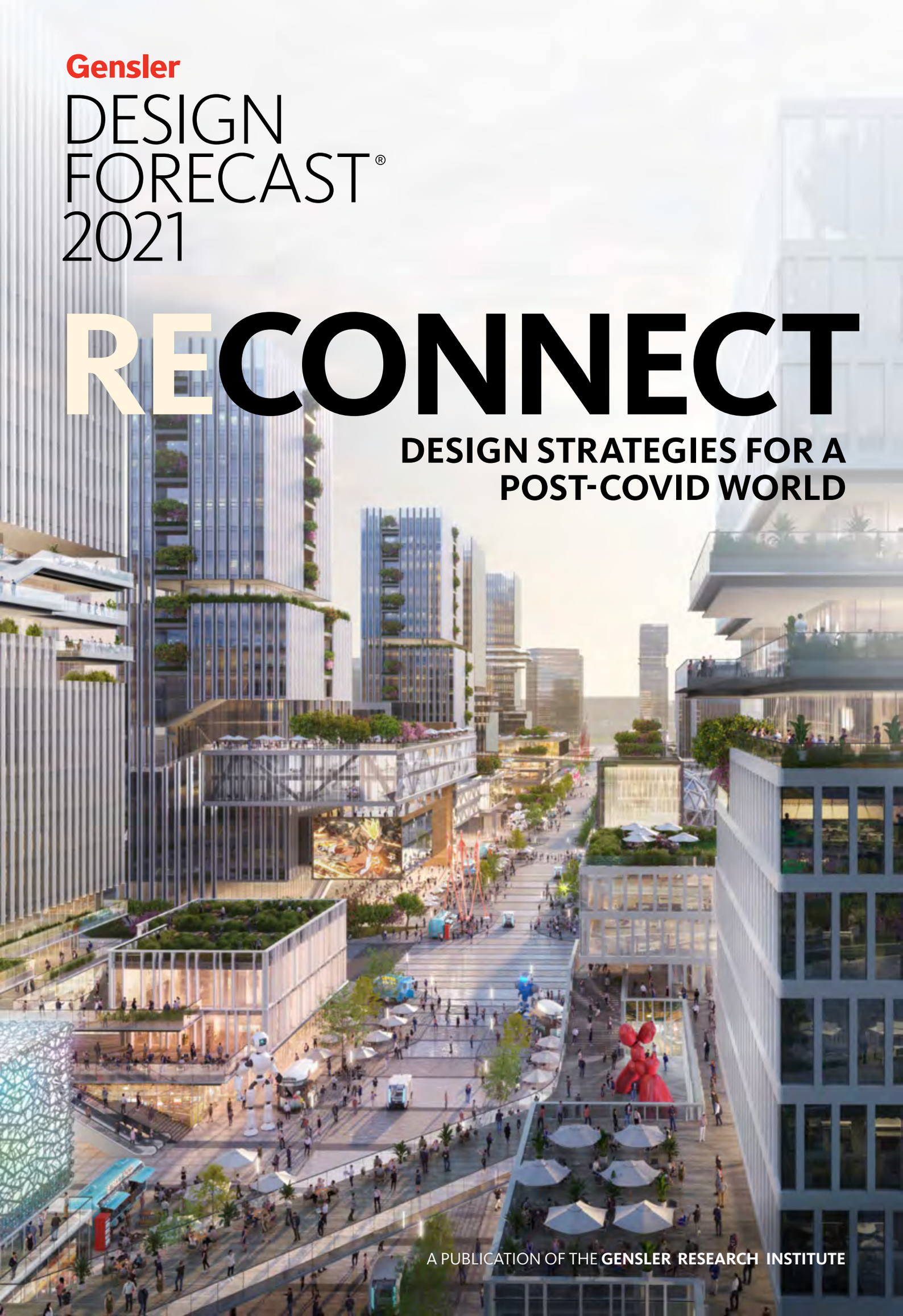
Gensler

DESIGN FORECAST® 2021

RECONNECT

DESIGN STRATEGIES FOR A POST-COVID WORLD



A PUBLICATION OF THE **GENSLER RESEARCH INSTITUTE**

This dramatic staircase would emphasize collaboration and connection among students.

University of California, Riverside Student Success Center, Riverside, Calif.

ON THE COVER: Chengdu High Tech Zone Qilong Innovation Park Urban Design, Chengdu, China

THE RELATIONSHIP BETWEEN THE EXPERIENCES AND THE PLACES WE VALUE IS MORE IMPORTANT THAN EVER BEFORE.

Since the start of the pandemic, the world has faced game-changing challenges. The unprecedented health crisis and the resulting economic fallout continue to have lasting impacts. At the same time, social unrest combined with the ongoing threat of climate change has put a new spotlight on issues of equity and sustainability.

Now, we are entering a new season of hope. Vaccinations are underway, and there is growing anticipation for getting back to the social environments that bring us joy. If the pandemic has taught us anything, it's that we need to be together — not virtually through video meetings, but actually together in the same space.

In fact, places are essential for life, and the absence of life outside our homes emphasizes how valuable those places are. That's because when we vacated many places due to the pandemic, we also lost the experiences that go with those places. Today, our understanding of the relationship between the experiences and the places we value is sharper than ever before.

In 2021, many of our clients and communities are looking ahead to recover and recapture the experiences they offer. We know that many are still grappling with the pressures of economic recession and more. For everyone, the key to a successful return is a focus on people and their needs and expectations. The value of design and architecture is the human experience it facilitates. People-first design has never been more important.

This publication is a response to our clients' and communities' challenges. The strategic advice in these pages can be more immediately actionable and help people achieve the reimagined future they need — one that puts people at the center of design as we return back to the office, restaurants, sports, travel, schools, and other experiences we cherish in life.

These are transformational times. We hope these trends will help our clients and communities to create a reimagined future and lay the framework for their strategic approaches to making it real and tangible.

Diane Hoskins
FAIA, IIDA
Co-CEO

Andy Cohen
FAIA
Co-CEO

REDISCOVERING THE VALUE OF HUMAN CONNECTION

The desire to be together is driving the recovery and reminding us of the true impact of real estate.

This development will create a new gateway to downtown that is inclusive, welcoming, and equitably prosperous.

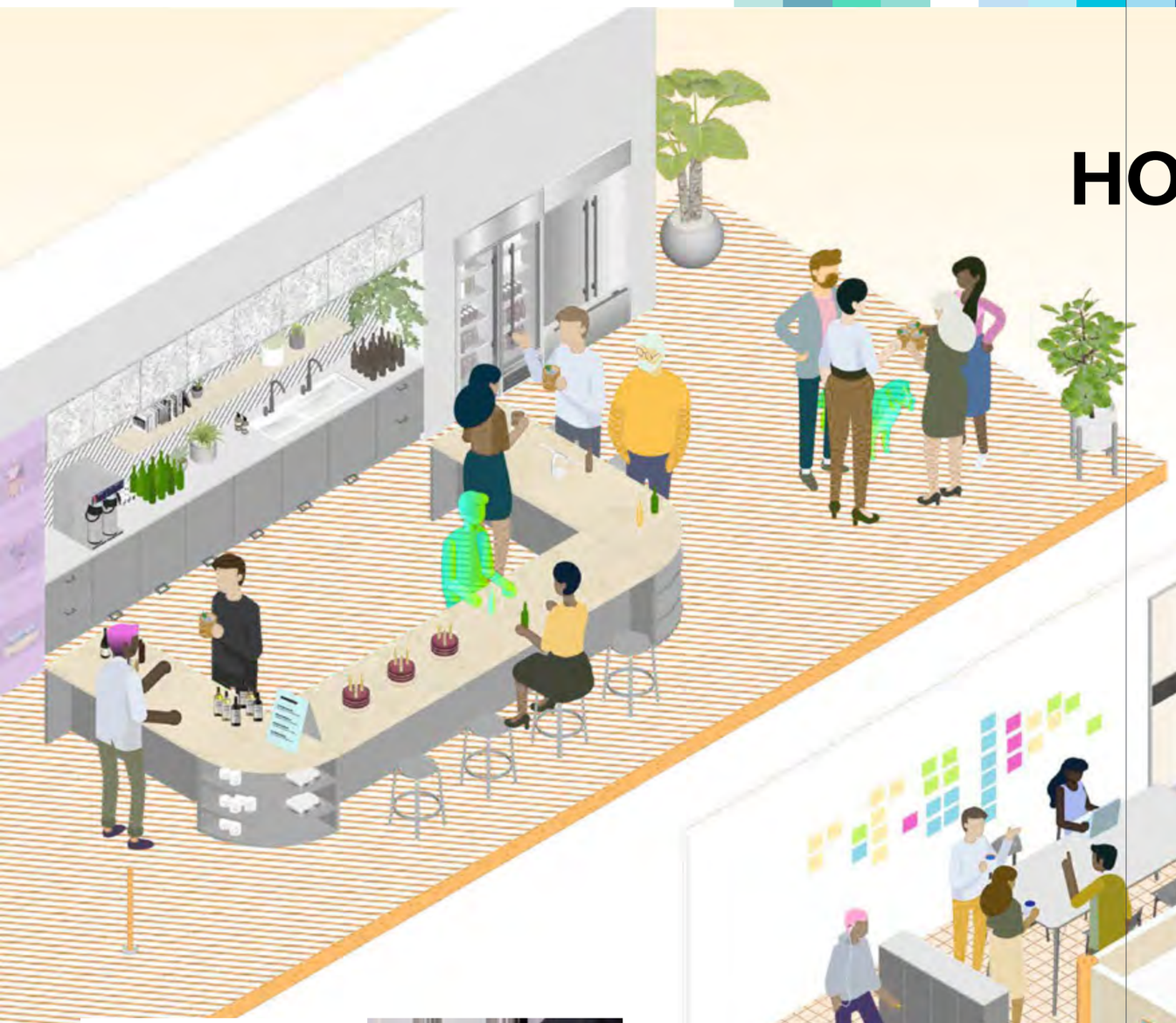
Infill on the Cut, Detroit

Since the start of the pandemic, developers and organizations have been grappling with the pressures of economic recession, social equity, and climate change while simultaneously trying to make decisions about how to reset for the future. As the vaccine rolls out across the globe and our cities open up once again, what are the opportunities our clients have available to them to increase the value of their real estate in a post-pandemic world?

During the pandemic, we vacated the spaces we typically frequent, and because of that we also lost the experiences that go with them. We were deprived of choice — home became the singular place to work and live. We relied on delivery services to bring us food and other goods, and we were consumed by virtual technologies to connect us with others.

While we were initially enamored by the new technologies that helped us stay connected, we also became exhausted by them. The absence of being able to work and socialize together in person has underscored how important those things are. Being apart has reminded us how valuable the places and spaces in which we work, live, and play are to our health and well-being.

Today, the desire to be together is driving the recovery. How can we safely bring people back together while also providing meaningful experiences? The opportunity we see is a realignment of real estate with human experience. By designing with people at the center, we can add value to real estate because in a post-pandemic future people will prioritize their use of real estate based on its human experience value. Real estate is the stage on which life is lived, and its value can be maximized if it is designed to enhance those experiences.



