



Gensler

DESIGN FORECAST[®]

CREATED BY THE GENSLER RESEARCH INSTITUTE

SHAPING THE FUTURE OF CITIES

GENSLER HAS A UNIQUE AND PROFOUND ROLE IN MAKING A POSITIVE DIFFERENCE IN THE WORLD.

SHAPING THE FUTURE OF CITIES

Every day, we impact millions of people's lives in cities around the globe by creating places where people live, work, and play. Last year alone we created 1.2 billion square feet of space. That's why we are committed to designing with an unwavering focus on Human Experience as we work to shape the future of cities.

Why Cities Matter So Much

We are living through the greatest period of urbanization in history. For the first time, more people live in urban centers than don't. By 2050, more than 70% of the earth's population will live in cities. Cities are also responsible for 80% of global GDP—they are engines of creativity and economic innovation for everything from technology to healthcare. We have an opportunity to make cities more livable and improve the lives of people.

Design for Human Experience

Our vision to Create a Better World Through the Power of Design comes to life through our breadth, diversity, and innovative design strategies. That vision is driven by design excellence, our practice areas, our valued relationships with clients, and our global reach. Our "one-firm firm" global and local leadership network has never been more important than it is now.

Taking on Tough Global Challenges

With these strengths, Gensler is uniquely positioned to take on the toughest challenges facing cities. We are impacting Climate Change by reducing the carbon footprint of our buildings. We are shaping the Future of Mobility by inventing how cities embrace autonomous vehicles and aerial ride-shares, with the ultimate goal of taking city streets back for people. We are creating Connected Cities using intelligence and sensors that connect people and places. And we are bringing new thinking to challenges like affordable Housing and Homelessness.

The more cities grow, the more we feel the consequences of these disruptions. Through the power of design, we believe we can improve human experience, leverage our capabilities for good purposes, and make a difference in cities all over the world.



Diane

Diane Hoskins
FAIA
Co-CEO

Andy

Andy Cohen
FAIA
Co-CEO

THIS PAGE: KUNMING CHANGSHUI INTERNATIONAL AIRPORT, KUNMING, CHINA

ON THE COVER: DEX, SEATTLE

WE ARE TAKING ON THE TOUGHEST CHALLENGES FACING CITIES.



METRO CRENSHAW URBAN DESIGN STUDY, LOS ANGELES



ZHUHAI HUACE INTERNATIONAL PLAZA, ZHUHAI, CHINA

The world is changing. Global population shifts mean that over half the world's people now live in cities—a total of 4.2 billion people. By 2030, there will be 43 megacities on the planet with populations of at least 10 million people in each. These concentrations of people are already introducing tough new challenges.

Economic volatility is perhaps the topmost concern for our clients. Markets can turn on a dime and are influenced by an increasingly unpredictable political and environmental landscape.

Climate change is on everyone's mind, and is affecting markets, governments, and people the world over. More than 90% of all urban areas are coastal, putting most cities at risk of flooding from rising sea levels and powerful storms.

On top of this, new technologies continue to disrupt every industry in the world, introducing a massive skills gap in the talent pool. At the same time, we're experiencing enormous demographic shifts in the global workforce. By 2025, millennials will make up 75% of all workers, bringing new expectations to the workplace and a median job tenure that's barely two years. This kind of churn is costly, time-consuming, and fiercely competitive.

For many of our clients, the change they're seeing and the challenges they face represent an uncertain future.

WE HAVE AN OPPORTUNITY TO MAKE A POSITIVE AND LASTING IMPACT AROUND THE GLOBE.

CLIMATE CHANGE



RECYCLING AND COMMUNITY CENTER OF CHIRA, ISLA CHIRA, COSTA RICA

40%

OF GLOBAL GREENHOUSE GAS EMISSIONS ARE GENERATED EACH YEAR BY BUILDINGS.

—ARCHITECTURE 2030

Because Gensler impacts millions of lives in cities around the world, we have an opportunity to address climate change and create a resilient future like few others can.

Buildings generate nearly 40% of annual global greenhouse gas emissions and 50% of the world's energy usage. With an additional 2.48 trillion square feet of new building stock anticipated by 2060, we have an urgent responsibility to lead our industry in meeting and exceeding net zero carbon standards. Meanwhile, cities around the globe are already experiencing climatic stress. Seawater rise in coastal communities presents a real and imminent challenge. Our design solutions need to rethink our relationship to water by incorporating natural defense strategies and smart building designs that can create resilient cities.



GENSLER CLIMATE CHANGE CITY CHALLENGE
Join us in shaping the future of climate-resilient cities.

At Gensler, we're committed to resilience, recognizing that design must constantly evolve to prepare for a changing world. This is why we're renewing our commitment—and our challenge to the entire design industry—to meet an ambitious goal: the elimination of all greenhouse gases associated with the built environment. Join us as we develop a model of new strategies, tools, and metrics for the rest of the industry.

FUTURE OF MOBILITY



CHENGDU CAR TOWN CONCEPTUAL PLANNING, CHENGDU, CHINA

New modes of mobility are giving roadways and streetscapes back to people. With autonomous vehicles and aerial ride-share on the horizon, Gensler is shaping mobility for the future and transforming the world's cities.

Ride-sharing services and new modes of mobility like e-bikes, electric scooters, and other rolling devices have already multiplied transportation options for millions. But city streets were designed a century ago for cars and pedestrians—not scooters, drop-off and pickup spots, and bikes. Our opportunity is to rethink roadways, streetscapes, parking garages, and other car-dependent real estate—giving space back to people for parklets, outdoor dining, pedestrian promenades, and gathering spaces. In the U.S. alone, 500 million parking spaces will become available for redevelopment as autonomous vehicles become the norm. On a global scale, that opportunity expands to the equivalent of 5 billion parking spaces.

500M

PARKING SPACES WILL BE AVAILABLE FOR REUSE IN THE U.S. WITH THE ADOPTION OF AUTONOMOUS VEHICLES.

—THE NEW YORK TIMES

CONNECTED CITIES

50K

SINCE 1992, DATA PRODUCTION HAS EXPLODED FROM A RATE OF 100 GIGABYTES PER DAY TO 50,000 GB PER SECOND.

—VOUCHER.CLOUD

Using sensors, AI, and data platforms, we will create user-centric, intelligent, and highly adaptive spaces that seamlessly connect people to each other and the built environment.

As urban populations keep swelling—and the challenges of pollution, congestion, and crime grow more acute—we must rethink how people experience every aspect of their lives. It's about making cities more human, not less. We live in a time of extraordinary innovation, driven by the exponential growth of data. As designers, we can create buildings with smart systems that augment people's abilities and cater to individual needs with truly personalized experiences. By deploying technology in service to people, we can become the driving force for cities that are efficient, livable, and sustainable.

SHANGHAI, CHINA



HOUSING AND HOMELESSNESS



EL PUENTE TEMPORARY BRIDGE HOUSING, LOS ANGELES

Genster is bringing new thinking to some of the world's toughest problems, such as affordable housing and the needs of the homeless.

By 2050, two-thirds of the world's people will live in cities, exacerbating the demands on these environments, increasing the number of urban poor, and causing homelessness to skyrocket—all while threatening public health and well-being. We have an essential role in helping our cities create healthy environments where people can thrive. Part of the solution will be in addressing homelessness, first by quickly mobilizing to create temporary supportive housing options, and second by seeking innovative solutions to developing permanent housing for communities in need. We are committed to Shaping the Future of Cities for everybody.

+12%

IN 2019, NEARLY 59,000 PEOPLE WERE HOMELESS IN LOS ANGELES COUNTY—A 12% INCREASE IN ONE YEAR.

—LOS ANGELES HOMELESS SERVICES AUTHORITY

WE DESIGN FOR THESE CHALLENGES WITH AN UNWAVERING FOCUS ON THE HUMAN EXPERIENCE.



888 DOUGLAS ADAPTIVE REUSE, LOS ANGELES



SEAPORT DISTRICT BLOCK L4, BOSTON

Gensler is uniquely positioned to help our clients respond to the rapid pace of change and take on the toughest problems facing cities. Our innovation platform—combined with our global scale and diversity across 48 offices and 24 practice areas—is unmatched.

As a result of our broad portfolio, we were able to remove 11 million metric tons of CO₂ from the atmosphere last year. We also do the research. The data-driven insights uncovered by the Gensler Research Institute inform all our work and help define the trends you'll find in this publication.

Perhaps the biggest reason why we're able to shape the future of cities is because we design for the needs of people.

Last year alone, we created 1.2 billion square feet of building space, impacting the way millions of people in cities around the world go about their lives, their jobs, and everything in between.

Design is no longer just about creating beautiful things. It's about creating experiences that connect people to the places where they live, work, and play. This unwavering focus on the human experience is what sets us apart.

EVERY DAY, WE IMPACT MILLIONS OF PEOPLE'S LIVES.

Every day, through 24 areas of expertise, we live out Gensler's commitment to make a difference in the communities where we live, work, and play. It's through these projects, designed with people at the center, that our solutions to tough challenges come to light.

The trends you'll find in this publication are the outcome of our expertise, our research, and our diverse talent. For clients facing a changing world, we hope these insights can offer a guide to move forward in an uncertain future.

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THE FUTURE OF

WORK

How, when, and where we work is increasingly redefining the workplace. It requires a human-centered design approach to meet the needs of a changing workforce and include people of all abilities. As the business day expands beyond 9-to-5, and people are getting the job done in many more places besides the office, this work-anywhere, work-anytime culture is pushing employers to create great workplace experiences that attract talent, boost performance, and make the office a satisfying place to be. Organizations are using data to create intelligent spaces so that offices can anticipate people's needs in real time. Companies are adding variety and providing choice in the form of collaboration rooms, focus rooms, and work-focused amenities. And, with a global talent shortage of 85 million people projected by 2030, the competition to attract talent is fierce.

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FORECAST: CONSULTING & REAL ESTATE SERVICES

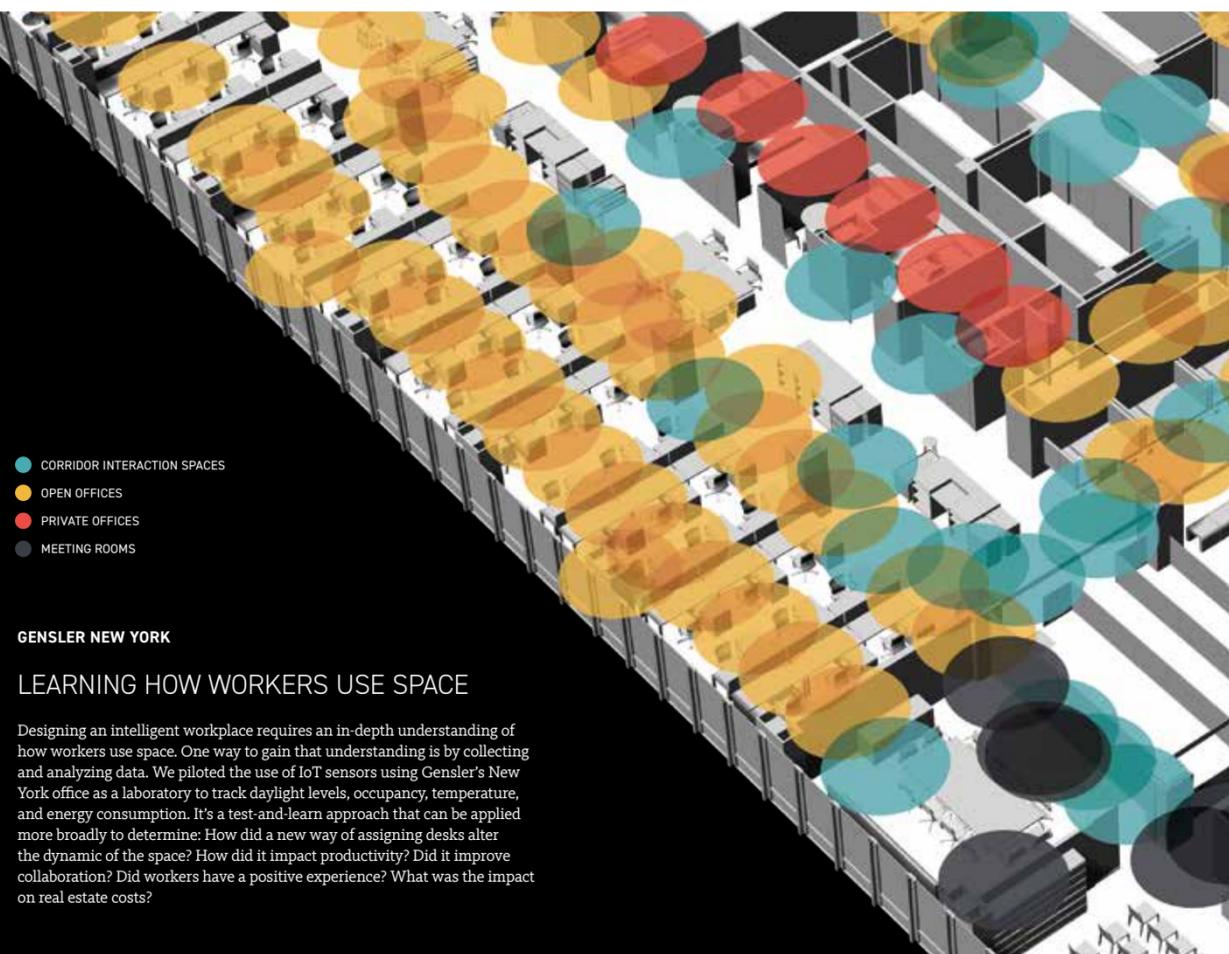
We help our clients solve their most complex challenges and gain a competitive advantage through a fusion of research, strategy, and design. This approach is predicated on a keen understanding of operations, process, technology, and physical space, while putting people's well-being at the center.

AI AND OFFICE DESIGN: TEST AND LEARN

Advances in sensor technology, cloud computing, bandwidth, and storage have opened the door for office spaces that learn and adapt. These intelligent buildings appeal to companies with large real estate portfolios that are already in frequent test-and-learn feedback loops. Through an evidence-based approach that integrates data, AI, and intelligent building systems, the next generation of office buildings will empower people to do their best work.

NEW JOBS WILL REQUIRE NEW SKILLS

By 2022, more than half (54%) of all employees will require significant reskilling and upskilling, according to the World Economic Forum. Of these, more than one-third are expected to require additional training of up to six months, and the focus of the training is likely to be on skills like technology design and programming. At the same time, human skills such as creativity, critical thinking, persuasion, and negotiation will maintain or increase their value.



GENSLER NEW YORK

LEARNING HOW WORKERS USE SPACE

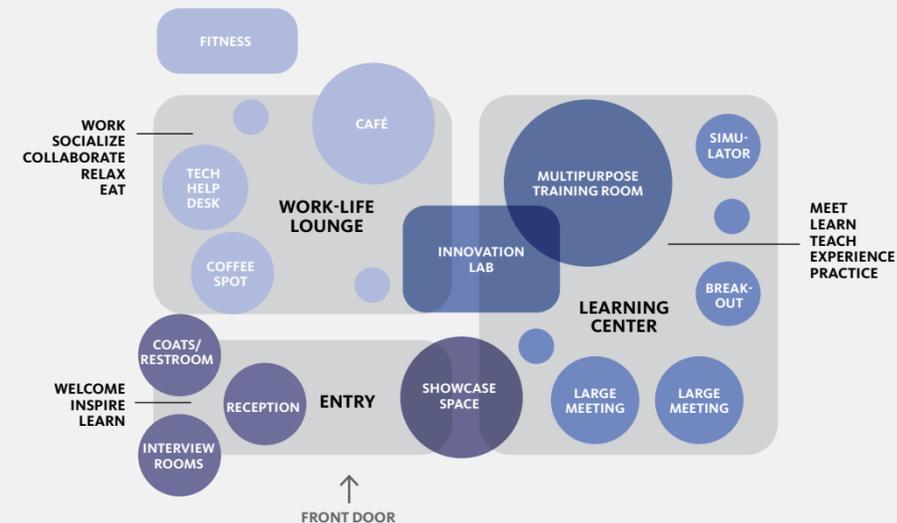
Designing an intelligent workplace requires an in-depth understanding of how workers use space. One way to gain that understanding is by collecting and analyzing data. We piloted the use of IoT sensors using Gensler's New York office as a laboratory to track daylight levels, occupancy, temperature, and energy consumption. It's a test-and-learn approach that can be applied more broadly to determine: How did a new way of assigning desks alter the dynamic of the space? How did it impact productivity? Did it improve collaboration? Did workers have a positive experience? What was the impact on real estate costs?

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4X

PEOPLE WHO HAVE A GREAT EXPERIENCE AT WORK ARE FOUR TIMES MORE LIKELY TO BE IN AN ENVIRONMENT THAT BALANCES FOCUS AND COLLABORATION.

—GENSLER 2019 U.S. WORKPLACE SURVEY™



CONFIDENTIAL TECHNOLOGY COMPANY WORKPLACE STRATEGY, SOUTHERN U.S.

CREATING WORKPLACES THAT SPUR INNOVATION

Organizations continue to be obsessed with innovation—that special sauce that gets companies ahead of the curve on the newest technologies and market opportunities. But companies are increasingly realizing that the path to innovation is not about creating a SWAT team of innovators or establishing some kind of innovation lab. It must be a daily part of the culture and the workplace. That means creating workplaces that encourage collaboration and chance encounters, and a culture that prioritizes teamwork and diverse opinions.

COWORKING HAS ITS LIMITS

There's a fast-rising contingent of "enterprise" users of coworking spaces—people who use coworking space through an agreement with their employer and a third-party coworking company. However, according to Gensler's 2019 U.S. Workplace Survey, while most people still find coworking spaces valuable, they are only using those spaces for less than one day per week. This reinforces the trend that a variety of spaces in the office is the best environment for getting the most productive work done.

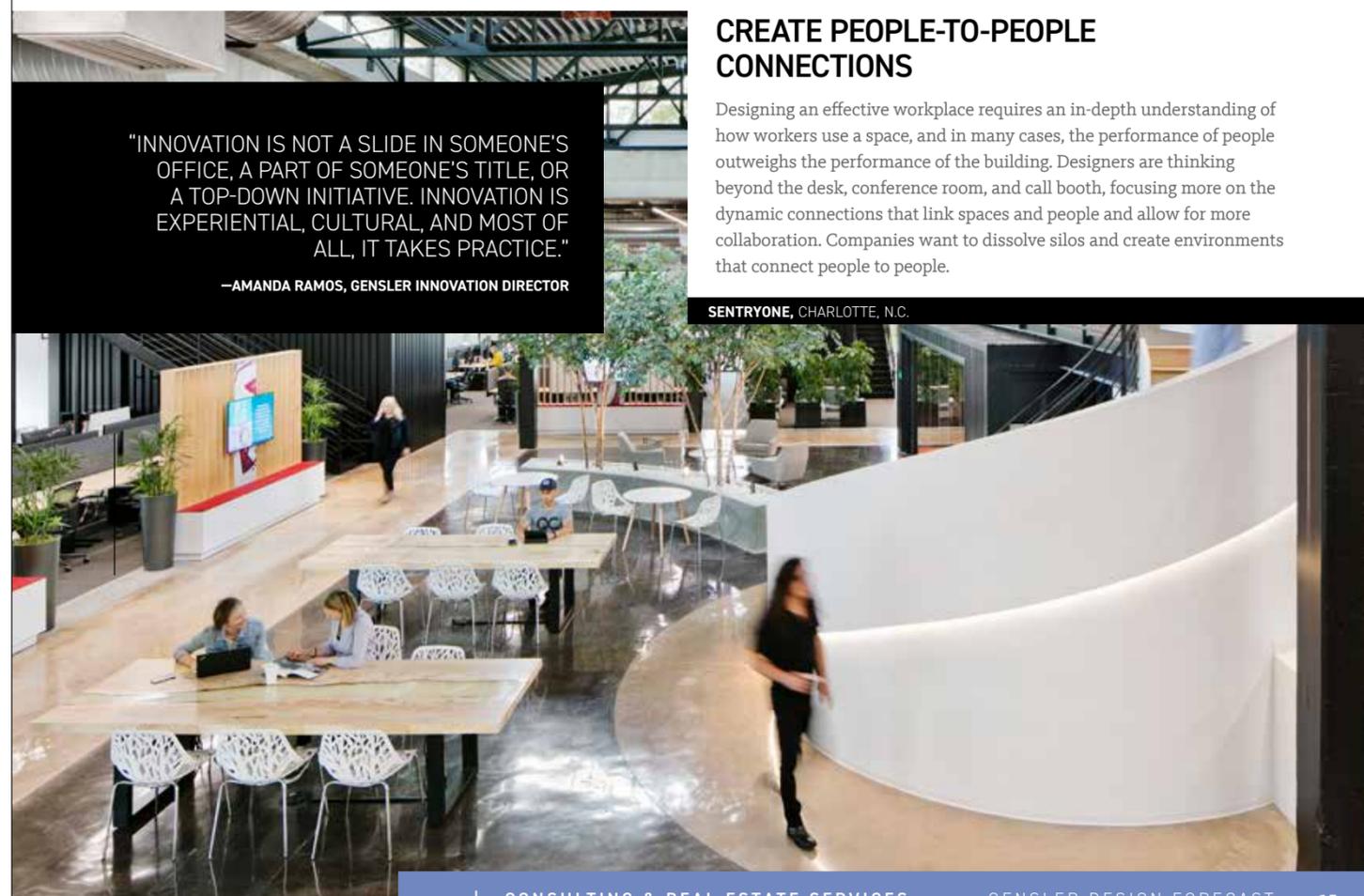
CREATE PEOPLE-TO-PEOPLE CONNECTIONS

Designing an effective workplace requires an in-depth understanding of how workers use a space, and in many cases, the performance of people outweighs the performance of the building. Designers are thinking beyond the desk, conference room, and call booth, focusing more on the dynamic connections that link spaces and people and allow for more collaboration. Companies want to dissolve silos and create environments that connect people to people.

SENTRYONE, CHARLOTTE, N.C.

"INNOVATION IS NOT A SLIDE IN SOMEONE'S OFFICE, A PART OF SOMEONE'S TITLE, OR A TOP-DOWN INITIATIVE. INNOVATION IS EXPERIENTIAL, CULTURAL, AND MOST OF ALL, IT TAKES PRACTICE."

—AMANDA RAMOS, GENSLER INNOVATION DIRECTOR



FORECAST: ENERGY & SCIENCES

With the accelerated rate of technological advancements, science and energy companies must be nimble and ready to adapt to continual change. Similarly, as the science and energy disciplines place increasing emphasis on collaboration across multidisciplinary teams, scientists and engineers require adaptable and livable technical environments in order to solve the world's most challenging problems.

SANOFI GENZYME HEADQUARTERS, CAMBRIDGE, MASS.



ADAPTIVE, AGILE WORKPLACES THAT RESPOND TO CHANGE

The sciences industry and the technology that supports it are constantly in a state of evolution and disruption. In an industry where lab spaces are highly technical and mergers and acquisitions are prevalent, we need to create flexible, nimble spaces that react and adapt quickly to changes in research and the market. An adaptive workplace is required in the energy industry as well, where it's critical to respond to business fluctuations. Flexible facilities that change over time with minimal capital expense will help companies compete and stay relevant.

CREATING A CULTURE OF COLLABORATION

Research science has moved from a culture of individual persistence to a culture of urgent collaboration. Technology has enabled science to move toward new models of innovation that engage a broad range of research disciplines and organizational partnerships. Blue-collar resurgence is about bringing expertise into the workplace that has become scarce as the economy has focused on technical over applied expertise. As technical and corporate disciplines converge, co-creation spaces can fuel the cross-pollination of ideas.

INDUSTRY DISRUPTION REQUIRES REVOLUTION

The energy industry is adapting to new types of energy and alternatives to fossil fuels in an effort to reinvent itself. As workers are pushing their employers to be accountable, be innovative, and have speed-to-market solutions that can help solve the energy crisis, there's an increased focus on culture, values, and environmental stewardship. For clients in the sciences, the industry has become less monolithic as it has begun to acquire innovative ideas from startups. The trajectory is continuing in the direction of entrepreneurial science, as large companies draw talent and new ideas from startups and early-stage companies.

TECH AND AUTOMATION PUT THE FOCUS ON HUMAN EXPERIENCE

Open innovation and technology are influencing the design of research environments and supporting new ways of working. Automation is giving scientists more mobility than ever before. Additionally, the process of analyzing data is revolutionizing the way scientists work. This shift requires design that makes transitions between lab and workplace easier. We also have to create spaces that stimulate process evolution, support task-specific work, and reinforce purpose-driven cultures. As automation becomes more pervasive, we need to develop design solutions that focus on the human experience.

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MAXIMIZE FLEXIBLE LAB SPACES AND ADJACENCIES

67%

OF RESPONDENTS AGREED THAT IT IS CRITICAL TO MAXIMIZE FLEXIBLE LABORATORY AREAS.

—ADAPTABILITY IN LIFE SCIENCE DESIGN, GENSLER RESEARCH INSTITUTE



AMERICAN WATER HEADQUARTERS, CAMDEN, N.J.

RESEARCH: ADAPTABILITY IN LIFE SCIENCE DESIGN

What is a value-driven solution to maximizing our needs for flexible life science lab design? We researched the space typologies typical of life science labs and arrived at a set of archetypes differentiated by functionality, flexibility, and cost-effectiveness. Our research tested three life science lab design types: traditional/fixed, flexible, and adaptable. We created a user-generated list of priorities that encapsulate the drivers of experiential value—and in doing so, we discerned what is necessary, and what is not necessary, in building ideal life science labs.



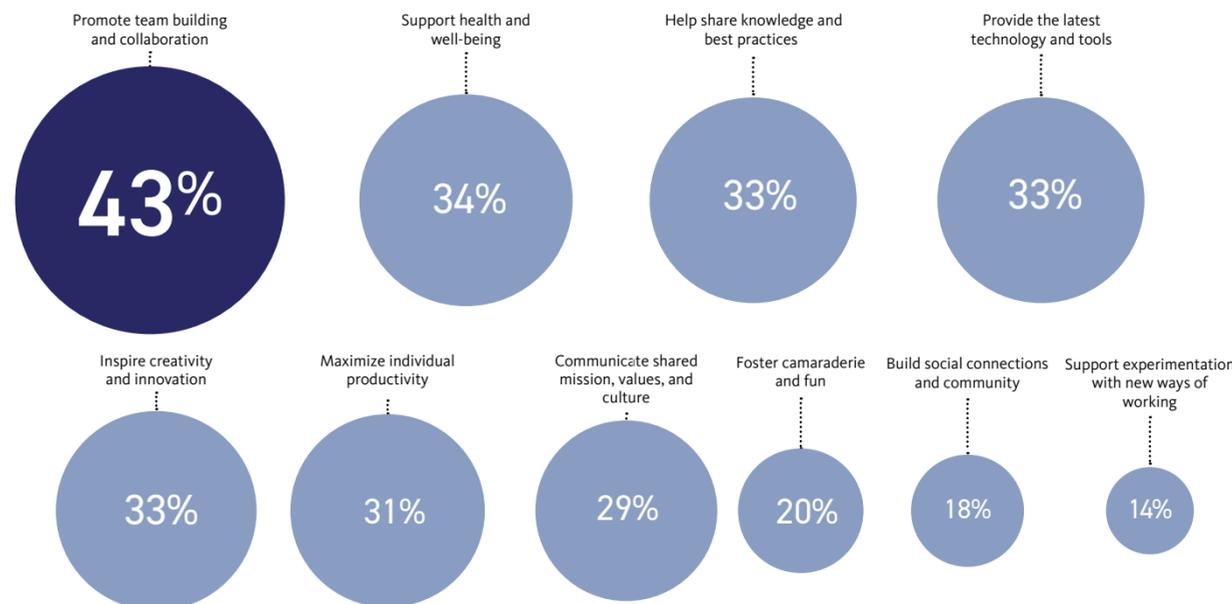
78%

AGREED THAT LAB AND OFFICE ADJACENCIES SHOULD BE MAXIMIZED.

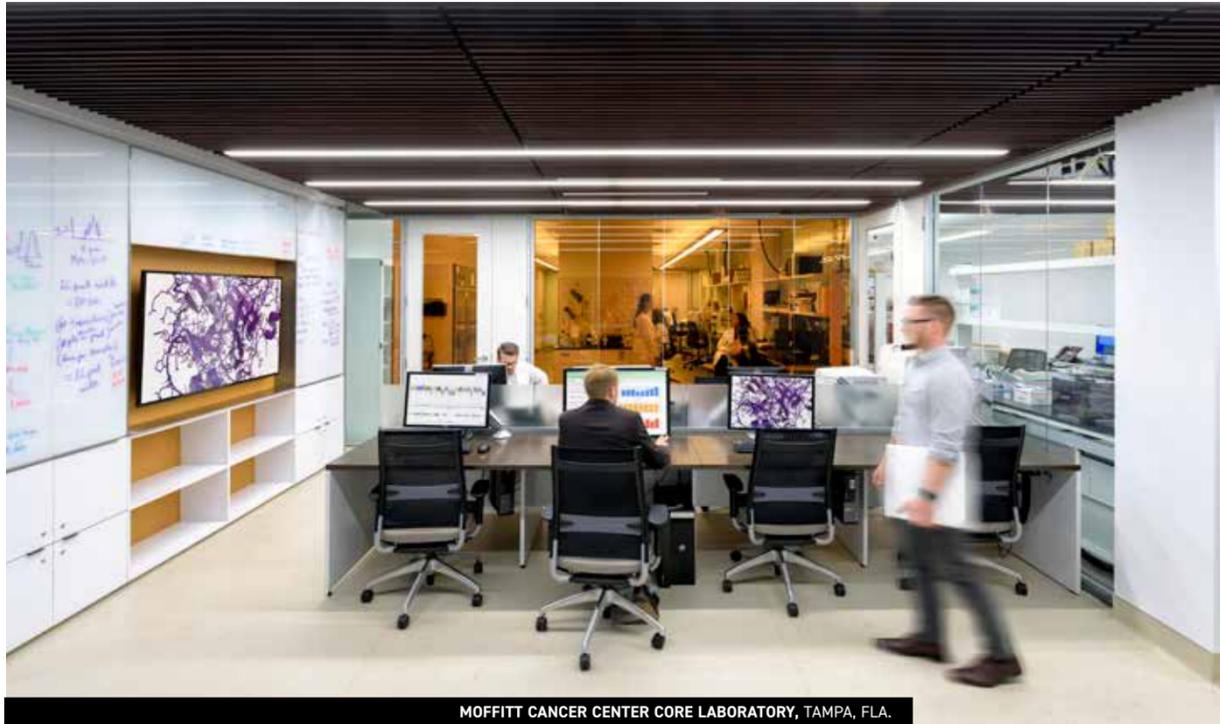
—ADAPTABILITY IN LIFE SCIENCE DESIGN, GENSLER RESEARCH INSTITUTE

TEAM BUILDING: THE MOST IMPORTANT ASPECT OF GREAT WORKPLACES

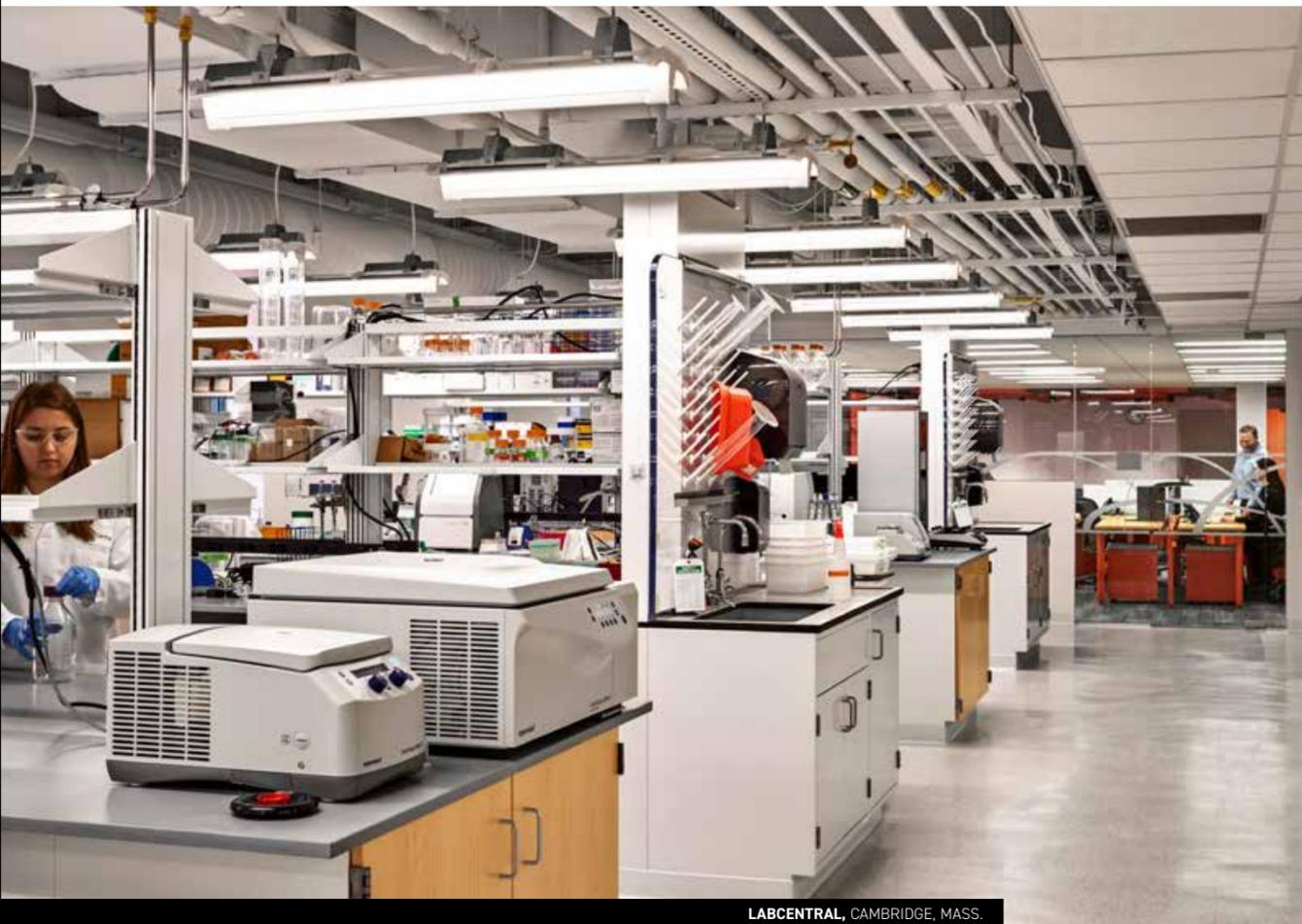
Percent of respondents who selected each attribute as describing the "best" workplaces.



