs for a vibrant future.

DESIGN WILL BE PERSONAL

Integrated platforms, digital environments, and personalized pathways equip people to chart their own paths and curate much of what they experience. By understanding what drives people to engage and succeed, learning and cultural environments will be geared to meet individual needs, with that purpose guiding design every step of the way.

65%

Of today's grade-school kids, 65 percent will end up at jobs that haven't been invented yet.

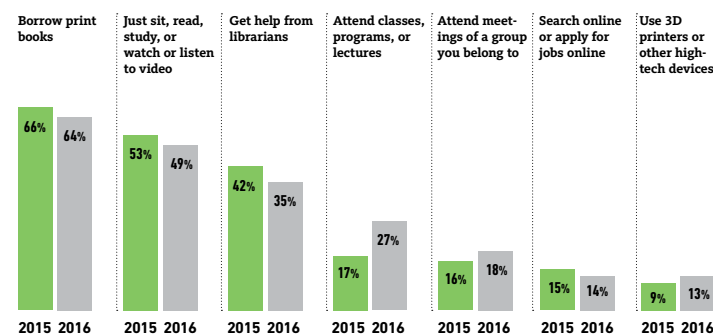
—Pew Research Center

DESIGN WILL BE ASKED TO BUILD SOCIAL EQUITY

A focus on inclusion and equality has spurred objective, data-driven decision-making. There is profound public pressure—and increasingly an economic argument—for responding to pressing challenges of inequality. Spaces and programs will flex to provide access to a broader spectrum of people and uses. A robust connective matrix of public space supports economic development and provides a platform for enhancing social interaction and livelihood opportunities, and bridging diversity.

LIBRARIES, CENTERS OF LEARNING FOR GENERATIONS IN FLUX

We are witnessing a huge generational shift. As baby boomers grow out of the traditional workforce and millennials age in, both cohorts are being impacted by the shifting economy and the resulting educational demands. Maintaining relevancy in the 21st century educational landscape will require that libraries support emerging learning models that extend outward, leveraging community and business partnerships.



How US library users (16+ years old) have used libraries within the past 12 months.
—Pew Research Center

“Education has a vital role to play in developing the knowledge, skills, attitudes and values that enable people to contribute to and benefit from an inclusive and sustainable future.”

—Organization for Economic Co-operation and Development

THE PUBLIC REALM GETS REINVIGORATED IN THE DIGITAL AGE

Growing beyond the notion of Third Place, cultural institutions are increasingly serving as a de facto public realm, accommodating community events and cultural programs, and supplementing social services.

Arts, cultural, and educational facilities are also becoming important spaces of dialogue, where people come to explore current issues. To that end, cultural spaces are increasingly providing unprogrammed and flexible spaces where visitors can reflect on experiences and engage in conversation. But cultural organizations are also looking beyond their own walls to operate as part of the city around them, with the aim of creating continuity of vibrant public experience from the outside in. It is all about breaking down barriers to entry and expanding opportunities for engagement.

LEARNING SPACES BECOME INTERDISCIPLINARY



A culture of innovation and an urgency to transcend silos have permeated the campus experience, demanding flexibility, multi-modality, and visibility. Museums and libraries are gradually transforming from collectors and catalogers of information to disseminators and enablers of information. That often requires working collaboratively with other institutions to broaden their expertise and find solutions that leverage each other's resources. Bridging between the private and the public sector, civic organizations are filling in the gaps of social services and cultural development. Their spaces reflect this, bringing together people who want to co-create around a shared aim.

Lone Star College, Center for Academic & Student Engagement, Cypress, TX

Community essential when designing for learning, experience

While virtual access to knowledge, education, and experience continues to evolve, the visceral experience of place remains critical to learning. The student center and academic classrooms build upon the rich traditions of Lone Star's campus by creating spaces that embrace its core values of community. Like a “living room,” the student center empowers students and the broader community with a space to make their own. It creates a platform for collaboration and showcases the vibrant identity of students, clubs, and organizations.

Learn more: [gensler.com/DF18-26](https://www.gensler.com/DF18-26)

Cities Sector > Education, Civic + Culture >

EDUCATION

TALENT IS THE NEW CURRENCY

Education has a new mandate: to prepare students for a rapidly changing economy. That means strengthening the ties between learning and practice, and between getting an assignment done and developing valued critical thinking skills. Aiming for applicability, schools are supporting students to develop their own interests as skills.