WHEN THE PANDEMIC HIT, WE BEGAN DESIGNING CREATIVE SOLUTIONS FOR

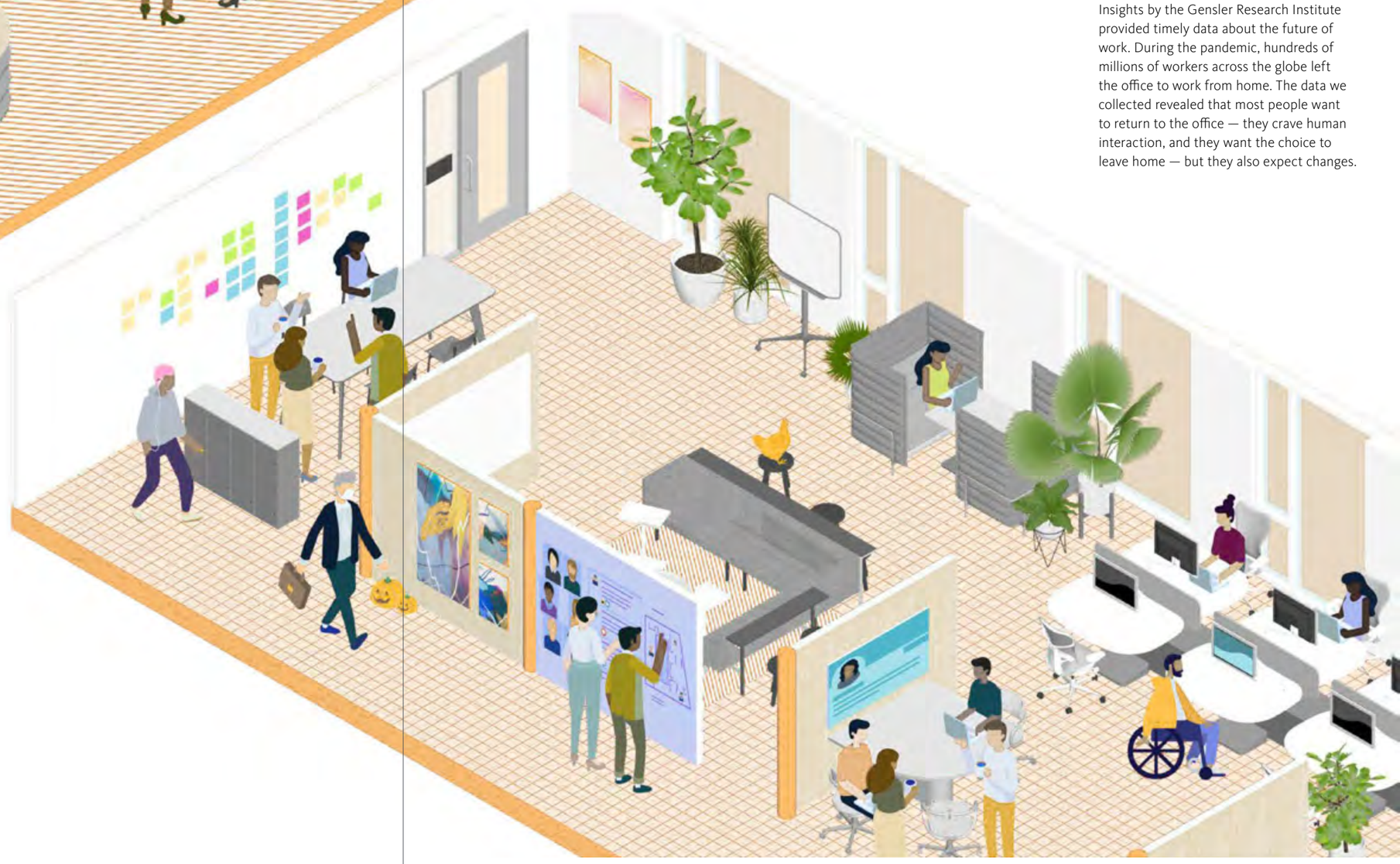
HOW TO PREPARE FOR POST-PANDEMIC LIFE AND RECOVER STRONGER.

As soon as we all went home in March of 2020, Gensler began to reimagine what the pandemic would mean for the future of our cities. The firm led the industry with creative design solutions, thought leadership, research, and strategic thinking about what recovery looks like. Across our 50 offices, we gathered our people into various design charrettes to think about and identify solutions for new approaches to health and well-being, equity, and climate change. The key theme in all of our thought leadership: We must have a new understanding of global wellness.

By delivering post-pandemic ideas and strategies to our clients, we've been able to help them plan to emerge stronger in the recovery. Our "back to" series and thought leadership helped clients get through the short term while also giving them advice for how to adapt and prepare for life after the vaccine.

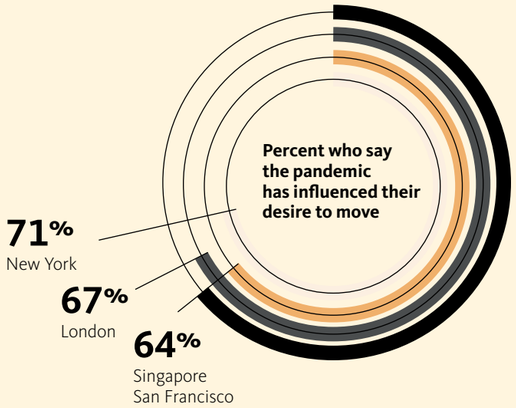
Insights by the Gensler Research Institute provided timely data about the future of work. During the pandemic, hundreds of millions of workers across the globe left the office to work from home. The data we collected revealed that most people want to return to the office — they crave human interaction, and they want the choice to leave home — but they also expect changes.

In response to the COVID-19 pandemic, the firm offered robust thought leadership and an array of design strategies, webinars, Gensler-designed products, and a signage and wayfinding system to facilitate new habits.



THE PANDEMIC IS STRAINING PEOPLE'S RELATIONSHIPS WITH THEIR CITIES. ROUGHLY TWO-THIRDS OF URBAN RESIDENTS WHO WANT TO RELOCATE SAY THAT THE PANDEMIC HEALTH CRISIS HAS MADE THEM MORE LIKELY TO MOVE.

—GENSLER CITY PULSE SURVEY 2020



THE PRINCIPLES OF THE 20-MINUTE NEIGHBORHOOD

The concept of the 20-minute neighborhoods has every commercial, residential, and institutional need within a 20-minute walk or bike ride of each other. According to C40 Cities, here are the core elements of such neighborhoods:

1. **EASY ACCESS TO GOODS AND SERVICES, PARTICULARLY GROCERIES, FRESH FOOD, AND HEALTHCARE**
2. **A VARIETY OF HOUSING TYPES, OF DIFFERENT SIZES AND LEVELS OF AFFORDABILITY, TO ACCOMMODATE MANY TYPES OF HOUSEHOLDS AND ENABLE MORE PEOPLE TO LIVE CLOSER TO WHERE THEY WORK**
3. **CLEAN AIR, FREE OF HARMFUL AIR POLLUTANTS, AND PUBLIC GREEN SPACES**
4. **SMALLER-SCALE OFFICES, RETAIL AND HOSPITALITY, AND COWORKING SPACES THAT ALLOW PEOPLE TO WORK CLOSER TO HOME**

Developers are transforming San Jose and connecting tenants to the city with abundant outdoor spaces.

Almaden Boulevard Tower, San Jose, Calif.

NOW MORE THAN EVER, WE HAVE THE OPPORTUNITY TO

REIMAGINE THE FUTURE OF CITIES.

For several years, we've been focused on the critical role of the world's cities and our primary goal to design for people living, working, and playing in urban environments. Shaping the future of cities for the human experience has been our call to action and the centerpiece of our purpose as designers. That purpose is even more true now.

According to Gensler's City Pulse Survey findings, people's relationships with their cities are shifting as the pandemic continues to disrupt city life — in particular, persistent health concerns over the use of public transit. This is part of what's driving a trend toward 20-minute neighborhoods, where every commercial, residential, and institutional need is within a 20-minute walk or bike ride of each other.

As we continue to emerge from lockdown living, the developments that motivate us to leave our homes will be the most in-demand, yielding the biggest financial returns for developers and investors. We see this trend continuing to play out, which is why people's health, wellness, and experiences must be at the center of our design decisions.

When examining our cities and real estate from a value framework, the places that do not support health and wellness lose value because people refuse to occupy them. This includes buildings that aren't sustainable.

In fact, climate change remains the defining issue of our time. And while the threat of the climate crisis did not start during the pandemic, COVID-19 showed how the natural world can bring the global economy to its knees. It's not hard to imagine how the increasing intensity of climate change can do the same. This is especially true for commercial real estate in coastal areas where rising seas are an ongoing threat (90% of all urban areas in the world are coastal). If anything, 2020 was another wake-up call for climate action.

Making healthy buildings for people and the planet will be critical, and it will serve as both an opportunity and an imperative for Gensler and our clients.

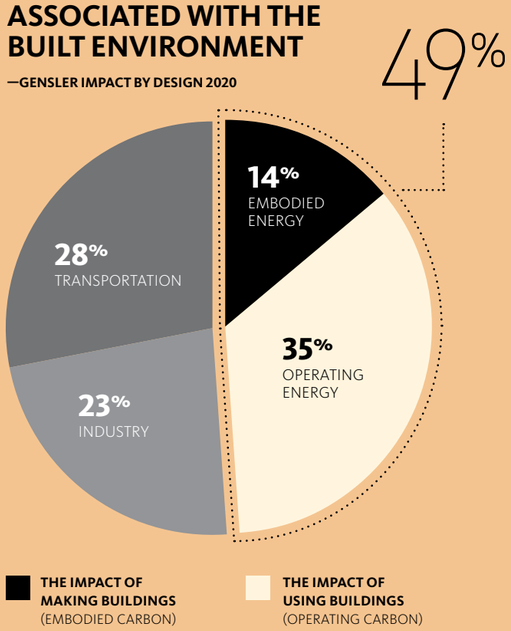
OUR FOCUS ON HEALTH MUST INCLUDE CLIMATE ACTION.

For the repositioning of Chicago's Old Main Post Office, designed by Gensler and Hoerr Schaudt Landscape Architects, many of the building's original materials were reused, and 87% of the construction waste was diverted from landfill.

The Post Office, Chicago

49% OF U.S. ENERGY CONSUMPTION IS ASSOCIATED WITH THE BUILT ENVIRONMENT

—GENSLER IMPACT BY DESIGN 2020



THE ROAD TO NET ZERO

The Gensler Cities Climate Challenge (GC3) is our commitment to achieving carbon neutrality in all our work within a decade. It also is a rallying cry to our industry, our clients, and our colleagues.

Achieving carbon neutrality entails eliminating or offsetting all CO2 emissions from the built environment. To that end, the GC3 is focused on minimizing two primary sources: emissions related to using buildings (operating carbon), and those related to making buildings (embodied carbon).

WE SEEK OUT PLACES THAT SUPPORT SOCIAL CONNECTIONS

Places that support community and social connection perform better — from higher job satisfaction in the workplace, to a greater likelihood of recommendation for retail stores and public spaces.

—GENSLER EXPERIENCE INDEX

THE PANDEMIC HELPED US REMEMBER WHAT'S TRULY IMPORTANT: LIFE WITH OTHER PEOPLE. THIS IS WHY

HUMAN-EXPERIENCE DESIGN IS A POWERFUL OPPORTUNITY.

The pandemic underscored the need to prioritize health while racial injustice and the ongoing threat of climate change in 2020 put a new spotlight on issues of equity and sustainability. All these challenges put a focus on people and their needs and expectations. That's why people-first design is now the new currency in building communities.

Creating a built environment that motivates us to leave our homes requires a more holistic design approach focused on people's experiences. Design must understand what drives behavior, promotes human interaction, and optimizes effectiveness.

If we've learned anything from the pandemic, it's that we need in-person human interactions — both for our health and well-being, and for the economy. Coming back together is how we will emerge from the recession. This is why so many "back-to" plans revolve around this equation. How can we bring people back together safely and provide spaces that allow them to feel healthy, inclusive, and purposeful? The answer can be found through the power of design, and its ability to address the evolving human needs and expectations in a new world.

With hospitality-like open spaces that encourage and invite diverse interactions, this reimagined workplace breaks down conventional boundaries and zones.