—2019 U.S. WORKPLACE SURVEY



MOFFITT CANCER CENTER CORE LABORATORY, TAMPA, FLA.



LABCENTRAL, CAMBRIDGE, MASS.



YAMPA VALLEY ELECTRIC ASSOCIATION, STEAMBOAT SPRINGS, COLO.

FORECAST: FINANCIAL SERVICES

The digitization of everyday life has spurred a technological and cultural revolution in the financial services industry. To operate more efficiently and keep pace with expectations, financial firms are placing a premium on supporting innovation and experience in the workplace, ultimately enhancing their connections with consumers through superior services and products.



CAPITAL ONE WEST CREEK, RICHMOND, VA.

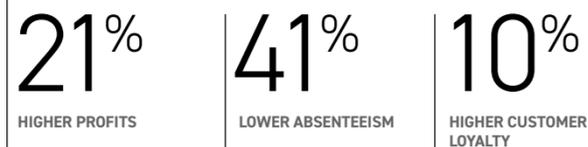
DIGITAL TRANSFORMATION IS HERE TO STAY

Technology is the new game in banking. How well banks succeed at digital transformation will ultimately depend on how well they integrate all aspects of their organizations. Of the firms planning to invest in digital technologies, 15% say the emphasis of that spend will be to build the modern workplace. That implies more than new computers and servers, but an “intelligent workplace” that quickly adapts to new technologies and meets the demands of an increasingly tech-savvy workforce.

COMPETITION FOR TALENT IS INCREASING

Businesses that attract talent with the workplace are also reaping the benefits of having happier, more engaged people. According to Gensler’s 2019 U.S. Workplace Survey, when people have great experiences at work, they are more engaged with the company culture, have better interaction with their peers, and are more productive.

When compared to their peers, businesses with the highest engagement from their people report:



—2019 U.S. WORKPLACE SURVEY

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By 2020, Gartner estimates Internet-connected things will outnumber humans 4-to-1, creating new dynamics for marketing, sales, and customer service.

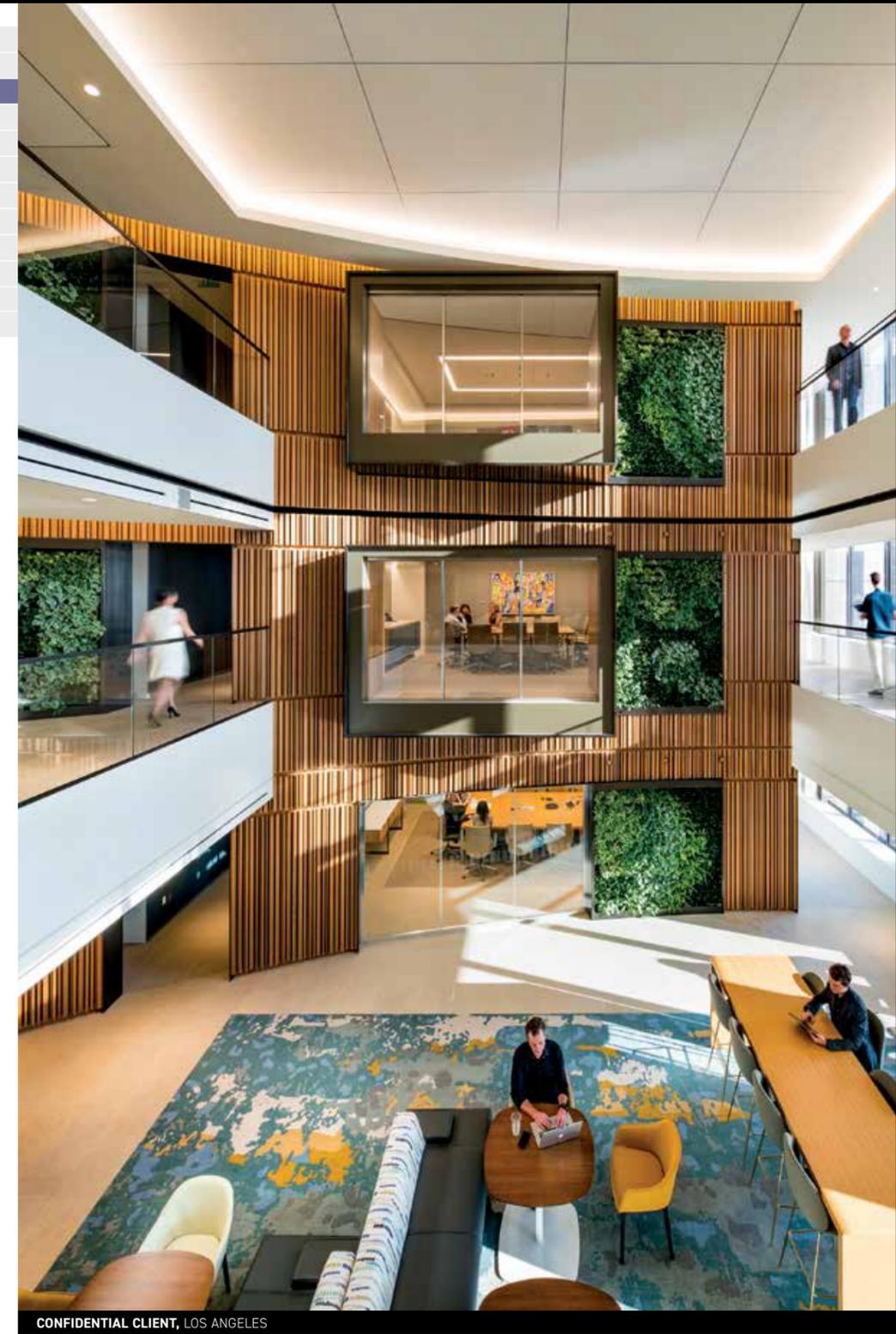
—LEADING THE IOT, GARTNER

76%
OF CORPORATE ORGANIZATIONS

87%
OF PRIVATE EQUITY ORGANIZATIONS

The vast majority of corporate and private equity organizations expect an increase in mergers and acquisitions.

—M&A TRENDS REPORT 2019, DELOITTE



CONFIDENTIAL CLIENT, LOS ANGELES

INDUSTRY COMBUSTION RESHAPES THE COMPETITIVE LANDSCAPE

According to Deloitte’s M&A Trends Report 2019, 76% of corporate organizations and 87% of private equity organizations expect an increase in mergers and acquisitions. This activity is contributing to the rise of cities and the evolution of business models, and leading to an imperative for flexible workplace design.

TECHNOLOGY BREEDS CONSTANT DISRUPTION

Mission-driven startups have shaken the core of legacy financial services firms and challenged them to focus on their customer experiences and reimagine their product offerings. The future of financial services design is driving a new era of innovation through the convergence of employee and consumer engagement.



NORTHWOOD INVESTORS, DENVER



HYUNDAI CAPITAL, BEIJING

AN URBAN OASIS THAT MIMICS NATURE

An innovative oasis amid the pollution of Beijing's urban core, Hyundai Capital's new China headquarters seeks to provide respite within its walls. The unique space offers an indoor environment that mimics a lush, natural setting, with small gardens dotting the workspace to help purify internal air.

THE UNIQUE SPACE OFFERS AN INDOOR ENVIRONMENT THAT RESEMBLES A LUSH, NATURAL SETTING.

Light wells with specially calibrated lamps imitate daylight. Centralized pantries on each floor cantilever into the building's towering atrium. Inspired by the traditional tea pavilions of Chinese culture, these pantries are a retreat from the stressors of the office, as well as a gathering spaces for employees.



DIGITAL HYUNDAI CARD PIXEL FACTORY, SEOUL

BARCLAYS WHIPPANY CAMPUS, WHIPPANY, N.J.

FROM UNOCCUPIED CAMPUS TO AMENITY-RICH WORKPLACE

Redefining the meaning of a "best in class" workplace, Barclays repurposed a vacant campus in suburban New Jersey to attract top talent with an amenity-rich workplace. The Barclays campus design centers on authentic experiences and choice, with a holistic live-work-play perspective.

The Whippany campus revitalizes obsolete real estate, strengthens the company's real estate portfolio, expands its technology branch, and creates a community-facing workplace. The 65-acre site redesign includes a robust amenity program, a green transportation hub, and an array of outdoor amenities and spaces. Each aspect of the campus is well-connected to its nucleus, an outdoor pavilion dedicated to socialization, meetings, and work.

THROUGH VISIONING SESSIONS WITH THE BARCLAYS TEAM, GENSLER DEVELOPED GUIDING PRINCIPLES FOR THE CAMPUS DESIGN.

Through visioning sessions with the Barclays team, Gensler developed guiding principles for the design, including community integration, amenity-rich opportunities, local partnership, and large open workspaces. Barclays has adopted this framework as the global guidelines for its workplaces in the U.K., India, and the U.S.

The campus' verdant setting led to a design aesthetic featuring a natural, farmhouse style. Authenticity was an overarching theme of Gensler's design. An authentic workplace fosters a sense of connection, and the experience offers employees a diversity of settings tailored to bolster their individual work styles—from focused, to collaborative, to creative.



BARCLAYS WHIPPANY CAMPUS, WHIPPANY, N.J.

FORECAST: FOUNDATIONS, ASSOCIATIONS & ORGANIZATIONS

Mission-based goals are a common denominator for not-for-profit organizations, so their workplaces need to reflect the mission and culture of the company more than most. There is great diversity among these entities—ranging from grant-giving foundations to membership-based associations—but the causes they support are human-centered. Design of their physical space amplifies their story, and communicates their ideals about meaningful social change to their community and beyond.

BRANDED ENVIRONMENTS TELL THE STORY OF MISSION

Every organization has a story. Branded workplaces create a narrative that connects with people on an emotional level. This helps attract top talent, engages the workforce, and inspires visitors, clients, and donors. In the case of mission-driven nonprofits, media like graphics, signage, murals, and plaques do more than chart the history of the organization, they embody values and perpetuate them.

CREATE SPACES FOR ADVOCACY

For organizations dedicated to helping disadvantaged or underserved communities, the office can serve as place for advocacy. Space can provide refuge and solace—a place for encouragement and affirmation, a place of belonging. Purpose-driven spaces can also help with job training, counseling, placement services, and continued education opportunities that lead to upward mobility. Most importantly, they empower their constituents.



CLASSY, SAN DIEGO

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IN THE FACE OF SO MANY DISRUPTIONS, THE INSTITUTIONS THAT WILL REMAIN RELEVANT TO THEIR AUDIENCES AND MEMBERS ARE THE ONES THAT EXPAND AND REDEFINE THEIR MISSION TO BE MORE INCLUSIVE.



AMERICAN KENNEL CLUB HEADQUARTERS, NEW YORK

ASPIRE TO A PURPOSE-DRIVEN WORKPLACE

Talented people want more than a paycheck; they want workplaces where they can excel at their jobs while also feeling connected to a greater purpose. This cohort of purpose-driven workers is naturally drawn to nonprofits. To help them realize their dream, their workplace needs to provide a variety of spaces that express mission, attract donors, provide flexibility, and give back to the employees. Office space that attracts the best talent and helps them achieve meaningful results is a great motivator.

4X

NOT-FOR-PROFIT EMPLOYEES ARE 4 TIMES MORE LIKELY TO ATTRIBUTE JOB SATISFACTION TO THEIR ORGANIZATION'S MISSION THAN TO COMPENSATION.

1.5^M

THERE ARE MORE THAN 1.5 MILLION REGISTERED FOUNDATIONS, ASSOCIATIONS, AND ORGANIZATIONS IN THE U.S.

—URBAN INSTITUTE

9%

FOUNDATIONS, ASSOCIATIONS, AND ORGANIZATIONS ACCOUNT FOR 9% OF THE WORKFORCE IN THE U.S.

—URBAN INSTITUTE

\$195^B

IN THE U.S. ALONE, 25% OF ADULTS DONATED THEIR TIME IN 2015 TO NONPROFITS, A VOLUNTEER CONTRIBUTION VALUED AT \$195 BILLION.

—URBAN INSTITUTE

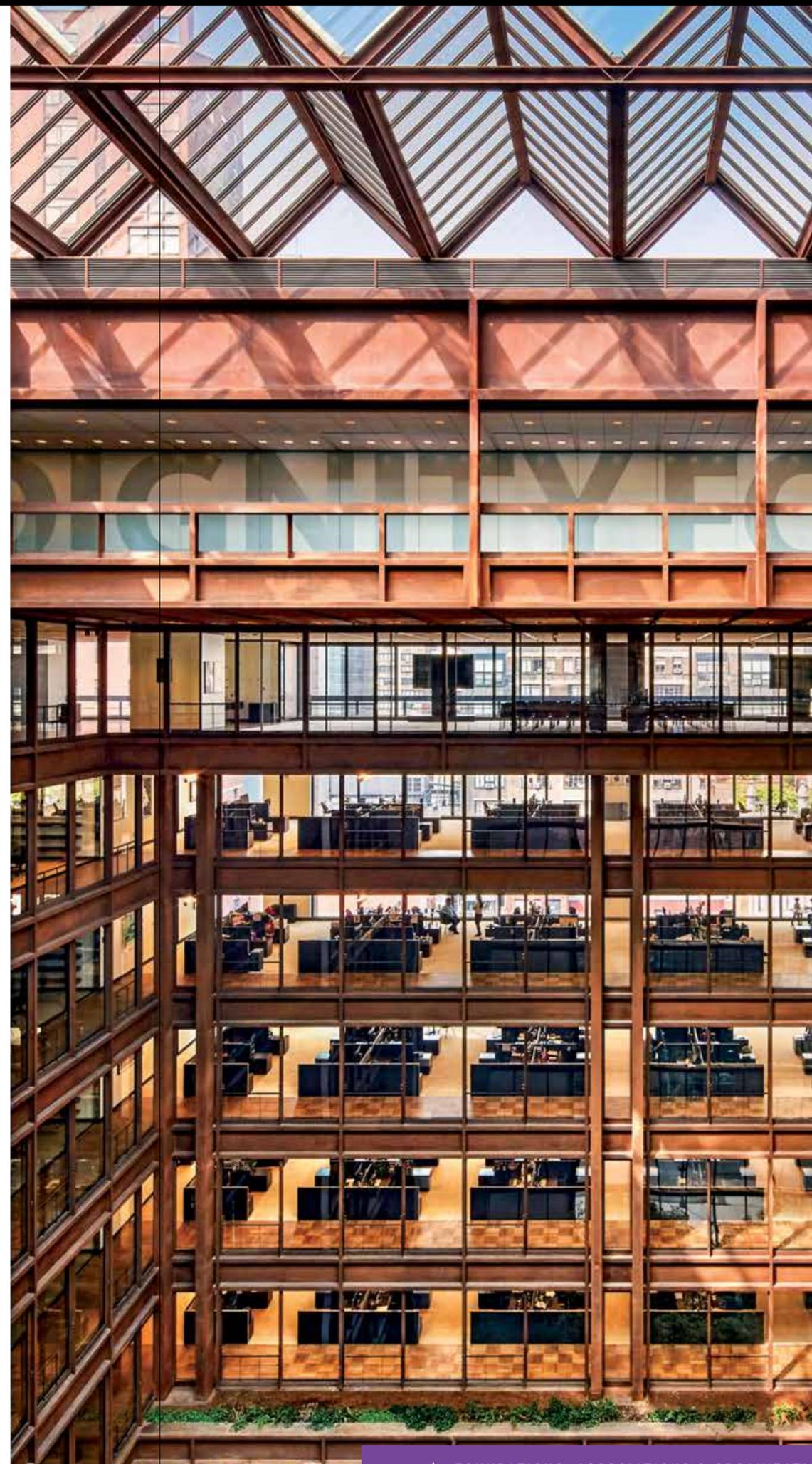
OUR CLIENTS' NEEDS DON'T STOP WITH THEIR WORKPLACE. GENSLER'S CROSS-DISCIPLINARY NETWORK GROWS RELATIONSHIPS ACROSS OUR COMMUNITIES TO CREATE MEANINGFUL SOCIAL CHANGE WITH OUR CLIENTS.



FORD FOUNDATION CENTER FOR SOCIAL JUSTICE, NEW YORK



FORD FOUNDATION CENTER FOR SOCIAL JUSTICE, NEW YORK

FORD FOUNDATION CENTER FOR SOCIAL JUSTICE,
NEW YORK

A MODERN LANDMARK RENEWED FOR TODAY

When the Ford Foundation enlisted Gensler to renovate its iconic New York headquarters, it seized the opportunity to realign its physical space to reflect its 21st-century mission: to promote the inherent dignity of all people. That meant revitalizing the building with respect for its architectural legacy while making it more sustainable, accessible, and reflective of the foundation's core values.

Renovation of the building, originally designed by Kevin Roche John Dinkeloo and Associates, has boosted its performance and addressed a host of structural and mechanical upgrades required for fire protection and life safety. With Roche's holistic design vision central to the renewal, stewardship of the revered landmark was a key guiding principle, with the Gensler team focused on the restoration of original finishes and reuse of materials throughout the project.

DISTINCTIVE MATERIALS WERE RETAINED, BUT BROUGHT BACK TO LIFE WITH EXTENSIVE RESTORATION AND REPAIR.

One of the project's noteworthy design interventions was the rejuvenation of the building's signature botanical garden, designed by landscape architect Dan Kiley. Heralded as the first large-scale interior atrium garden in the U.S., the landscape was replanted with species that adhere to Kiley's design intent. The foundation's sustainable mission also set high expectations for the renovation, which has been awarded LEED Platinum certification.

Beyond the technical aspects of the project, it was critical to the foundation that its social justice mission be clearly communicated throughout, which meant that accessibility and universal design were prioritized to welcome all users. Access to daylight and views was given equal importance, so the partitions of original private offices were removed, resulting in an open office layout with floor-to-ceiling glass that makes the building bright and open. This was key to reflecting the foundation's guiding principle of reducing hierarchy and creating transparency and openness. Today, with increased public access, including improved accessibility in the garden and a new double-height gallery that features art and public programs highlighting themes of social justice, the Ford Foundation Center for Social Justice is a space that says change and growth happen here.

FORECAST: GOVERNMENT & DEFENSE

Our Government & Defense practice provides design leadership that celebrates civic pride. Whether designing campuses, buildings, or interiors for local, state, provincial, or national governments, our projects use the best public- and private-sector design and delivery practices to create secure and healthy work environments for public workers and the citizens they serve.

LAND USE & ENVIRONMENTAL SERVICES AGENCY, MECKLENBURG COUNTY, N.C.



REUSING EXISTING BUILDINGS AND RESOURCES

Governments are renovating and reusing their existing buildings wherever feasible. Reuse of an existing building is also a sustainable practice that conserves construction resources and reduces energy and operating costs.

MORE ENERGY IS EXPENDED DURING THE MANUFACTURE, DELIVERY, AND ASSEMBLY OF BUILDING MATERIALS THAN AT ANY OTHER POINT DURING A BUILDING'S LIFE CYCLE.

—GENSLER'S IMPACT BY DESIGN 2018

CREATIVE DELIVERY METHODS RIGHT-SIZING THE FOOTPRINT

Government organizations are embracing new creative delivery methods to accelerate schedules, cut costs, and take advantage of private financing. More states and localities are using public-private partnerships and design-build methodologies to design and construct public facilities, thereby bringing private-sector delivery efficiency to government projects.

Technology has untethered workers from their desks, which often allows for a reduction in workplace square footage. The federal government has led the way in adopting more open and collaborative office environments pioneered in the private sector that are designed to optimize a variety of work settings. States and localities are increasingly following suit, and finding that increased access to online state and local citizen services leads to a reduction in on-site service centers.

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"MORE THAN ONE-THIRD OF FEDERAL EMPLOYEES ON BOARD AS OF 2015 WILL BE ELIGIBLE TO RETIRE BY 2020."

—U.S. GOVERNMENT ACCOUNTABILITY OFFICE, FEBRUARY 2017



TRAVIS COUNTY CIVIL AND FAMILY COURTS, AUSTIN, TEXAS

A BALANCED WORKPLACE PROMOTES ENGAGEMENT

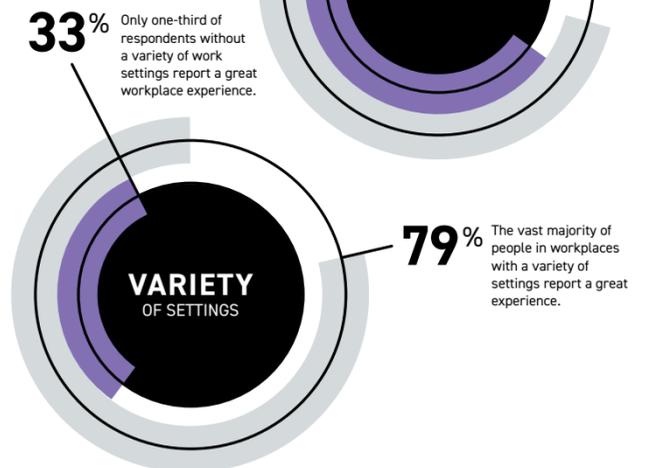
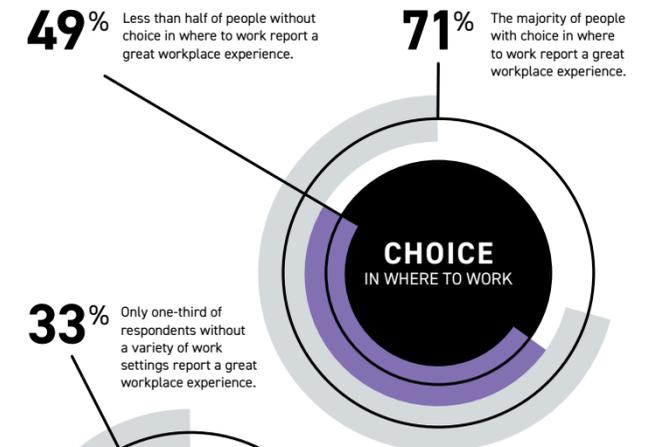
To engage workers and heighten performance, government facilities should have a balance of "we" space and "me" space to foster collaborative as well as individual performance. Gensler's 2019 U.S. Workplace Survey has shown that workplaces with a variety of settings result in a more engaged and higher-performing workforce.

WORKPLACE INNOVATION IN THE WAR FOR TALENT

As the large percentage of baby boomers in the government workforce retire, public employers will compete to recruit entry- and mid-level workers who expect the flexibility and technology assets of the most advanced workplaces. This is particularly true for cyber security and cyber defense agencies, which contend with private-sector tech firms for top talent. For government agencies, a well-designed workplace with effective use of graphics and branding can help recruit and retain workers by reminding them of the mission they serve.

THE POWER OF VARIETY AND CHOICE

Workspaces that provide variety and choice are more effective. People with choice in where to work are significantly more likely to report a great experience than those without.



"ACCESS TO A GREATER VARIETY OF WORKSPACES WOULD INCREASE THE BALANCE AND CHOICE THAT UNDERPIN WORKPLACE PERFORMANCE AND INNOVATION."

—GENSLER 2016 U.S. WORKPLACE SURVEY™, REPORT ON GOVERNMENT SECTOR

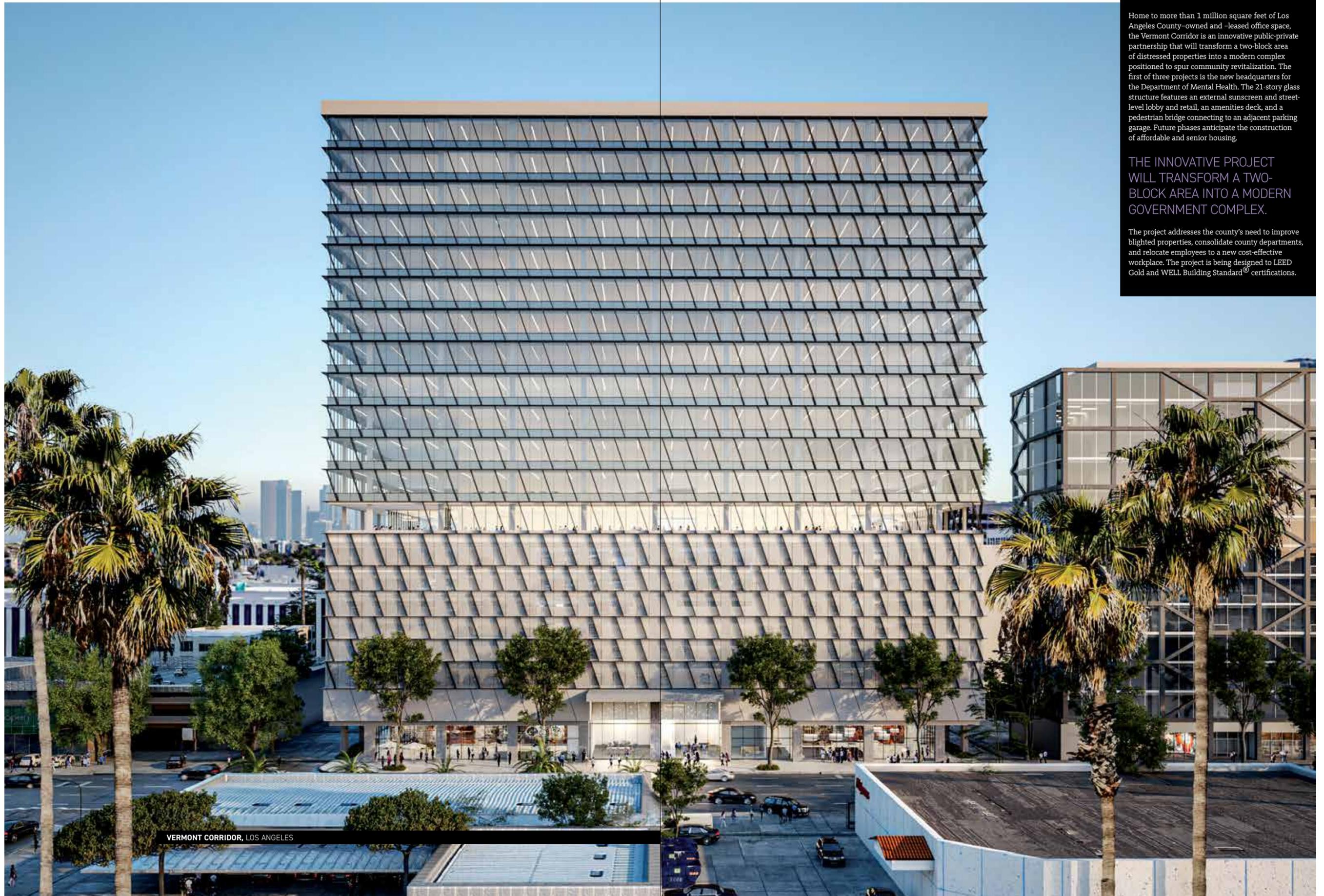
—2019 U.S. WORKPLACE SURVEY

PARTNERSHIP FOR A REVITALIZED COMMUNITY

Home to more than 1 million square feet of Los Angeles County-owned and -leased office space, the Vermont Corridor is an innovative public-private partnership that will transform a two-block area of distressed properties into a modern complex positioned to spur community revitalization. The first of three projects is the new headquarters for the Department of Mental Health. The 21-story glass structure features an external sunscreen and street-level lobby and retail, an amenities deck, and a pedestrian bridge connecting to an adjacent parking garage. Future phases anticipate the construction of affordable and senior housing.

THE INNOVATIVE PROJECT WILL TRANSFORM A TWO-BLOCK AREA INTO A MODERN GOVERNMENT COMPLEX.

The project addresses the county's need to improve blighted properties, consolidate county departments, and relocate employees to a new cost-effective workplace. The project is being designed to LEED Gold and WELL Building Standard® certifications.



VERMONT CORRIDOR, LOS ANGELES

FORECAST: INTELLIGENT PLACES

Data analytics is powering a revolution in the performance of the built environment. Organizations that harness this potential will have a significant advantage. To succeed in a rapidly changing market, design will need to begin with data-driven insights and evolve with real-time learning. Predictability and agility will become the new standard.



MICROSOFT EUROPEAN HEADQUARTERS, DUBLIN, IRELAND

NEW WAYS TO MEASURE AND MANAGE BUILDINGS

Sensor technologies, machine learning, and AI are changing the way we measure and manage buildings. Their application opens new ways to learn about high-performance space and understand what makes people happy and healthy. Gensler's Experience IndexSM shows that improving human experience adds up to better business outcomes and higher employee and customer satisfaction.

THE BUILT ENVIRONMENT WILL BE MORE TAILORED AND ADAPTABLE

Data-driven design enables the tailoring of environments and greater empowerment of people. Owners and occupants will have the insights necessary to predict and optimize hospitality, wellness, and utilization. The agile model creates customized experiences that will have far-reaching impacts on the ways people live, work, and play.

4,800 INTERACTIONS/DAY

BY 2025, ONE-HALF OF THE WORLD'S DATA WILL BE IOT DATA. OVER 25% WILL BE REAL-TIME DATA. THE AVERAGE NUMBER OF DIGITAL INTERACTIONS PER DAY FOR EVERY CONNECTED PERSON WILL INCREASE FROM 800 TO NEARLY 4,800.

—DATA AGE 2025: THE EVOLUTION OF DATA TO LIFE-CRITICAL, IDC

MAKING "SMART" A STARTING POINT TO FUTURE-PROOF SPACES

Intelligent personal devices and building systems will become essential to learning behavior and observing activity patterns. The next frontier is integrating data into real-time, user-accessible 3D models, giving owners and occupants valuable capabilities in advanced scenario planning and designing for operational efficiencies.

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THE COMMERCIAL SMART BUILDING MARKET FOR IOT IS EXPECTED TO GROW NEARLY TENFOLD WITHIN THE NEXT FIVE YEARS TO MORE THAN \$51 BILLION GLOBALLY BY 2023.