STUDENTS CHART THEIR OWN PATHS

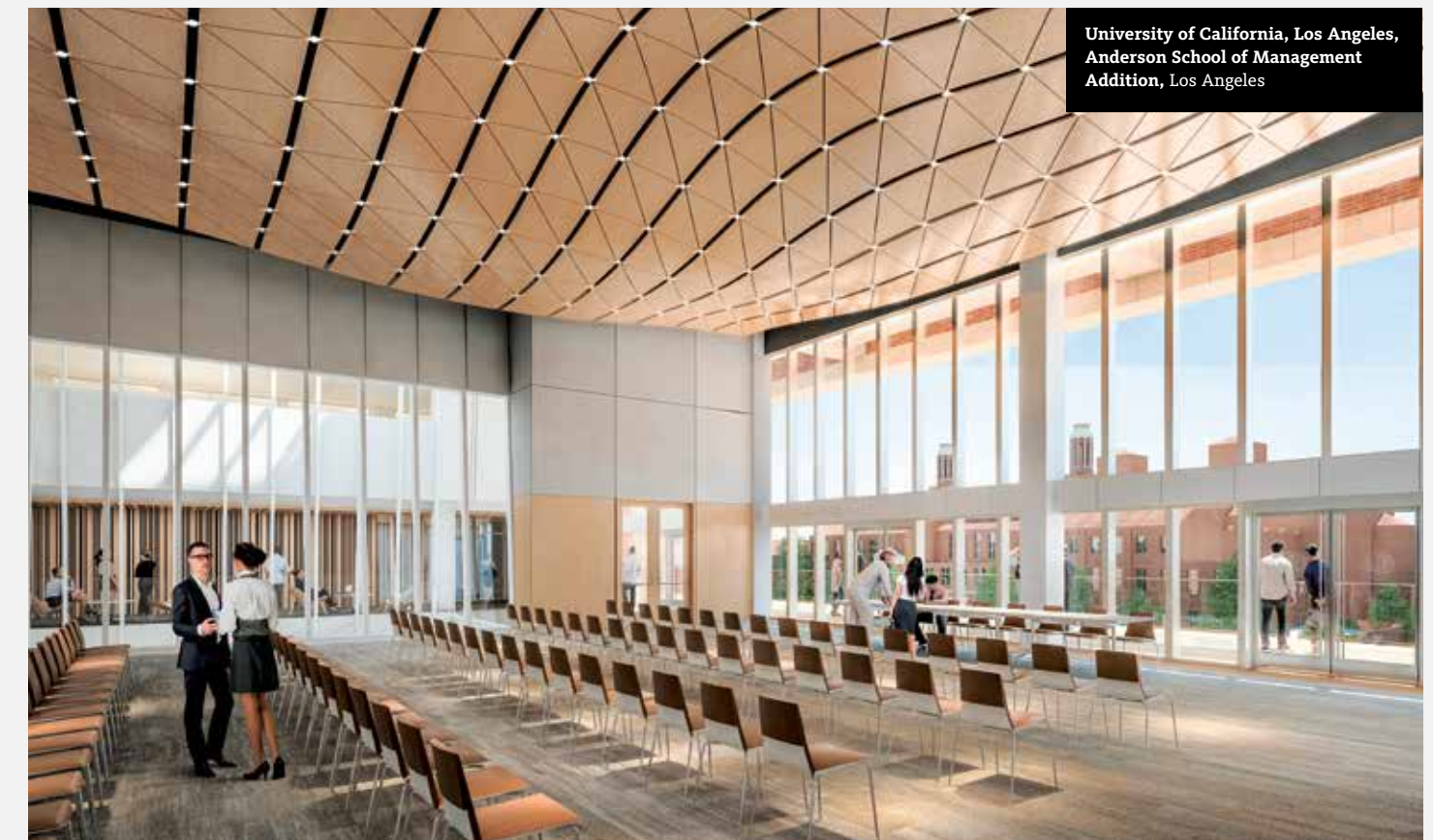
The future of education is learner-centered. Integrated platforms and flexible environments allow students to chart their own success. Hands-on learning spaces empower students to integrate the practical with the theoretical. Student-centered instruction aims at lifelong learning and independent problem-solving—the skills most highly valued today.

EDUCATION WILL NEED TO FOSTER CONNECTIONS

Connections made beyond the campus through partnerships with local business, government, and community make learning resonant. Schools are now positioned as engines of growth for their communities. Schools are also where students gain exposure to new ideas, fields, and opportunities. The campus must serve to cultivate those connections.



Wiseburn USD/Da Vinci Schools
El Segundo, CA



University of California, Los Angeles,
Anderson School of Management
Addition, Los Angeles

Columbia College Chicago Student Center, Chicago

A new context for education

Columbia College Chicago's five-story student center is the first on its expansive urban campus. More than a typical student center, it centralizes services and actively magnifies the energy and creativity found within. The building creates visual awareness and encourages students to reevaluate their perspectives. To achieve this, the conventional idea of an atrium is turned inside-out, making the active student spaces more visible. By pushing the atrium space to the perimeter, the building provides inter-floor connectivity and enhances its connection back out to the surrounding campus.

Learn more: [gensler.com/DF18-27](https://www.gensler.com/DF18-27)





Medical Sciences High School, Chaffey Joint Union
High School District
Ontario, CA

Elevating experience on campus

The new Medical Sciences High School for Chaffey Joint Union High School District provides a new vision for what schools can be: one that allows teachers and students to work in innovative ways with a primarily project-based curriculum. Guided by the principle that connection fosters collaboration, the building centers around the goal of creating a truly integrated learning experience. To bring that goal alive, interactive and connected learning environments are organized around a courtyard that visually bridges all activities within the school. An elevated classroom plane is literally supported by shared program elements and establishes a more connected experience for both students and the community.

Learn more: gensler.com/DF18-28

CIVIC + CULTURE

MUSEUMS + COMMUNITIES LEADING TO NEW ERA OF CO-CREATION

Museums need to be more agile than ever, offering a range of experiences through which users can shape their own journeys. Apps allow visitors to access the content that is most relevant to them and to extend their engagement with it for a seamless, self-directed journey. Social media is a driver here: what visitors share will ultimately become part of the museum’s brand.

AUDIENCES GET MORE DIVERSE; SO DO SPACES

Cultural institutions are getting more flexible and creative in programming to be accessible to more diverse audiences. To reach more—and more diverse—people, cultural institutions are looking at how their spaces reflect a mosaic of needs and uses that are open to all. Also, because people come to them to socialize, cultural spaces are attracting new visitors through expanded programming, from happy hours and concerts to classes and lectures.

IMMERSIVE EXPERIENCES CONTINUE TO TREND UPWARD

People demand immersive experiences, driven by choice and met with wonderment. They want to participate in the creation of their experiences. Cultural spaces are going beyond the two-dimensional and the didactic to more fully engage visitors. Technology—whether augmented reality or binaural sound; social media or other digital media—extends and deepens engagement.



Cyprus Museum Conceptual Design
Cyprus, Greece

INSIGHTS FROM THE GENSLER RESEARCH INSTITUTE

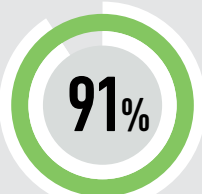
The Future of Museums

We conducted a survey of more than 2,000 museum goers and discovered that the cultural focal points shown at right are still strikingly relevant and vital in many cities. The future of museums will be rooted in their missions and their inclusive nature. Many museum goers see them as one of the last bastions of democratic space in their communities.

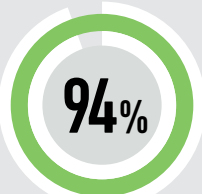
Museums have the power to excite, educate, and enlighten. How this power should be used—and shared—is very much at issue in our pluralist society.

Download the white paper: [gensler.com/DF18-29](https://www.gensler.com/DF18-29)

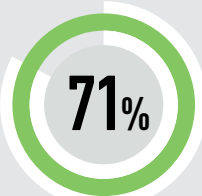
How museum goers view museum spaces:



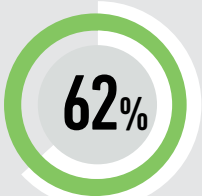
believe that museums are trustworthy sources of information.



believe that museums welcome all types of people.



believe that museums foster feelings of community.



believe that museums can be places of solace or refuge.