Confidential Client, London

DESIGN STRATEGIES FOR A POST-COVID WORLD

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REIMAGINING THE FUTURE OF HEALTH

The ongoing health, human, and economic impacts of the pandemic have forever changed how we design our environments — from creating places that enrich our communities in times of health, to spaces that shift their focus in times of crisis. A handful of industries disproportionately impact human health, and they are all in a period of profound transformation. Now more than ever, these industries — Healthcare, Sciences, Senior Living, and Wellness — are hungry for new ideas and an understanding of how they can play out in the physical and digital realms. The best solutions are the ones that improve access to care, ignite discovery, and reshape our cities to address a renewed focus on global health and wellness.

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5 STRATEGIES FOR RETHINKING THE HEALTH ECOSYSTEM

The COVID-19 pandemic has been a wake-up call for the healthcare and life sciences industries and the ways in which we design spaces for discovery, care, aging, and wellness. How can environments perform better, both in normal times and during a crisis? People need more choices, and their experiences need to improve.

Here are five overarching considerations for rethinking the health ecosystem:

1 USE TECHNOLOGY TO PROVIDE BETTER CARE.

Telehealth has been the most visible technology in care delivery over the last year, but it is only one of the health technologies that has become an integral part of future-ready healthcare. From connected interfaces to automated systems and sensors, emerging digital solutions that are blended with physical spaces can help make care more personalized, responsive, and effective.

2 UNDERSTAND THE CONNECTIONS THAT DRIVE THE BUSINESS OF SCIENCE

Laboratories are complex environments, and their planning begins with a deep understanding of the processes and objectives of research and production. Sciences organizations also need to better understand the way people connect in order to drive their businesses. There are design parameters that make a building "science ready" but organizations must also be aware that the workplace can be a tool to encourage connections between the scientists and the regulatory, marketing, and financial experts who comprise the entire team.

3 RETHINK ENVIRONMENTS THROUGH THE LENSES OF EQUITY AND GENERATIONAL DIVERSITY.

Today's older adults are seeking residential environments that are mixed use, intergenerational, and rich with experience. Many are choosing to continue living in urban settings, which are very different from the freestanding and purpose-built suburban facilities embraced by previous generations. Now, our cities and infrastructure must accommodate and encourage a thriving lifestyle for every resident.

4 FOCUS ON WELLNESS.

It's not just traditional hospital settings; virtually every industry has a heightened focus on personal wellness. The health of our environments will be a primary criterion for recruitment and retention of the future workforce, and for choosing the places we live and go to school, shop, and seek entertainment. Environments and amenities that prioritize holistic well-being will have an edge.

5 MAKE ENVIRONMENTAL STEWARDSHIP PART OF YOUR BUSINESS AND YOUR BRAND.

Most companies in this sector exist to advance human health and well-being in some way. Increasingly, their customers will judge their purpose and make lasting connections based on their contributions to improving environments — as stewards of resources who actively combat climate change and support resilience. Every action taken needs to be viewed through the lens of lasting impact on the earth and reestablishing a balance between resource use and replenishment.

The Neuroscience Wellness Center at OhioHealth is envisioned as a place for a community of users to take charge of their recovery process. Looking beyond institutional treatment, patients experience comprehensive care focused on the mind, body and spirit.

OhioHealth Neuroscience Wellness Center, Columbus, Ohio

HEALTHCARE

Health systems are transforming at an unprecedented rate. Driven by the pandemic, social inequality, consumer demands, and rapidly evolving technologies, the need for holistic thinking has never been greater. An integrated approach to healthcare accelerates innovation in support of human health, putting patient and provider at the center of this new equation.

COLUMBIA PRIMARY CARE MANHATTAN VALLEY, NEW YORK

TREND 01 | DIGITAL HEALTHCARE

DIGITAL HEALTHCARE IS INTRODUCING NEW OPPORTUNITIES

Digital health has proliferated across the entire healthcare system. Healthcare providers are rethinking the delivery of care. New digital platforms provide new opportunities for engagement, community, and equity. This, in turn, opens new possibilities to design new experiences, rethink real estate, and focus on the role of physical sites. This is an unprecedented opportunity to reconsider care delivery through the lens of human experience.

TREND 02 | NEW MODELS

THE PANDEMIC IS INSPIRING NEW MODELS OF CARE

The pandemic has put an emphasis on how the healthcare system and its environments need to become both customized and more flexible. To achieve this, providers can leverage new technologies for touchless care and engagement. They can also use new physical models for care that reduce or eliminate waiting and focus the physical resource on the human-centered experience of care. Healthcare can be more personal and therefore more effective.

TREND 03 | TACKLING INEQUITY

IT'S TIME TO TACKLE INEQUALITY IN HEALTHCARE

The pandemic has highlighted disparities in receiving care. Whether due to structural injustice or fear of infection, patients are delaying or canceling interactions with the health system — including receiving the COVID-19 vaccine. Providers must understand individuals' emotional states throughout their care journeys and customize environments — physical and digital — to provide support.

COOK COUNTY HEALTH, CHICAGO

TREND 04 | THE FLEXIBLE HOSPITAL

FLEXIBILITY IS ESSENTIAL TO FUTURE SUCCESS

The pandemic exposed the inflexibility in current healthcare settings. We can remedy this by making the most complex healthcare settings flexible and improving human experience and staff performance simultaneously. With convertible patient rooms, multifunctional post-anesthesia care unit (PACU) and emergency department (ED) beds, and reduced waiting space, the physical environment becomes malleable to meet the demands of patients and staff. Repurposing underutilized space can offer additional flexibility when a surge occurs. Modular construction will also facilitate seamless flexibility and growth over time.

TREND 05 | THE INTELLIGENT HOSPITAL

INTELLIGENT HOSPITALS CONTINUOUSLY IMPROVE

Intelligent technologies can make hospitals safer and more effective for patients and staff. Automated systems and sensors can give hospital operators a more holistic picture of what's occurring in the space — such as crowding or a potential contagion — and enable them to rapidly respond. Infrared fever-detection sensors and other automated technologies can help hospitals quickly and safely respond to an immediate need, make a change, address a patient need, or improve performance. Healthcare providers need to leverage new and existing technologies to realize success in an uncertain future. Intelligent hospitals can reduce risk and help providers advance their positions in the communities they serve.

83%

OF PATIENTS EXPECT TO USE TELEMEDICINE AFTER THE PANDEMIC RESOLVES.

—MEDICAL ECONOMICS

VIRTUAL HEALTHCARE IS HERE TO STAY

"Up to $250 billion of current U.S. healthcare spend could potentially be virtualized."

— McKINSEY, "TELEHEALTH: A QUARTER-TRILLION-DOLLAR POST-COVID-19 REALITY?"

ADVENTIST HEALTHCARE ONCOLOGY CENTER, WASHINGTON, D.C.

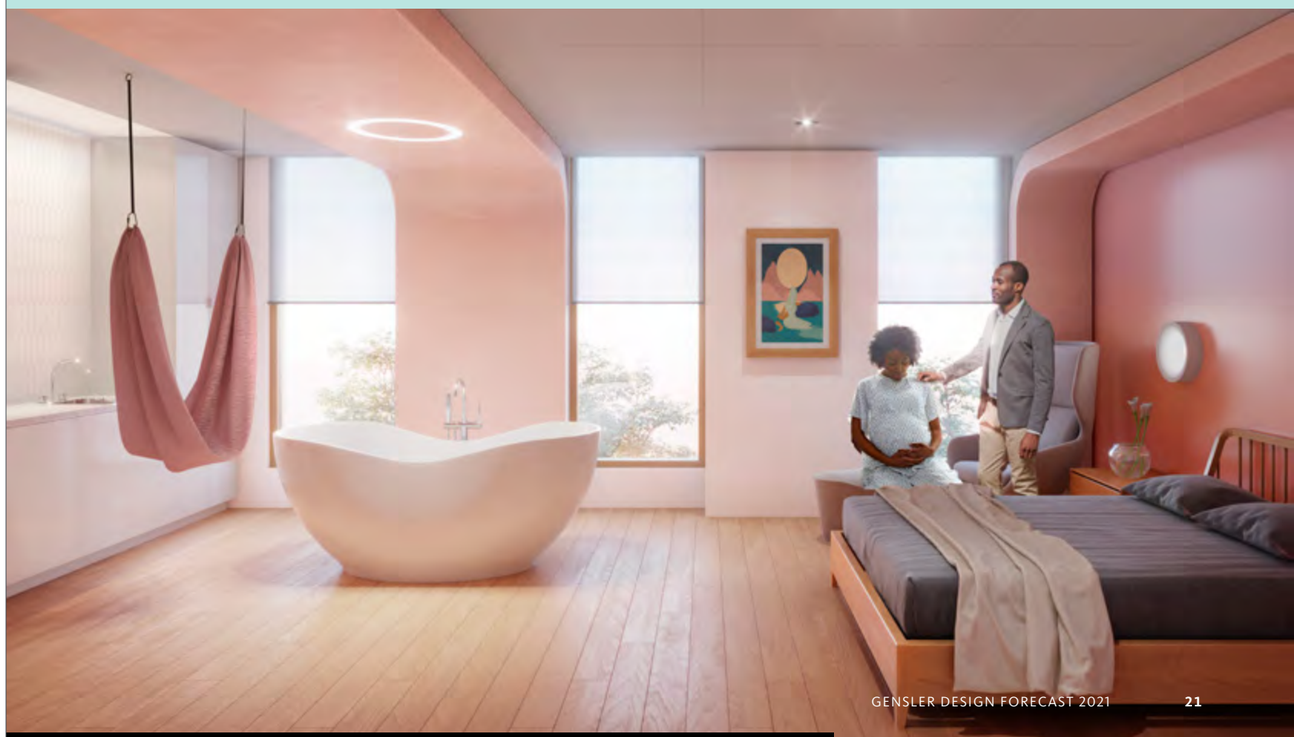
NEWTON-WELLESLEY HOSPITAL, NEWTON, MASS.

NATIONAL UNIVERSITY HOSPITAL, SINGAPORE

POST-PANDEMIC CONFIDENCE IS RETURNING

While 35% of respondents have reduced confidence in the overall health system, only 4% have reduced confidence in medical professionals they know or consult with. 22% say it would scare them to consult with medical professionals they don't know well.

—GENSLER DIALOGUE BLOG, "WHERE HAVE ALL THE PATIENTS GONE? THE ART AND SOUL OF RECAPTURING LOST TREATMENT VOLUME"



COMMUNITY OF HOPE – DC FAMILY HEALTH AND BIRTH CENTER, WASHINGTON, D.C.

A MODEL FOR CROSS-DISCIPLINARY COLLABORATION

CITY OF HOPE ADMINISTRATIVE OFFICE BUILDING, IRWINDALE, CALIF.

This new office building will consolidate staff from several dispersed locations on campus, providing a transformational building that reflects City of Hope's long-term vision. Central to the building's mission is to encourage a more integrated open culture that fosters collaboration between the different departments. This LEED Gold v4 certified Central Office Building will stand as a testament to City of Hope's faith in the power of cross-disciplinary practice, its commitment to improving the natural environment, and by extension, the health of all its people.

SCIENCES

In the race to find solutions to COVID-19, many science organizations have been developing faster diagnostics, life-saving therapies, effective vaccines, and innovative products and technologies. Anticipating rapid change, designs focused on adaptability and flexibility are enabling nimble innovation under the urgent pressure to lead the world out of this crisis.

ZEISS INNOVATION CENTER, DUBLIN, CALIF.

TREND 01 | NEW WAYS OF WORKING

THE PANDEMIC HAS PUSHED SCIENTISTS TO WORK IN NEW WAYS

Science companies have continued to work in the lab through the pandemic, but have learned new ways of working outside the lab. The paper lab notebook may finally have run its course in favor of the electronic lab notebook. Many routine preparatory, analytical, and documentation tasks are being supported remotely, with the opportunity for AI to streamline processes and setups. While IoT and web access to experiments have been slow to mainstream, there has been increased interest in new ways of resourcing, monitoring, and improving the efficiency of R&D labs.