—IOT IN SMART BUILDINGS MARKET OUTLOOK AND FORECASTS 2018-2023

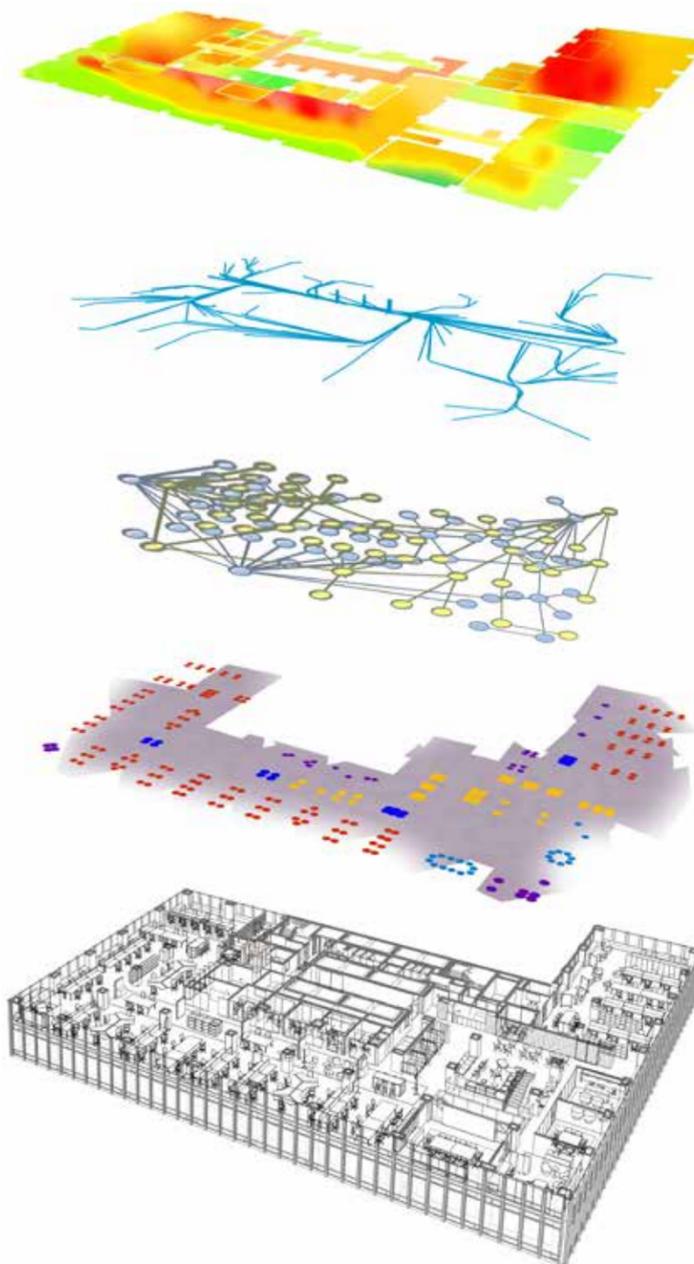
BUILDINGS ARE FAST BECOMING HIGHLY INSTRUMENTED

80%

OF COMMERCIAL BUILDINGS HAVE IOT.

DATA IS A SUPERPOWER FOR SHAPING OUTCOMES

BACKED BY DATA, DESIGN BECOMES AN INTELLIGENT RESPONSE SYSTEM FOR ACHIEVING SPECIFIC HUMAN AND BUSINESS OUTCOMES.



GENSLER NEW YORK

USING SENSORS AND IOT TECHNOLOGY TO DRIVE EVIDENCE-BASED DESIGN

From the outset, Gensler's New York office was envisioned as a living lab for ongoing research on the future of work, technology, and design. Gensler has been using IoT sensors specified for the New York office to learn how to inform evidence-based design. A network of more than 1,500 sensors tracks daylight levels, occupancy, temperature, and energy consumption relative to spatial conditions.

THE GOAL IS TO MAKE SPACE FOR PEOPLE, NOT FIT PEOPLE INTO SPACE.

Our pilot program used mixed-methods studies including user surveys (applying Gensler's WPixSM tool), observation (using Observe[®], our iPad app that maps and analyzes space utilization), and room booking data to capture occupancy.

As we deepened our research, we introduced an additional layer of occupancy-sensing, temperature, and motion-capturing capabilities to more richly explore how we work, operate, and adapt to space across time—ultimately advancing Gensler's expertise in how data can be applied to design for human experience.

FORECAST: MEDIA & CONSUMER GOODS

Shaping cities for the people who live, work, and play in them is the core of Gensler's design approach, and this is especially pronounced in the work we do for the media and consumer goods industry. Fueled by major advancements in digital technology, this industry shapes consumer behaviors more than most by driving people to specific content, products, and services. We help media and consumer goods companies create powerful narratives in their physical spaces that, in turn, shape the human experience of our cities.



NESTLÉ USA HEADQUARTERS, ARLINGTON, VA.

CONNECT SPACE TO PERSONAL IDENTITY

In an era of constant change and content saturation, consumers and workplace talent are craving authenticity. Companies can use the workplace as a tool to connect people to their personal identities, create a sense of commitment and belonging, and remain authentic in the face of change. Designing the workplace as the physical embodiment of the brand enhances engagement and cultivates innovation. Ultimately, the most successful workplaces connect workers with their consumers.

PEOPLE WANT MULTIMODAL SPACES

Recognizing that traditional uses of spaces are blurring, consumer goods and media companies are embracing places designed to accommodate multiple activities of different types at the same time. According to the Gensler Experience Index, spaces that support multiple "modes" are more likely to create great experiences. As single-use spaces become obsolete, places that are activated from day to night, such as workplaces that function as a coworking space during the day that become event venues at night, are driving ancillary revenue and creating multifaceted experiences.

CROSSING BARRIERS BETWEEN PUBLIC AND PRIVATE

Consumer goods and media companies thrive when they break barriers between consumers and brands, between private and public. Social media has amplified the power of brands and consumers. As a result, these companies have become highly responsive to what consumers want. As these barriers dissolve, it's crucial that companies engage directly with users. They're inviting the public in, using the workplace not only as a place for business, but also a place for consumers to experience a brand, to test and prototype products, and provide direct feedback.

BALANCE LEGACY AND INNOVATION

To evolve and keep up with changing consumer expectations, brands must strike a balance between showcasing their heritage and accomplishments while telling a story of their future. A clear, purposeful celebration and expression of brand legacy in the workplace can be powerful for talent and for consumers and clients. At the same time, companies must use the workplace to keep the best talent and recruit new people, which they can do by expressing a clear purpose and narrative for the future in their space.

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CONSUMERS OPT FOR MULTIPLE SUBSCRIPTIONS TO GET THE CONTENT THEY WANT

43% OF U.S. CONSUMERS

HAVE BOTH PAY TV AND STREAMING SUBSCRIPTIONS

52% OF GEN X

—DELOITTE DIGITAL MEDIA TRENDS 2019

"MANY [ENTERTAINMENT AND MEDIA] SEGMENTS ARE AT A TIPPING POINT... NEW DISTRIBUTION MODELS ARE FORCING COMPANIES TO REVISIT THEIR APPROACH TO MIX TO REACH FANS WHERE THEY ARE."

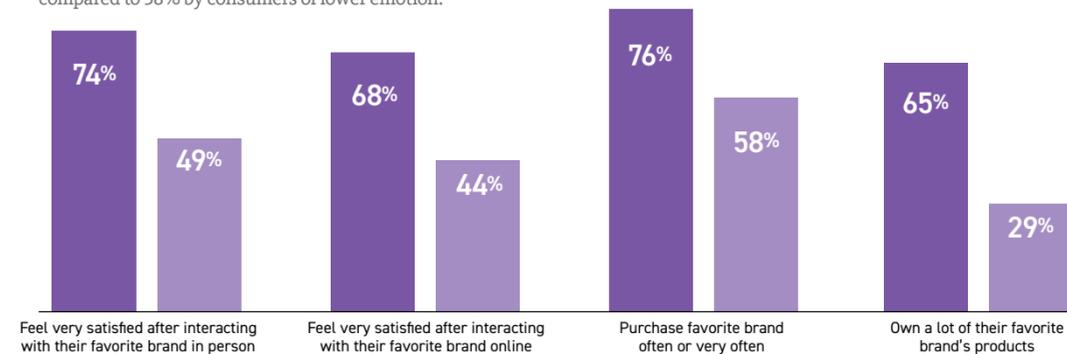
—PWC, GLOBAL MEDIA & ENTERTAINMENT OUTLOOK, 2017-2021



WTOP, CHEVY CHASE, MD.

APPEAL TO CONSUMERS' EMOTIONS

Of the "high emotion" consumers, 76% purchased their favorite brand often or very often, compared to 58% by consumers of lower emotion.



—GENSLER BRAND ENGAGEMENT SURVEY



HEARST MAGAZINES, LONDON



NETFLIX, HOLLYWOOD, CALIF.



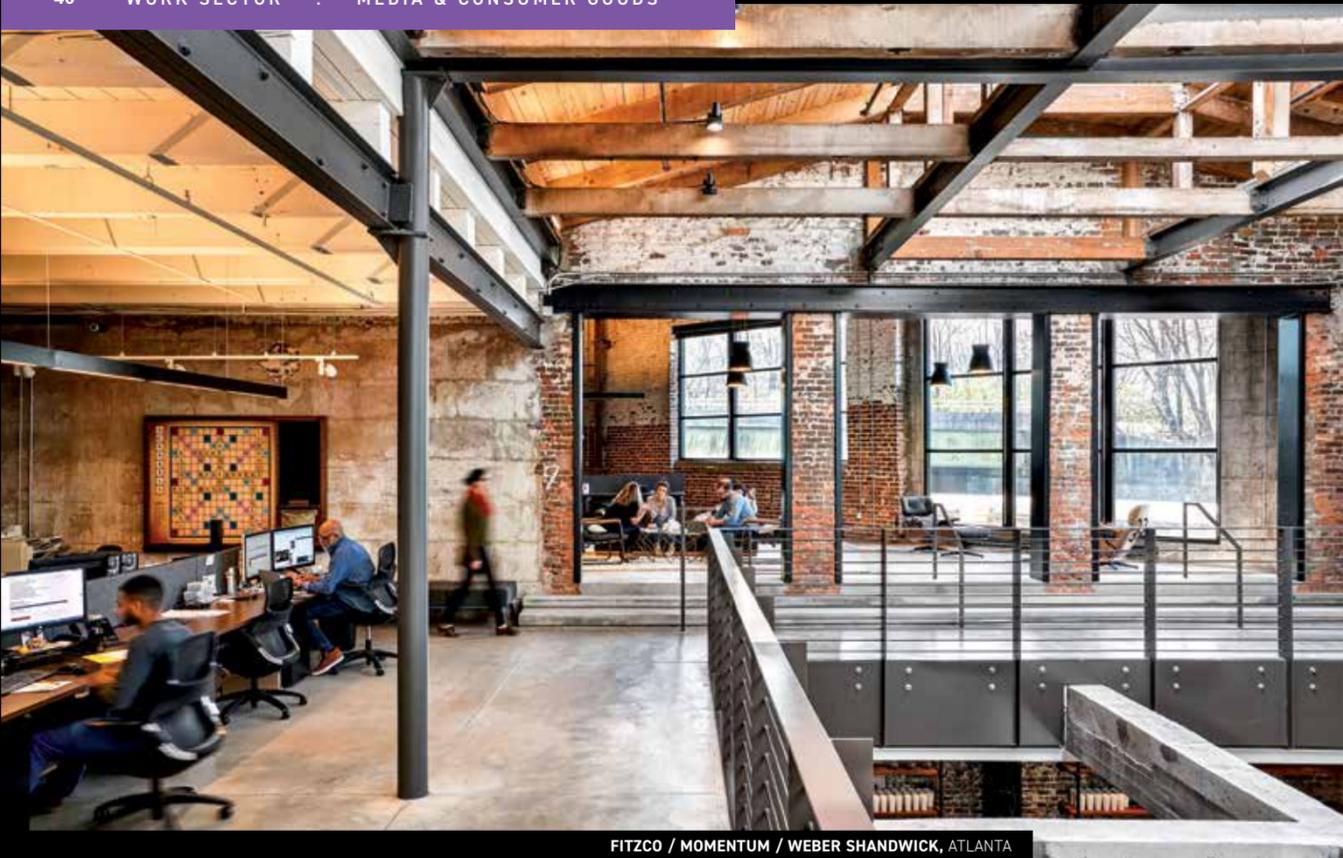
CAMPARI NORTH AMERICAN HEADQUARTERS, NEW YORK

THE RIGHT AMENITIES TO ATTRACT TOP TALENT

Today's companies are looking for amenities that attract and retain top talent. The amenities that have a measurable upshot on people's experience and effectiveness in the office offer a choice of dynamic workspaces.

ACCORDING TO GENSLER'S 2019 U.S. WORKPLACE SURVEY, A VARIETY OF WORKSPACES IS CONNECTED TO A GREAT WORKPLACE EXPERIENCE.

Campari Group's new North American headquarters cultivates collaboration and experimentation among staff and clients with an innovation lab where bartenders, brand ambassadors, and industry insiders can experiment with and create new cocktails. Within Campari's open work plan, four distinct bar experiences immerse guests and staff in the Campari culture while offering people a place to interact with the company's spirits brands in a lifelike setting.



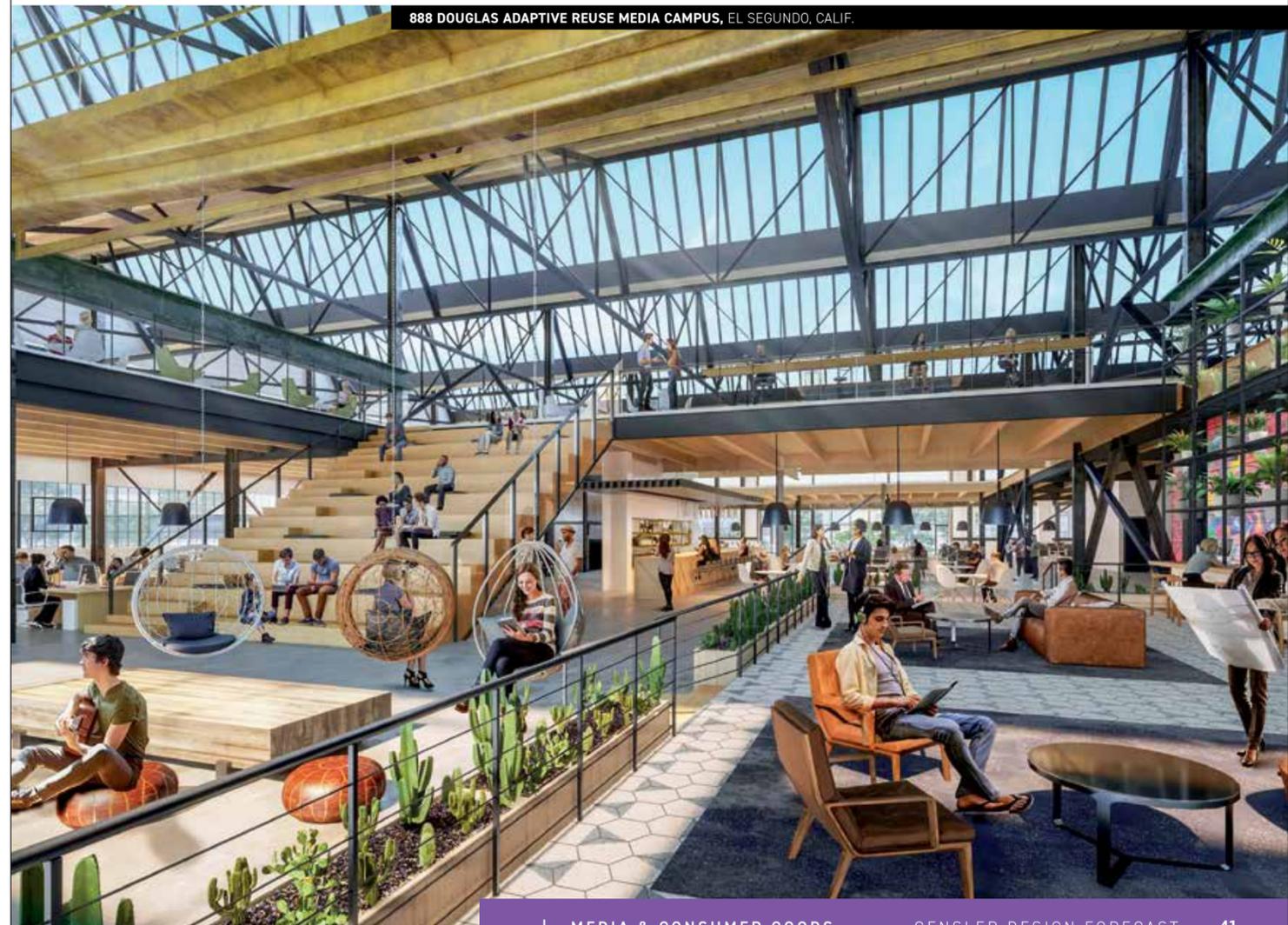
FITZCO / MOMENTUM / WEBER SHANDWICK, ATLANTA



EDRINGTON SPIRITS, MIAMI



THE COCA-COLA COMPANY, ATLANTA



888 DOUGLAS ADAPTIVE REUSE MEDIA CAMPUS, EL SEGUNDO, CALIF.

MERCEDES-BENZ USA HEADQUARTERS,
SANDY SPRINGS, GA.

A MODERN WORKPLACE THAT BALANCES LEGACY AND INNOVATION

A legendary carmaker builds a modern, connected environment that balances legacy and innovation. At the new headquarters of Mercedes-Benz USA—the unit responsible for sales and service support, as well as marketing for Mercedes' U.S. dealerships—cars and collaboration are on full display.

THE COMPANY'S NEW HOME ENABLES COMMUNICATION, COLLABORATION, AND INNOVATION.

Designed from the inside out, the company's glassy home is built on the idea of creating an open office environment to better enable communication, collaboration, and innovation. This emphasis on helping people connect more easily is a hallmark of modern workplace thinking. Here, that thinking drove not only the interior design of the building, but the geometry of the entire structure.



MERCEDES-BENZ USA HEADQUARTERS, SANDY SPRINGS, GA.



FORECAST: OFFICE BUILDINGS

For building owners and operators, the gold standard for office buildings has shifted. Companies now want to occupy buildings that are part of vibrant communities. Mixed-use developments add energy and variety that enrich lives and connect people, and they are magnets for attracting new talent. Office building owners and operators are also aware that to keep the best people, they have to offer the right mix of amenities in workspaces to improve people's effectiveness at work and help build company culture.

TOWER FIFTH, NEW YORK



CREATE EXPERIENCES FOR A NEW ASPIRATIONAL CLASS

The office building is more than just a place to work. For a new wave of talent—and not just millennials—it's a place to gather with like-minded peers. No longer driven primarily by material gain, this cohort of elites aspires to be better human beings, and they express their social values through their consumer choices. At work, they are seeking a sense of belonging and an emotional connection to the mission and purpose of the organization.

ADAPT TO WORKPLACE MOBILITY

50%

BY 2030, 50% OF OFFICE WORKERS WILL BE FREELANCE, REMOTE, OR PROJECT-BASED.

—FORBES

Employers in every industry are facing the reality that increasing numbers of people are choosing to work in many places besides the office. To keep their people engaged and lure new talent, organizations are creating dynamic work environments. They're investing in spaces that encourage individual, collaborative, and virtual settings, as well as amenity strategies that prioritize a work-anywhere approach.

HIGH-PERFORMING PEOPLE WANT HIGH-PERFORMANCE BUILDINGS

The cost of unwell workers represents 10% to 15% of annual global economic output, according to the Global Wellness Institute. But a high-performing, healthy workplace can boost engagement and productivity. Access to fresh air and daylight, including outdoor work environments, can alleviate stress and other ailments. Intelligent building controls can lower energy and water costs and make buildings safer and healthier. The next generation of smart buildings will leverage sensor technology and IoT-enabled devices so that individuals can adjust temperature, air, lighting, and acoustics to their own liking.

URBANIZING THE SUBURBS

The American suburb is getting a makeover as suburban developments adopt more sustainable models of urban planning. Edge towns and ring cities located on the outskirts of urban centers are calling for increased density where people can work, live, and play in compact mixed-use developments. As recently as 2017, office construction in the suburbs far outpaced the cities, according to CBRE. The key for office-driven mixed-use is to mimic the qualities of urban settings that knowledge workers and millennials want: walkability and access to public transit, retail, restaurants, and a mix of housing options.

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IT'S NEARLY TWO DECADES SINCE "TALENT" WAS IDENTIFIED AS THE SPARK FOR 24-HOUR CITY GROWTH. THE AGGLOMERATIVE POWER OF TALENT IS THE KEY TO PRODUCTIVITY, PROFITS, AND URBAN VITALITY.

—EMERGING TRENDS IN REAL ESTATE 2019, PWC AND THE URBAN LAND INSTITUTE

62%

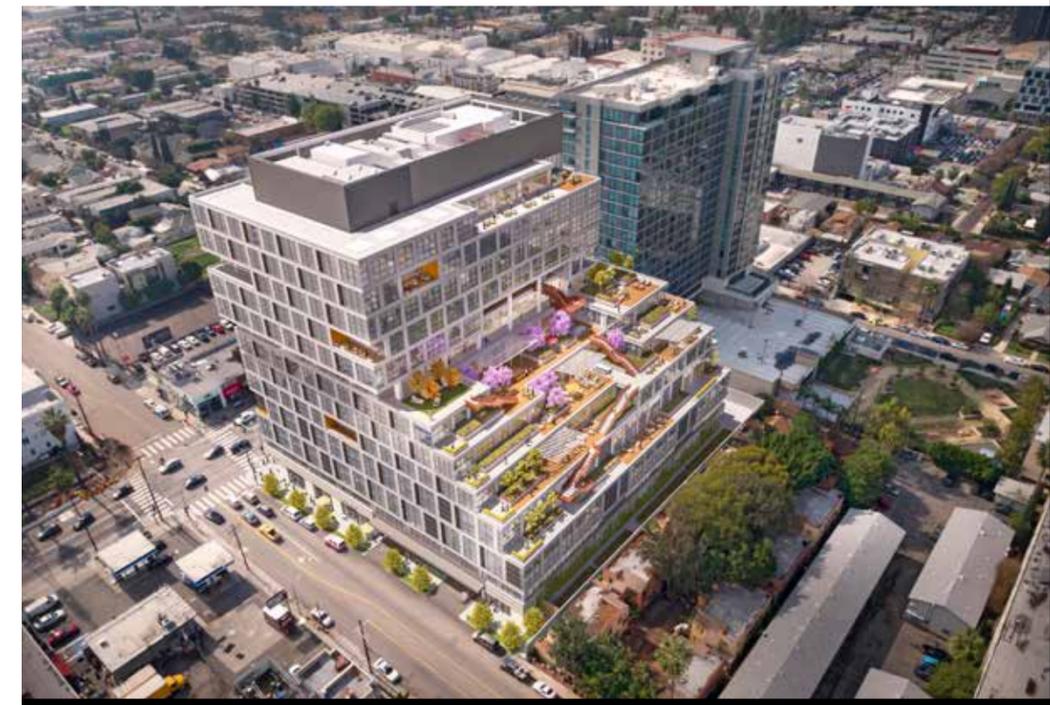
OF MILLENNIALS FAVOR MIXED-USE COMMUNITIES THAT COMBINE LIVE, WORK, AND PLAY.

—CONSTRUCTION DIVE, GENSLER

\$1 TRILLION

WAS CONTRIBUTED TO U.S. GDP IN 2018 BY COMMERCIAL REAL ESTATE DEVELOPMENT AND OPERATION OF EXISTING BUILDINGS.

—NAIOP, ECONOMIC IMPACTS OF COMMERCIAL REAL ESTATE, 2019



EPIC, LOS ANGELES

High-performing, green-certified office environments scored 26% higher on cognitive tests and had 30% fewer symptoms of sick building syndrome than offices in high-performing, but noncertified buildings.

—T.H. CHAN SCHOOL OF PUBLIC HEALTH'S CENTER FOR HEALTH AND THE GLOBAL ENVIRONMENT AT HARVARD UNIVERSITY AND SUNY UPSTATE MEDICAL

A NEW ALTERNATIVE: MASS TIMBER

Given the high carbon footprint of concrete and steel construction, a new alternative for large-scale buildings has emerged: wood construction. The combination of fire resistance, structural integrity, and environmental attributes makes new wood buildings an attractive option. Recent mass timber buildings, for example, weigh approximately 20% of comparable concrete buildings, which reduces their foundation size and embodied energy, according to the Mass Timber Code Coalition. While the technology is more prevalent in Canada due to more lenient building codes, there's a big shift coming in the U.S.

MASS TIMBER IS COST EFFICIENT

25%

MASS TIMBER BUILDINGS ARE ROUGHLY 25% FASTER TO CONSTRUCT THAN CONCRETE BUILDINGS AND REQUIRE 90% LESS CONSTRUCTION TRAFFIC.

—MASS TIMBER CODE COALITION



ADOBE NORTH TOWER, SAN JOSE, CALIF.



STARWOOD CAPITAL HEADQUARTERS, MIAMI BEACH, FLA.



SHIMAO 108 TOWER, TAIJIANG DISTRICT, FUZHOU, CHINA — 630-METER TOWER

CONFIDENTIAL CLIENT, THE NETHERLANDS



3855 WATSEKA, CULVER CITY, CALIF.



FINANCE CENTRE, MANILA

FORECAST: PRODUCT DEVELOPMENT

Great products have their beginnings in great insights, and great insights are powered by a broad perspective. Product development is at its best when it combines cross-disciplinary thinking, a broad understanding of people's interaction with the built environment, and thorough knowledge of design trends and evolving needs. The benchmark of success is when design integrity and beauty lead to a better human experience.

SUSTAINABLE PRODUCTS ARE IN HIGH DEMAND IN TODAY'S WORLD, INCLUSIVITY IS ESSENTIAL

More and more, products are being designed and manufactured to have a net positive impact on growing urban centers and their people. The workplace is an important contributor. Sustainable products are key contributors in helping building owners achieve WELL Building Standard® and LEED certifications. Carpeting, for example, can be carbon neutral, made with high percentages of recycled content, manufactured free of Red List Building Materials that are harmful to human beings, and Living Product Challenge Petal certified—all which contribute to a healthier planet and human comfort.

Disability is often equated with an inability to experience the built environment to its fullest, and one of the most physically and emotionally frustrating experiences any person can face is not being able to "get in." By following a rigorous interpretation of ADA standards, and exceeding those standards when we can, designers can make the seemingly simple act of opening and closing doors and drawers easier for people of all abilities—all while demonstrating that elegant design can integrate seamlessly into accessible spaces. It creates places that are healthier and welcoming for all users.



FANTONI ATELIER



PBA EVERYONE MILLWORK PULLS

DESIGN FOR SHIFTS IN DEMOGRAPHICS

For our cities to thrive as cohesive communities, they must adapt to the needs of their residents. By 2050, the 65+ age group in the U.S. is projected to nearly double from 48 million to 88 million adults. Globally, life expectancy in the same span of time is predicted to increase from 68.6 years to 76.2 years of age. The demand for well-designed products for this generation is clearly on the rise. Our opportunity is to design products that are easy to operate by people with diminishing physical capabilities, without sacrificing aesthetics or decreasing the dignity of users.

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NEW MARKETS AND NEW BUSINESS NEEDS

2X

BY 2050, THE 65+ AGE GROUP IS PROJECTED TO BE 88M PEOPLE, NEARLY TWICE ITS CURRENT POPULATION.

—U.S. CENSUS BUREAU



MOHAWK GROUP NUTOPIA

DESIGNED WITH SUSTAINABILITY IN MIND

Mohawk Group Nutopia is a carbon neutral modular carpet plank system made with 30% recycled content and is recyclable through Mohawk Group's ReCover Program. It carries the Declare label for material health (Red List

Free) and is Living Product Challenge Petal certified. All these efforts and certifications contribute to a healthier environment.



THE NEW TRADITIONALISTS (TNT) ELEVATE

KEEPING PACE WITH A CHANGING WORKPLACE ECOLOGY

As the workplace continues to shift to reflect diverse work styles, products need to address workers' changing needs in ways that allow a customized workplace. Space planning should allow a range of solutions to accommodate work settings that support everything from concentrated work to cross-team collaboration. Configurable components allow businesses to recombine elements and create versatile work zones. Those systems should incorporate features that adapt to each person's needs—whether they are freestanding carrels that create concentration zones, or height-adjustable desks that let people feel their workspace is their own. Controlling for these factors means an increase in human comfort and workplace performance.

GETTING OLDER NO LONGER MEANS A SLOW TREK TOWARD INFIRMITY. IN FACT, MANY OF THOSE APPROACHING RETIREMENT WANT THE SAME CITY-BASED AMENITIES THAT YOUNGER GENERATIONS PREFER.

—BUILDING BOOMTOWN, GENSLER RESEARCH INSTITUTE

FORECAST: PROFESSIONAL SERVICES

At the center of every professional services firm are people, regardless of whether the firm specializes in law, consulting, engineering, or other offerings. They leverage space as a primary tool for engaging people and sparking emotional connections through one-of-a-kind experiences. When designed with an understanding of human needs, the workplace becomes a magnet that attracts and energizes people.



QBE AUCKLAND, AUCKLAND, NEW ZEALAND

CURATING MEMORABLE EXPERIENCES

Fundamental expectations about the professional services workplace are shifting. At the office, people now seek the kinds of experiential moments that were previously reserved for other arenas of life. Now, workplace zones that have distinct atmospheres dedicated to reflecting, communing, or energizing the people who work there can help organizations win the war for talent and provide clients with rich and memorable experiences that forge strong relationships and entice them to come back.

ENGAGEMENT THROUGH VARIETY AND CHOICE

Professionals—particularly younger professionals—are looking for variety and choice in the workplace. In Gensler's own survey of millennial attorneys from Am Law Top 100 firms, 62% of respondents said that having a choice in different kinds of workspaces would support productivity. Providing different environments for different modes of work yields a more effective and engaging work experience.

TELLING THE STORY THROUGH BRAND INTEGRATION

Having a highly functional office space is good. But integrating that space with a firm's ethos is better, even transformational. Every organization has its own unique identity that can pay dividends when it comes to employee and client engagement. To spotlight that identity, firms are integrating branded elements that provide a sense of place, establish differentiation, and evoke emotion.

THE RESILIENT WORKPLACE: SEEKING ADAPTABILITY AND FLEXIBILITY

In today's professional settings, the frequency of change, and the uncertainty that goes with it, means firms will need flexible and adaptable workplaces. Progressive workplace strategies, flexible furnishings, demountable partitions, and open plans have all found their way into pioneering organizations that have set themselves apart on this front. It's all part of a strategy to keep employees happy and productive—and keep real estate costs in check.

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AKIN GUMP, DALLAS

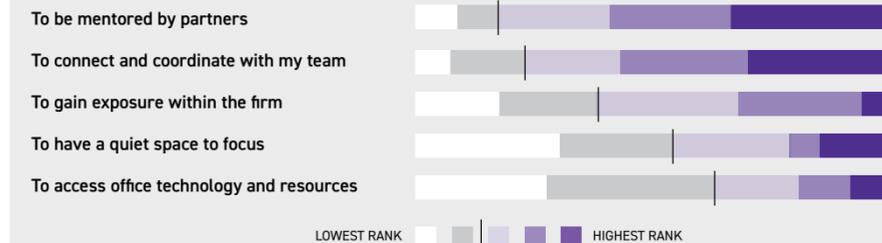
INFORMALITY REIGNS WHEN IT COMES TO CONNECTING

72%

AMONG YOUNG ATTORNEYS, 72% SAID THEY PREFERRED TO COLLABORATE WITH COLLEAGUES IN BUZZY, INFORMAL SPACES RATHER THAN SILENT, FORMAL SETTINGS.

—GENSLER SURVEY OF MILLENNIAL ATTORNEYS FROM AM LAW TOP 100 FIRMS

IT'S IMPORTANT FOR ME TO COME INTO THE OFFICE:



—GENSLER SURVEY OF MILLENNIAL ATTORNEYS FROM AM LAW TOP 100 FIRMS

BRAND IS A DIFFERENTIATOR IN THE BATTLE FOR TALENT



YOUNGER WORKERS ACTUALLY WANT TO COME TO THE OFFICE

83%

OF THE MILLENNIAL ATTORNEYS WE SURVEYED, 83% SAID THEY HAVE NO INTEREST IN FULL-TIME REMOTE WORK, BUT WOULD INSTEAD PREFER TO SPEND JUST ONE TO TWO DAYS PER WEEK WORKING REMOTELY.

—GENSLER SURVEY OF MILLENNIAL ATTORNEYS FROM AM LAW TOP 100 FIRMS

"The professional services winners will be the firms that do the best job of recruiting, hiring, and retaining the best consultants. There's a growing emphasis on building differentiated brands based on culture to attract top talent."

—JEANNE URICH, MANAGING DIRECTOR, SERVICE PERFORMANCE INSIGHT (SPI)

\$977.3^B

THE GLOBAL MANAGEMENT CONSULTING MARKET WAS VALUED AT \$977.3 BILLION IN 2018 AND IS PROJECTED TO GROW 10.6% ANNUALLY UNTIL 2022.

—MANAGEMENT CONSULTING GLOBAL MARKET OPPORTUNITIES AND STRATEGIES TO 2022, THE BUSINESS RESEARCH COMPANY



STEWART, RALEIGH, N.C.