RELIGIOUS

INCLUSIVE PROGRAMS FOR PERSONAL MEANING

Religious institutions are helping members to find personal meaning by offering inclusive practices and customized ways of engaging. The spaces being designed reflect this sense of dynamic openness and flexibility.

REACHING ACROSS PLATFORMS

Social media, live streaming, and digital platforms are playing a larger role in the religious experience. Livestream capacities, Instagrammable moments, and unique experiences that can only be found at the facility unite the physical/digital layers.



Science of Spirituality
Lisle, IL

HEALTH + WELLNESS: FORECAST

Healthcare
Wellness

The healthcare model is moving toward sustaining wellness at every stage in human life. When wellness is the measure, people favor a personalized approach to care and prevention, and expect it to be addressed in new ways and settings. Wellness design today integrates all aspects of our lives and environments to shape healthy experiences and outcomes.

PATIENT EXPERIENCE A GROWING PART OF BRAND

With more choices and portals—both virtual and physical—for health systems, patient experience is more important than ever. As health systems continue to consolidate, the through line of experience and brand recognition is more critical. For providers, this means prioritizing patient needs and expectations to provide care that is convenient, affordable, and customized—both inside and outside the facility walls.

INCUBATORS ESSENTIAL TO HEALTHCARE INNOVATION

Medical technology holds the future for personalized medicine. Healthcare innovation incubators and accelerators around the world are helping entrepreneurs develop their startup companies with funding, mentorship, and investment resources.

OF MILLENNIALS:

74%

would prefer to see a doctor virtually;

71%

book appointments online.

—Harris Poll

CONVENIENCE IS KEY TO COMMUNITY HEALTH

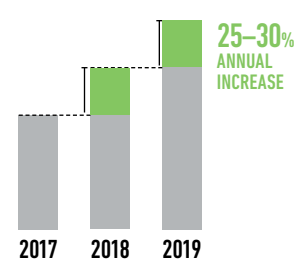
People expect easy access to basic healthcare services, but increasingly they also want to maintain their health while still well, not only when responding to a health emergency. To incorporate wellness into their daily lives, people need access to on-demand information, extended hours, convenient locations, walk-in appointments, affordable services, and—more than ever—transparent pricing. As people become more accustomed to and demanding of convenience and flexibility, healthcare providers are responding by designing spaces tailored to specific services.



44%

Since 2000, 44 percent of patient visits have taken place when physician offices typically are closed.

—Becker's Hospital Review



New types of healthcare delivery are projected to drive 25 to 30 percent growth annually in retail clinics.

TRANSLATIONAL PRACTICES TRANSFORM MEDICINE

Collaboration across medical disciplines is leading to new treatments, impossible when groups worked in isolation. Multidisciplinary partnerships are essential in tackling today's most pressing health issues, and ensure that these proven strategies for disease treatment and prevention are implemented within the community.

Multidisciplinary environments have to be flexible and adaptable, so modularity and transparency are paramount. These new models of care will drive real estate decisions and design of facilities that promote collaboration and advance the field.

ACCOUNTABILITY FOR WELLNESS RISING

Between telemedicine and the explosion of health-tracking apps and devices, consumers not only have more access to health information, but also have platforms through which they can monitor and address health concerns on their own. That dispersion and individualization mean the places where people seek care will likewise become more varied and specific.

330%

Health and fitness tracking apps are the fastest-growing app category, with usage up by over 330 percent in the last three years.