TREND 02 | LABS AS INNOVATION HUBS

LABS ARE BECOMING INNOVATION AND COLLABORATION HUBS

Social distancing, shift work, and reductions in density have highlighted the important role of the R&D center as an innovation hub and connector of people. Scientists have learned how to deliver work remotely, particularly for focused tasks. Scientific workers miss the unstructured collaboration, socialization, and tacit learning that occurs from being in the lab and in-person interactions with colleagues. These things don't happen as intuitively or effectively remotely, or even at partial occupancy under a hybrid model.

TREND 03 | CONVERTING NON-LAB SPACES

SCIENTIFIC HUBS ARE MOVING INTO THE URBAN CORE

For science organizations in prime markets, a shortage of available research-capable space is driving building owners and developers to convert non-lab space into facilities that can support R&D activities. These facilities are most often in urban cores close to scientific talent, capital, and infrastructure. By colocating live-work amenities with academic institutions, health systems, and R&D, these developments help create an ecosystem for growing scientific ideas into impactful therapies and technologies.

PDI HEADQUARTERS, WOODCLIFF LAKE, N.J.

TREND 04 | SPEED TO MARKET

SPEED TO MARKET IS DEFINING REAL ESTATE STRATEGY

Speed to market is as applicable to building stock as it is to advancing drugs. When a company is in growth mode, technical space cannot be built out fast enough to meet that need. New real estate models and leasing structures are emerging to respond to the growth curves of science companies. By the time an early-stage science company needs the space, it has to be move-in ready. This is highlighted by most major markets having single-digit vacancy rates for lab facilities.

TREND 05 | BUILDING EFFICIENCY

SOLVING THE UP-FRONT CARBON EQUATION

As scientists continue to translate or observe the complicated and disparate interactions of a global economy into rising carbon emissions, they are not leaving their anthropogenic impact out of the equation as we race to solve the climate crisis. Carbon emissions from energy consumption in research buildings dwarfs the typical office building by a factor of five or more, making it increasingly difficult for these facilities to meet the aggressive energy conservation targets sweeping across most countries. One way to address this is to tackle the up-front carbon that dominates the construction of new buildings by repositioning discarded structures for retrofit.

IN-PERSON COLLABORATION IS VITAL FOR SCIENCES

63%

OF EMPLOYEES IN THE SCIENCES SECTOR SAY THEIR JOBS ARE HEAVILY RELIANT ON IN-PERSON COLLABORATION (12 POINTS HIGHER THAN THE AVERAGE U.S. WORKER).

—GENSLER U.S. WORKPLACE SURVEY 2020 SUMMER/FALL

$4.56T

GLOBAL R&D SPENDING IS BOOMING

Global spending on R&D has reached a record high of almost U.S. $1.7 trillion. By 2030, $4.56T will be spent globally on R&D.

—DATA FROM UNESCO INSTITUTE FOR STATISTICS BASED ON PPP$, FUTURE DATA IS BASED ON AVERAGE 10-YEAR CAGR.

3151 MARKET ST. LIFE SCIENCES BUILDING AT SCHUYLKILL YARDS, PHILADELPHIA

4

Considerations for the New Lab of the Future

The pandemic has given us new insights into the "lab of the future." Here are four key ingredients to consider when designing new labs:

1 INTRODUCE OUTDOOR MEETING SPACE FOR EACH TENANT.

By using conference rooms or other spaces as a vestibule, it is possible to allow labs to have access to fresh air for meeting spaces and provide space to hold meetings outdoors, both of which encourage collaboration and mitigate airborne pathogens.

2 AUTOMATE WORKFLOW AND TASKS FOR GREATER AGILITY.

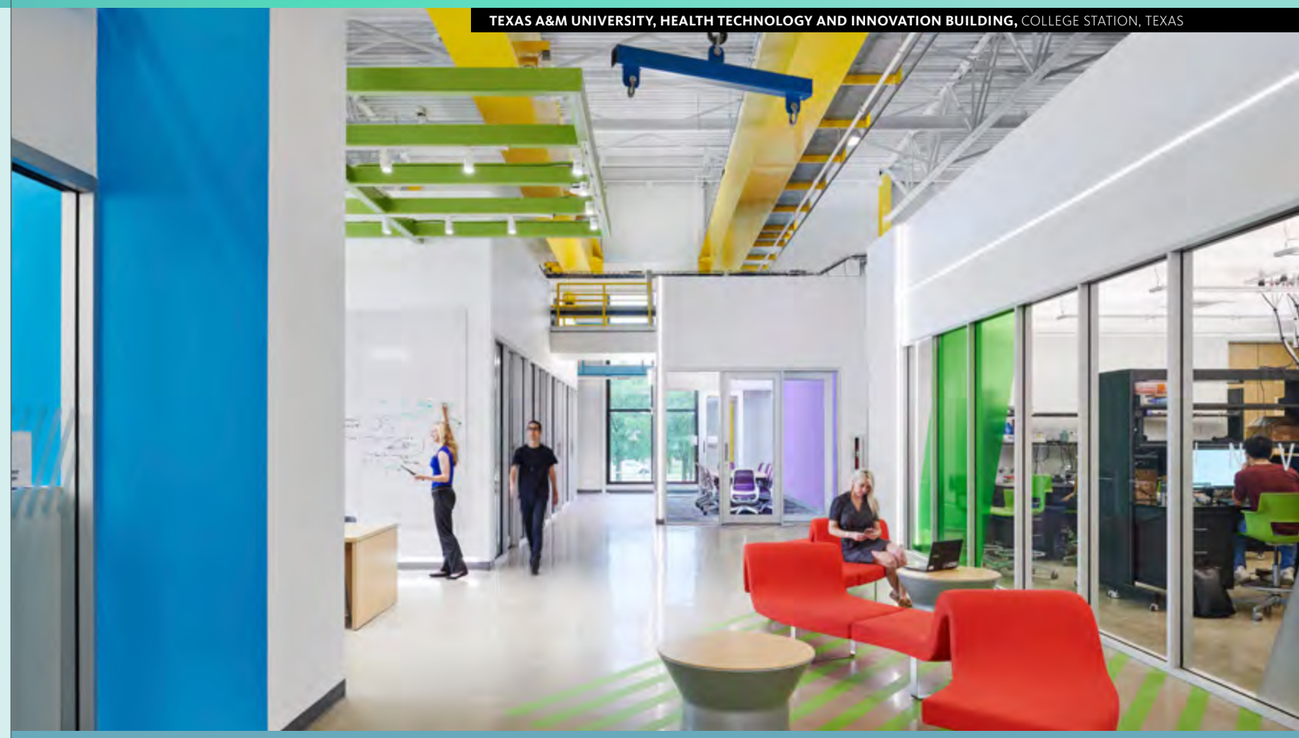
Automated or remote-controlled scientific equipment can further enable the optimization of workflow, organize people into work cells, and generally keep projects running with fewer staff on-site.

3 USE AI AND MACHINE LEARNING TO INNOVATE EXPERIMENTATION.

AI and machine learning are becoming increasingly important in research, in particular with the advancement of in silico modeling to complement and, in some cases, replace in vivo research. In order to continually innovate, a growing number of research experiments will be done on the computer — known as in silico — to complete and accelerate in vivo approaches, which are done using a whole, living organism.

4 EMBRACE FLEXIBILITY AND ADAPTABILITY.

COVID-19 has shown us the importance of flexible and adaptable laboratory facilities, which allow companies to pivot their sciences to respond to changes in global needs while providing spaces for adapting to occupational safety issues like social distancing.



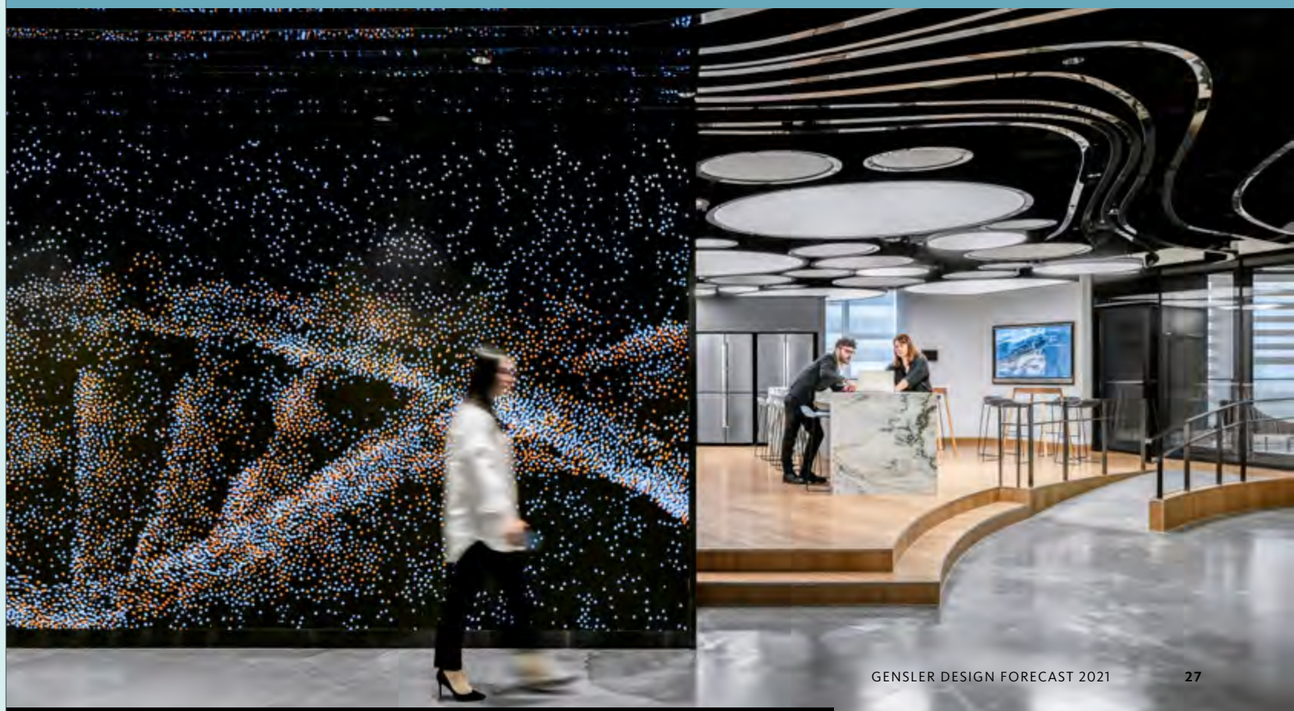
TEXAS A&M UNIVERSITY, HEALTH TECHNOLOGY AND INNOVATION BUILDING, COLLEGE STATION, TEXAS

$100B

BY 2030, UP TO $100 BILLION WILL BE SPENT ANNUALLY ON R&D FACILITIES.*

*Based off 2.2% of R&D spend for capital expenditures for land and buildings. UNESCO Institute for Statistics indicates for reporting countries this expenditure range being from 1.2 – 2.4%.

—UNESCO INSTITUTE FOR STATISTICS



JOHNSON & JOHNSON INNOVATION – JLABS @ SHANGHAI, SHANGHAI

SCIENCES ON DISPLAY

GENMAB U.S. HEADQUARTERS, PRINCETON, N.J.

The lab is the center of work culture at the new U.S. headquarters for global biotech company Genmab. Converting a suburban office building into an integrated workplace, the new headquarters puts on-site laboratories on display. The design creates a shared sense of purpose among employees with labs adjacent to informal gathering spaces, and a centralized cafe. This purpose is also delivered digitally through visualization dashboards throughout the space and AV enhanced collaboration spaces in the laboratories. A work hotel located adjacent to reception supports mobile workers and visitors with a variety of focus and collaborative spaces.