CONFIDENTIAL CLIENT, SAN FRANCISCO

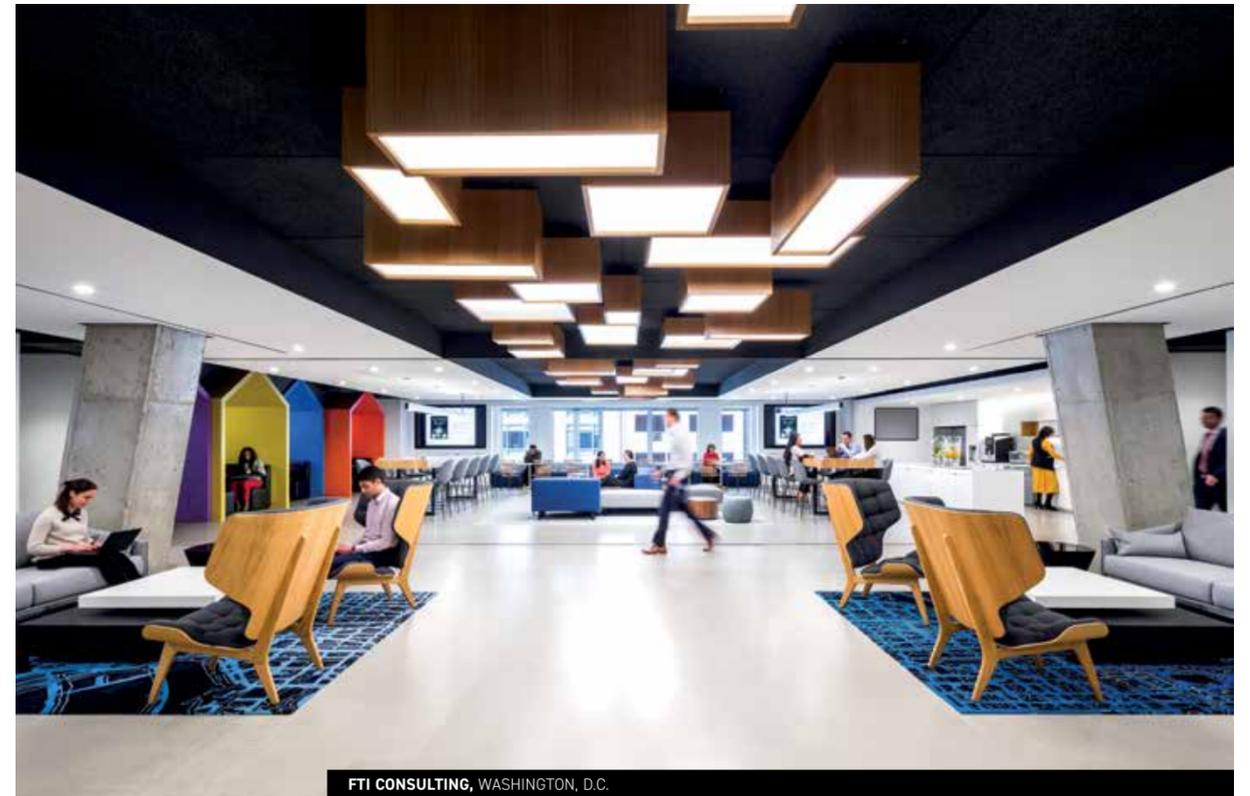


BARTLIT BECK HERMAN PALENCHAR & SCOTT LLP, CHICAGO

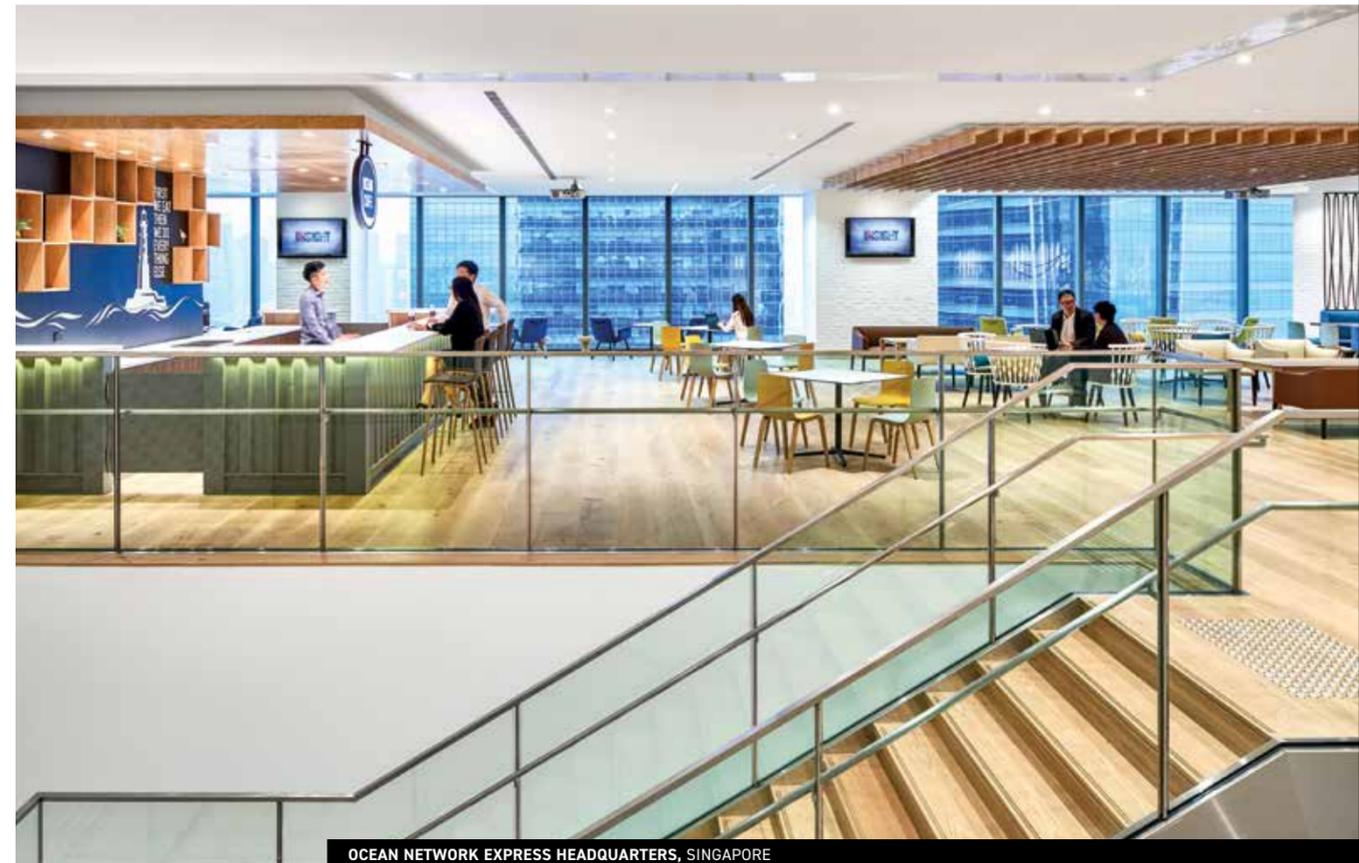




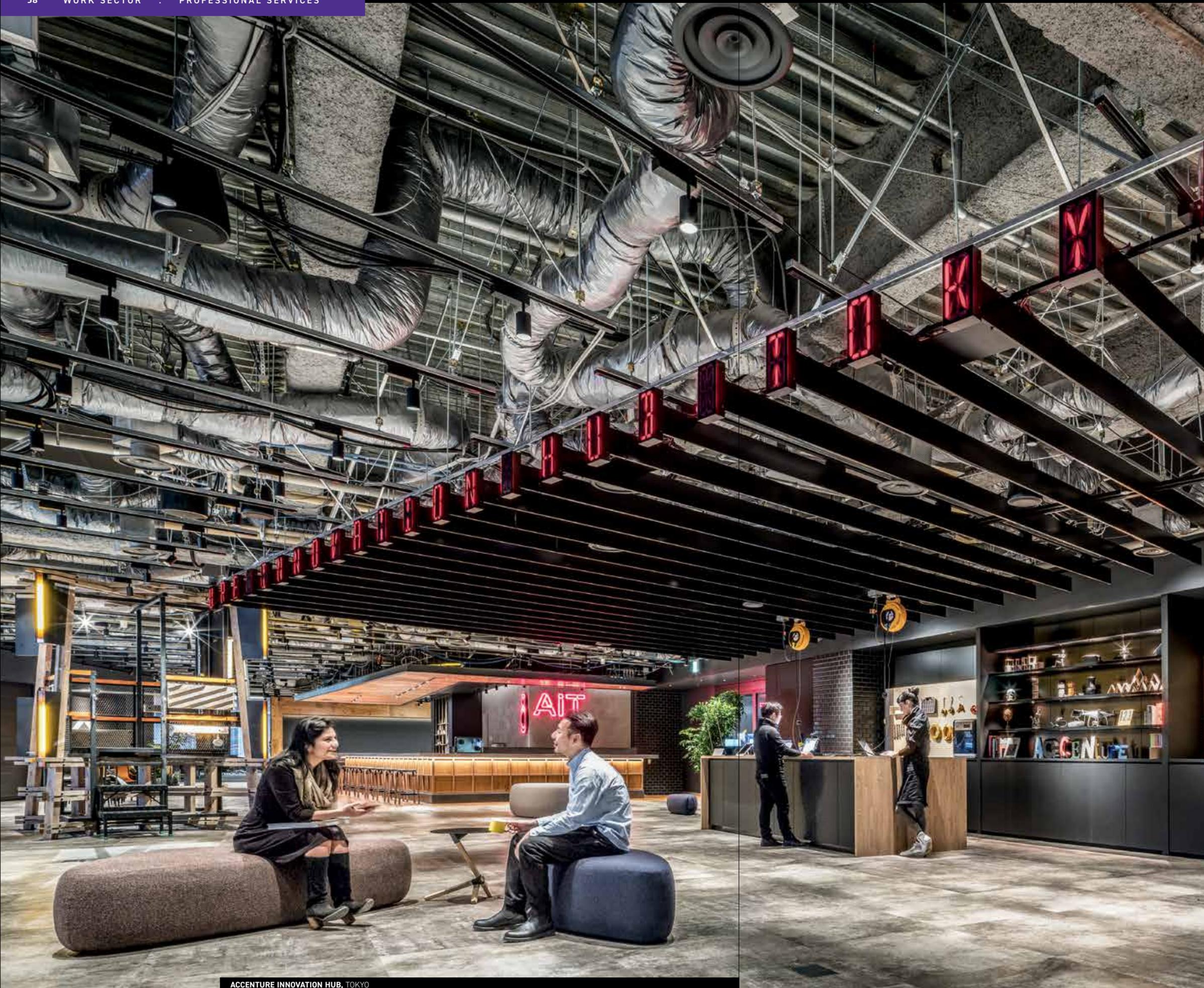
ARAMARK HEADQUARTERS, PHILADELPHIA



FTI CONSULTING, WASHINGTON, D.C.



OCEAN NETWORK EXPRESS HEADQUARTERS, SINGAPORE



ACCENTURE INNOVATION HUB, TOKYO

ACCENTURE INNOVATION HUB, TOKYO

A TEST LAB FOR INNOVATION AND CO-CREATION

In response to changing workforce demographics and a desire for more hands-on collaboration with its clients, Accenture rolled out a global initiative to build a model of its future workplace. With hubs in several key locations, such as Melbourne, Toronto, and San Francisco, learnings from each project are documented and fed into the next project, ensuring rapid, continuous improvement.

Each of Accenture's innovation hubs boasts a different design concept tailored to the local culture and context. Inspired by the origin of manufacturing in Japan's Edo era, Accenture's Innovation Hub in Tokyo is an experience-driven facility where Accenture people and clients collaborate, ideate, rapidly prototype, and launch digital solutions. With a variety of spaces to support innovation, the workplace is designed to accelerate the launch of services and strategies to market.

LEARNINGS FROM EACH PROJECT ARE FED INTO THE NEXT ONE, ENSURING CONTINUOUS IMPROVEMENT.

A series of distinct "neighborhoods" provide a diversity of work settings and community spaces. The lower level *kaiwai* is a space where clients, researchers, and entrepreneurs meet, collaborate, and create. *Yagura*, a symbol of co-creation, welcomes guests to an open-space cityscape-inspired room with tatami design elements as symbols of Japanese attention to detail. The upper-level *machiya* provides a relaxing home-like atmosphere that acts as a lab and studio for creative talent, with a detached space for extended collaborative work sessions. Together, these spaces provide talent an environment to focus on their projects and bring experts from varied backgrounds together to immediately respond to clients' requests with a holistic, multidisciplinary approach.

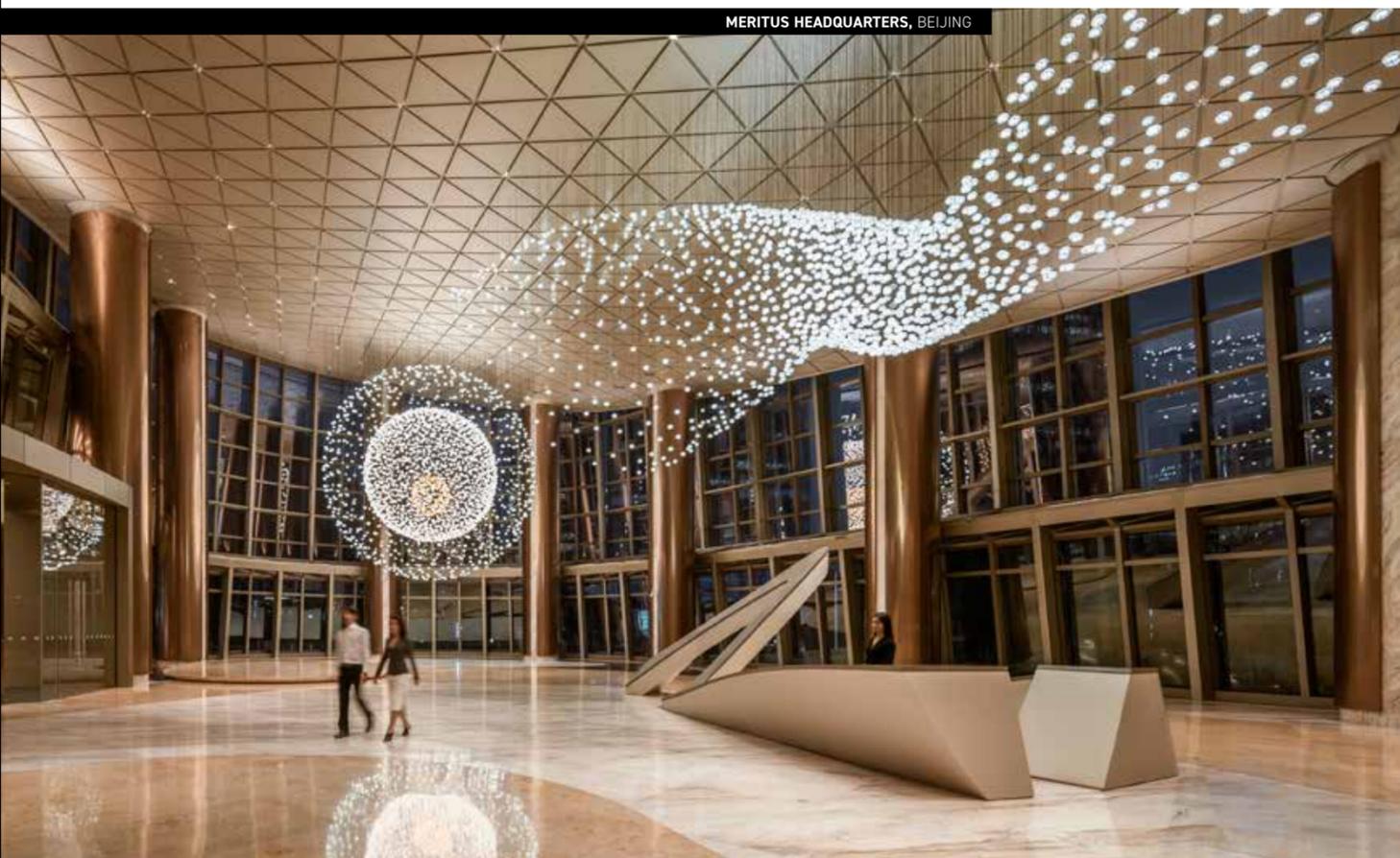
FORECAST: REPOSITIONING & LANDLORD SERVICES

To stand out in a fiercely competitive office market, building owners are looking to increase asset value by curating amenities that optimize the human experience and enhance the communities they're in. It's not necessarily about adding space or leveling aging buildings—it's about revitalizing and re-envisioning buildings that are viable. Given the ample volume of existing building stock, there's plenty of opportunity.

P14	CONSULTING & REAL ESTATE SERVICES
P16	ENERGY & SCIENCES
P20	FINANCIAL SERVICES
P26	FOUNDATIONS & ORGANIZATIONS
P30	GOVERNMENT & DEFENSE
P34	INTELLIGENT PLACES
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P44	OFFICE BUILDINGS
P50	PRODUCT DEVELOPMENT
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"THE SCALE OF IMPACT WE CAN HAVE BY IMPROVING THE PERFORMANCE OF OUR EXISTING BUILDINGS IS IMMENSE—MUCH GREATER THAN IF WE ONLY FOCUS ON NEW BUILDINGS."

—RIVES TAYLOR, DIRECTOR OF DESIGN RESILIENCE, GENSLER



MERITUS HEADQUARTERS, BEIJING

20%

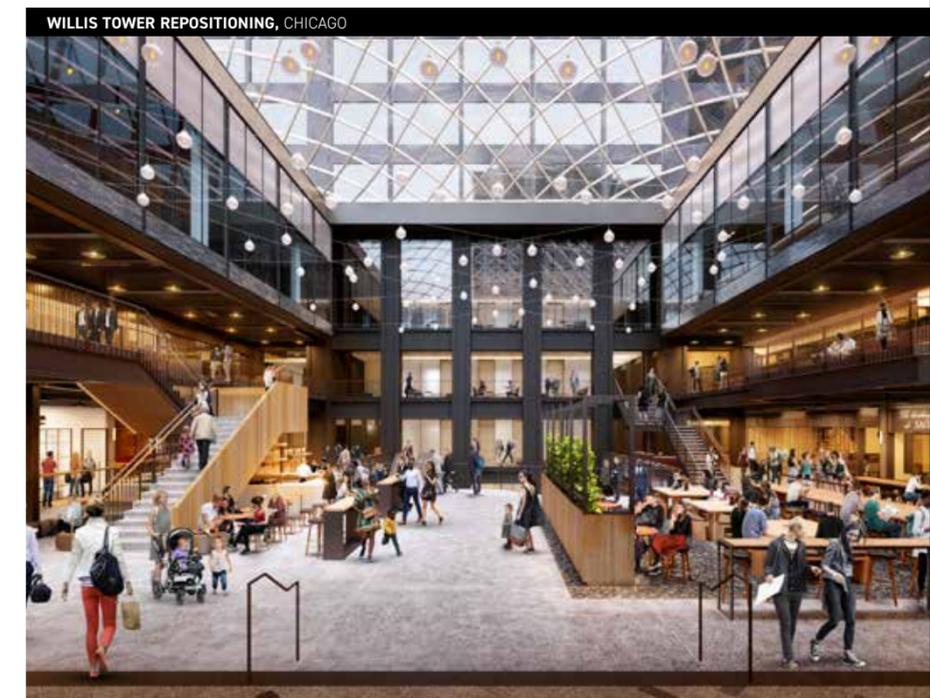
SUSTAINABLE BUILDINGS HAVE 20% FASTER LEASE-UP RATES

—ERNST & YOUNG

500^M SQ. FT.

OF OFFICE SPACE IS IN NEED OF SIGNIFICANT REPOSITIONING IN THE U.S. ALONE

—URBAN LAND INSTITUTE



WILLIS TOWER REPOSITIONING, CHICAGO

REPOSITIONING'S RIPE OPPORTUNITY KEEP CHARACTER BY REPURPOSING

The large inventory of older, underutilized buildings in growing urban centers offers a huge opportunity to transform these properties into lucrative revenue generators. The Urban Land Institute estimates there is more than 500 million square feet of office space in need of significant repositioning in the U.S. alone.

The character and authenticity that tenants are looking for can often be found in older repositioned buildings. From turn-of-the-century to midcentury, older designs are valued. Tenants respond to memorable spaces that tell a story, which companies can leverage in their brand narrative and culture building. It's also a more sustainable approach. It typically represents a substantial savings in capital and time, versus building new.

TENANTS WANT VARIETY AND CHOICE GO FROM INTROVERT TO EXTROVERT

Multitenant office buildings serve a variety of stakeholders, but to appeal to today's workforce, landlords need buildings that provide people with choices in how and where to work. Amenities are expected to be part of the mix, but not to escape work; tenants want amenities that can help them do their jobs better. In other words, the amenities need to be convenient, help improve well-being and performance, and add positive returns to the bottom line.

As organizations begin to think about a new generation of workers, building owners, managers, and developers have started to give underperforming properties personality makeovers. Through interventions like modified entrances, curated amenities, and pedestrian-friendly connections, inward-focused properties can be transformed into inviting places that engage tenants and connect them to each other.

WILLIS TOWER REPOSITIONING, CHICAGO

REVITALIZING AN ICON

Projects that reposition districts and existing buildings leverage real estate values. For developers and cities, there is a cache to repurposing what already exists. For nearly 25 years, Willis Tower (formerly Sears Tower) held the distinction of being the world's tallest building. To breathe new life into this iconic structure, Blackstone Group enlisted Gensler to reimagine the current tower space while re-energizing the surrounding downtown.

THE PROJECT AIMS TO ACT AS A CATALYST FOR CHANGE.

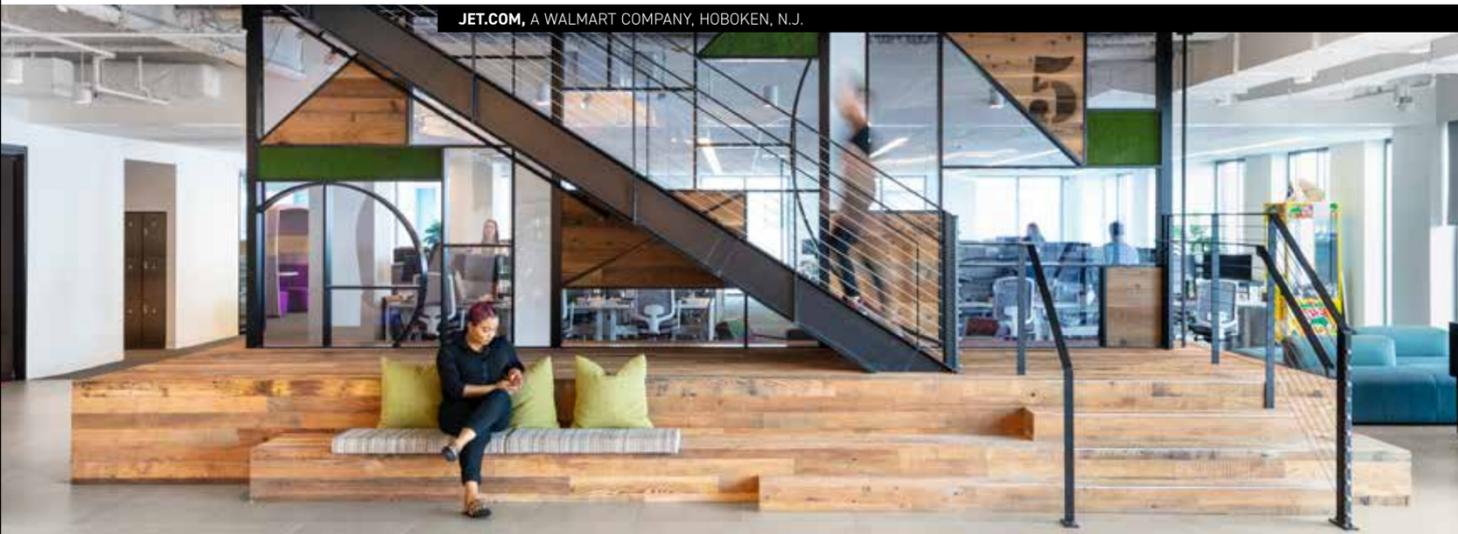
Named "Catalog," an homage to the building's original tenant, the Sears Roebuck Company, the reimagined base of Willis Tower will connect Chicagoans and visitors with five levels of retail, dining, shopping, and immersive entertainment. With a design that extends the streetscape, creates community, and engages visitors, the project aims to become a neighborhood catalyst and a world-class destination.



WILLIS TOWER REPOSITIONING, CHICAGO

FORECAST: TECHNOLOGY

Technology will continue to drive the future of our global communities—our cities, our buildings, our workplaces, and our daily lives. As tech companies' global footprint and influence rapidly expand, these organizations are emerging as stewards of humanity and setting the new bar for the future of work—one that looks far beyond the workplace.



JET.COM, A WALMART COMPANY, HOBOKEN, N.J.

TECH IS SHAPING OUR EXPERIENCE OF CITIES

Technology is changing the world's skyline, and the composition of every workforce. As tech companies flourish, there's a sprint to lay claim to cities that can support their scale, and also offer a lifestyle and a talent pipeline that will fuel their targeted growth—often linking multiple cities together to achieve their vision and market impact. Situated at the helm of the digital revolution, tech firms are uniquely positioned to influence the development of communities and drive positive change at scale through design.

TECH WORKPLACES MODEL THE FUTURE OF PLACE

The technology industry is leading the way in anticipating how we will work in the future, and other industries are following suit. Recognizing changing work styles, tech companies are providing workers with choice and balance, as well as the tools to get that work done across any location—in and beyond the workplace. Data-driven insights that inform how space should be utilized, and spaces that enable fluidity and adaptability within the workplace will be critical to supporting tomorrow's workforce.

BRINGING HUMANITY TO THE WORKPLACE

As industries become more reliant on technology and their workforce becomes more diverse, they're also becoming more humane by embracing inclusivity, diversity, and sustainability. To create spaces for people to do their best work, tech companies are delving into personas and human behaviors, examining the purpose behind spaces, and conducting collaborative research to learn what next-gen talent wants and needs in any future environment.

IOT GAINS TRACTION

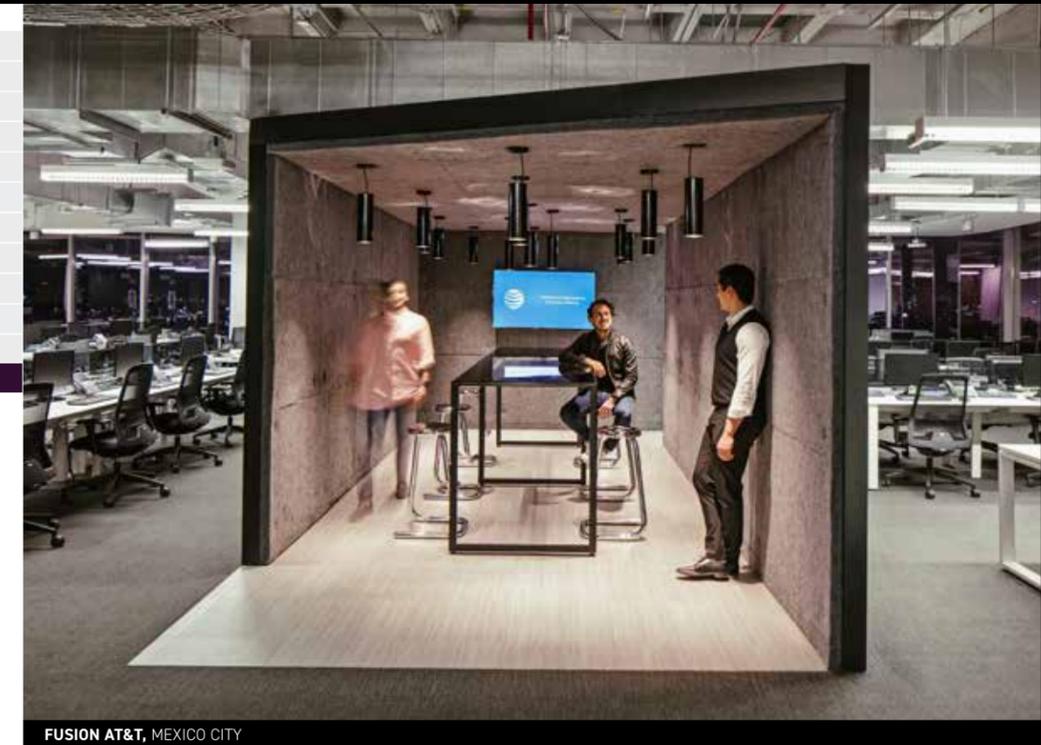
"In 2019, Forrester believes that IoT is poised to make a much bigger impact in our lives at work and around town, with 85% of companies implementing or planning to implement IoT solutions."

—FAST COMPANY

85%

OF COMPANIES ARE IMPLEMENTING OR PLANNING TO IMPLEMENT IOT SOLUTIONS.

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FUSION AT&T, MEXICO CITY

THE RISE OF BIG DATA

The world's data is growing exponentially as consumers rely on digital devices, and businesses use data to become more agile and competitive. And real-time data demand is driving this growth: by 2025, nearly 30% of the global datasphere will be real-time information, according to IDC.

"In 2025, each connected person will have at least one data interaction every 18 seconds."

—BABAK BEHESHTI, NEW YORK INSTITUTE OF TECHNOLOGY, IN TECHREPUBLIC

49%

IN 2025, NEARLY HALF OF THE WORLD'S STORED DATA WILL RESIDE IN PUBLIC CLOUD ENVIRONMENTS.

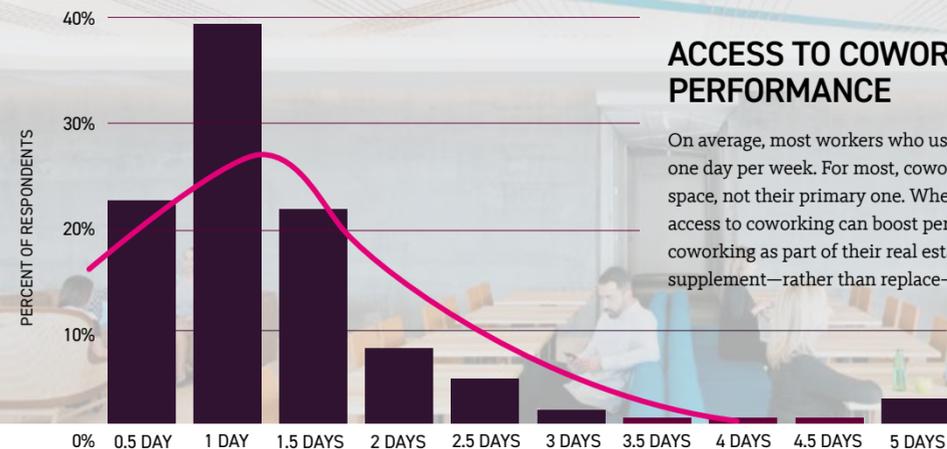
—IDC, DATA AGE 2025

10X

IDC PREDICTS THAT THE WORLD'S DATA WILL GROW TENFOLD, FROM 33 ZETTABYTES (ZB) IN 2018 TO 175 ZB BY 2025.

30%

BY 2025, NEARLY ONE-THIRD OF THE GLOBAL DATASPHERE WILL BE REAL-TIME, UP FROM 15% IN 2017.

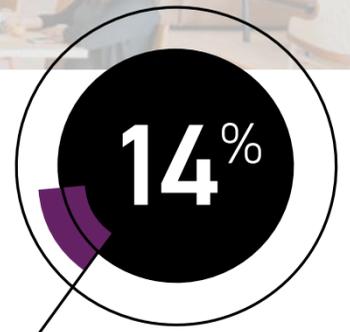


ACCESS TO COWORKING BOOSTS PERFORMANCE

On average, most workers who use coworking space use it for less than one day per week. For most, coworking serves as an alternative workspace, not their primary one. When offered as a high-value amenity, access to coworking can boost performance. Employers should consider coworking as part of their real estate strategy, but coworking should supplement—rather than replace—the workplace.