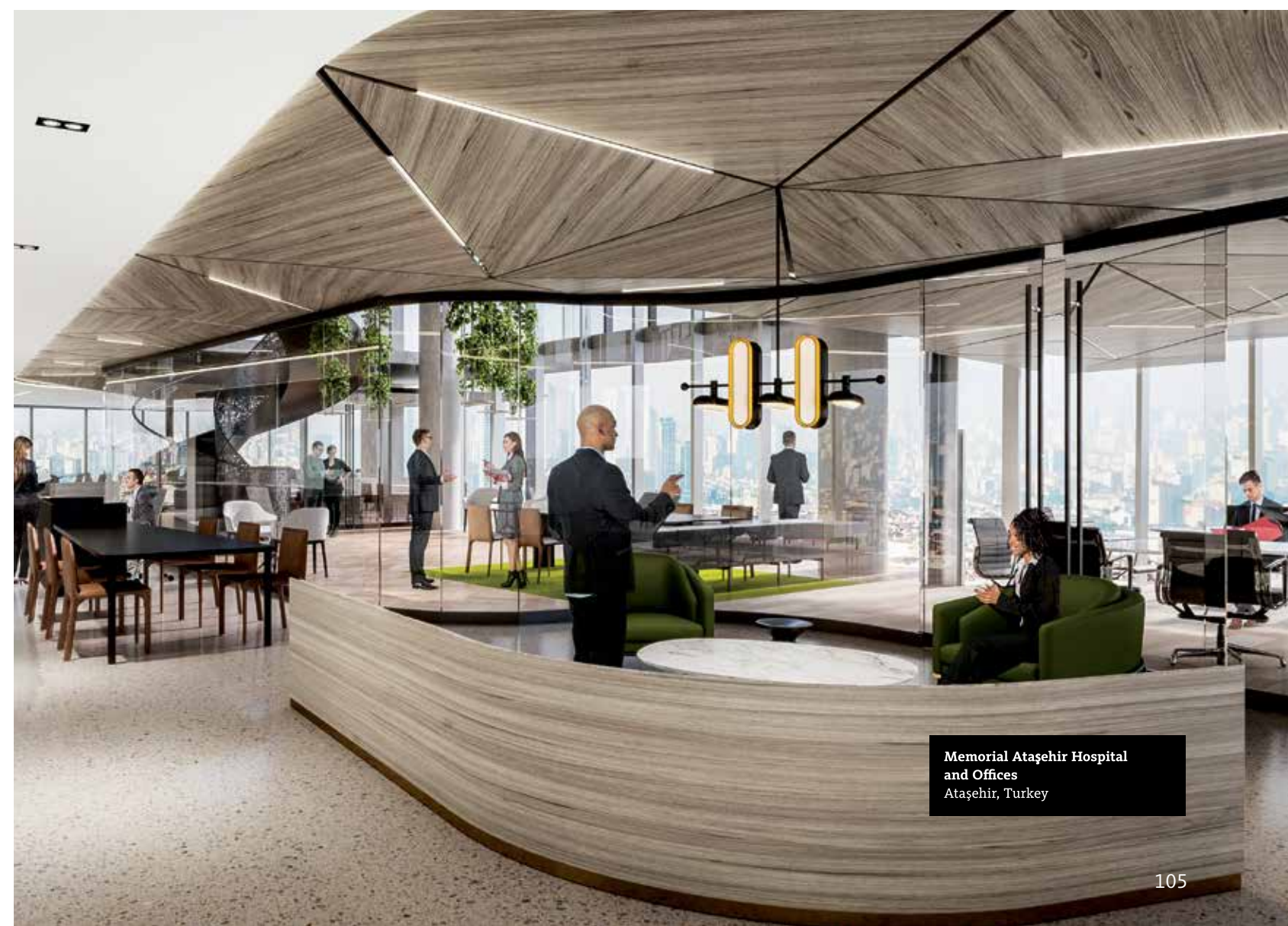
—Flurry Insights

LEVERAGING DATA TO REPURPOSE HOSPITALS

As outpatient facilities continue to rise in popularity and patient choice, the nation's hospitals are under increasing pressure to provide better care outcomes and improve patient satisfaction at a lower price point. Healthcare real estate will leverage economic, demographic, and ethnographic research to reimagine America's underused healthcare facilities, giving them more spaces for community and outpatient care.



Memorial Ataşehir Hospital
and Offices
Ataşehir, Turkey



Memorial Ataşehir Hospital
and Offices
Ataşehir, Turkey

Cities Sector > Health + Wellness >

HEALTHCARE

SHIFTING FOCUS TO PREVENTIVE CARE

Health systems are increasingly focused on offering outpatient care and reducing costly inpatient “sick” care. Distributing health services throughout the community is one way healthcare providers can increase access for patients and families. Telemedicine and remote monitoring are among newer technologies being offered by providers for similar reasons.

TELEMEDICINE, THOUGH DISTANT, STILL ABOUT CONNECTION

Telemedicine is on the rise, not only for remote areas, but for the convenience. Thanks to its cost- and time-saving potential, and its easier access to healthcare specialists, large-scale telemedicine facilities are on the rise. To work, they will have to enhance interaction and promote human connection.

HEALTHCARE'S FUTURE IS IN DATA

Analytics are playing a larger role in diagnosis, showing likely outcomes and suggesting actions to make providers more successful and responsive to patient needs. The use of data helps tailor precise paths of care for each individual. Simulation will also mark the field and help shift focus to driving productivity, improving patient safety, controlling costs, and analyzing population health.



Cook County Hospital
Chicago



Downtown Club at The Met
Houston



Stryker Endoscopy
San Jose, CA

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WELLNESS

WEARABLES, BIG DATA, GROWING FORCE IN WELLNESS

The global wellness industry market is currently one of the fastest growing, currently estimated at \$3.7 trillion. A focus on wellness is driving healthier solutions in the built environment. Wearables and big data will also allow healthcare systems to gather information about people's bodies, physiology, and health outside healthcare settings. Wearables may make their way back into the hospital, eliminating hardware and allowing facilities to be more agile.

WORKPLACE WELL-BEING ADDS UP

Employee turnover in the healthcare industry is costly, and burnout is frequent. To change that, leading healthcare systems are making well-being a priority, incorporating spaces for recharge. Well-being in the workplace not only improves health outcomes, it adds up. Companies with healthy and happy employees are twice as innovative, and every dollar invested in workplace health initiatives results in a twofold increase in returns, reports Gallup.

HEALTH POINTS BACK TO COMMUNITIES

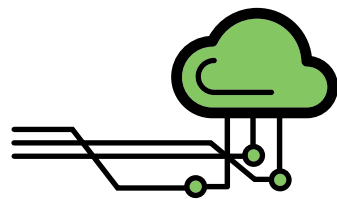
Getting to the root of health points beyond the hospital and into the communities and the daily lives of patients. Health systems are investing in programs that support the well-being of would-be patients in their daily lives. Housing is the linchpin of well-being: affordable, accessible, and well-located housing is central to quality of life for people of all ages, but especially for older adults.

CRITICAL FACILITIES: FORECAST

Critical facilities are becoming more diverse as advances in technology create market shifts. Quicker, leaner facilities are a must. Cybersecurity, regulations, and open markets are driving new types of critical facilities—from command centers to high-tech factories.

CLOUD IS THE NEW UTILITY

Cloud computing and the continuous increase in demand have turned data centers into utility providers. We may think the cloud exists in the ether, but it needs an infrastructure, and one that's as nimble and secure as the world it connects.



COLOCATION: ANSWER TO GROWING DATA DEMAND

The growing global demand for data storage is being increasingly served by colocation data centers. Colocation data centers meet the need of financial services and other industry sectors for increased scale, lower IT costs, and manage increased technological complexity. Growth of the industry can also be tied to the expansion of companies joining the movement toward increased storage in highly scalable, cost-efficient data centers.

15.4%

The colocation data center market is projected to see 15.4 percent annual growth by 2020.

—BCC Research

#1 Cybersecurity is the number one concern for CEOs in the United States.

—Zeitgeist Guide, 2017

ALWAYS IN ADVANCE OF RAPID CHANGE

For data centers, rapid change is inevitable as facilities scramble to keep pace with rapid tech cycles. As a result, design's focus has always been on creating modular, scalable computing systems. Today, designers and data center operators are finding ways to do the same thing with the buildings that house these computing systems. The challenge lies in creating facilities that remain relevant. Building data centers in a prototypical, modular fashion enables them to grow and change out mechanical and electrical systems efficiently.

DATA CENTERS ARE NEIGHBORS TOO

Communities welcome companies that make an effort to harmonize their data center with the local environs. Materials, landscaping, and the building form all play a part in making data centers friendly to their neighborhoods.

REAL ESTATE GETS A REBOOT

The tightening of available land and power refocuses building on new kinds of sites. There is a perennial trend of repurposing existing buildings for a very different purpose. As more facilities are built, they become efficient, minimal, and nimble. Underutilized sites, such as underground caves and abandoned retail centers, are becoming alternative real estate locations for data centers.

MORE CENTERS, MORE SECURE

The need for critical facilities is growing, and the way enterprise companies will build them is changing. Rather than focusing on single, massive facilities with layers of redundancy and hardening, data storage providers are building multiple data centers in different geographic areas. Some include both primary and disaster recovery facilities, while others pursue dual primary facilities with the capacity to back up each other.