SENIOR LIVING

Today's aging population is increasingly tech-savvy, innovative, independent, and diverse. The design of living spaces ranging from retirement communities to multigenerational urban high rises are evolving to offer more choice and physical-digital integration. Savvy operators and developers are building spaces that accommodate the full spectrum of clients, catering to their specific needs.

ELEVATE™ SENIOR LIVING COLLECTION, THE NEW TRADITIONALISTS

1 IN 6

BY 2050, ONE IN SIX PEOPLE IN THE WORLD WILL BE OVER AGE 65. IN 2018, FOR THE FIRST TIME IN HISTORY, PERSONS AGED 65 OR ABOVE OUTNUMBERED CHILDREN UNDER 5 YEARS OF AGE GLOBALLY.

—UNITED NATIONS

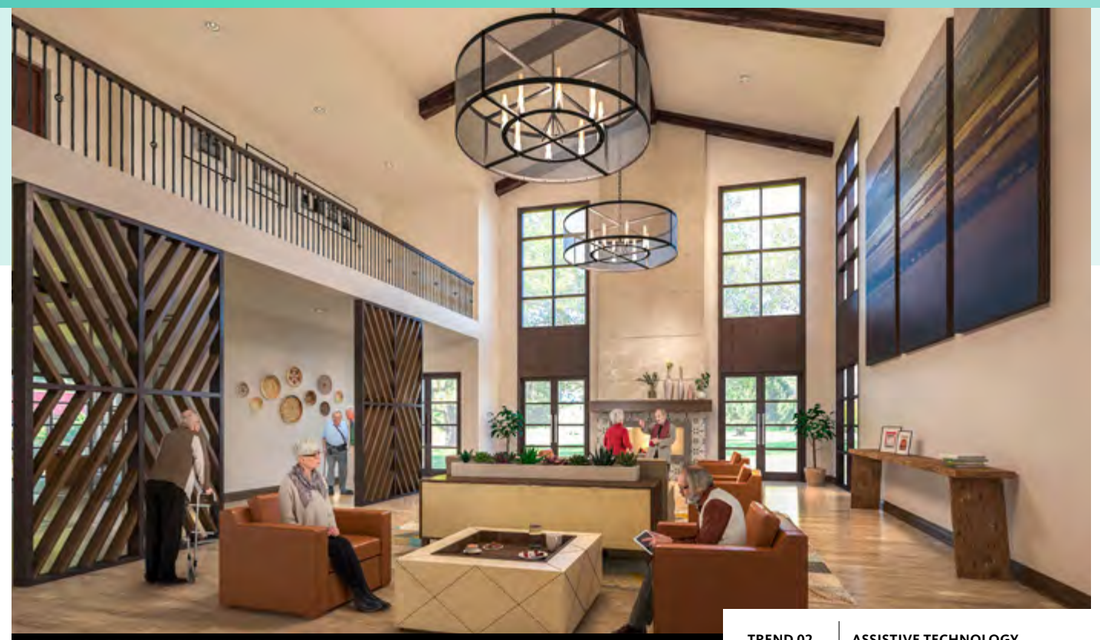
"We are designing a new generation of products to empower older adults; products that delight and excite. Through this, we are creating crossover appeal and transcending the stigma associated with aging."

—TAMA DUFFY DAY, GENSLER SENIOR LIVING LEADER

TREND 01 | **AGE-INCLUSIVE DESIGN**

ELIMINATE AGEISM THROUGH DESIGN

Age-inclusive design takes into account vision, hearing, balance, memory, touch, and more. To respond to diverse consumer needs, the industry has begun to design cities, communities, buildings, and products to promote a world that supports all ages. From wider sidewalks, to "slow" streets, parks with activities for people of all ages, touchless doors, modular lounge furniture, and flooring materials that reduce slips and falls, the opportunities to enrich the lives of older adults are endless.



CALIMESA COUNTRY CLUB VILLAGE, CALIMESA, CALIF.

POPULATION AGING HAS WIDESPREAD IMPLICATIONS ACROSS SECTORS

Population aging is poised to become one of the most significant social transformations of the 21st century, with implications for nearly all sectors of society.

—UNITED NATIONS

TREND 02 | **ASSISTIVE TECHNOLOGY**

TECHNOLOGY CAN ASSIST INDEPENDENT LIVING

Whether we're training caregivers to embody the perspectives and conditions of older adults through virtual reality or wearing an "aging" suit to truly understand how aging impacts mobility, technology can educate and assist people in living independently. With a shortage of nursing staff and caregivers, robots will increasingly assist, interact with, and support older adults. Technology also has the potential to assist us in living longer by helping us become more aware of our own health and nudging us to remain active participants in our physical environment.

TREND 03 | **PROMOTE WELL-BEING FOR ALL**

EMBRACE RADICAL INCLUSIVITY

Many older adults seek to shed the burden of home ownership and live in a community with like-minded individuals. Others want to stay put and enjoy their lives in the comfort of their homes surrounded by their neighbors. We need to design all spaces to support the health and well-being of a diverse aging population. In today's market, savvy operators are designing buildings and spaces that accommodate the full spectrum of residents, while catering to their specific needs at all stages of life.

TOWN HALL APARTMENTS, CHICAGO

MOSAIC VIA WILLOW VALLEY, LANCASTER, PA.

4

Strategies for Rethinking Longevity in an Age-Inclusive World

The COVID-19 pandemic has taken a toll on people of all ages, but older adults are among the most impacted.

Design plays an important role in keeping older adults safe, connected, and engaged in their community. Here are four strategies for reimagining longevity in an age-inclusive world:

1 RECONNECT WITH NATURE.

Evidence-based design research suggests that exposure to natural light and air, as well as views of nature, have positive health outcomes, from reducing stress to lowering blood pressure. Facilities can improve access to clean air by increasing the quantity and quality of filtered air while also reinforcing the importance of operable windows. They can also extend gardens into building designs, add balconies into unit designs, and recognize the full sensory benefits of nature.

2 REDEFINE PUBLIC AND PRIVATE SPACES.

We have an opportunity to more clearly define and expand private and semi-private spaces; distributing amenities closer to residential units, revisiting building delivery strategies, and reimagining corridors as spaces. We can also design thresholds for senior living facilities that can extend private spaces in a way that prioritizes residents' health and safety, such as drop zones for food delivery, or an area where staff or other residents can visit from behind glass to help avoid contagion risk.

3 EMBRACE TECHNOLOGY.

"Smart" technology, such as sensors, wearables, voice activation computers, mobile apps, and more can educate and assist people in living independently — at the high levels of aesthetic and performance quality they've come to expect. Technology can help people become active participants in their own health and physical environment. Telehealth, for example, is becoming increasingly important to reach older adults in their homes and communities.

4 DESIGN AGE-FRIENDLY CITIES AND EXPERIENCES.

Age-friendly infrastructures can support people of all ages to live and age in their homes and communities. By diversifying housing stock, creating more accessible connections to transit, using transportation to build social connections, creating safe pedestrian experiences, and other interventions, cities can make communities more livable for all ages and establish fully integrated multigenerational communities over time.

FOUNTAINVIEW AT GONDA WESTSIDE, LOS ANGELES

INCREASE HEALTH AND WELLNESS RESOURCES FOR OLDER ADULTS

Integrated health and wellness resources such as on-site clinics and telehealth services have become a necessity for communities with older adults in a post-COVID world. Designing with these resources and services in mind ensures families that their loved ones are receiving the best care and resources possible.

EL BOSQUE HOUSE FOR THE ELDERLY, SAN JOSÉ, COSTA RICA

WELLNESS

In the aftermath of the pandemic, the built environment is taking a larger role in people's emotional and physical health and welfare. Now, spaces are more adaptable to evolving user needs. A wellness ecosystem is resilient; it is focused on health, diversity, and inclusivity.

SJSU SPARTAN RECREATION AND AQUATICS CENTER, SAN JOSE, CALIF.

CHANGES IN HEALTHY HABITS WILL LIKELY CONTINUE AFTER THE PANDEMIC

48%

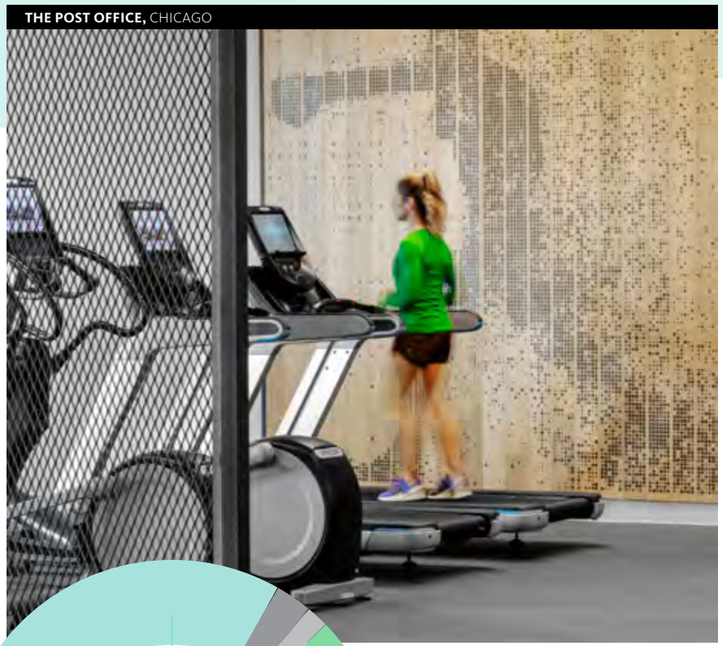
OF U.S. CONSUMERS INTEND TO MAINTAIN NEWLY ACQUIRED HEALTH AND WELLNESS HABITS OVER THE LONG TERM.

—PwC

TREND 01 | DESIGNING FOR HUMANITY

BRING MORE HUMANITY INTO THE BUILT ENVIRONMENT

The wellness value system is evolving from individual preference to a collective experience. The new value system considers the wellness of individuals, communities, and the planet. We can learn from this crisis to improve wellness at all scales — from enhancing the experience of public spaces, to creating interiors that promote well-being. The key lies in addressing emotional, cognitive, and physical needs, by designing for experiences with outcomes that are resilient and able to evolve over time.

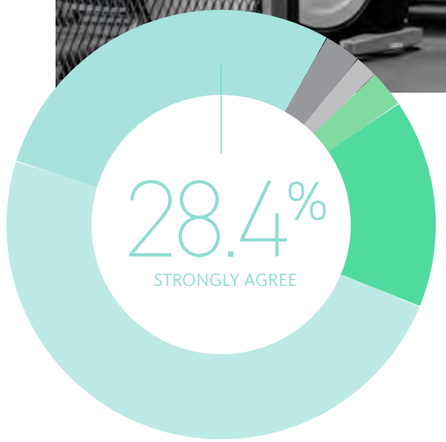


THE POST OFFICE, CHICAGO

TREND 02 | DESIGNING FOR INCLUSIVITY

DESIGN FOR CHOICE AND INCLUSIVITY TO ADDRESS DIVERSE WELL-BEING NEEDS

A welcoming environment can look very different for different individuals and populations. Rather than designing for one overarching solution, it's imperative to design for multiplicity, choice, and inclusivity to meet people's diverse emotional and well-being needs. By designing to the edges, to the extreme users, we design for everyone in-between. This drives a greater diversity of use all in one place. The single-purpose workplace, or classroom, is a thing of the past. Today, a great experience is multiuse, adjustable, and variable in ways that allow people to meet their physical and emotional needs.