1 IN 7 WORKERS USES COWORKING SPACES, MOST FOR LESS THAN A DAY PER WEEK.

—GENSLER 2019 U.S. WORKPLACE SURVEY

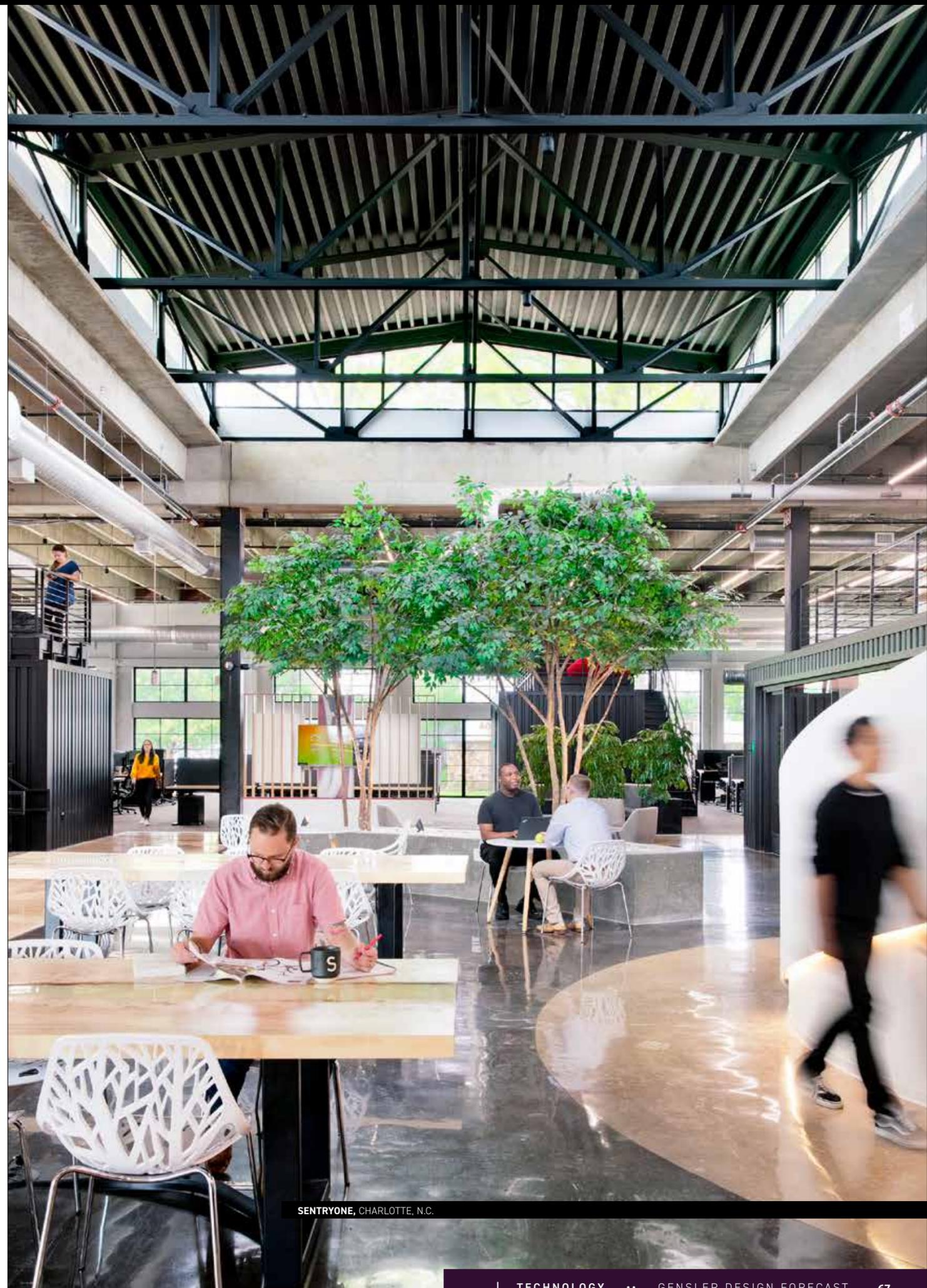


14% OF CORPORATE WORKERS USE COWORKING SPACES REGULARLY.

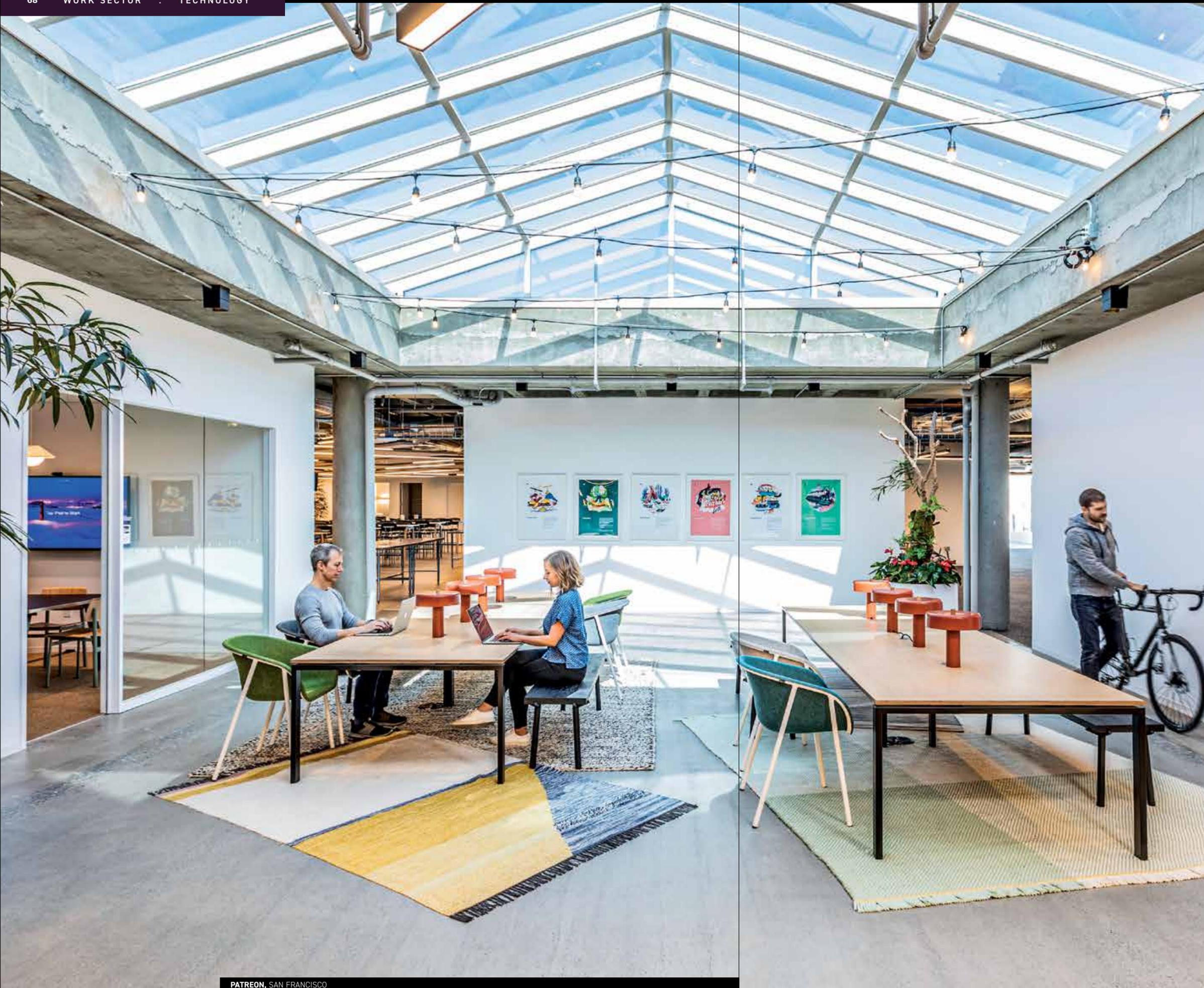


FACEBOOK, SINGAPORE

ONE WESTSIDE GOOGLE CAMPUS, LOS ANGELES - HUDSON PACIFIC PROPERTIES AND MACERICH



SENTRYONE, CHARLOTTE, N.C.



PATREON, SAN FRANCISCO

PATREON, SAN FRANCISCO

A PLACE THAT CONNECTS A THRIVING CREATIVE COMMUNITY

Patreon is designed to connect creators—artists, musicians, podcasters, and others—with their fans and supporters, creating a strong community of artistic thought and a network of income streams. Founded in 2013, the company grew rapidly and worked its way through several workspaces. In 2018, the leadership was ready to establish a more permanent home, and secured 41,000 square feet of space in San Francisco's Design District, a neighborhood that's increasingly popular with tech and arts companies.

THE NEW HEADQUARTERS OFFERED THE CHANCE TO ADD RECORDING FACILITIES, ART STUDIOS, AND CREATOR-IN-RESIDENCE SUITES.

Patreon wanted a space that maintained the living room vibe of its former offices, but signaled it was a maturing successful company. The new headquarters doubled the size of its previous workplace, but more importantly offered the chance to build out suitable creative spaces, including recording facilities, art studios, and creator-in-residence suites.

The headquarters serves as a hub for Patreon's community of members. The creative vibe resonates through the entire workplace with art pieces and artifacts from the company's history, supported by a performance area and music setup in the café. Balancing the creative spaces, Gensler designed a variety of work areas that provide employees with the environments they need to focus, collaborate, and connect with each other. The office reflects the company's focus on community, with distinct "neighborhood" aesthetics that lend a variety of moods, lighting, and energy levels to the space.

THE FUTURE OF

LIFE - STYLE

As epicenters of human experience in cities, places like hotels, restaurants, residential buildings, sports arenas, and retail shops have become microcosms of ever-evolving human behavior and consumer expectations. People today are tech-fueled, digitally empowered, time-starved, and relentlessly distracted. As digital experiences expand and become easier to access, there's an expectation that physical experiences must also be immediate, convenient, and frictionless. The evolution of our cities will be about how we react and respond to this new narrative. It is fundamental that design begins and ends with the human experience. Lifestyle brands that deliver seamless and fully orchestrated experiences will thrive in the competition for people's time, attention, and spending.

BRAND DESIGN | P72

DIGITAL EXPERIENCE DESIGN | P78

HOSPITALITY | P82

MIXED USE & RETAIL CENTERS | P86

RESIDENTIAL | P90

RETAIL | P96

SPORTS | P100

FORECAST: BRAND DESIGN

The most compelling brands are those that are able to connect with people through great storytelling. Brands must communicate on every dimension and speak to diverse audiences in the most authentic way possible. The measure of success is an experience that is uniquely ownable and highly shareable.

CONFIDENTIAL TECHNOLOGY CLIENT, SAN FRANCISCO



“60% OF LONG-TERM CUSTOMERS USE THE SAME LANGUAGE THEY’D USE FOR FRIENDS, PETS, AND FAMILY (E.G., LOVE, ADORE, HAPPY) WHEN THEY TALK ABOUT [A] BRAND.”

—INC.



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UNIQUE SPATIAL ASPECTS ELEVATE THE BRAND EXPERIENCE

HOW DOES DESIGN CREATE A GREAT EXPERIENCE? TAPPING INTO HUMAN EMOTION IS THE KEY COMPONENT.

—GENSLER EXPERIENCE INDEX



T-MOBILE, 3305, BELLEVUE, WASH.

EACH GENERATION ACCELERATES A NEW SET OF EXPECTATIONS

As the next generation entering the workforce and the marketplace, Gen Z is quick to adopt new communication channels and favors real-time, visually rich content. This socially and environmentally conscious, always connected cohort prioritizes honest, transparent, and authentic messaging from friends, leaders, employers, and brands. Gen Z’s relationship with technology will re-wire how they show up as workers and consumers.

EXPERIENCE WILL BE THE REASON PEOPLE COME TO THE OFFICE

Our tech-enabled, always connected society means we can theoretically work from anywhere. So why go into the office? Simply put, we go for unique experiences. When an organization sets expectations about its culture and then delivers on them through its brand experience, workers feel a stronger connection. Keys to that experiential aspect include a sense of place, authenticity, and the legacy narrative that makes each organization unique.



OF CONSUMERS SAY THAT SHARED VALUES HELP THEM BUILD TRUST WITH A BRAND.

—FORBES

CONSUMERS CONTINUE TO SHAPE BRANDS’ IDENTITIES

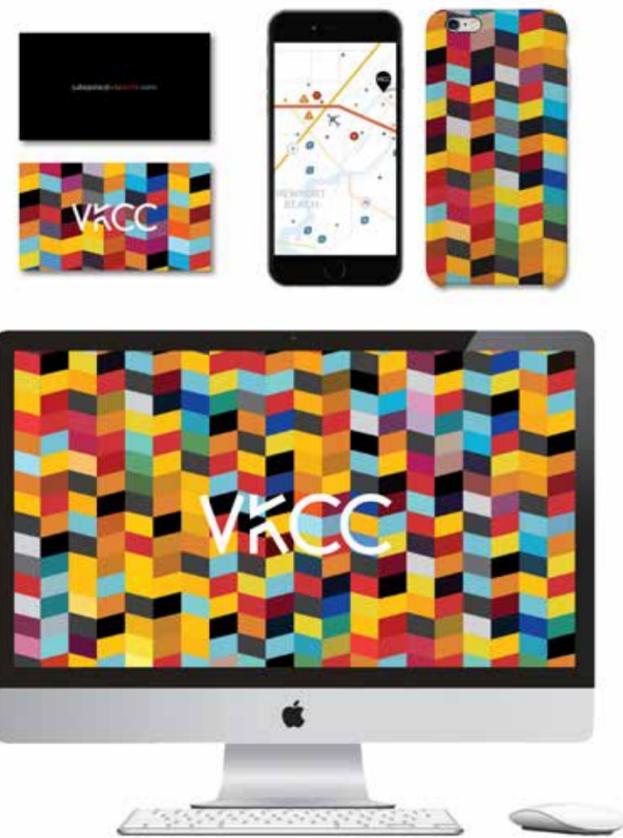
The societal shifts brought on by social media have transformed brands’ conversations with consumers from one-way to two-way. It’s a development that ultimately helps brands better reflect current styles and adapt for future ones. When these conversations are at their most successful, brands become iconic and spur powerful emotional reactions from consumers. But once a brand’s reputation is set, it’s difficult to change public opinion.

THE POWER OF DIVERSITY GIVES CITIES VITALITY

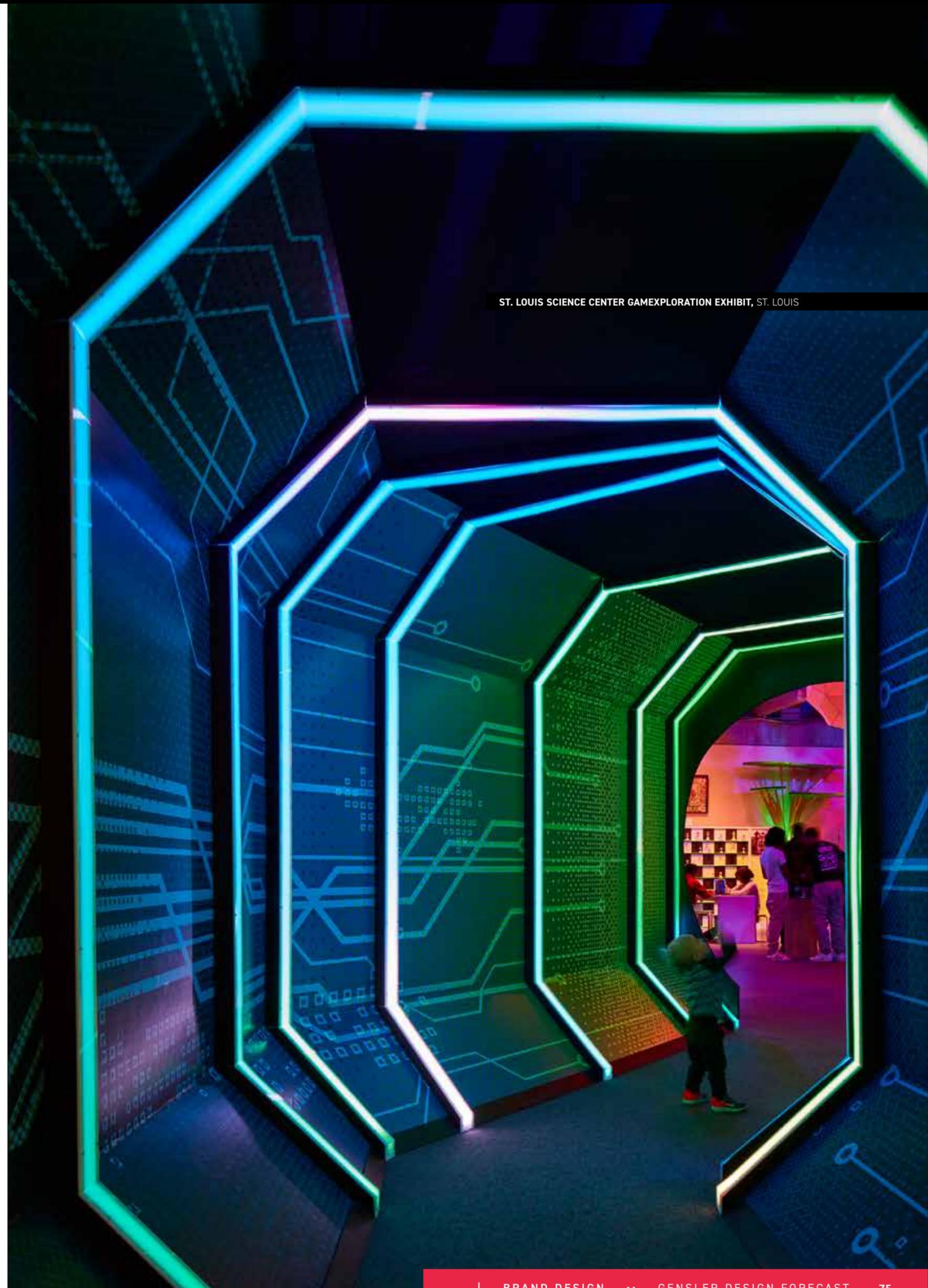
Few forces add as much richness to a city’s brand as diversity. It gives rise to unique experiences, signals inclusion, and empowers communities by creating a sense of identity, pride, and celebration. The result is a distinctly authentic sense of place that can attract people, business, and civic investment.



AUGUSTA & CO., AUGUSTA, GA.



VON KARMAN CREATIVE CAMPUS, IRVINE, CALIF.



ST. LOUIS SCIENCE CENTER GAMEXPLORATION EXHIBIT, ST. LOUIS



LINKEDIN, DETROIT



LINKEDIN, MULTIPLE LOCATIONS

INSPIRING CULTURE AND CREATIVITY IN THE WORKPLACE

Today's organizations are using the workplace to connect workers with their vision and purpose, spark creativity and relationships between workers and with the company itself, and reinforce the experience employers are investing in. Gensler worked with LinkedIn to develop a dynamic environmental graphic design program to help the company express their unique corporate culture across global locations. Using humor and wit, the graphics speak directly to the impact LinkedIn has on its members.

INTERACTIVE ENVIRONMENTAL GRAPHICS INSPIRE, ELEVATE, AND SPARK JOY FOR LINKEDIN WORKERS.

For LinkedIn's global offices, Gensler created vibrant graphics in the lobbies, cafés, work zones, socialization areas, and restrooms—with phrases like "Better Together," and "Change Is Good" tying back to their cultural tenets. Each location's bespoke graphics pay homage to the city it resides in. These graphics create Instagrammable moments where workers have commented about why they love coming to work every day, proof that graphic design goes beyond retention and recruitment to help cultivate a positive working experience.



LINKEDIN, MOUNTAIN VIEW, CALIF.



LINKEDIN, MOUNTAIN VIEW, CALIF.



LINKEDIN, CHICAGO

FORECAST: DIGITAL EXPERIENCE DESIGN

Next-wave digital technologies—such as augmented reality, artificial intelligence, and IoT-enabled devices—are already transforming our world in unexpected ways. As these technologies evolve and become more widely adopted, people and organizations will search out those applications that can integrate into their daily experiences with the least friction. The role of digital experience design is to help smooth that integration and enrich the human experience through technology.

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34%
OF BUSINESSES NOW USE IOT TECHNOLOGIES.
—VODAFONE

84%
OF ADOPTERS ARE MORE CONFIDENT IN IOT TECHNOLOGIES THAN THEY WERE A YEAR AGO.
—VODAFONE

“A SIGNIFICANT PORTION OF THE POPULATION OF DEVELOPED COUNTRIES, AND EVENTUALLY ALL COUNTRIES, WILL HAVE AR EXPERIENCES EVERY DAY, ALMOST LIKE EATING THREE MEALS A DAY.”

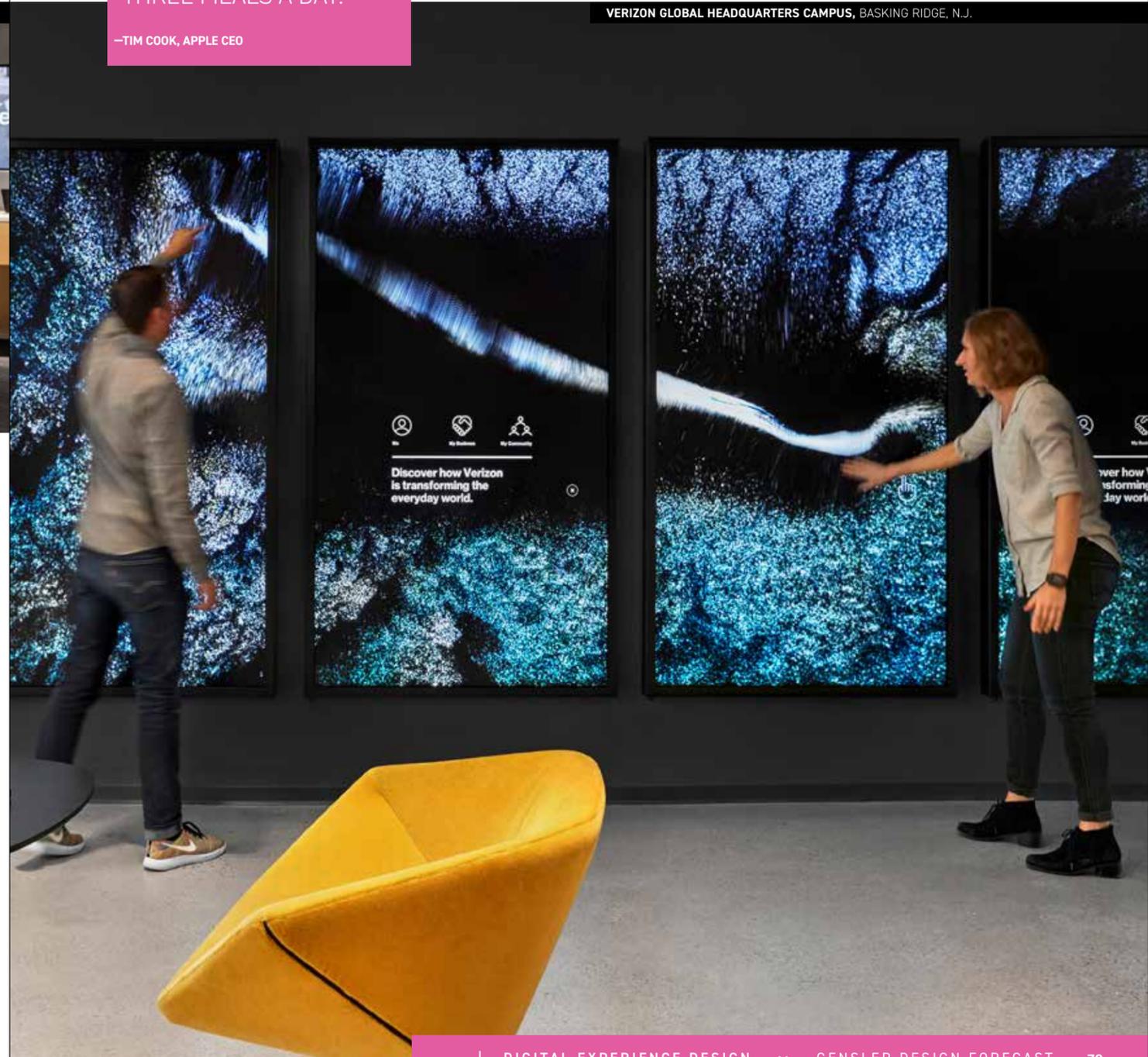
—TIM COOK, APPLE CEO

\$95.8B
THE GLOBAL SMART CITIES MARKET IS PROJECTED TO REACH \$95.8 BILLION IN 2019, A 17.7% INCREASE OVER 2018.
—INTERNATIONAL DATA CORPORATION

VERIZON GLOBAL HEADQUARTERS CAMPUS, BASKING RIDGE, N.J.



VERIZON GLOBAL HEADQUARTERS CAMPUS, BASKING RIDGE, N.J.



URBAN PLANNING SHIFTS GEARS WITH SMART CITIES

For city administrators looking to implement smart city technologies, the challenge will lie in building a digital network that has little in common with today's infrastructure. Where urban planning has traditionally sought to rework the underlying physical structures of cities, smart city planning is shifting focus toward incremental improvements to existing systems and enabling better management through digital technology.

CITIES WILL BECOME CUSTODIANS FOR DIGITAL RIGHTS

As cities become layered with digital technologies that extract more data, municipal governments must take steps to ensure that the same human rights that people have offline will also be protected in the digital realm. The Charter of Human Rights and Principles for the Internet, which was established within the framework of the United Nations' Internet Governance Forum, can serve as a powerful tool for the development of policies and resources to help advance digital rights.

SMART CITIES SHOULD BE HUMAN CITIES

To deliver true value, smart cities will have to leverage technology to make our urban environments more livable, efficient, and sustainable. In a best-case scenario, cities would focus first on human-centric objectives rather than revenue generation. They would also be flexible enough to respond to public interests and points of view.

THE VALUE OF REAL-TIME MAPPING

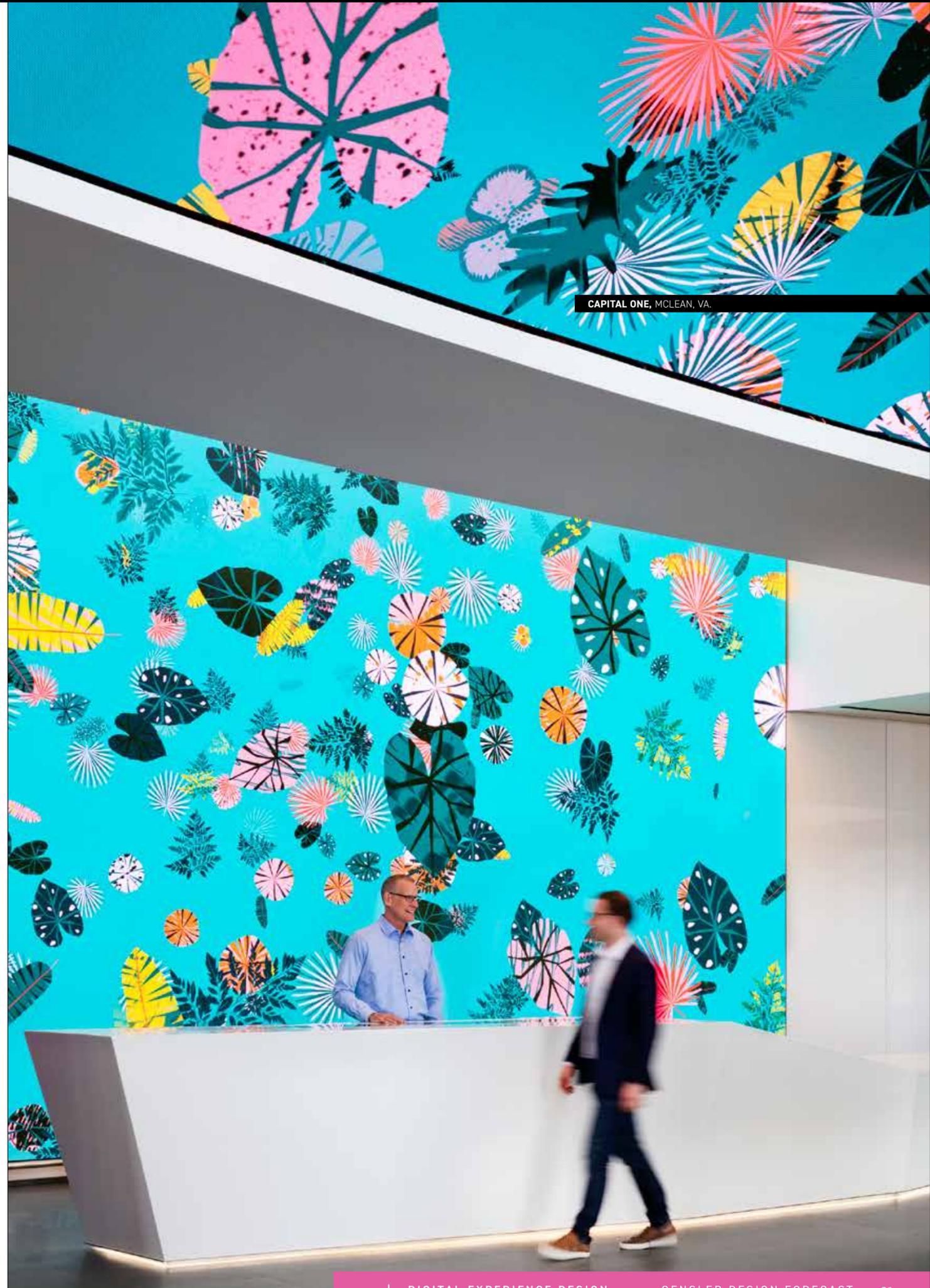
When deployed thoughtfully and with respect for privacy, sensors can be used across city infrastructures to create new data sources that allow cities to monitor, analyze, and anticipate urban phenomena in new ways. This information can be paired with anonymous data from other sources, such as hand-held devices and social media feeds, to unlock hidden patterns and trends that ultimately deliver benefits to city dwellers.



AMERICAN KENNEL CLUB MUSEUM OF THE DOG, NEW YORK



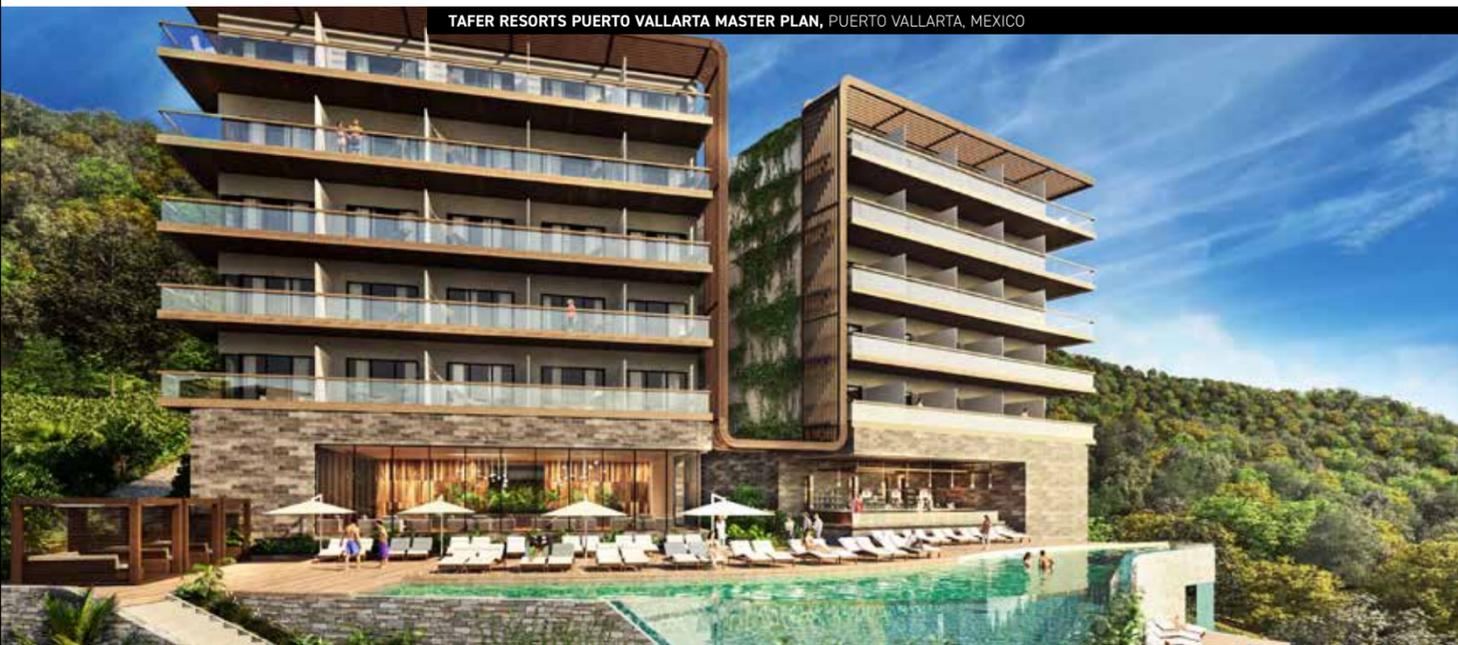
JETBLUE LOGAN AIRPORT, TERMINAL C RENOVATION, BOSTON



CAPITAL ONE, MCLEAN, VA.

FORECAST: HOSPITALITY

No matter what far-flung destinations people venture to, they have a genuine desire to connect with local places and spaces. Hospitality companies—hotels, restaurants, and gaming venues—can foster those connections through the curation of unique programming, design, architecture, technology, and entertainment. When executed effectively, the resulting guest experiences will resonate in an increasingly competitive marketplace.



TAFER RESORTS PUERTO VALLARTA MASTER PLAN, PUERTO VALLARTA, MEXICO

VIRTUAL REALITY LEADS TO REAL-WORLD EXPERIENCES

Advances in virtual reality (VR) now allow people to indulge in travel fantasies without leaving home. But rather than serving as fully satisfying experiences, virtual trips function as more of a taste of the real thing, ultimately leading people to plan real-world trips. As part of the booking process, some hospitality companies are leveraging VR to let guests experience a hotel or resort before deciding if it's right for them.

THE SKY BECOMES THE NEW FREEWAY

Population shifts continue to overwhelm traditional urban infrastructure, spurring some municipalities to consider new modes of transportation. Aerial ride-share is one option that's gaining traction. Private companies are now investing in aerial transit technologies that have the potential to radically reshape travel throughout—and in some cases between—cities. With that effort comes aerial urban mobility hubs, which can be designed as mixed-used destinations ideally suited for hospitality venues.