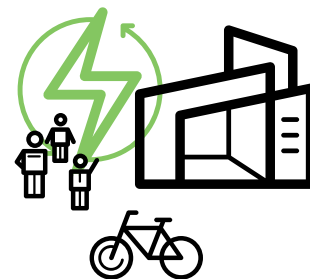
COMPUTING MOVES TO CAMPUS

As universities and industry come closer together, there is greater need for advanced computing power on campuses. The same can be said of hospitals and any large-scale organization that needs to keep its data running. These facilities are being housed on-site in the middle of the action, and are taking on forms to better integrate with their environments.

12%

The global data center market anticipates 12 percent growth by 2020.

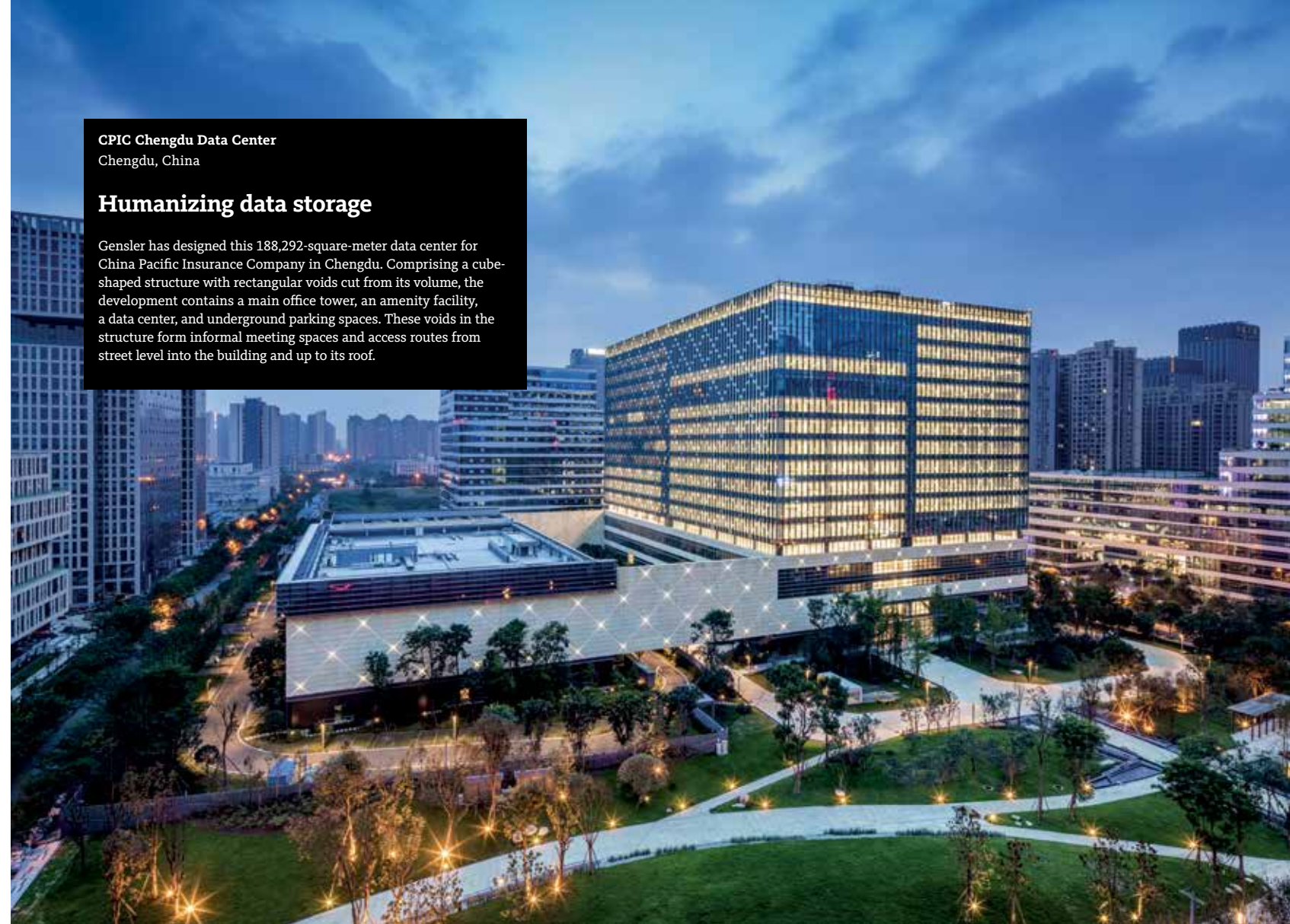
—Telehouse



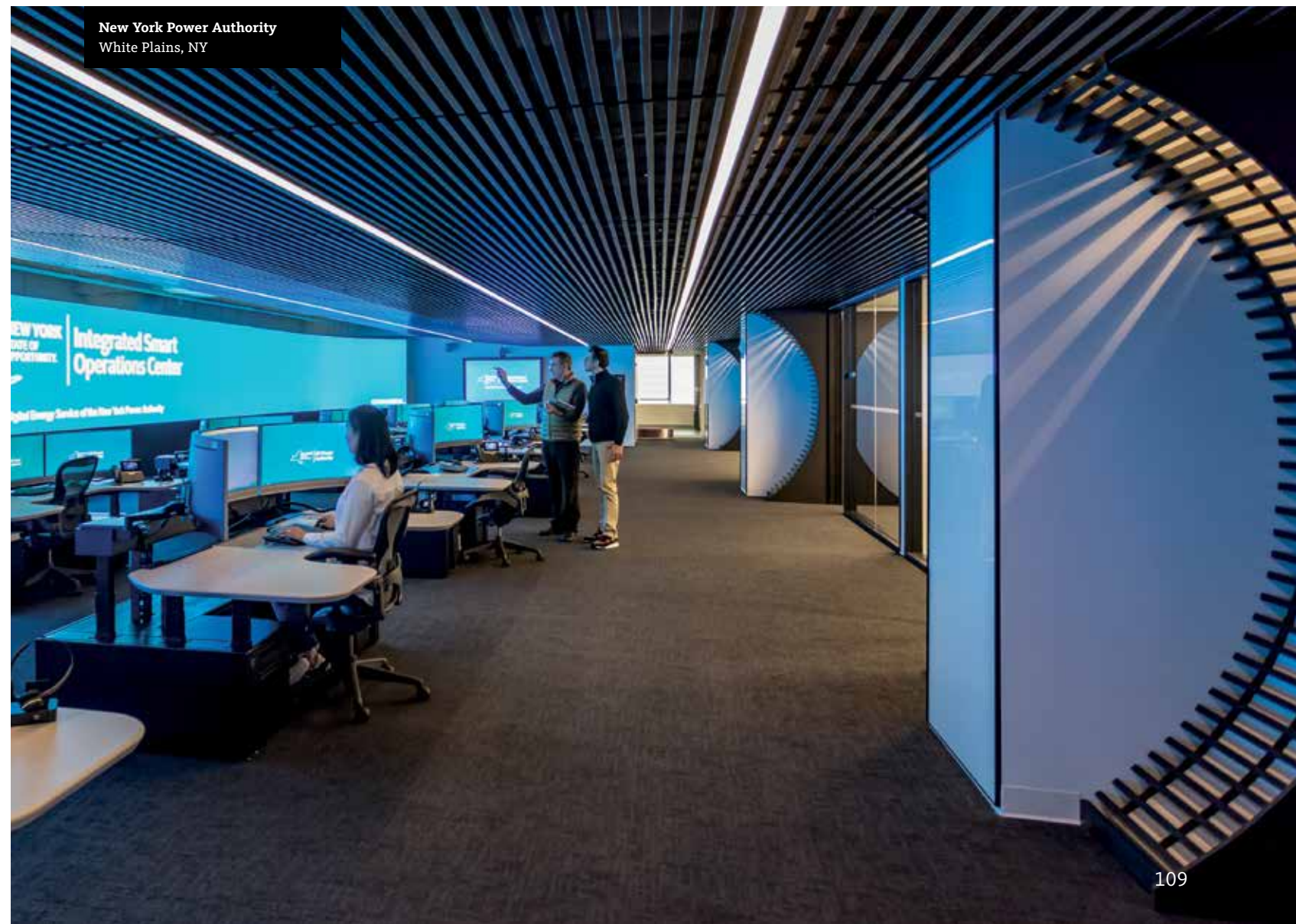
CPIC Chengdu Data Center
Chengdu, China

Humanizing data storage

Gensler has designed this 188,292-square-meter data center for China Pacific Insurance Company in Chengdu. Comprising a cube-shaped structure with rectangular voids cut from its volume, the development contains a main office tower, an amenity facility, a data center, and underground parking spaces. These voids in the structure form informal meeting spaces and access routes from street level into the building and up to its roof.



New York Power Authority
White Plains, NY



AVIATION: FORECAST

Airlines
Airports

Today's airport is more than a transportation hub—it's a small city. Airport operators are integrating the diverse needs of the passenger, tenant, employee, and owner into facilities that bring surprise and delight through a tailored, world-class experience.