HEALTH AND WELL-BEING WILL BECOME MORE IMPORTANT ACROSS ALL REAL ESTATE SECTORS

- AGREE **53.9%**
- NEITHER AGREE NOR DISAGREE **13.7%**
- DISAGREE **2.3%**
- STRONGLY DISAGREE **0.6%**
- DON'T KNOW **1.1%**

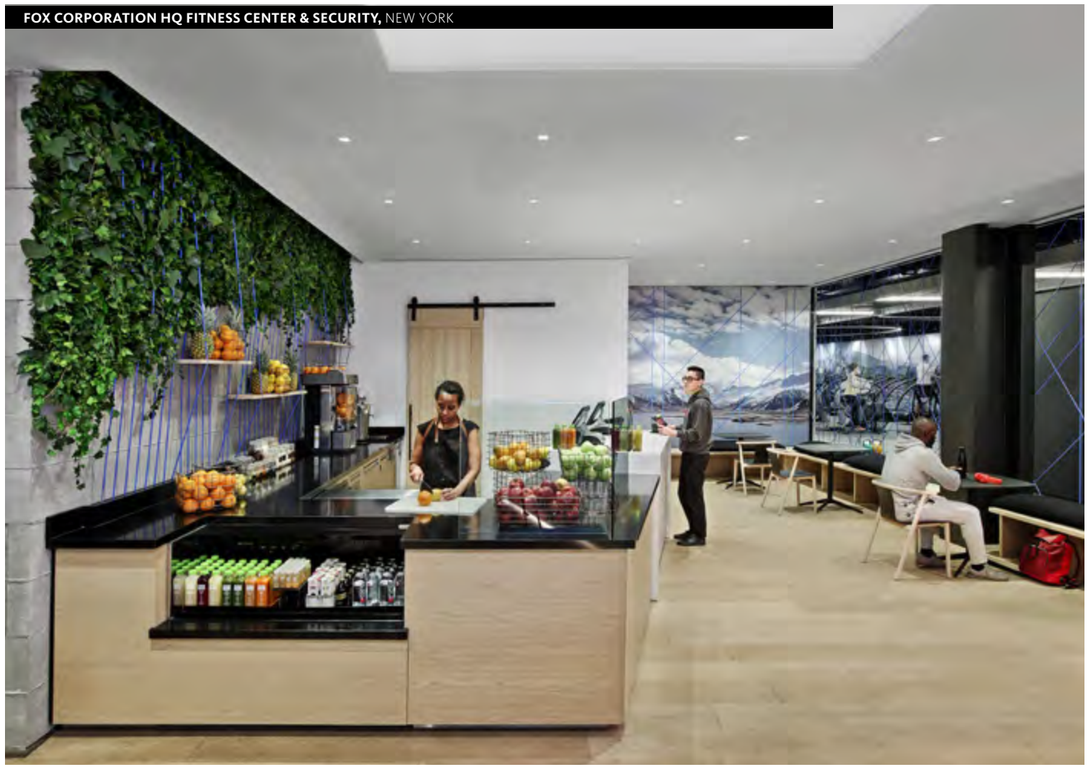
—ULI AND PwC, "EMERGING TRENDS IN REAL ESTATE 2021"

TREND 03 | BLENDING PHYSICAL + DIGITAL

THE PHYSICAL WORLD IS BLENDING WITH THE DIGITAL ONE

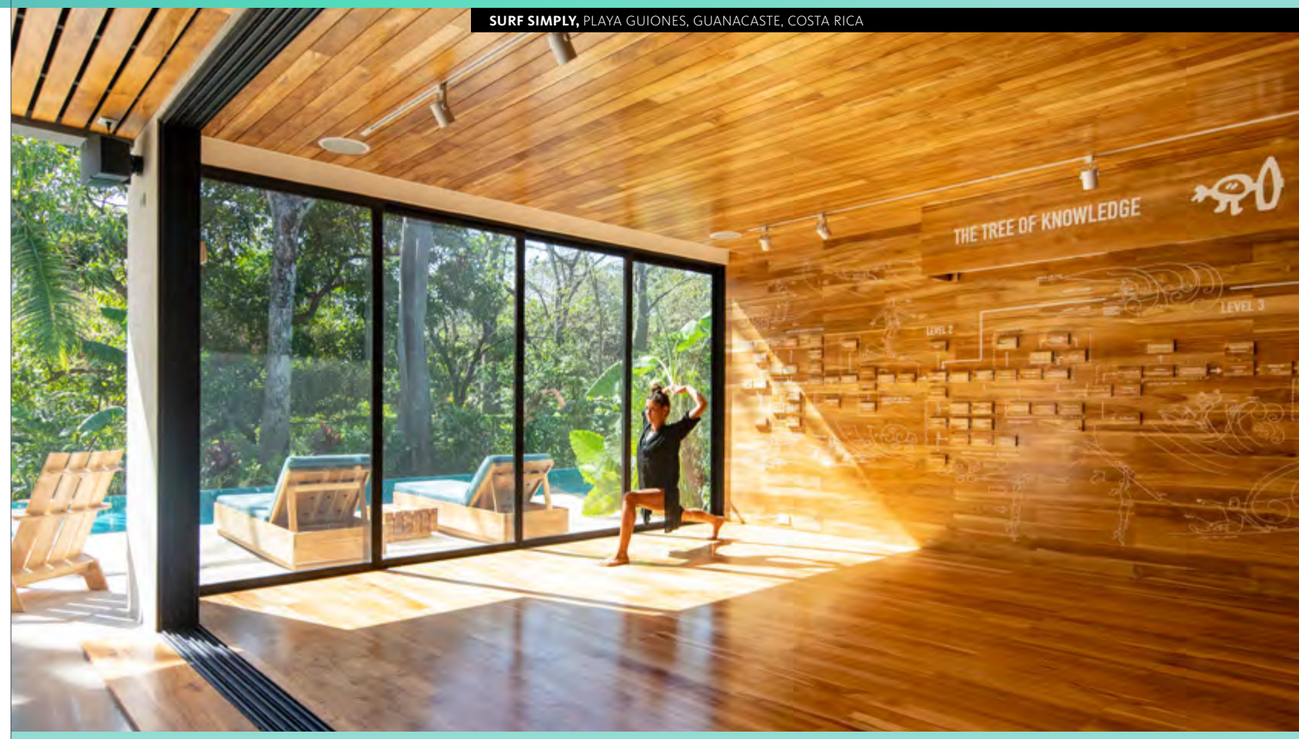
In response to the pandemic, physical and digital worlds are colliding and new hybrid and distributed models of working, learning, and shopping are emerging. AI and virtual collaboration tools are considered to be more convenient and self-serve. Now, the physical world needs to step up to do the same. The physical environment is an important tool in conveying purpose and building community. As people work and learn from home without the benefit of physical colocation, the need for purpose has been elevated. While real estate may get smaller, it can elevate its purpose — to be in service of humanity.

HOTEL SAN LUIS OBISPO, SAN LUIS OBISPO, CALIF.



FOX CORPORATION HQ FITNESS CENTER & SECURITY, NEW YORK

500 WEST 2ND STREET, AUSTIN, TEXAS



SURF SIMPLY, PLAYA GUIONES, GUANACASTE, COSTA RICA

TREND 04 | FLEXIBLE DESIGN SOLUTIONS

LOOK FOR DESIGN SOLUTIONS THAT CAN FLEX TO ACCOMMODATE MORE OR FEWER OCCUPANTS

Greater concern over density, overcrowding, and low utilization has put into question real estate's return on the investment, requiring new measures for real estate value. With uncertainty in the quantity of occupants that a company, school, or organization may have at any given time, clients must be able to stage flexible physical environments that accommodate many or few occupants. To design for flexibility, it's important to create strategies that allow for "accordion" populations.

INSTAGRAM, MENLO PARK, CALIF.

REIMAGINING THE FUTURE OF WORK

The pandemic has triggered a massive shift in global work patterns. We've learned new behaviors, adopted new technologies, and adjusted to new ways of working. We've also come to a deeper understanding of the fundamental role of place in how we work, especially how we work together. Organizations around the world are rethinking the future of the workplace based on experiences and learnings from the past year, with a particular focus on the well-being and connectivity of their teams. Collectively, we are reimagining the future of work on a global scale, with the physical office continuing to play a central role in creating more connected, equitable experiences that benefit people, organizations, and their surrounding communities.

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4 INSIGHTS THAT ARE DEFINING THE NEW WORKPLACE

❶ THE ROLES OF THE WORKPLACE AND OFFICE BUILDINGS ARE EVOLVING.

Work and place have become uncoupled, redefining the office as the best place to bring people together — especially for those whose jobs rely on in-person collaboration or specific spaces or shared resources. Physical and virtual experiences must be fully integrated since digital systems will continue to shape a seamless level of connectivity and personalization.

❷ CULTURE, COMMUNITY, AND COLLABORATION ARE AT THE CORE OF THE NEW WORK EXPERIENCE.

The fundamental role the office is shifting to become a place that brings people together to collaborate, to build personal and professional relationships, and to connect with a company's unique business, mission, and purpose. New behaviors, technology, and policies will be required to allow flexible and virtual work to thrive, while also supporting coaching and mentoring and more equitable and inclusive experiences.

❸ PRE-PANDEMIC TRENDS ARE ACCELERATING.

Choice, autonomy, health, and well-being have become paramount for individuals and teams to perform at their best. From health checks and touchless security to improved air quality systems, owners and users are focused on healthy buildings and experiences. Outdoor spaces are increasingly becoming part of the workplace environment, with open façades and retrofitted rooftops providing additional work settings.

❹ FLEXIBILITY AND ADAPTABILITY ARE CRITICAL FOR A HYBRID WORKFORCE.

A new hybrid workforce, working both at the office and remotely, is an opportunity to fix the pre-pandemic issues of the workplace, and to explore new real estate strategies. Office buildings will increasingly get smarter to enable office-to-home connectivity and anticipate evolving tenant needs. New workspace approaches must be more responsive to rapidly adjust to new ways of working with flexible spaces and furniture for newly emerging work patterns.

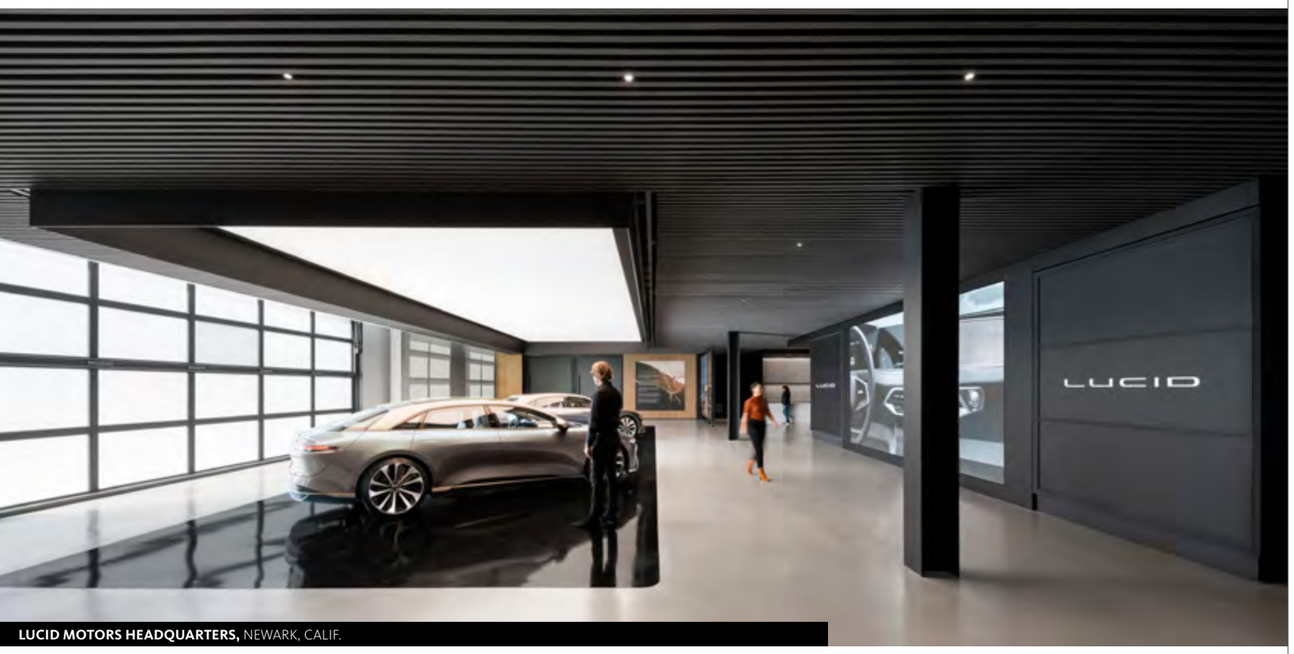
This repositioning transforms a Class-B office building into trophy-class office space. With over-cladding that will give the fenestration a more elegant and monumental proportion, the new expansion floors and occupied penthouse will assert the building's identity and capitalize on the location's greatest asset: the views to the White House.