THE FULL POTENTIAL OF 3D PRINTING

Already a common model-making tool used by architects, 3D printing has even greater potential during the construction process. We're close to the point where hospitality organizations—which bear considerable real estate costs due to their large portfolios—will be able to realize significant cost savings by mass-producing components of their properties off-site. When paired with modular construction techniques and the lower labor costs involved, 3D printing has the potential for big savings.

USING BRAND TO BUILD THE HUMAN CONNECTION

Social media, online advertising, and our 24/7 information culture have bombarded consumers with messaging, causing them to reflexively tune out brands. Hospitality companies can cut through the noise by focusing on hyperpersonalized brand experiences that demonstrate an understanding of their audience's values, aspirations, and passions. Such experiences ultimately drive emotional engagement and generate human connections.

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“WE'RE SEEING MUCH MORE FLEXIBLE, INTERACTIVE USE OF WHAT IS TRADITIONALLY A HOTEL LOBBY. IT'S BREAKFAST SPACE IN THE MORNING, IT'S LUNCH SPACE IN THE AFTERNOON, IT'S COWORKING SPACE.”

—MENNO HILBERTS, CITIZENM

4X

PERSONAL-CONSUMPTION EXPENDITURES ON EXPERIENCE-RELATED SERVICES—SUCH AS TRAVELING AND ATTENDING EVENTS—HAVE GROWN NEARLY 4 TIMES FASTER THAN EXPENDITURES ON GOODS.

—MCKINSEY & CO.

THE TRAVEL & TOURISM INDUSTRY IS NOW A JUGGERNAUT

\$1.6^T

THE GLOBAL TRAVEL INDUSTRY NOW STANDS AT \$1.6 TRILLION, AND ROUGHLY 1 IN 10 PEOPLE IN THE GLOBAL ECONOMY IS EMPLOYED IN TOURISM.

—DELOITTE, 2019 U.S. TRAVEL AND HOSPITALITY OUTLOOK

52%

OF HOTELIERS AND CONSUMERS SAY THAT VR WILL BE PART OF THE BOOKING PROCESS BY 2025.

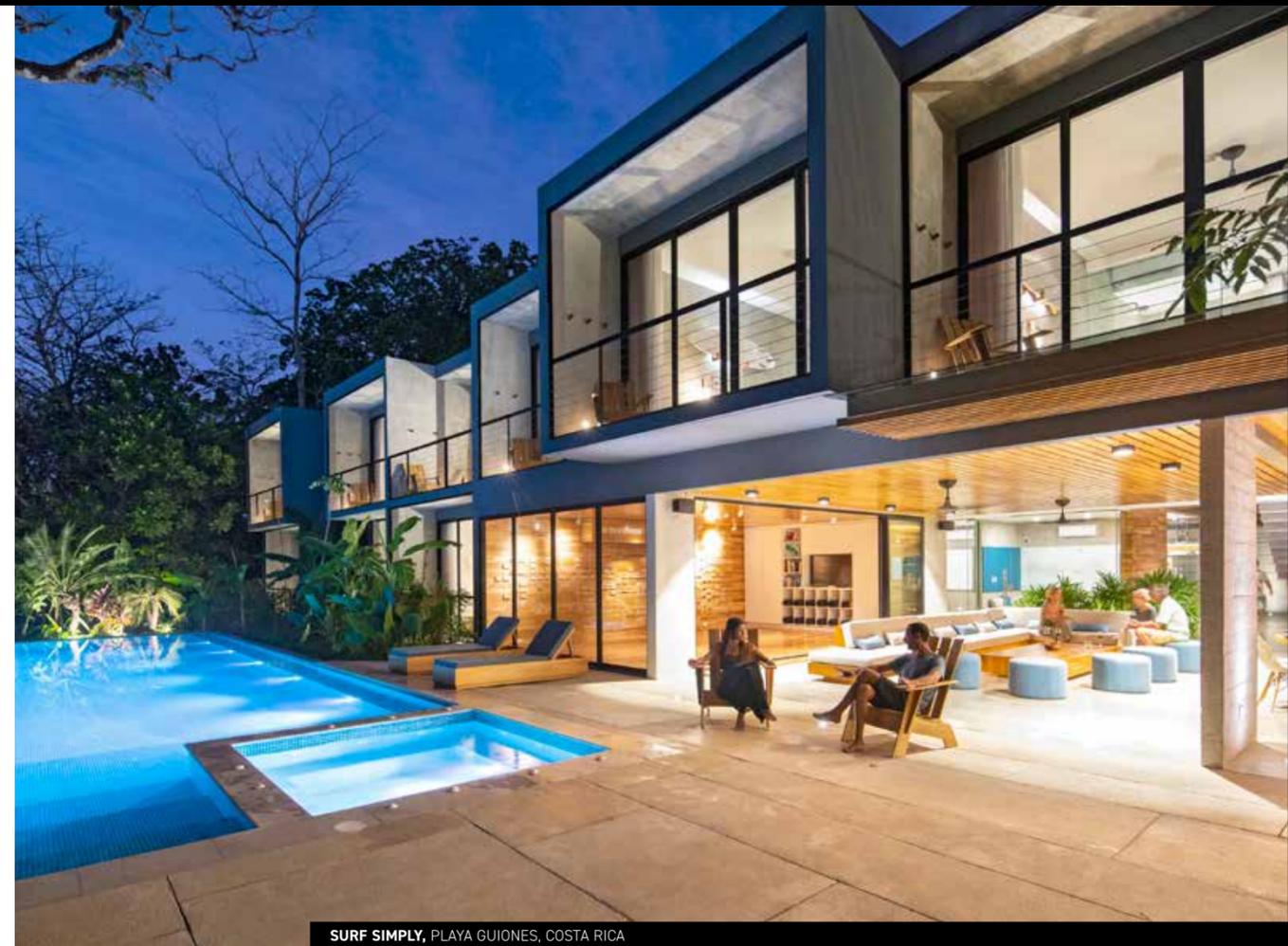
—ORACLE

THE ARTS CLUB, WEST HOLLYWOOD, CALIF.

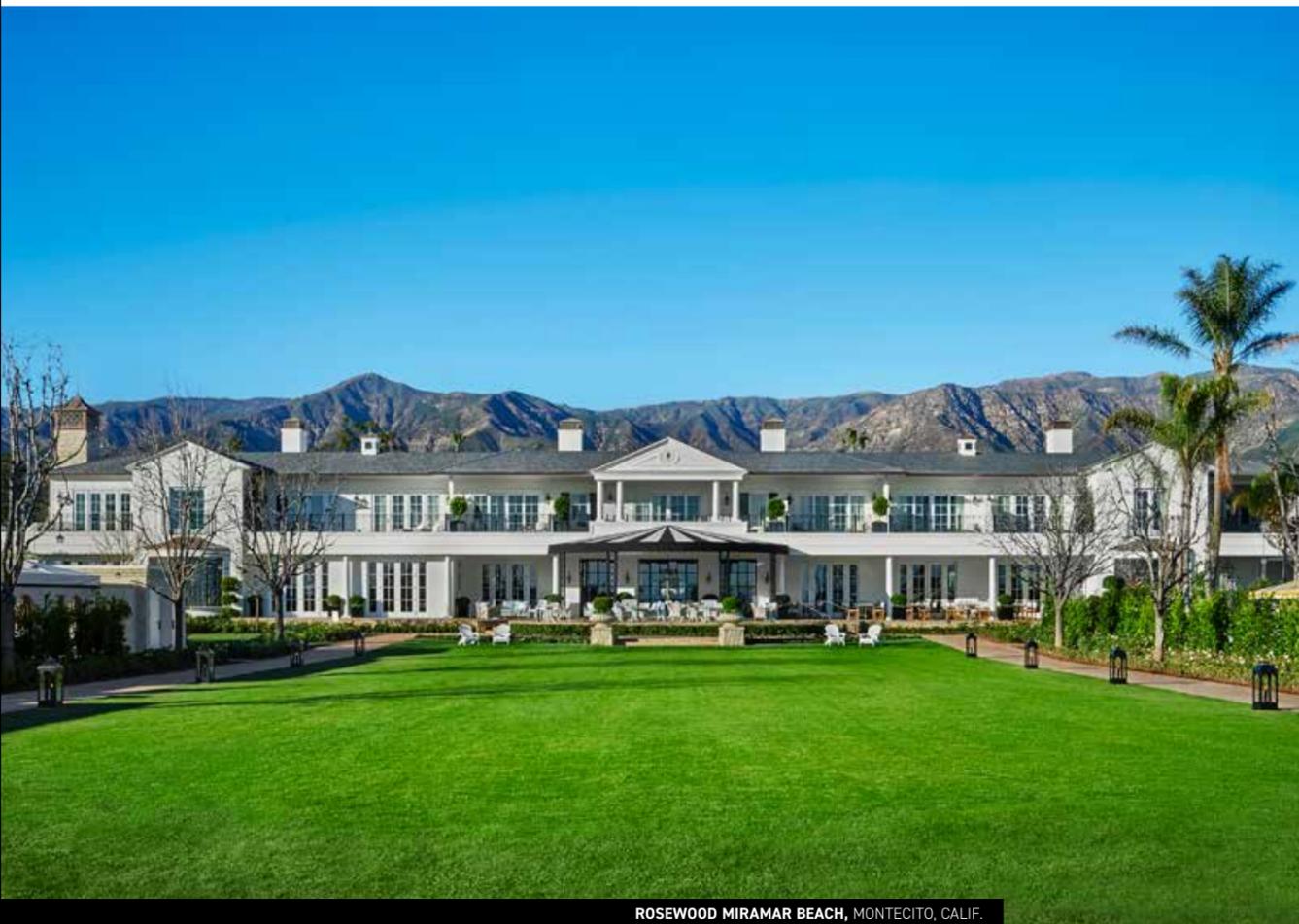




KIMPTON AERTSON HOTEL, NASHVILLE



SURF SIMPLY, PLAYA GUIONES, COSTA RICA



ROSEWOOD MIRAMAR BEACH, MONTECITO, CALIF.



THE BANANA LEAF APOLO, SINGAPORE

FORECAST: MIXED USE & RETAIL CENTERS

Mixed-use developments are the distilled essence of urban living. They are dense, walkable environments that offer activities and a pulse of city life that draw people to them. The most successful examples function as social hubs that enable shared experiences and resonate as vibrant, people-focused destinations.

WALKABILITY IS DESIRED ACROSS AGE GROUPS



—DELOITTE

62%
OF MILLENNIALS

45%
OF GEN XERS AND
BABY BOOMERS

55%
OF THE SILENT
GENERATION

CREATING HUMAN-CENTRIC DISTRICTS SHARED AND ON-DEMAND

Cities come alive thanks to people. And by providing diverse programming and space types punctuated by lively “in-between spaces”—outdoor areas between buildings—mixed-use destinations draw in people and spur interaction. The key to injecting a mixed-use development with soul lies in providing a sense of wonder and delight, which can be accomplished through special events, intriguing public art, statement architecture, and the right mix of programming. Get it right, and people will linger.

It seems everything now is shareable, including cars, workspace, and travel accommodations. It also seems everything is on-demand, thanks to instant downloads and next-day delivery. Mixed-use ties into these trends with its shared and economical use of space and its ability to conveniently serve up a bevy of options on the spot. This alignment with today’s expectations and lifestyle will continue to spur mixed-use moving forward.

DOING MORE WITH LESS VERTICALLY INTEGRATED, YET TIED TO THE STREET

Compared to single-use projects of similar size, mixed-use projects use land and resources more efficiently, support larger populations, and generate higher revenues. By effectively leveraging spaces for multiple uses, mixed-use developments create a diversified product mix that can shield investors from economic volatility. And their condensed live-work-play model also means they generate ROI across a broader swath of the day than single-use projects.

Mixed-use is all about porosity and connectivity, including connections to public transit and linkages to different parts of the city. That being said, in designing vertical mixed-use projects, special attention must also be paid to how the development ties into the surrounding urban fabric at the street level, so as to add street life rather than drain it.

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DEMAND WILL CONTINUE TO GROW FOR MIXED-USE, TRANSIT-ORIENTED DEVELOPMENTS

25%

BY 2030, NEARLY 25% OF ALL U.S. HOUSEHOLDS LOOKING TO RENT OR BUY WILL WANT HOUSING NEAR HIGH-DENSITY, TRANSIT-ORIENTED DEVELOPMENTS.

—CENTER FOR TRANSIT-ORIENTED DEVELOPMENT

CONSIDER INCORPORATING NONTRADITIONAL TENANTS

“Retail as an anchor can be fickle and seasonal; multiple healthcare and wellness tenants can be more sustainable, especially with complementary development that fosters convenient and positive consumer experiences.”

—NAIOP

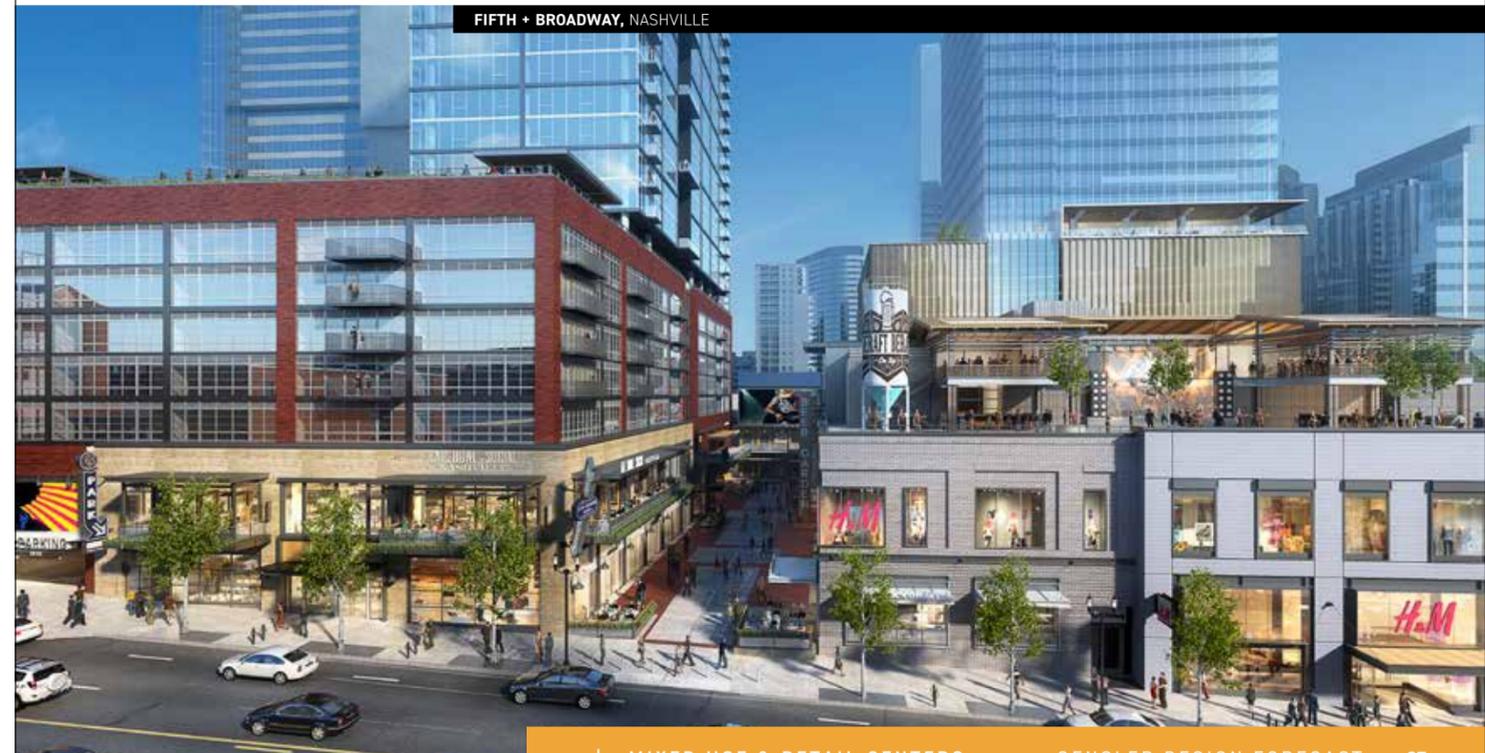


WEST EDGE, LOS ANGELES

SPORTS VENUES GET IN ON THE ACT



IT MAKES SENSE TO LEVERAGE A SPORTS STADIUM YEAR-ROUND, RATHER THAN FOR JUST EIGHT MONTHS OUT OF THE YEAR. MIXED-USE DEVELOPERS—WHO ARE INCREASINGLY BECOMING EXPERIENCE CURATORS—ARE WELCOMING HIGH-PROFILE SPORTS TEAMS AS ANCHORS IN THEIR PROJECTS.



FIFTH + BROADWAY, NASHVILLE

THE AVENUES, KUWAIT CITY, KUWAIT

"RETAIL CITY" ADDS NEW EXPERIENCES TO REGIONAL SHOPPING DESTINATION

Drawing inspiration from the world's most vibrant urban shopping districts, the Phase 4 enlargement of The Avenues Kuwait adds 167 new restaurants and stores, an entertainment zone, and two hotels that boost the shopping complex's reputation as a regional destination. More than a mall, The Avenues is an exercise in placemaking that redefines the retail experience in Kuwait, where shopping is a social activity.

THE AVENUES REDEFINES RETAIL IN KUWAIT, WHERE SHOPPING IS A FAMILY-ORIENTED SOCIAL ACTIVITY.

Four new districts have been added and three existing ones have been extended. Grand Avenue, the retail center's signature promenade, has been lengthened to over 700 meters (765 yards). Characterized by a mix of local, Western, and contemporary architectural influences, it binds The Avenues' districts together. The bustling retail street funnels shoppers into the center's new Grand Plaza—an open and flexible area for events and celebrations that also serves as the gateway to the center's new multiscreen cinema.

To enhance the center's appeal to a young generation, the

design team introduced a new district called Electra, where digital and electronic retailers are clustered. The centerpiece of Phase 4 is The Forum, an 80-meter-wide (260-foot) domed space that encourages shoppers to linger. A new Gensler-designed hotel will expand the center's appeal as a world-class destination and meeting venue.

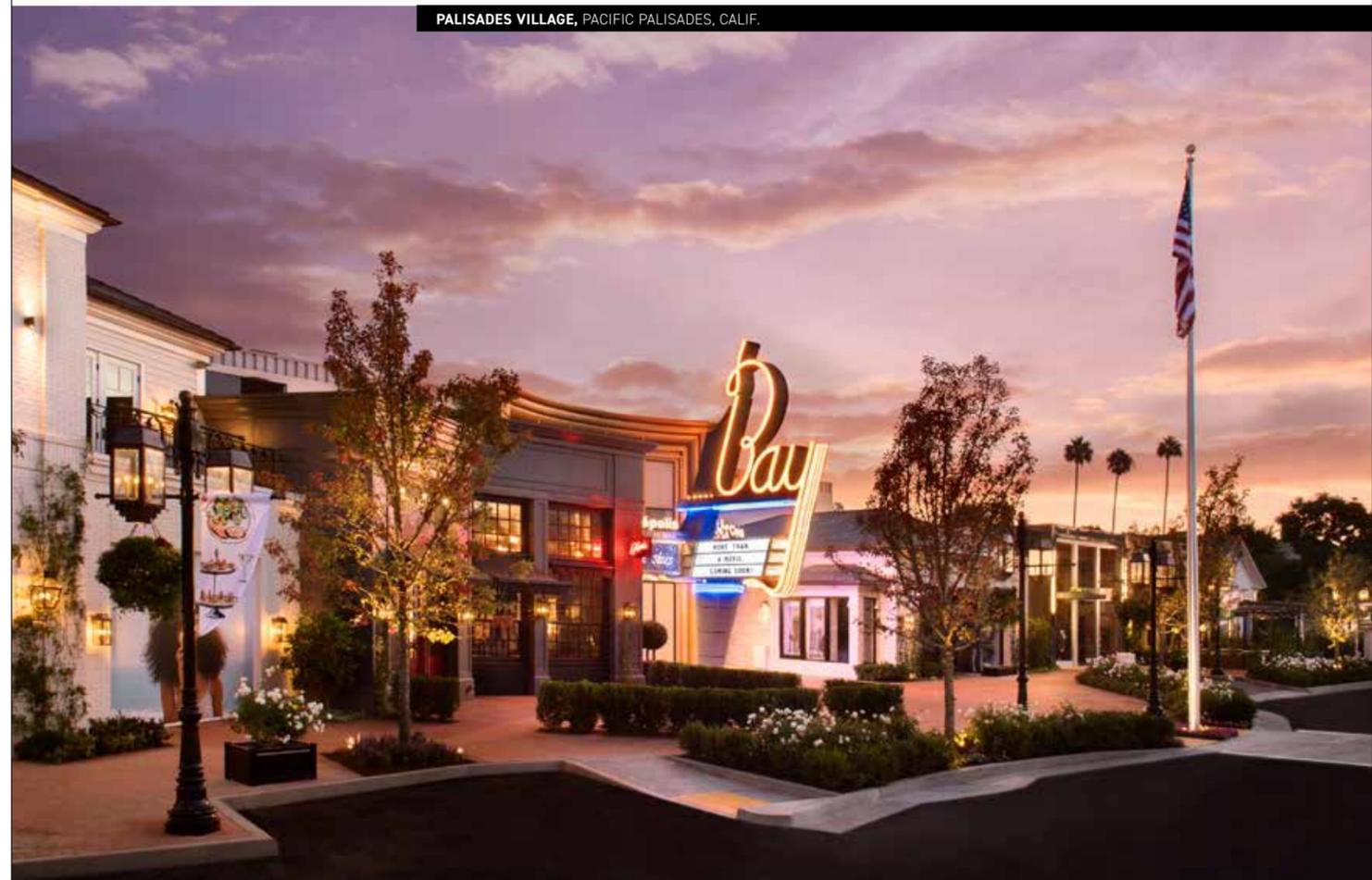


THE AVENUES, KUWAIT CITY, KUWAIT



PALISADES VILLAGE, PACIFIC PALISADES, CALIF.

PALISADES VILLAGE, PACIFIC PALISADES, CALIF.



FORECAST: RESIDENTIAL

Cities live up to their full potential when they're inclusive. Yet the skyrocketing cost of housing is threatening to turn many urban environments into exclusionary zones. To guard against such a scenario and enable more people to find opportunities in urban areas, cities need to develop creative, diverse, and affordable solutions for all types of housing.

333 LA CIENEGA, BEVERLY HILLS, CALIF.



TO DRIVE AFFORDABILITY, WE NEED TO INNOVATE INCHING CLOSER TO THE FRICTIONLESS HOME

Building materials can represent up to 50% of the cost of a residential project. That's why materials innovations that lower the up-front spend is so imperative. Energy expenditures can be lowered through more efficient designs for building envelopes, appliances, and operational systems, while maintenance costs can be reduced through improved structural durability. Gensler is designing many projects with factory-built modular housing units that can be assembled on site in a fraction of the time of conventionally-built projects.

The rise of the Internet of Things and AI has made possible the connected home, which can offer convenience, safety, and value. While devices that operate by touch or motion are widely available, voice-controlled interfaces have become the most ubiquitous outcome of this phenomenon. Concerns around privacy, integration, and ease-of-use have led to slower-than-expected adoption. Addressing those concerns will be key to making the frictionless home a reality.

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\$175^B

THE GLOBAL MODULAR CONSTRUCTION MARKET IS EXPECTED TO GENERATE AROUND \$175.15 BILLION BY 2025.

—ZION MARKET RESEARCH, 2019



STERLING 920 TERRACE CLUBHOUSE, TEMPE, ARIZ.

FOCUS ON HEALTHIER MATERIALS

It's now possible to find residential building materials that meet rigorous well-being certification standards and offer greater transparency into their chemical makeup. But such products are still more the exception than the norm. For many residents of substandard housing—as well as residents of some upmarket homes—toxins, mold, and other environmental hazards are persistent issues. Designing with a greater focus on the human impacts of materiality will be key to making our homes safe and healthy sanctuaries.

40%

THE HOUSING SECTOR USES 40% OF THE PLANET'S TOTAL RESOURCES AND PRODUCES MORE THAN ONE-THIRD OF GLOBAL GREENHOUSE GAS EMISSIONS.

—UNITED NATIONS

RENTERS ARE BEING HIT HARD BY A LACK OF AFFORDABILITY. ONE IN FOUR RENTERS IN THE U.S. SPENDS MORE THAN 50% OF THEIR INCOME ON HOUSING.

—COUNTY HEALTH RANKINGS & ROADMAPS

THE GLOBAL CHALLENGE FOR ADEQUATE HOUSING

1.6 BILLION

GLOBALLY, 1.6 BILLION PEOPLE LIVE IN INADEQUATE HOUSING, WITH 1 BILLION OF THEM RESIDING IN SLUMS OR INFORMAL SETTLEMENTS

—UNITED NATIONS



ASPIRE COLLEGE STATION, COLLEGE STATION, TEXAS

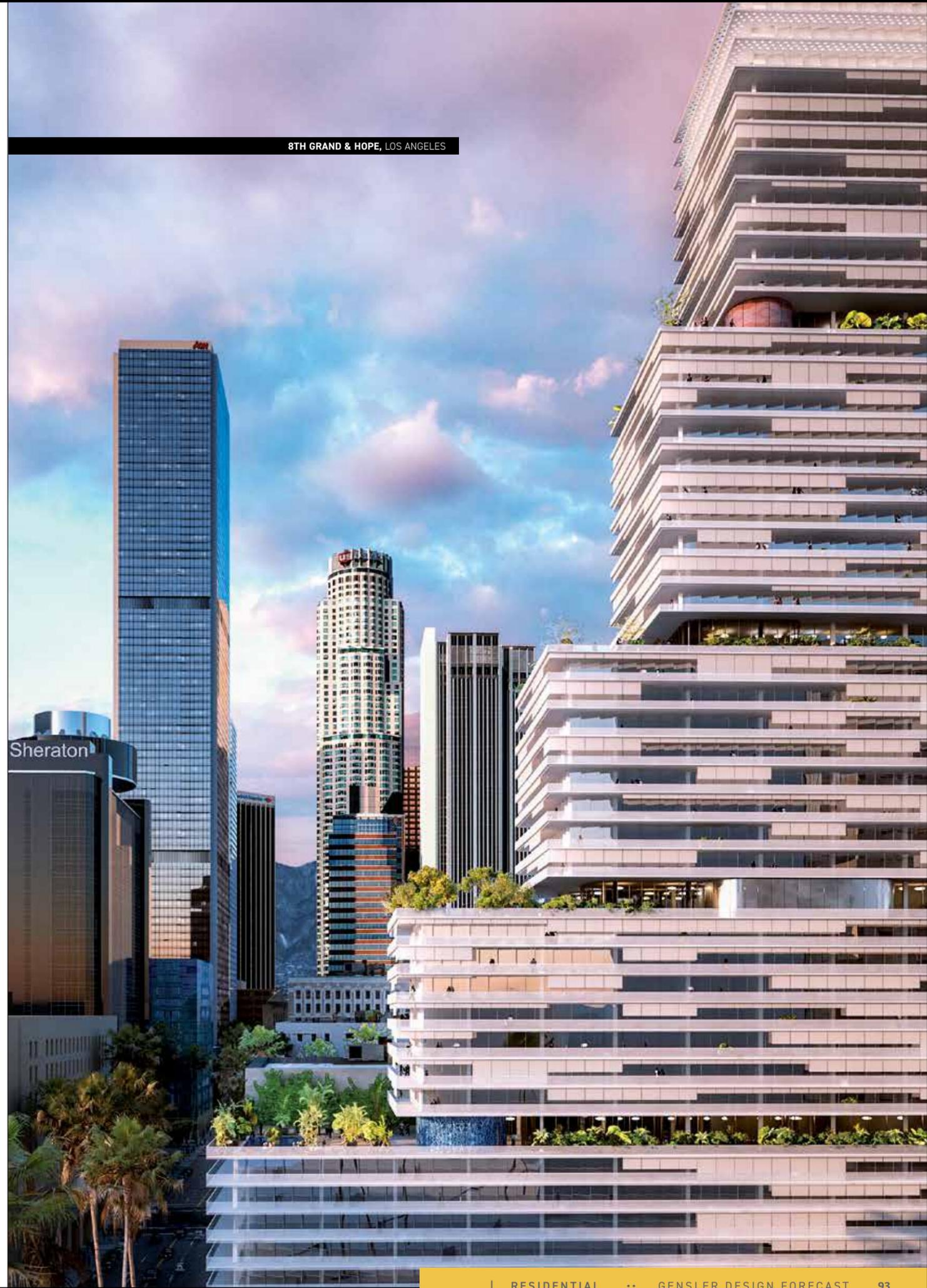


WOODLAWN STATION, CHICAGO

REVITALIZING A NEIGHBORHOOD THROUGH MIXED-INCOME HOUSING

Cities across the U.S. are facing an affordable housing shortage. Gensler's master plan for the Woodlawn community, one of Chicago's most distressed neighborhoods, reimagines more than 130 acres of blighted land and calls for redevelopment around three public transit stations and primary thoroughfares. The first of these projects, Woodlawn Station, is a four-story, 70-unit mixed-income residential building with commercial space fronting a historic retail street that takes advantage

of its location adjacent to the Green Line station by positioning its main door near the station's ground-level entrance. A collaboration by Gensler and a team of clients, residents, community members, and elected officials, Woodlawn Station is a model for cities facing gentrification and displacement. It exemplifies how cities can create equitable mixed-income housing that improves quality of life and forges a better economic future for residents who need it.



8TH GRAND & HOPE, LOS ANGELES



900 HILGARD, LOS ANGELES

A LEARNING COMMUNITY OF VERTICAL NEIGHBORHOODS

Located at the prominent corner of Hilgard and Le Conte avenues across from the UCLA campus, the 16-story building is an urban infill project that will bring much-needed student housing to the Westwood area. The building will offer a mix of multiple-bedroom living units, community gathering areas, and study spaces. Each unit is carefully designed to provide ample daylighting, natural ventilation, and a strong connection with the outdoors.

STUDENTS ARE LOOKING FOR NEW WAYS OF LEARNING TOGETHER, ACCORDING TO GENSLER RESEARCH.

Planning for the project aligned with the mission of residential life to enhance the learning experience, by building a residential community that supports academic and personal growth. In addition, Gensler's research indicates students are looking for new and different ways of learning together. The 900 Hilgard project responds to these needs through the incorporation of wellness components, co-living spaces, and tenant amenities. The design creates "live/learn neighborhoods" throughout the vertical community to encourage integrated academic, social, and well-being experiences.

To improve student life, the design team reallocated space from a conventional dormitory-style layout into shared living spaces where students can study, cook, collaborate, and recharge. In addition to ground-level courtyard and rooftop amenities, double-height "living rooms" with outdoor decks are located every two floors. These shared living spaces encourage students to build community. Planted terraces serve as a natural buffer to the adjacent residential neighborhood.

900 HILGARD, LOS ANGELES

FORECAST: RETAIL

Great retail experiences begin with an understanding of what drives customers to visit a store or website. Armed with this knowledge, retailers can devise strategies that unite their brands with communities of shoppers. Knowing when people are visiting to get something done, to connect, or simply to have fun allows brands to deliver experiences that cultivate loyalty and improve the business.



MICROSOFT OXFORD CIRCUS FLAGSHIP, LONDON

THE FAST & SLOW OF RETAIL

There's a growing population of consumers who need quick and frictionless transactions even though they don't have time to shop. On top of that, these same people are unwilling to sacrifice human connection and quality service. It all adds up to a situation that requires brands to balance the perks of fast retail (giving consumers what they want exactly when they want it) with the benefits of slow retail (providing deeply engaging experiences in virtual and physical environments).

AN OPERATING SYSTEM APPROACH TO RETAIL

Online shopping and the evolution of malls and high streets are creating a new form for brand engagement. Retailers who are thriving are doing so by taking an "operating system" approach to the design of their environments, considering the role that space, service, visual merchandising, brand messaging, digital, sensory, and activation strategies play in offering customers immersive and unparalleled experiences that respond to their ever-changing wants and needs.

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RETAIL IS A PILLAR OF U.S. EMPLOYMENT



RETAIL IS THE LARGEST PRIVATE-SECTOR EMPLOYER IN THE U.S., RESPONSIBLE FOR 1 IN 4 JOBS.

—NATIONAL RETAIL FOUNDATION



HARMAN EXPERIENCE STORE, MUNICH

THREE CYCLES OF RETAIL DISRUPTION

To track the forces that impact retail and will shape its future, Gensler's Retail practice area developed this framework.