AIR TRAVEL DEMOGRAPHICS CHANGING DRAMATICALLY

There are more passengers than ever, and that number is growing: By 2035, there will be almost twice as many travelers as there are today. Passenger diversity is also on the rise, in terms of age, income level, and cultural background, and the industry will adapt to meet that array of needs. With the introduction of aircraft with increased range and low fuel burn, international traffic continues to grow at gateway hubs of all sizes and is giving rise to new hubs around the globe.

2x
7.2B

Annual air travel is predicted to double by 2035.

By 2035, there will be 7.2 billion travelers annually.

—The International Air Transport Association

CONNECTING ALL POINTS ALONG THE JOURNEY

Airports can change the game at the ends of the passenger journey—from home to terminal and vice versa. While quick travel to downtown attracts visitors and locals to cities with connected airports, the connection is no longer just A to B—city to city—but to passenger lifestyles, and to the regions surrounding the airport.

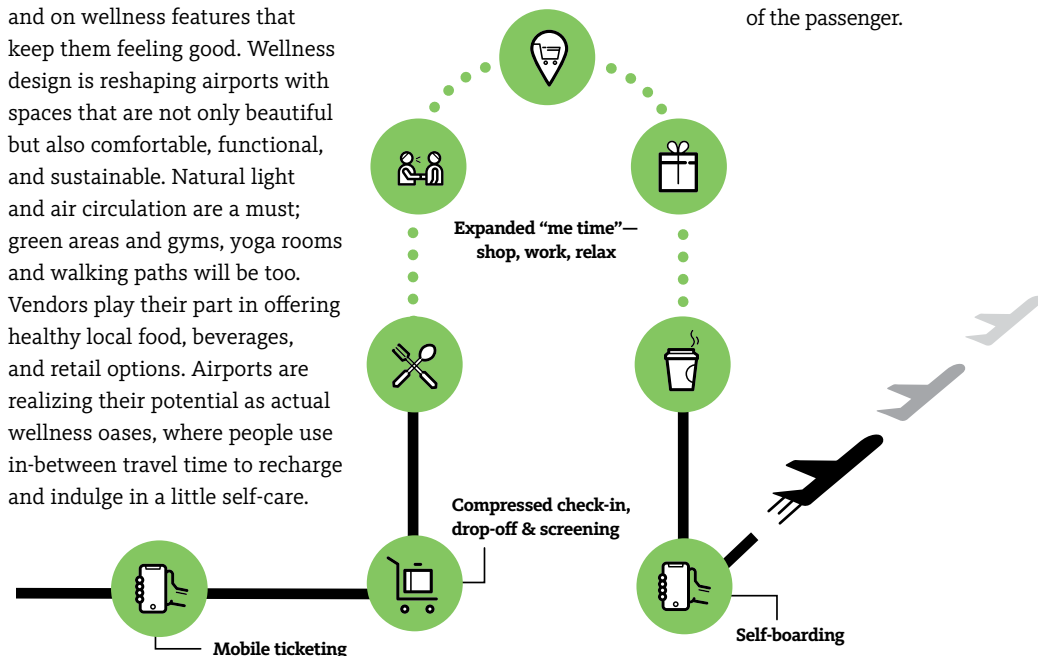
31%

Outdoor park areas are cited by 31 percent of passengers as their most wanted airport amenity.