1700 Pennsylvania Avenue – Repositioning, Washington, D.C.

CONSUMER GOODS

In response to the economic downturn and supply chain disruption accelerated by the pandemic, Consumer Goods companies see opportunity in consumer engagement and innovation through co-located experience centers and research and development facilities. Across the industry, there is sharper focus on flexibility for remote work.

CONSUMER GOODS
ENERGY
FINANCIAL SERVICES
FOUNDATIONS, ASSOC. & ORGANIZATIONS
GOVERNMENT & DEFENSE
MEDIA
OFFICE BUILDINGS: DEVELOPER
OFFICE BUILDINGS: REPOSITIONING
PRODUCT DEVELOPMENT
PROFESSIONAL SERVICES
REAL ESTATE SERVICES & CONSULTING
TECHNOLOGY



LUCID MOTORS HEADQUARTERS, NEWARK, CALIF.

CONSUMERS ARE TRYING NEW BRANDS AMID ECONOMIC AND PANDEMIC UNCERTAINTY

50% OF CONSUMERS ARE TRYING NEW BRANDS.

66% ARE LIKELY TO STICK WITH THOSE NEW BRANDS.

—PwC

CPG COMPANIES THAT HAVE A VIRTUAL WORKING STRATEGY WILL STRENGTHEN THEIR EMPLOYEE VALUE PROPOSITION AND SHOW THEY ARE IN TOUCH WITH THEIR EMPLOYEE PREFERENCES.

—ACCENTURE

INSPIRE BRANDS SUPPORT CENTER, ATLANTA

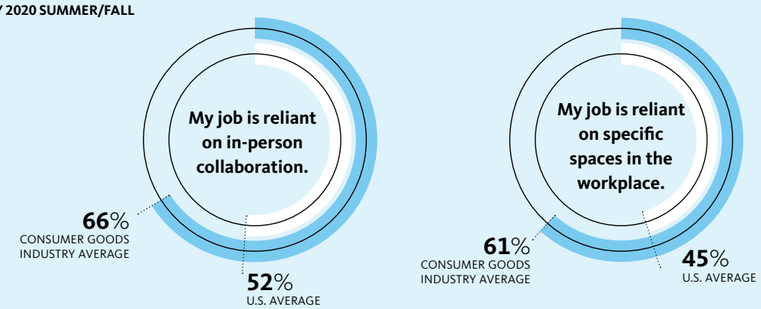
TREND 01 | WORKPLACE CULTURE

PRIORITIZE CULTURE AND CONNECTION IN THE WORKPLACE

Company culture and connection to brands have become even more critical. According to a 2019 Glassdoor multi-country survey, 75% of employees pay close attention to a company's culture before applying for a job. And 56% say that culture is more important than salary. The workplace is essential to building culture, and that extends to the virtual realm. According to PwC, organizations with a distinctive culture that gives them a competitive advantage are twice as likely to outperform other companies in their industry peer group on revenue and profitability.

U.S. CONSUMER GOODS OFFICE WORKERS SAY THEIR JOBS ARE RELIANT ON IN-PERSON COLLABORATION AS WELL AS SPECIFIC SPACES, MATERIALS, AND RESOURCES IN THE WORKPLACE.

—GENSLER WORKPLACE SURVEY 2020 SUMMER/FALL

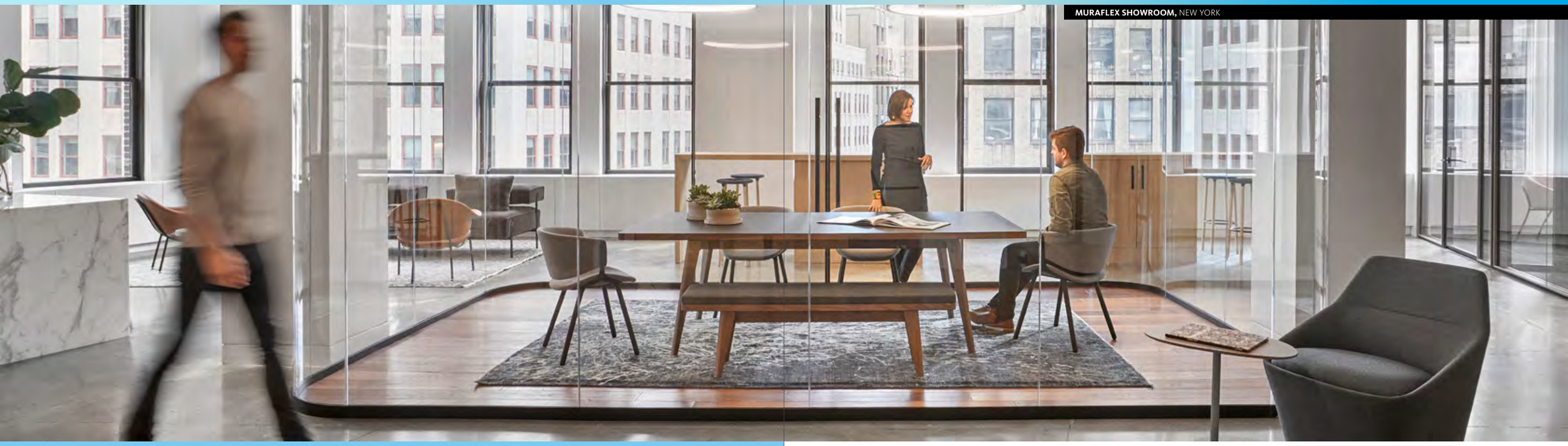


TREND 02 | MORE COLLABORATION SPACE

SAFE COLLABORATION SPACE IS IN DEMAND

The distribution of focus and collaboration space is changing in the workplace. Consumer Goods companies are leveraging space more effectively around product and consumer engagement, where there will be less real estate dedicated to focus work and more toward collaboration, with mockup spaces, showrooms, virtual reality lounges, and more. There is still a critical need for Consumer Goods workers to work in the office with products and physical collateral. Digital technologies can bring remote and on-site team members together for seamless collaboration. Consider creating a "digital twin" of the workplace to allow employees — whether collocated or remote — to connect.

INSPIRE BRANDS SUPPORT CENTER, ATLANTA



MURAFLEX SHOWROOM, NEW YORK

TREND 03 | EXPERIENCE CENTERS

WORKPLACE, R&D, AND EXPERIENCE CENTERS ARE CONVERGING

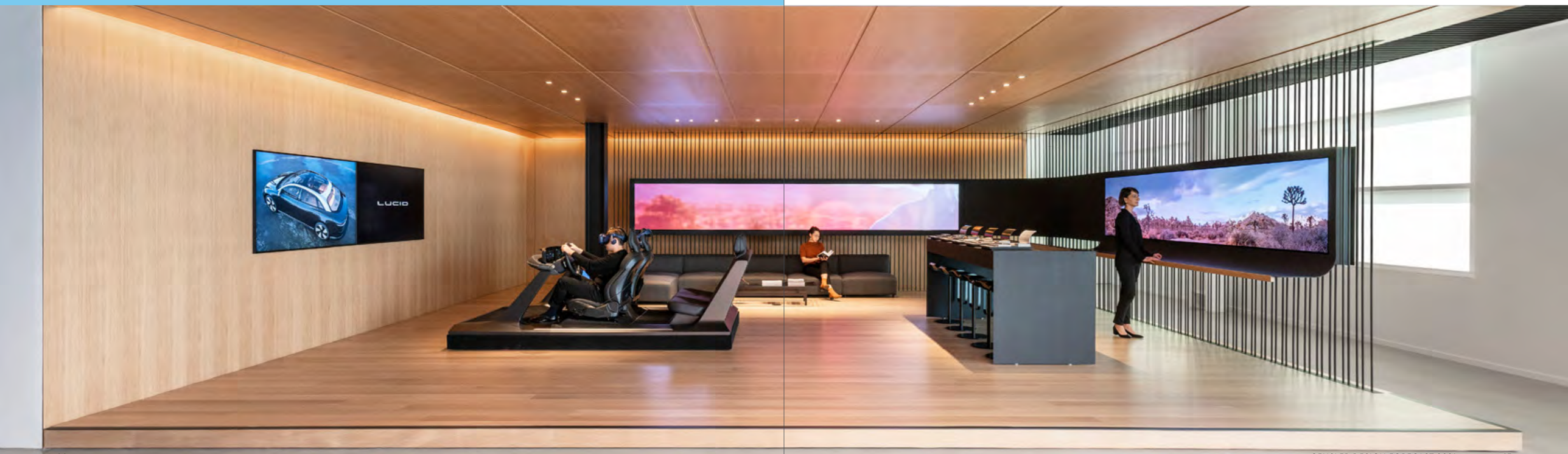
The pandemic has accelerated the trend of the workplace becoming a touch point for consumer engagement. In order to position themselves for the future, Consumer Goods companies have taken a more keen focus on innovation and experience centers, as well as research and development facilities, all co-located with workplace. The industry is seeing a convergence of workplace and retail experience centers.

THE MILLENNIAL AND GEN-Z EFFECT

4X

U.S. millennials are almost four times more likely than baby boomers to avoid buying products from "the big food companies" and almost six times more likely to find newer brands "better or more innovative."

—McKINSEY



LUCID MOTORS HEADQUARTERS, NEWARK, CALIF.

ENERGY

With climate resilience and health and wellness as top priorities for developers and tenants, Energy sector design solutions must focus on human experience and environmental strategies for all spaces, including industrial-scale facilities and offices. Energy is an essential facilitator of economic growth and cultural development, influencing the future of cities.

NEWMONT MINING HEADQUARTERS, DENVER

TREND 01 | **ENERGY TRANSFORMATION**

DESIGN FOR ENERGY TRANSFORMATION

To address the urgency of climate change and respond to economic, political, social, and environmental pressures, the Energy sector is transforming as it shifts toward decarbonization and carbon neutrality. With a common goal of curbing emissions, the industry is uniting around increased efficiency, accessibility, and sustainability. Recognizing the need for collective action to create meaningful change, new partnerships are emerging between large Energy companies, mid-size companies, and startups. Energy sector companies are rethinking the workspace and looking for more types of collaborative space to facilitate and accelerate this transformation.