	AGE OF EFFICIENCY	AGE OF EXPERIENCE	AGE OF BELONGING
TIME PERIOD	1950s - 2000s	2000s - Today	Today - ?
KNOWN FOR	More Stores, More Stuff	Digital Disruption	Partnership, Connection & Agency
PARTNERSHIP MODEL	Business Consultancy First, Design Firm Second	Business Consultancy & Design Firm Together	Retained Design Consultancy with Collaborators
DECISION MAKER	Facilities & Real Estate	Creative Director/Chief Marketing Officer	Creator/Community Leader
SOLVING FOR	Efficiency & Expansion	E-commerce & Space Coexisting	Open Source, Co-Creation & Sharing Economy
CUSTOMERS DRIVEN BY	Consumption & Convenience	FOMO, Need It Now & "That Instagrammable Moment"	Purpose, Community, Creating, Sharing
INNOVATION & DISRUPTION	Credit Cards, Globalization	The Third Space, Activations, Omni Channel	Co-Creation on Demand, Sharing & Upcycling



TAOBAO CHOICE STORE, HANGZHOU, CHINA

CONTINUOUS STORE REDESIGN IS THE NEW NORMAL

"Retailers must adopt a mindset of 'never being done': format redesign should be an ongoing process of implementing solutions quickly and refining them constantly, with retailers keeping their fingers on the consumer pulse and adapting store formats to respond to evolving consumer needs."

—THE EVER-CHANGING STORE: TAKING AN AGILE, CUSTOMER-CENTRIC APPROACH TO FORMAT REDESIGN, MCKINSEY

CYCLES OF DISRUPTION

Retail has been through disruptive periods before. But where previous disruptions were about efficiency or experience, we're now entering an era that's all about belonging. Consumers who have grown tired of chasing down experiences for that "Instagrammable moment" are seeking more meaningful and authentic opportunities to connect and co-create with a brand and its community. Brands that embrace this movement and offer a sense of purpose and partnership will be well equipped to navigate today's retail environment.

STARBUCKS RESERVE ROASTERY, TOKYO
 ARCHITECTURE DESIGNED BY KENGO KUMA; INTERIORS BY
 STARBUCKS IN COLLABORATION WITH GENSLER.

AN IMMERSIVE RETAIL EXPERIENCE

With the Tokyo Roastery, Starbucks continues to expand the boundaries of its craft. Located in Tokyo's vibrant Nakameguro neighborhood, the fully functional roastery and retail store delivers an immersive, educational retail experience for coffee exploration and discovery. The 32,000-square-foot, four-story store is the biggest roastery that Starbucks has opened and the fifth worldwide, following locations in Seattle, Shanghai, Milan, and New York.

The open floor plan draws customers in, introducing them to the art of roasting, brewing, and hand-crafting beverages. At 17 meters (55 feet) tall, the floor-to-ceiling hammered copper cask anchors the central atrium, adorned with handmade copper cherry blossoms that respond to natural light from the skylight above. On the first floor, visitors can experience the bean-to-cup journey by enjoying hand-crafted beverages and artisanal baked goods from Princi bakery at the main bar, while beans that are stored in the copper cask whirl through overhead symphony pipes.

THE ROASTERY DELIVERS AN IMMERSIVE, THEATRICAL EXPERIENCE FOR EXPLORATION AND DISCOVERY.

On the second floor, visitors can enjoy a modern tea experience in Japan at the Teavana tea bar. A Japanese paper (*washi*) wall and a teacup wall pay homage to the long-standing importance of tea in Japan. On the third floor, visitors can discover inspired mixology with coffee- and tea-inspired cocktails at the Arriviamo Cocktail Bar. The top floor is home to the AMU Inspiration Lounge—from the Japanese *amu*, meaning "knit together"—a dedicated space for the community to gather, socialize, hold impromptu meetings, or attend events. The space is also planned to become Starbucks' first Specialty Coffee Association-certified training location in Japan.

Throughout the interior, details such as an origami-inspired ceiling and locally sourced furniture celebrate modern Japanese style and culture of craftsmanship. The architecture is designed by Kengo Kuma; interiors by Starbucks in collaboration with Gensler. Blending traditional and modern design, the Roastery delivers a unique, inspired experience across all four floors.



FORECAST: SPORTS

One of the beauties of sports is their ability to unite people—around their school, their city, or their country. As the competition for people's attention and leisure time intensifies, sporting venues that foster a sense of unity through creative experiential design will be the ones that serve as communal focal points and stimulate economic and cultural growth.



UNIVERSITY OF TEXAS AT AUSTIN BASKETBALL ARENA, AUSTIN, TEXAS

SPORTS-ANCHORED DISTRICTS ARE ON THE RISE

CREATING COMMUNITY THROUGH WELLNESS

Today, the modern sports-anchored district is a lively retail and hospitality destination for fans and a major selling point for players. These multifunctional urban enclaves serve as major sources of economic activity and spur growth in the surrounding area. And as urban migration continues to rise, sports venues can function as natural hubs for transit-oriented districts.

Team-oriented wellness spaces can encourage more than just athletic training. They can be focal points for healthy habits, team camaraderie, and professional recruitment. On college campuses, recreation centers have become new hubs of student life that promote social and physical well-being, and they are going a long way toward unifying large and diverse student bodies.

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\$80B

IN NORTH AMERICA ALONE, THE SPORTS MARKET WILL GROW AT 3% ANNUALLY, FROM \$69.1 BILLION IN 2017 TO \$80.3 BILLION IN 2022.

—PWC

67%

ACROSS THE GLOBE, SPORTS VENUES ARE EXPERIENCING A 67% GROWTH IN DATA USAGE YEAR OVER YEAR.

—ERICSSON



AUSTIN FOOTBALL CLUB STADIUM, AUSTIN, TEXAS

“AS SPORTS TEAMS AND LEAGUES BUILD ON AND INCORPORATE THE SUCCESSES OF THE E-COMMERCE REVOLUTION, THEY’LL BE ABLE TO CONNECT ALL DOTS OF A SINGLE FAN’S JOURNEY, HELPING TO SELL ADDITIONAL TICKETS WHILE ALSO DRIVING PERSONALIZED CONNECTIONS AND EXPERIENCES THAT CAN INCREASE THE LIFETIME VALUE OF FANS.”

—DELOITTE, 2019 SPORTS INDUSTRY GAME-CHANGERS

DESIGN FOR THE EVOLVING GUEST EXPERIENCE

Today’s sports fans expect so much more from sports than just the game-day experience, which has become more multifaceted thanks to social media, video platforms, and fantasy leagues. Yet there’s still the very human need to connect with other fans and the team. That’s why we’re designing venues that are more intimate and provide easy mobility, both of which can encourage greater social interaction. Also, offering a wider variety of premium seating can provide fans with enhanced experiences while generating additional team revenue.

“THE NATIONAL HOCKEY LEAGUE REQUIRES THAT ITS TEAMS TRACK THE RESOURCES THEY CONSUME, THE WASTE THEY PRODUCE, AND OTHER BENCHMARKS, LIKE THE EMISSIONS GENERATED BY TEAM TRAVEL.”

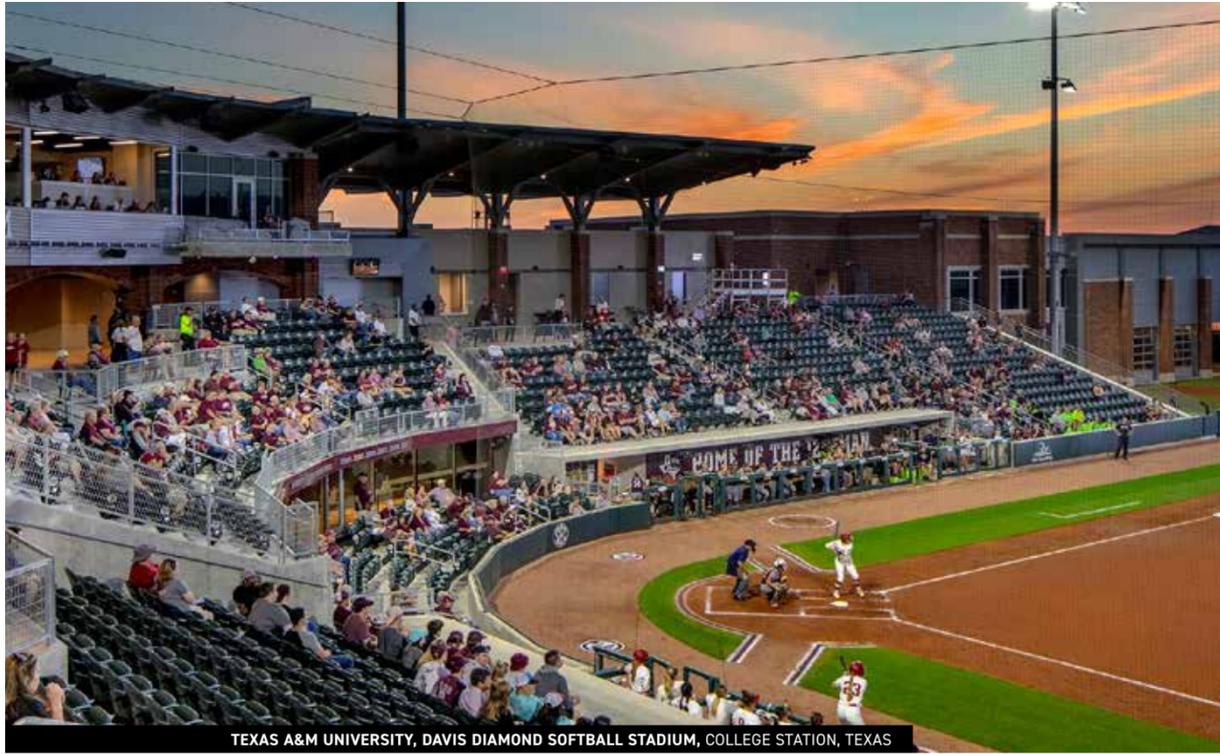
—THE NEW YORK TIMES

ENVIRONMENTAL RESPONSIBILITY IS A TEAM SPORT

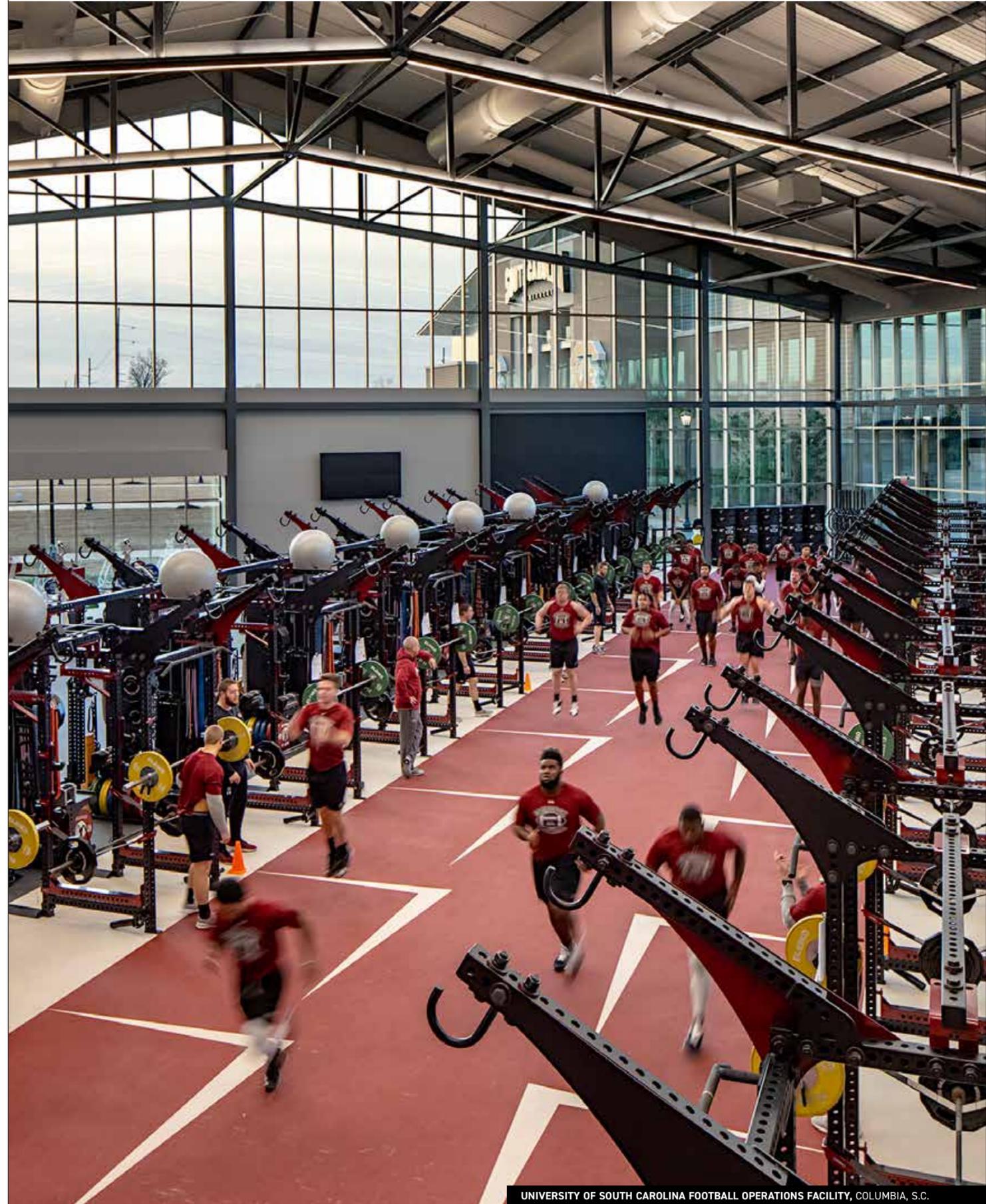
REVENUE OPPORTUNITIES AROUND BEYOND GAME DAY

Sports and athletic organizations at all levels are taking their responsibility seriously to be more environmentally friendly. That’s why they’re implementing tactics to systematically eliminate waste products, introducing better recycling programs and more effective sorting options. They’re also cutting back on foods that are taxing to the environment.

In an era of 24/7 entertainment, it’s no longer enough for sports venues to simply rely on game-day or seasonal revenue, then lie dormant in the off-season. Sports venues must be designed with the flexibility to accommodate a diverse mix of entertainment options, from concerts to private gatherings to special events. Such an approach can turn a narrowly focused sports facility into a broadly accommodating community asset.



TEXAS A&M UNIVERSITY, DAVIS DIAMOND SOFTBALL STADIUM, COLLEGE STATION, TEXAS



UNIVERSITY OF SOUTH CAROLINA FOOTBALL OPERATIONS FACILITY, COLUMBIA, S.C.



LOS ANGELES FOOTBALL CLUB PERFORMANCE CENTER, LOS ANGELES



WISEBURN USD/CITY OF EL SEGUNDO GYMNASIUM AND AQUATICS CENTER, EL SEGUNDO, CALIF.

A WORLD-CLASS FACILITY FOR STUDENTS AND THE COMMUNITY

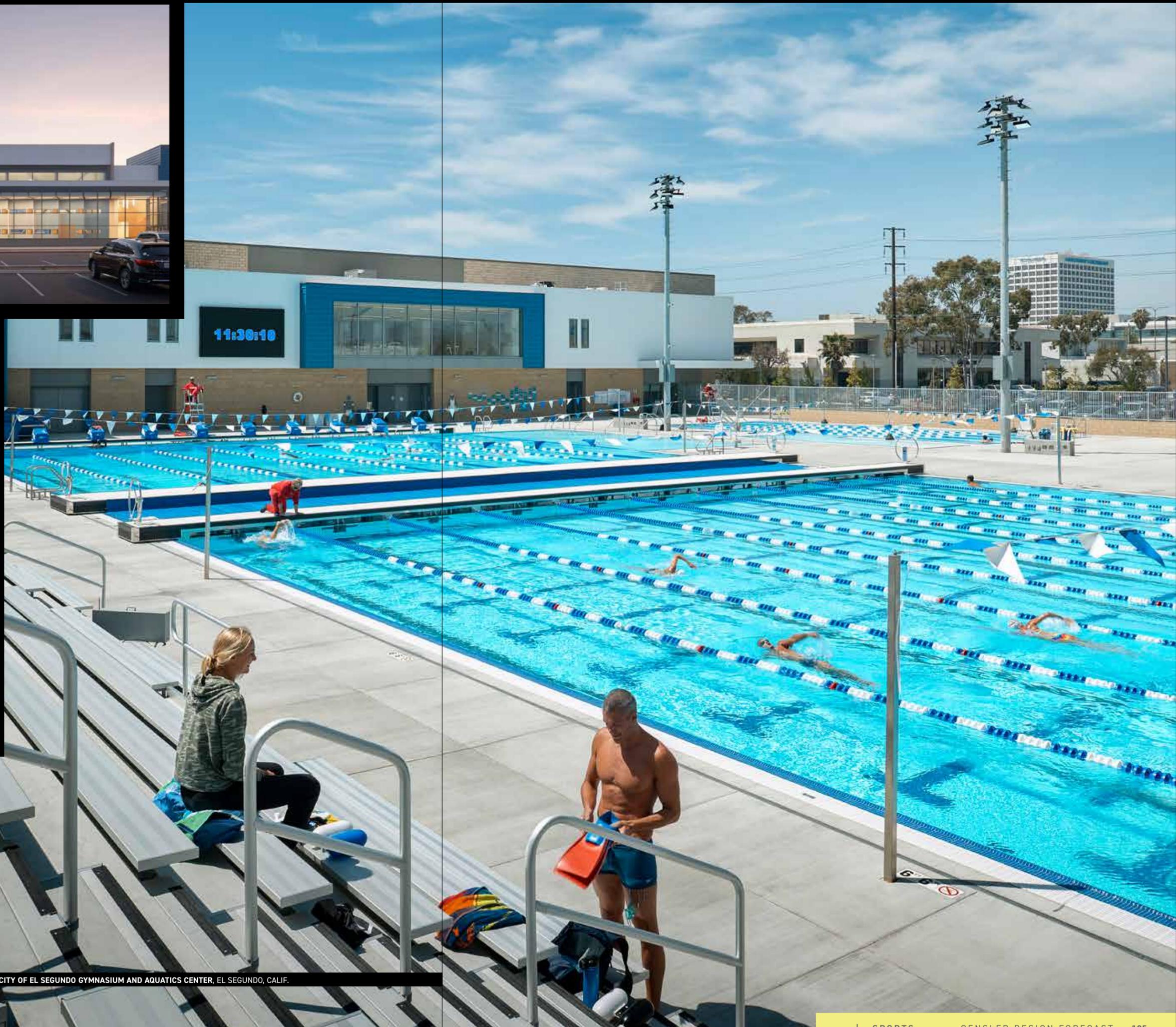
To create a world-class facility to serve student athletes and the community, the Wisburn Unified School District and the City of El Segundo partnered with Gensler to design a new joint-use, state-of-the-art gym and aquatics center, located on the Wisburn School campus. The facility is a community resource for both the City of El Segundo and Wisburn residents.

The new outdoor swimming facility houses local swim club teams, as well as varsity and junior varsity swim and water polo teams. The Olympic-caliber facility contains a 10-lane pool that can be set up for various swimming competition lengths, thanks to movable bulkheads. The pool is designed to accommodate public swim lessons and fitness programs, high school and regional competitions, and scuba diving and lifeguard training. Other amenities include a four-lane teaching and fitness pool, bleachers, scoreboards, and sports lighting.

THE FACILITY WILL BE SHARED BY THE PUBLIC AND STUDENTS, EPITOMIZING A GREAT COMMUNITY PARTNERSHIP.

The Wisburn Gymnasium can be configured for a basketball competition court with bleachers, three practice basketball courts, or up to six volleyball courts for use by high school teams and community club teams. Locker rooms, showers, and ticket facilities serve both the gym and the aquatic center.

The complex is accessible to students, local swim clubs, and the city's Recreation and Parks Department—helping to revitalize the region's athletic programs and build a healthier community. The public-private partnership serves as a model for future facilities.



WISEBURN USD/CITY OF EL SEGUNDO GYMNASIUM AND AQUATICS CENTER, EL SEGUNDO, CALIF.

THE FUTURE OF

COMMUNITY

Cities matter so much because of how profoundly they touch the lives of the people who live in them. More than half of the world's 7 billion people live in urban areas and that number is rising fast. Urban areas contribute more than 80% of global GDP, but they're also responsible for 70% of global carbon emissions. That's why we believe human experience is the driving force behind how we shape our future cities. As community builders, we have the opportunity to impact the challenges facing cities—from affordable housing to climate change. At the same time, we are leveraging the power of cities to reshape education, accommodate new forms of mobility, expand access to healthcare, and reinvent what it means to be a "smart city."

AVIATION | P108

CITIES & URBAN DESIGN | P112

CRITICAL FACILITIES | P116

EDUCATION, CIVIC & CULTURE | P118

HEALTH & WELLNESS | P124

FORECAST: AVIATION

As airports expand and gain importance in their locales, they've become much more than centers of transportation. They are user-driven ecosystems—operating as small cities with their own authentically local experiences. Characterized by mixed-use development that includes housing, retail, gourmet restaurants, conference centers, and entertainment venues, airports have become destinations in their own right.

AUCKLAND INTERNATIONAL AIRPORT, AUCKLAND, NEW ZEALAND



COMMUTER TRAVEL IS THE FUTURE BIOMETRIC SCREENING WILL IMPROVE TRAVELER EXPERIENCES

Daily commuting by air is common on routes connecting Sydney to Melbourne, or Tokyo to Singapore. It's not practical everywhere. But by using smaller aircraft on short- to medium-range flights, travel times between cities could be cut in half using secondary airports with only carry-on luggage and more efficient security checkpoints. This level of convenience can spur commuter demand, and new ventures in electric-powered aircraft could dramatically lower costs too.

Airports are adopting biometric screening to increase security and improve passenger processing. More than 15 airports across the U.S. have begun testing the technology with airline partners and found that it can cut boarding time in half, freeing passengers' time and attention. Facial recognition has been the primary tool, but government agencies are exploring a layered approach that would also include fingerprint verification.

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THERE WERE 494 MILLION NEW INTERNATIONAL TRAVELER DEPARTURES DURING THE PAST 10 YEARS, AND ANOTHER 507 MILLION NEW TRAVELERS WILL DEPART IN THE DECADE AHEAD.

—SKIFT



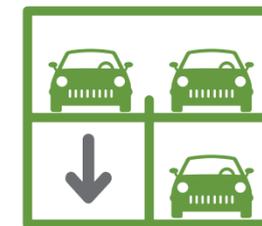
DELTA SKY WAY AT LOS ANGELES INTERNATIONAL AIRPORT, LOS ANGELES

20%

OF NON-AERONAUTICAL REVENUE AT AIRPORTS IS GAINED THROUGH PARKING.

—U.S. GLOBAL INVESTORS

REAL ESTATE ASSETS ARE MONETIZING AIRPORTS



Airports are looking for new ways to cover their costs, as they seek more income for improvements to their terminal and other facilities. For some airports, their real estate has become a valuable, revenue-generating asset. Office buildings, golf courses, sports facilities—even car dealerships—occupy land that is leased from adjacent airports. According to the Airport Cooperative Research Program, 70 U.S. airports have developed solar energy projects that lower their energy bills or provide income. As new forms of mobility decrease the need for parking garages, even more valuable land will be freed up for redevelopment.

THE INTERNATIONAL AIR TRANSPORT ASSOCIATION PREDICTS 7.8 BILLION PEOPLE WILL TRAVEL BY AIR IN 2036, ALMOST DOUBLE THE NUMBER IN 2017.

EMERGING MARKETS WILL DRIVE GROWTH

80%

OF THE WORLD'S POPULATION HAS NEVER FLOWN IN AN AIRPLANE.

—DENNIS MUILENBURG, CEO, BOEING

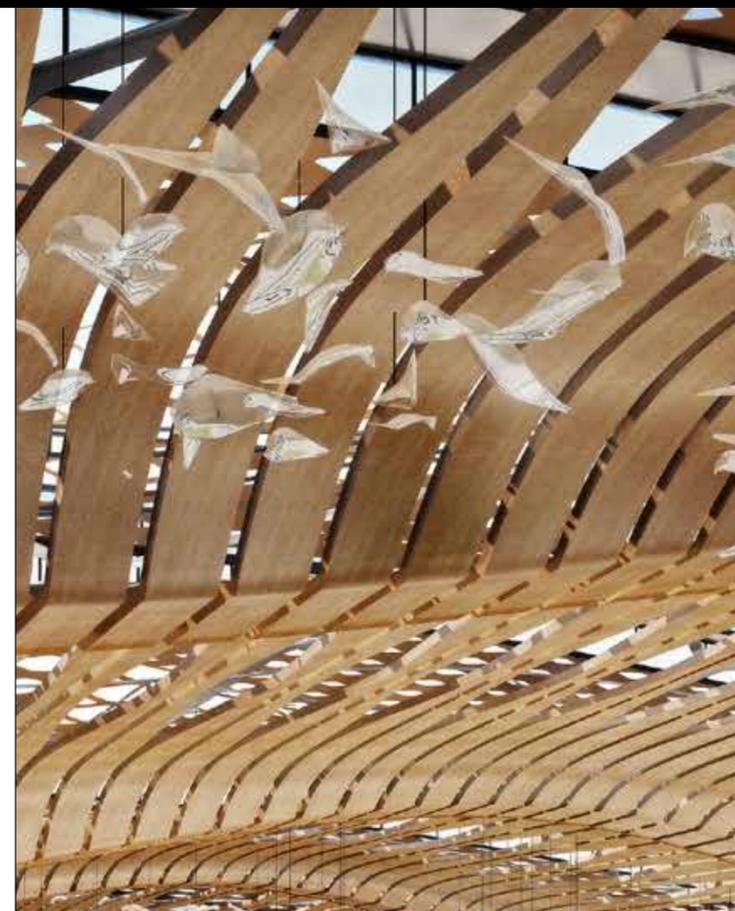
AMENITIES ARE A DRAW FOR LOCALS TOO COUNTERING STRESS WITH A FOCUS ON WELLNESS

As airports add more sophisticated offerings that include retail, gourmet restaurants, events, and entertainment, they are attracting not only travelers, but local patrons too. Both air passengers and local citizens appreciate how airports have upped their game in providing locally sourced food, regional artwork, and an authentic environment that elevates human experience.

Given the stresses of air travel, airports have flipped the script by placing renewed focus on wellness features that allow passengers to use their downtime for some well-deserved pampering. Basics such as natural light and good air circulation make for a healthy environment, but green spaces (indoors or out), gyms, yoga rooms, and walking paths add to the mix. Vendors join in by offering healthy local food, beverages, and products.



SAN FRANCISCO INTERNATIONAL AIRPORT T1 EXPANSION, SAN FRANCISCO



KUNMING CHANGSHUI INTERNATIONAL AIRPORT, KUNMING, CHINA

A TRANSIT HUB THAT'S ROOTED IN PLACE

In addition to adding a new terminal, this 17 million-square-foot mega-airport includes two hotels, a bus terminal, high-speed rail station, two subway stations, and a regional rail station. The passenger journey is designed for performance and delight.

THE ROOF DESIGN ACTS AS A CANOPY OF LEAVES, CASTING DAPPLED LIGHT IN THE CONCOURSE.

Inspired by the trees and forests of one of the most biodiverse forests on the planet, the terminal features a "leaf" roof design that baffles daylight, softly illuminating the concourse, reducing glare, and increasing passenger comfort.



PITTSBURGH INTERNATIONAL AIRPORT, PITTSBURGH

FORECAST: CITIES & URBAN DESIGN

We experience cities at many different scales, from singular buildings and spaces to neighborhoods and entire districts. This variety in the human experience of cities is why we are seeking to regenerate urban centers to create socially, environmentally, and technologically connected places for people. Connections are a key element to building communities that are lasting and adapt over time—incorporating a broad range of considerations that include context, site, culture, history, and knowledge.

RASH FIELD PAVILION, BALTIMORE



CHARTING A PATH TOWARD REGENERATION

The future of cities can be defined in terms of resilience, sustainability, and prosperity. But the path to that future is not linear, it's cyclical. There's an opportunity to reuse and recycle the resources that have been expended to build our cities. The urban fabric of the past can be connected to the future by creating frameworks that are flexible and adaptable to change through time. It's a vision that is more than future-proof, it's future ready—connecting cities to nature, embracing technology, and putting people at the center.

CREATING A CONNECTED HUMAN EXPERIENCE WITH SMART TECHNOLOGY

More urban centers around the world are investing in sophisticated digital infrastructure with the vision of becoming "smart cities." By combining data-driven decision-making tools, sensors, and AI, smart city strategies promise an urban experience that is dramatically improved for people. If channeled correctly, these technologies could help inform solutions to the most difficult challenges of urbanization, from crime and homelessness to elder care and transportation.

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"WITH OVER HALF OF THE WORLD'S 7 BILLION PEOPLE LIVING IN URBAN AREAS TODAY, THE TRAJECTORY OF CITIES WILL DETERMINE THE TREND LINES OF HUMAN EXPERIENCE ACROSS THE GLOBE."

—DIANE HOSKINS, GENSLER CO-CEO



METRO CRENSHAW URBAN DESIGN STUDY, LOS ANGELES

PEOPLE WANT AUTHENTICITY, NOT ANONYMITY

There's a growing desire to restore the vibrancy and enhance the experience of city life for people. This vision for the future of cities is a place that values walkability and a mix of uses. It's a place that is scaled to people, providing safe walking environments and open space for public life. Most importantly, it's an authentic place that is grounded in the unique culture and values of its people while embracing modern technology and the global community.

ADDRESSING THE WEALTH GAP THROUGH HOUSING AFFORDABILITY

With development pressures rising in cities everywhere, the income gap is widening. Not only are working-class families disappearing from urban neighborhoods, but housing in cities is fast becoming unattainable for public service workers and young professionals too. There's a dire need for mixed-income housing. Designers can be part of the solution, serving as leaders who advocate for social equity through housing opportunities that improve quality of life and track to a better economic future for residents who need it.

COASTAL COMMUNITIES MUST ADAPT TO CLIMATE CHANGE

Cities must plan aggressively for climate change. This is particularly true for coastal cities, which are most vulnerable to climate-related disasters such as sea level rise, hurricanes, and flooding. For cities to protect their citizens, local and regional governments must partner with the private sector to adopt innovative resilience strategies. Planners can anticipate sea level rise by zoning low-lying areas as parks and wetlands, while designing elevated transportation networks that still work during floods.