—Gensler Research Institute

WELLNESS ALL THE WAY

Passengers put a premium on de-stressing the travel experience and on wellness features that keep them feeling good. Wellness design is reshaping airports with spaces that are not only beautiful but also comfortable, functional, and sustainable. Natural light and air circulation are a must; green areas and gyms, yoga rooms and walking paths will be too. Vendors play their part in offering healthy local food, beverages, and retail options. Airports are realizing their potential as actual wellness oases, where people use in-between travel time to recharge and indulge in a little self-care.



EXPERIENCE GOES BEYOND TRANSPORTATION

Airports are growing their offerings beyond transportation to become full mixed-use destinations—with hotels, conference centers, gourmet food, luxury retail, and leisure amenities. The post-security experience is evolving so passengers can relax, work, and connect.

SMART BUILDINGS WILL BECOME GENIUS BUILDINGS

Not only will the experience of the airport change, but the terminal building itself must change. To meet community and sustainability expectations, smart buildings must become genius buildings. The near future airport campus will utilize an "all of the above" sustainability strategy, harvesting its own energy and water, recycling its own waste, and growing its own aviation fuel.

TAILORED SERVICE, SEAMLESS MOVEMENT

On-demand and personalization technology will allow passengers to move through the airport seamlessly, cutting out lines and stress and prioritizing motion over waiting. Airlines will know their passengers' preferences, allowing them to offer more tailored experiences. As personal and airport technology continue to improve, terminals must continue to employ strategies that put self-directed experiences in the hands of the passenger.

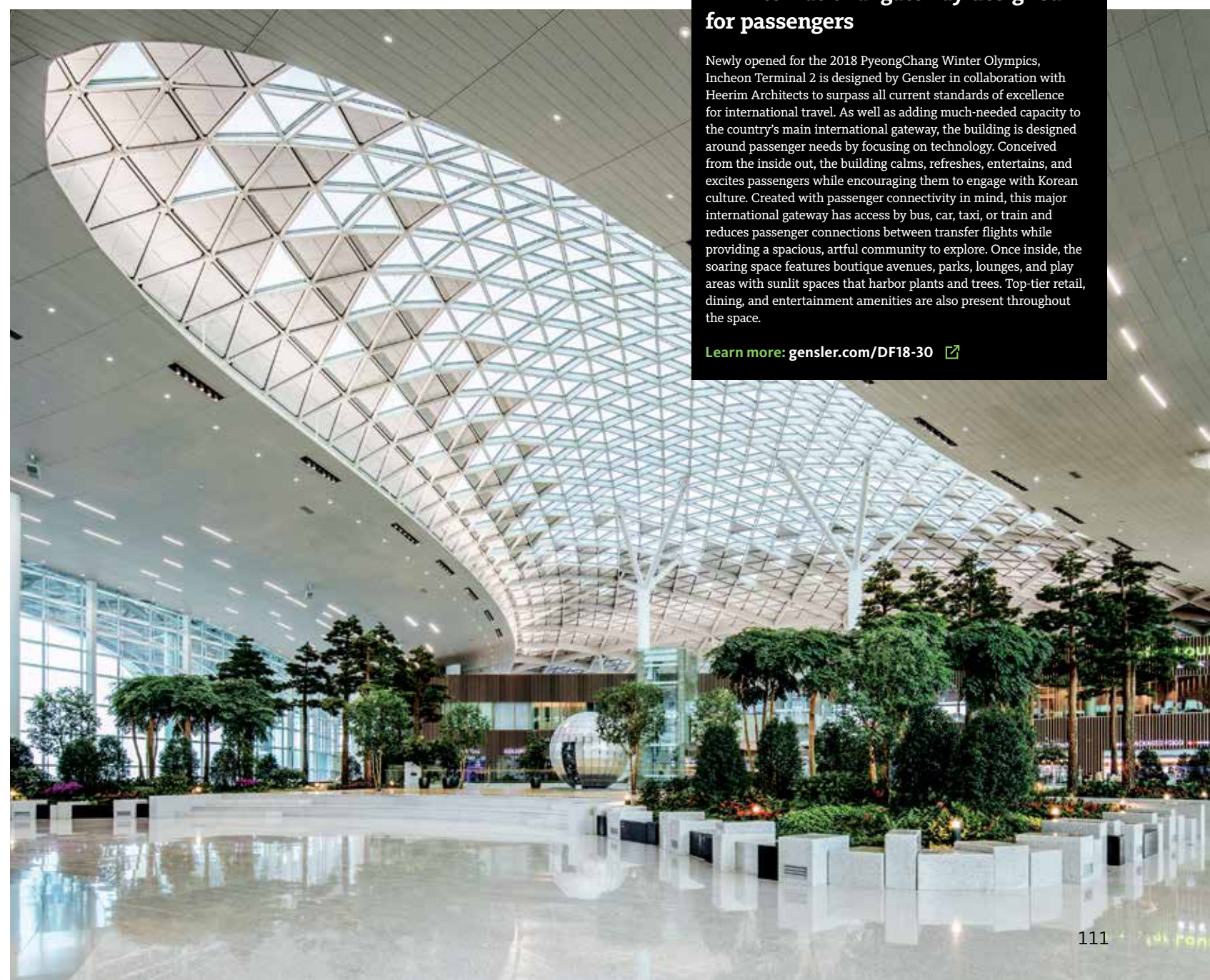


Incheon International Airport
Incheon, South Korea

An international gateway designed for passengers

Newly opened for the 2018 PyeongChang Winter Olympics, Incheon Terminal 2 is designed by Gensler in collaboration with Heerim Architects to surpass all current standards of excellence for international travel. As well as adding much-needed capacity to the country's main international gateway, the building is designed around passenger needs by focusing on technology. Conceived from the inside out, the building calms, refreshes, entertains, and excites passengers while encouraging them to engage with Korean culture. Created with passenger connectivity in mind, this major international gateway has access by bus, car, taxi, or train and reduces passenger connections between transfer flights while providing a spacious, artful community to explore. Once inside, the soaring space features boutique avenues, parks, lounges, and play areas with sunlit spaces that harbor plants and trees. Top-tier retail, dining, and entertainment amenities are also present throughout the space.

Learn more: [gensler.com/DF18-30](https://www.gensler.com/DF18-30)



Cities Sector > Aviation >

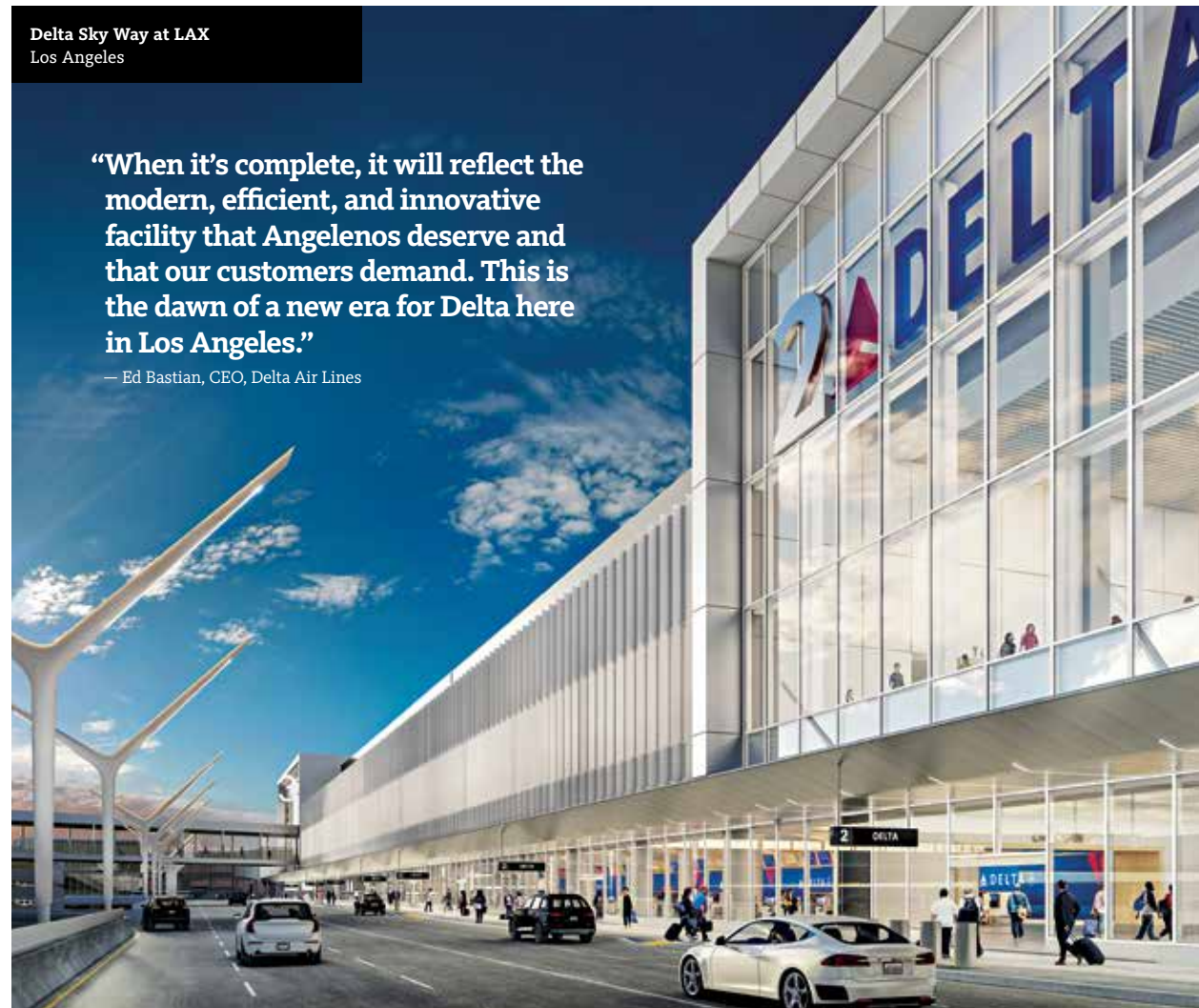
AIRLINES

THE EXPERIENCE TRADE WAR RAMPS UP

There is a passenger experience war brewing among carriers and how they set themselves apart from each other, particularly in trying to attract first-class and business passengers. Alongside pricing, alliances, and seating options, airlines are upping service amenities, including luxury lounges and new forms of branded respites.

REGIONAL DOMINANCE IS KEY

If airlines used to lay claim to one city as hub, today they are asserting control over multiple regions. Even with the growth of small and economy carrier services, airlines are consolidating and growing their hold over more extensive markets.



Delta Sky Way at LAX, Los Angeles

Designing a home for the future of LA

Delta Air Lines’ expansion and renovation at LAX positions the airline and the facility for future growth. The Sky Way is a model for future mobility—not only connecting two terminals but offering automated security lanes, more seating at gates, and new concession and dining options. When complete, travelers will be connected to the airport’s new automated people mover. The modernization of Terminals 2 and 3 is seen by the city of Los Angeles as an investment in the local economy and people, with Delta helping to accelerate an era of growth and innovation for the city.

\$1.86B DELTA INVESTMENT IN LAX



Cities Sector > Aviation >

AIRPORTS

WORLD CLASS MEETS HIGHER EXPECTATIONS

Across the globe, new steel and glass terminals are rising in the world’s growing cities. As they do, they boost expectations of what airports can be. To remain competitive, airports are asking: What makes for a world class airport today? The answer lies beyond retail and dining offerings, sleep pods, or the latest “it-amenity.” Airports have to celebrate their inimitable qualities, the characteristics that cater to memorable passenger journeys, from first impressions to experiences that engage from landside to airside.

AIRPORTS GLEAN THE BEST FROM CITIES

Much more than a building that hosts people as they travel, an airport should be viewed as a mini, 24/7 city. And the same urban notions that go into great cities must be considered in airport design: easy navigation, properly scaled districts, entertainment/cultural venues, and green spaces.



Austin-Bergstrom International Airport, Austin, TX

**Making an airport as local as possible
can greatly improve the passenger
experience**

In a globalizing world, the top airports reflect the quality of life their cities offer. Design is the vehicle that gives airports a sense of place reflective of the traits of their own community. Drawing from the character of Austin, the expansion of Austin-Bergstrom International Airport sets new standards for the passenger experience. Inspired by an expansive dance hall, the retail boulevard-style concourse lets passengers flow naturally and efficiently toward their gates with locally resonant food and retail on either side.



As our cities evolve and technological advances accelerate change, a new generation of talent and consumers is motivated by experience. Every space will need to compete on the experience it delivers.

Today, the human experience is the driving force behind every element of space. When we put people first, we can truly leverage the power of design to create a better world.

Microsoft
Dublin, Ireland

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