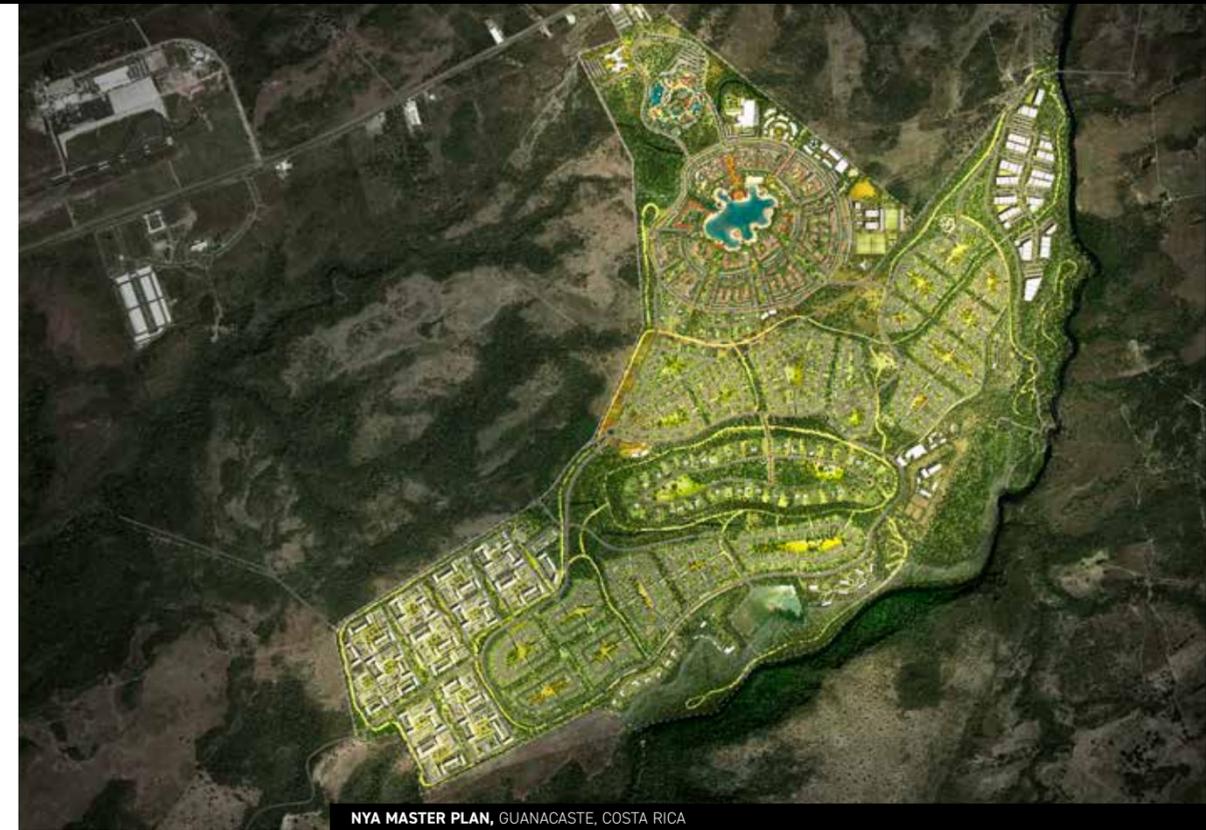
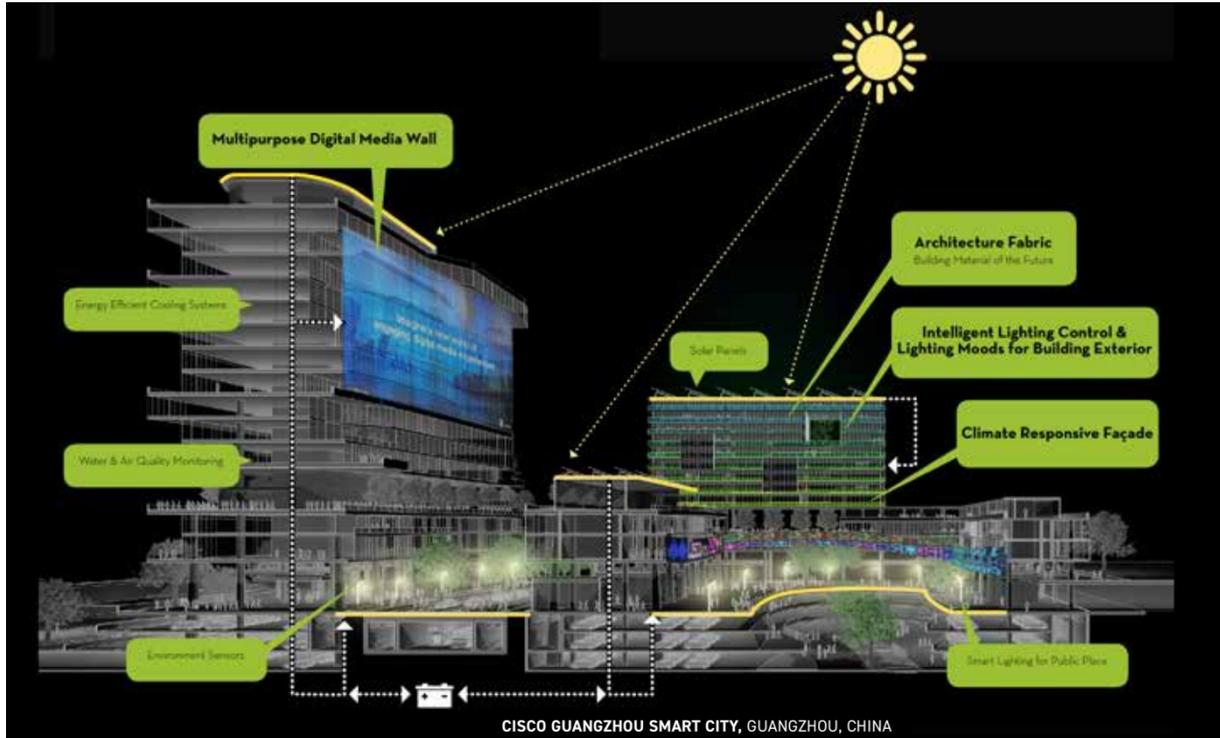
90%

OVER 90% OF ALL URBAN AREAS ARE COASTAL, PUTTING MOST CITIES AT RISK OF FLOODING FROM RISING SEA LEVELS AND POWERFUL STORMS.

—C40 CITIES



POPLAR GROVE MASTER PLAN, GERMANTOWN, MD.



**UBER SKYPORT MOBILITY HUB CONCEPT,
MULTIPLE LOCATIONS**

**MOBILITY'S NEXT WAVE: AERIAL
RIDE-SHARE ON THE HORIZON**

As part of Gensler's commitment to improving cities for people, we constantly monitor innovations in mobility and their impact on human experience. By improving mobility, we can give people back time and reduce carbon in our atmosphere, and we can begin to give our city streets back to people as dependence on automobiles diminishes. This is the promise of aerial ride-share, and it's why we created the CitySpace concept for Uber's Skyport Mobility Hub.

Gensler's design for CitySpace was revealed in June at the Uber Elevate Summit in Washington, D.C. One of a select few concepts showcased by Uber, the proposed design outlines a realistic approach to creating the framework of a new transit network. From above, CitySpace follows fundamental aviation planning principles. But designing for electric vertical takeoff and landing (eVTOL) vehicles that can leapfrog existing infrastructure provided the opportunity to work at the pedestrian scale.

EACH HUB WOULD FUNCTION AS A PIVOTAL PIECE OF THE URBAN FABRIC, BINDING THE NEIGHBORHOOD TOGETHER.

In order to quickly build a network for this new mode of transit, the design had to be highly adaptable. To accomplish that, the team created a kit of parts that can be applied in two ways: as a retrofit of existing buildings or as a customized ground-up solution.

CitySpace is a community destination and connection point that welcomes people at the beginning or end of their journey, while dramatically reducing parking impact on the city. Each hub would function as a pivotal piece of the urban fabric, binding the neighborhood together with a central place to shop, eat, and engage, while reducing congestion across the city and linking diverse modes of mobility.



FORECAST: CRITICAL FACILITIES

Critical facilities are the framework that enables the digital world. As advances in technology prompt shifts in the market, the shape and size of these facilities are becoming more diverse. While known for occupying buildings on isolated sites, their future is in the urban landscape as a component of hybrid projects.

NATIONWIDE CHILDREN'S HOSPITAL DATA CENTER, COLUMBUS, OHIO



A NEW GENERATION OF COMMAND CENTERS

Cybercrime is a growing concern—a threat so serious that a recent Zeitgeist Guide labeled it the number one concern for CEOs in the U.S. Executives in industries across the board are looking to build command centers to defend their brand and their customers against cyber hacking. Globalization of business and economics has heightened the risk even further. Fortunately, improvements in technology and visualization will transform command centers and help organizations oversee the management and control of their most essential computing systems.

SOLVING THE GROWING DEMAND FOR DATA WITH COLOCATION

The growing demand worldwide for data storage is being met increasingly by colocation data centers. The popularity and low operating costs of cloud computing are helping to drive this demand. Colocation data centers also meet the needs of industries such as financial services because of how they can increase scale, lower IT costs, and help manage complex technology stacks.

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\$97B

SIZE OF THE GLOBAL DATA CENTER MARKET WILL INCREASE BY \$97 BILLION BETWEEN 2017–2022, ACCELERATING AT A COMPOUND ANNUAL RATE OF MORE THAN 10%.

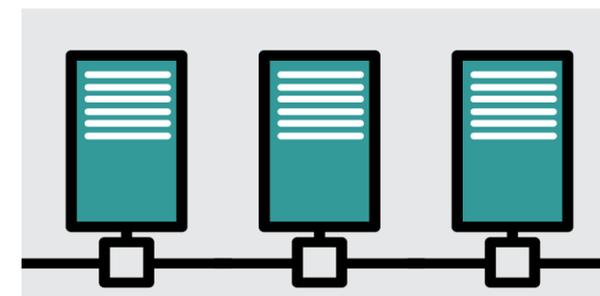
—TECHNAVIO

The data center market is witnessing strong growth in numerous major regions, including the Americas, Europe, and Southeast Asia. In Europe, this is attributable to heightened regulation regarding data protection and privacy. In Southeast Asia, it's due to the region's high Internet penetration and growth of modern technologies.

—TECHNAVIO

SUPERCOMPUTING IS BIGGER AND FASTER

National labs are in an arms race to build faster supercomputers, which are used for a wide range of computationally intensive tasks in fields ranging from quantum mechanics and weather forecasting to climate research and oil and gas exploration. Universities and hospitals are also rushing to build supercomputers to support scientific research and sequence DNA for diagnostic purposes.



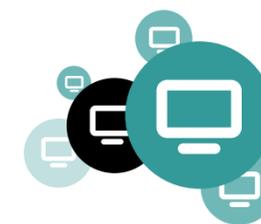
THE RISE OF HYBRID FACILITIES

Critical facilities are increasingly becoming an important component of multifunctional projects that are combining several uses—such as medical simulation labs, conference centers, and data centers—to improve efficiency and reliability. In university settings, for example, there's a greater need for advanced computing power to support research and facilitate partnerships with industry. Medical centers are important drivers too, both for patient records and for research and diagnostic processes. Often housed on campuses, these data facilities are being designed to better integrate with their surroundings.

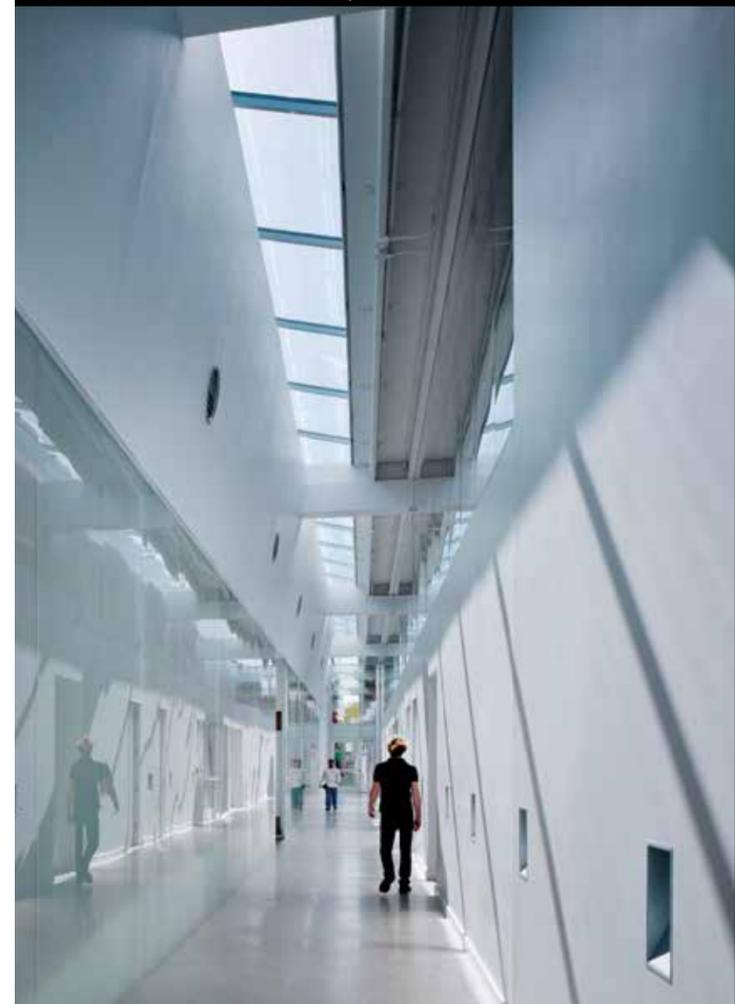
14%

THE COLOCATION DATA CENTER MARKET IS PROJECTED TO GROW AT A 14.2% ANNUAL RATE THROUGH 2026.

—ZION MARKET RESEARCH



CONFIDENTIAL UTILITY COMMAND CENTER, SOUTHWEST U.S.

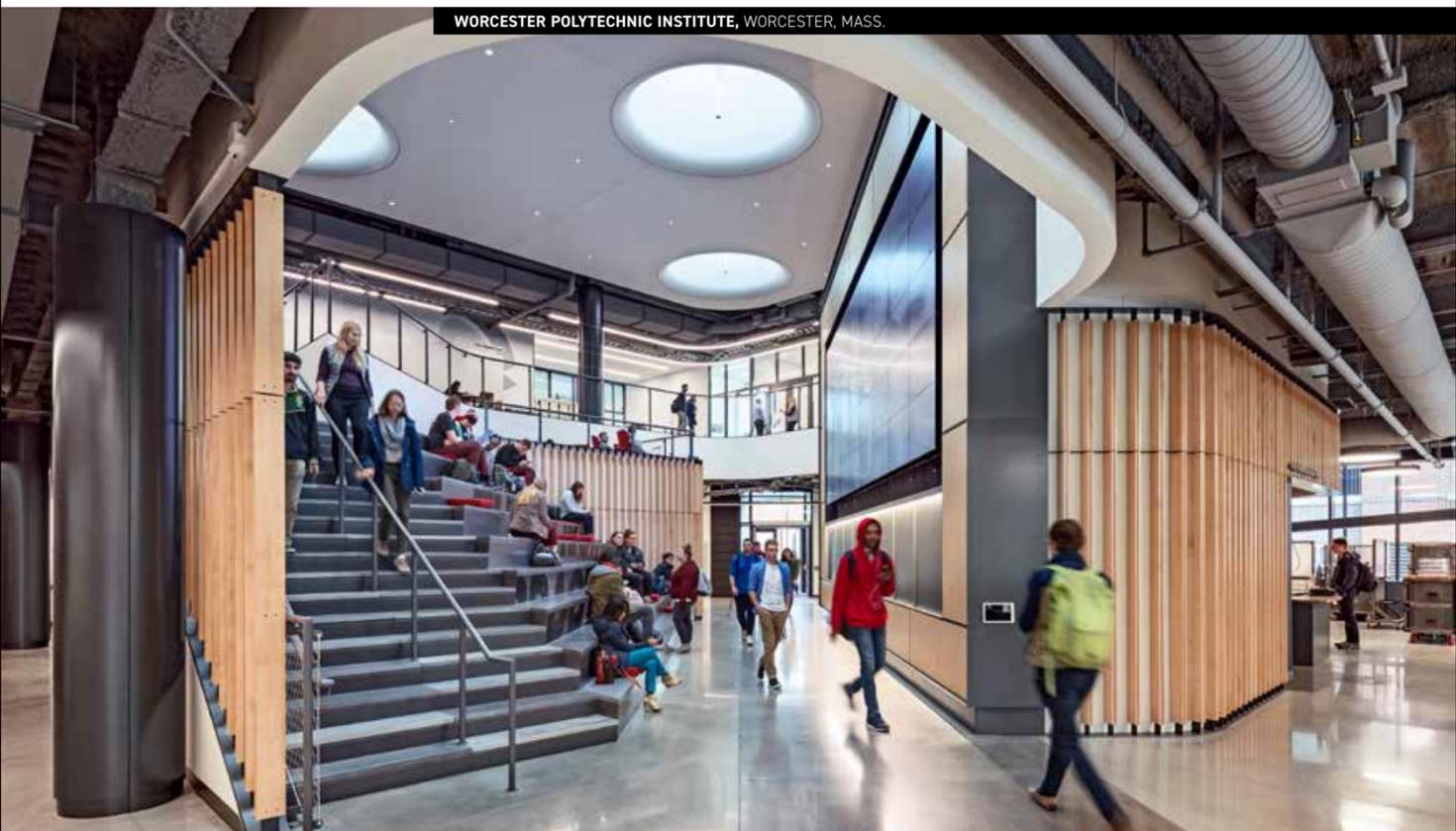


CLOUD COMPUTING AND THE STEADY INCREASE IN DEMAND HAVE TURNED DATA CENTERS INTO PROVIDERS THAT ARE AKIN TO UTILITIES. THE CLOUD NEEDS AN INFRASTRUCTURE THAT'S BOTH NIMBLE AND SECURE.

FORECAST: EDUCATION, CIVIC & CULTURE

Our schools, museums, libraries, and religious organizations play a critical role in shaping and nurturing the people who will lead our future cities. These institutions are the infrastructure of community. They form values, engender learning, transfer skills, and forge human bonds. Each kind of institution belongs to everyone, so our charge is to create welcoming, mission-focused places that embody diversity, equity, and inclusion.

WORCESTER POLYTECHNIC INSTITUTE, WORCESTER, MASS.



ACCESS TO EDUCATION REQUIRES NEW PATHWAYS

Holders of a college degree average 60% higher lifetime earnings than those with only a high school diploma, so schools and institutions are having to take a hard look at how they deliver education. Multiple vehicles—from curriculum and policy to technology and space—can be employed to expand pathways for students. An underlying theme heard from educators is “meeting the students where they are,” taking into account the social, cultural, and economic diversity of today’s students.

FAITH CENTERS ARE REPAIRING THE SOCIAL FABRIC

The majority of Americans (77%) look to faith leaders to help address the issue of global poverty, and faith leaders are taking the issue to heart. With gaps in public services, faith-based institutions are taking up the cause of serving the poor by providing food, housing, and counseling services, while working on a larger scale to build more equitable societies and tackle this global issue at a systemic level.

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THROUGH FACILITIES LIKE ACADEMIC INCUBATORS AND ACCELERATORS, EDUCATIONAL INSTITUTIONS ARE HAVING GREATER IMPACT ON LOCAL AND REGIONAL ECONOMIES.

77% OF THE AMERICAN PUBLIC LOOKS TO FAITH LEADERS TO ADDRESS GLOBAL POVERTY.
—BARNA GROUP



MUSEO DEL ORO PRECOLOMBINO RENOVATION, SAN JOSÉ, COSTA RICA

MUSEUMS CAN BE MODELS OF INCLUSIVITY

Museum-goers expect museums to provide an environment of inclusivity and equality. The Gensler Research Institute found that 94% of people perceive museums to be symbols of inclusivity. To achieve this, institutions must be accessible for people with a range of disabilities, meet the needs of different generations, and welcome people of diverse backgrounds. Gender-inclusive restrooms, railings, clear interpretive labels and navigational signage, and trigger warnings can all boost perceptions of inclusivity.

THE AVERAGE USER IS A MYTH

The common thread running through schools, museums, libraries, and religious organizations is the need to serve individual needs. This is a taller task than it used to be when organizations could cater to “types” or “the average person.” In fact, in an increasingly diverse world, the notion of the “average user” has become a myth. That means we must design for all people, listening to diverse perspectives, providing for multiple pathways, and allowing for variety and choice in settings and technology.

LIBRARIES ARE AS VITAL AS EVER

Libraries were once temples of learning that housed books and journals, but librarians have a different vision for the future. They see libraries as places for community service, learning through play, coworking, and community access to technology. To realize this future, librarians are leveraging new platforms of media production and distribution. Adapting to these changing functions will mean reconfiguration of space and rethinking the means through which people access information.

AMERICAN KENNEL CLUB MUSEUM OF THE DOG, NEW YORK



HOW DO USERS PERCEIVE THE INTEGRITY AND INCLUSIVITY OF MUSEUMS?

- 91%** believe that museums are trustworthy sources of information.
- 94%** believe that museums welcome all types of people.
- 71%** believe that museums foster feelings of community.
- 62%** believe that museums can be places of solace or refuge.

—MUSEUMS EXPERIENCE INDEX™, GENSLER RESEARCH INSTITUTE



LAMAR UNIVERSITY SCIENCE & TECHNOLOGY BUILDING, BEAUMONT, TEXAS

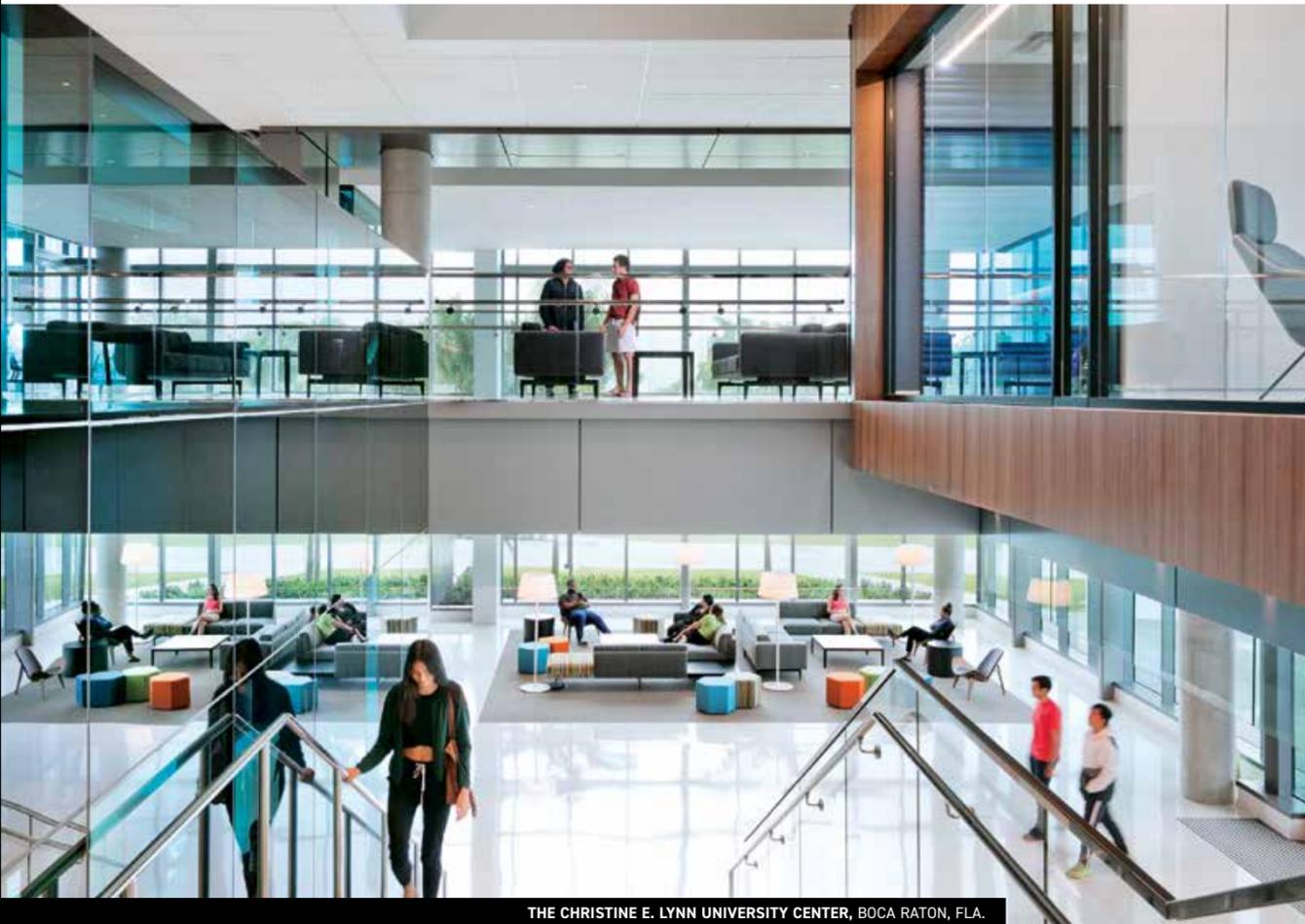


66%

OF STUDENTS PREFER A QUIET SPACE TO STUDY.

—CHANGING COURSE: CONNECTING CAMPUS DESIGN TO A NEW KIND OF STUDENT, GENSLER RESEARCH INSTITUTE

TOKYO COMMUNICATION ARTS COLLEGE, TOKYO



THE CHRISTINE E. LYNN UNIVERSITY CENTER, BOCA RATON, FLA.

PAVILLON NOTRE-DAME, PARIS

A SYMBOL OF HOPE AND REBIRTH

Following the devastating fire that destroyed the roof of the iconic Notre-Dame Cathedral in Paris, Gensler unveiled a design for a temporary place of worship and reflection while the 850-year-old cathedral is being restored. Set to be located next to the historic cathedral, the Pavillon Notre-Dame will offer a beacon of hope to Parisians and international visitors alike.

The design offers a modest, yet emblematic, temporary structure constructed primarily out of charred timber—one of the oldest and most effective methods of protecting wood from fire—providing the structure with added strength and durability.

CHARRED TIMBER SYMBOLIZES WHAT ONCE DESTROYED THE CATHEDRAL WILL ONLY MAKE IT STRONGER, THUS EXPRESSING REBIRTH AND TRANSFORMATION.

The temporary structure is reminiscent of the structural rhythm and form of the Gothic cathedral. With a roof constructed out of ETFE cushions and walls made up of translucent polycarbonate, the structure will be flooded with natural light, emphasizing the space's ethereal quality while creating visual relief.

Replicated to the same dimensions as Notre-Dame to ensure familiarity, the temporary space has been designed to serve a multitude of functions, from religious services to exhibitions to markets. The design team wanted to strike a balance between a structure that invites the community in and one that can be transformed into a reflective and spiritual haven when Mass is celebrated. Movable panels behind the altar would allow for a full view of the cathedral. The panels could be positioned to open or close the Pavillon to mirror the cathedral's configuration for Mass services or open it up for more public events.

The humble space pays homage to Notre-Dame, while providing a critical hub for the community to gather during the restoration—a statement of hope and rebirth.



PAVILLON NOTRE-DAME, PARIS

FORECAST: HEALTH & WELLNESS

Consumer culture, personalized medicine, and technology are putting the patient back at the center of the health and wellness equation. Widely distributed healthcare networks will impact how people access services. Drop-in clinics, virtual doctor visits, and community-based wellness offices are replacing hospitals or traditional doctors' offices, and that's changing the patient experience and altering the shape of our cities.



CONFIDENTIAL HOSPITAL, SOUTHERN CALIFORNIA



THE PATIENT WILL SEE YOU NOW

Control of the doctor-patient relationship is flipping, in part because patients have much greater choice in where and how to receive advice and treatment. The average healthcare consumer is increasingly tech savvy and price conscious, and they consider themselves an equal partner in their care. This will have lasting effects on care delivery—with options that include phone, Internet, and webcams—and it will lead to a more multidisciplinary approach by providers.

WELLNESS IS DRIVING BETTER HEALTH

A focus on wellness is driving healthier solutions in healthcare centers. In the physical space, lobbies can become wellness-focused third places. Likewise, waiting rooms are being reimagined as active health and wellness concourses, where the community can access advice, participate in classes, or connect with other patients in support groups. Outside of healthcare settings, wearables will help providers gather information about people's physiology and health over longer horizons.

BIG DATA WILL HAVE BIG PAYOFFS

Data analytics are playing a larger role in diagnosis, predicting likely outcomes and helping providers become more successful and responsive to patient needs. The use of data can help health systems create holistic views of patients, which can improve communication and create personalized care plans. Data-enabled simulation will also benefit healthcare organizations and the communities they serve by helping to drive productivity, improve patient safety, control costs, and analyze health trends in the general population.

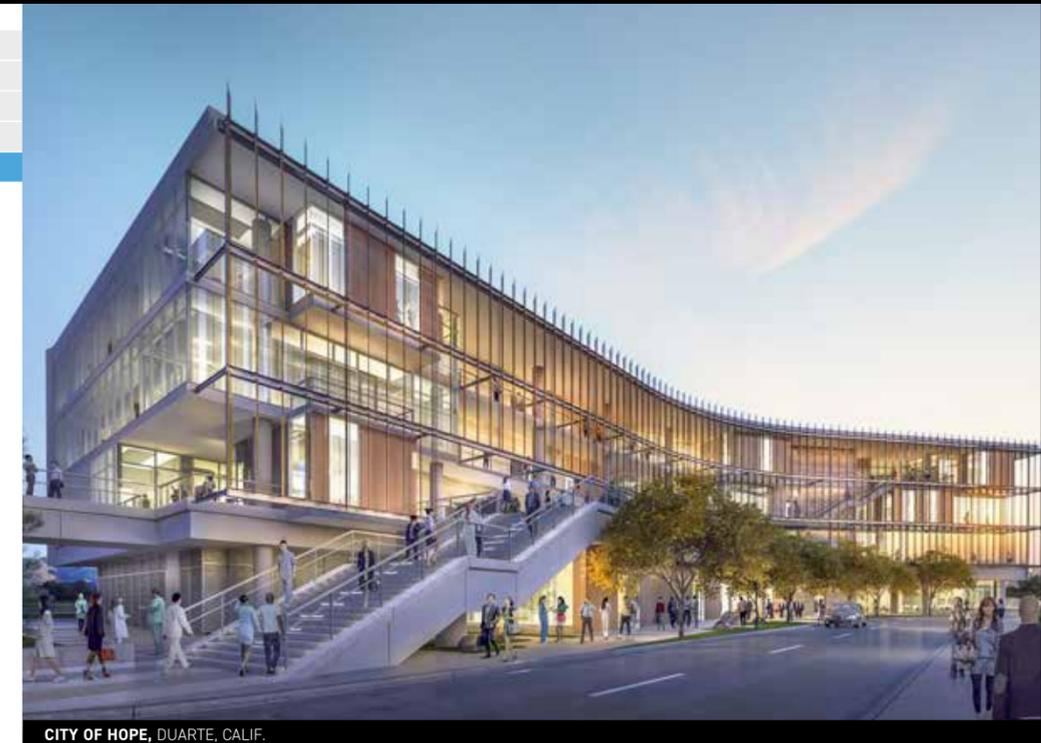
HEALTH-TECH IS PUTTING PEOPLE FIRST

Technology-focused health insurance startups are only part of the growing health-tech movement that's disrupting healthcare, according to Forbes. From genetic testers and health screeners to personal fitness solutions for the home, and from workflow and logistics solutions to device makers and more, many companies are making inroads in the market by putting the person—either the patient or the provider—at the center of the experience.

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INDIVIDUALS WANT THE BOUNDARIES BETWEEN TRADITIONAL CARE AND SERVICE SETTINGS, COMMUNITY SPACES, AND THEIR HOMES TO BE VERY FLUID.

—SIDEWALK LABS



CITY OF HOPE, DUARTE, CALIF.

WIDELY DISTRIBUTED NETWORKS WILL IMPROVE QUALITY OF LIFE

As healthcare becomes more widely available, overall health in communities will improve. Quality of life will increase as the likelihood of epidemics diminishes, child mortality rates decrease, and life expectancies improve. More centers for healthcare will broaden the dissemination of life-saving information and beneficial health-related knowledge. And an increase in free clinics will decrease teen pregnancy, increase vaccinations, and improve general health in low-income areas.

10%

HEALTH SPENDING ACCOUNTS FOR 10% OF THE WORLD ECONOMY.

—WORLD HEALTH ORGANIZATION

28%

OF AMERICANS SAY THEIR HEALTHCARE HAS GOTTEN BETTER, WHILE 23% SAY IT'S GOTTEN WORSE.

—MORNING CONSULT (ON BEHALF OF CVS HEALTH AND FORBES)

65%

OF AMERICANS SAY ADVANCES IN HEALTHCARE WILL MAKE LIVES SAFER AND 66% SAY ADVANCES WILL MAKE THEM LIVE LONGER.

—MORNING CONSULT (ON BEHALF OF CVS HEALTH AND FORBES)



IN THE UNITED STATES, WE PAY JUST OVER \$11,000 PER PERSON YEARLY FOR HEALTHCARE. IN GERMANY, NORWAY, AND THE U.K., IT'S LESS THAN HALF OF THAT.

—JAMES CRISPINO, HEALTH & WELLNESS LEADER, GENSLER



QUEENS HEALTH CENTER, LONG ISLAND CITY, N.Y.



QUEENS HEALTH CENTER, LONG ISLAND CITY, N.Y.



COOK COUNTY HEALTH AND HOSPITALS SYSTEM,
CHICAGO

A HEALTH CENTER DESIGNED FOR THE PATIENT EXPERIENCE

Cook County Health and Hospitals has a legacy as one of the top trauma centers in the U.S., serving Chicago's South Side and West Side. Historically, members of this community who do not qualify for Medicaid have been too poor to afford market rate health insurance and have been forced to rely on the Emergency Department for critical health crisis, where they're often diagnosed with chronic conditions, such as asthma, diabetes, or hypertension. The price of a single visit to an emergency room can increase quickly, with the hospital absorbing the cost and no way of providing the patient with ongoing care once they are discharged.

To fill the unmet needs of this chronically underserved community for essential healthcare, Cook County worked with Gensler to design a nearly 300,000-square-foot ambulatory care facility that attaches to its hospital and provides outpatient care alongside collaborative administration space. The building comprises 103,000 square feet of flexible, patient-centric clinical space and 137,000 square feet of highly collaborative administration space.

THE NEW COMMUNITY-FOCUSED FACILITY AIMS TO EXPAND ACCESS AND EXTEND THE CONTINUUM OF CARE.

Like many health systems across the U.S., the Cook County Health and Hospitals System is focused on providing more outpatient "health" care and reducing the need for costly inpatient "sick" care. The facility will provide a continuum of services with an emphasis on workplace well-being and patient experience. While supporting Cook County's mission as a trauma hospital, the new facility aims to entice people to come in for regular checkups long before they need more serious—and expensive—interventions. With its patient-centric design, the center represents the future of accessible, community-provided healthcare.



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Creative Director
William Taylor

Managing Editor
Nick Bryan

Editors
Kendra Mayfield
Vernon Mays

Designers
Bryan Burkhart
Yng Yng Marshall
Ngoc Ngo

Photography Editor
Clay Kessack

UX Designer
Jonathan Skolnick

Contributors
Brenden Jackson
Erica Sturges

Oversight
Andy Cohen
Diane Hoskins
Leslie Taylor

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Fully grown trees	49
Pounds of solid waste	200
Pounds of greenhouse gases	28,000
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