60%

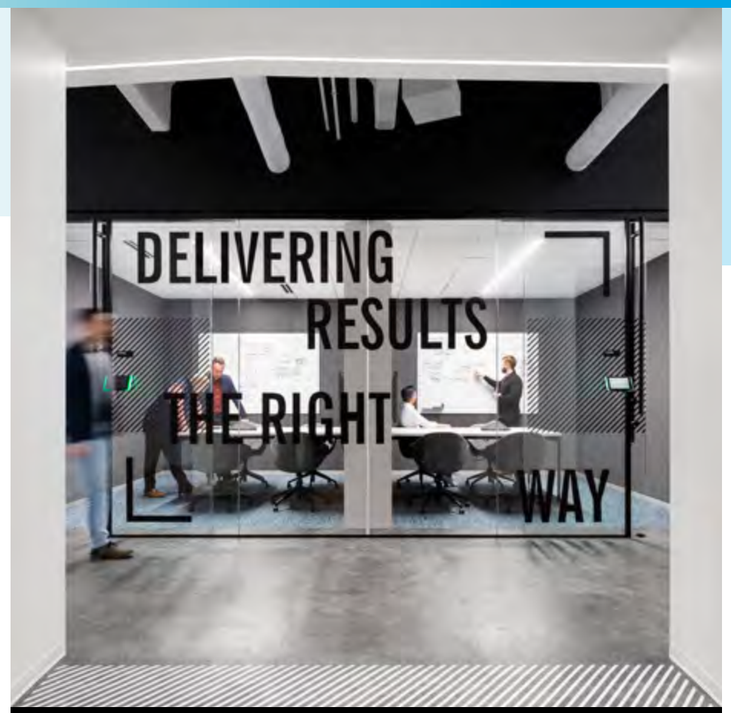
OVER HALF OF U.S. ENERGY WORKERS PREFER A HYBRID WORK MODEL.

—GENSLER WORKPLACE SURVEY 2020 SUMMER/FALL

TREND 02 | **REINFORCE CULTURE**

EXTEND CULTURE TO YOUR DISTRIBUTED WORKFORCE

Even with workers for essential services, such as R&D, trading, and manufacturing, who are continuing to be engaged in the physical office environment, working from home has become an accepted work mode for the Energy sector. According to Gensler's U.S. Workplace Survey 2020, 60% of U.S. Energy workers prefer a hybrid work model. Energy companies will need to find ways to continue to maintain and reinforce culture and connectivity among an increasingly distributed workforce. Energy employees expect crucial changes in the workplace as they return, including more flexibility to accommodate both in-office and remote workers.



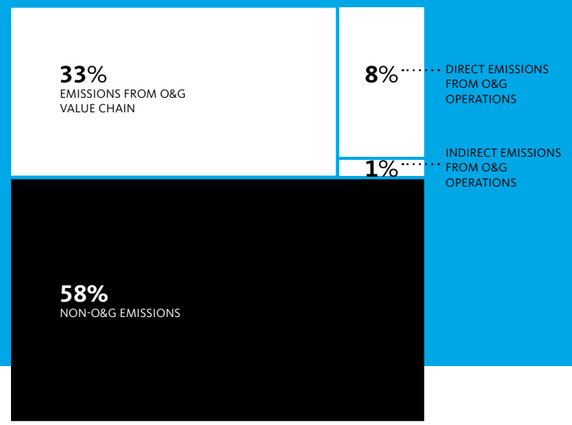
CONFIDENTIAL ENERGY CLIENT, CHARLOTTE, N.C.

THE OIL & GAS INDUSTRY ACCOUNTS FOR 42% OF GLOBAL EMISSIONS

The industry has an opportunity to decrease harmful emissions by adopting design resilience strategies.

—McKINSEY

OIL AND GAS (O&G) SHARE OF GLOBAL EMISSIONS, 2015



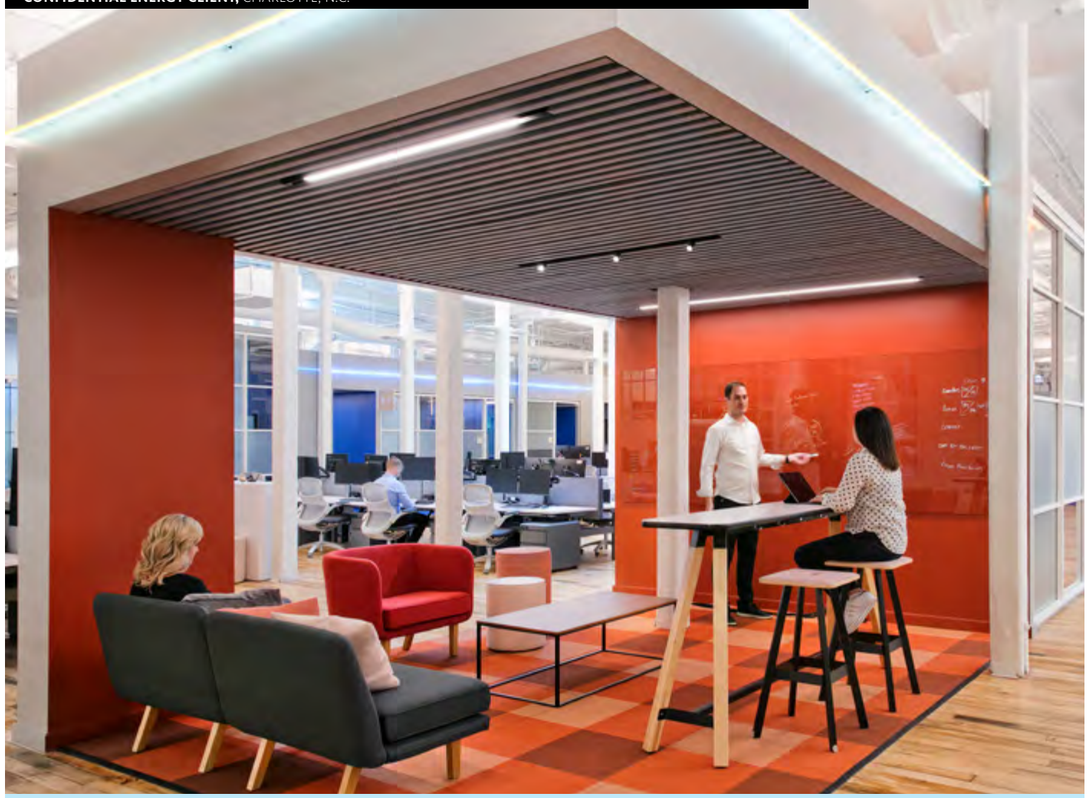
56%

OF U.S. ENERGY WORKERS WANT A MOSTLY OR ENTIRELY PRIVATE WORK ENVIRONMENT.

63%

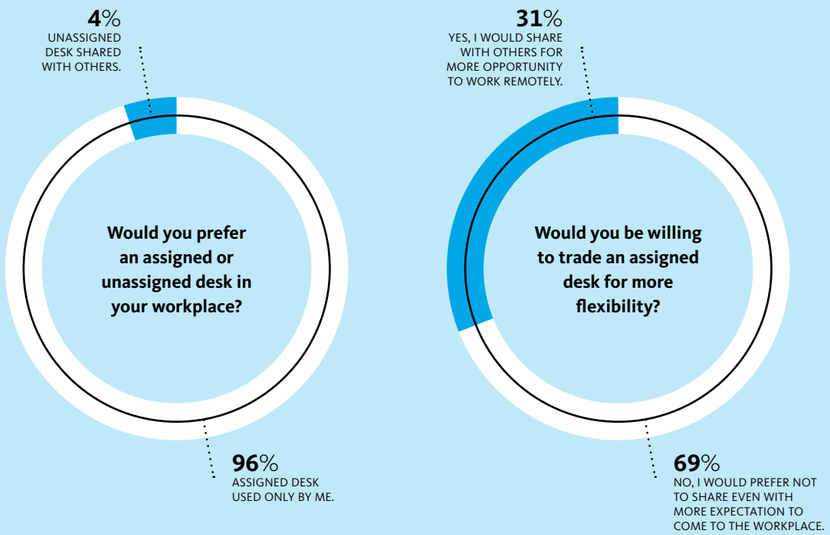
OF U.S. ENERGY WORKERS WOULD PRIORITIZE AN ASSIGNED SEAT OVER GREATER FLEXIBILITY TO WORK REMOTELY.

CONFIDENTIAL ENERGY CLIENT, CHARLOTTE, N.C.



U.S. ENERGY WORKERS DRAMATICALLY PREFER ASSIGNED SEATING — AND DESPITE A DESIRE FOR FLEXIBILITY, TWO-THIRDS ARE WILLING TO TRADE FLEXIBILITY FOR AN ASSIGNED SEAT.

—GENSLER U.S. WORK FROM HOME SURVEY 2020 SUMMER/FALL

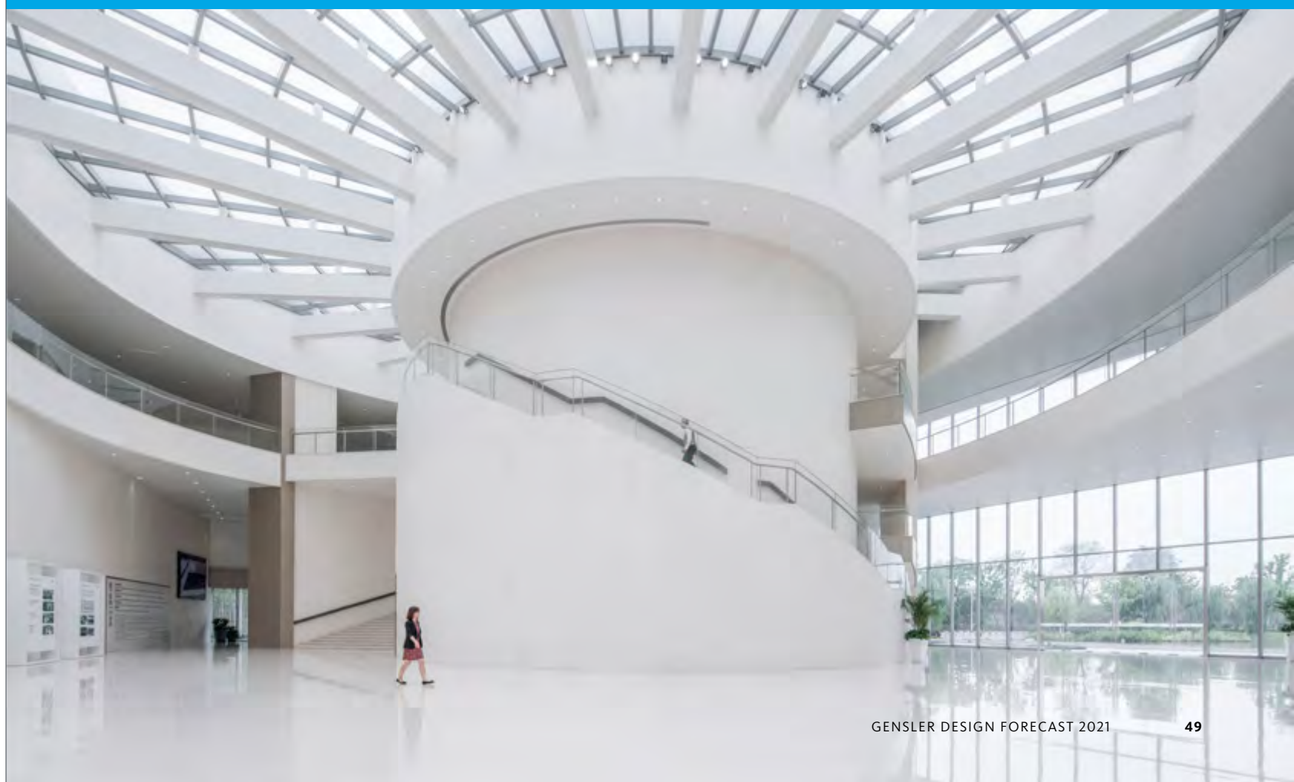


ABOVE AND BELOW: GCL SUZHOU INDUSTRIAL RESEARCH PHASE II, SHANGHAI

TREND 03 | **IN-PERSON COLLABORATION**

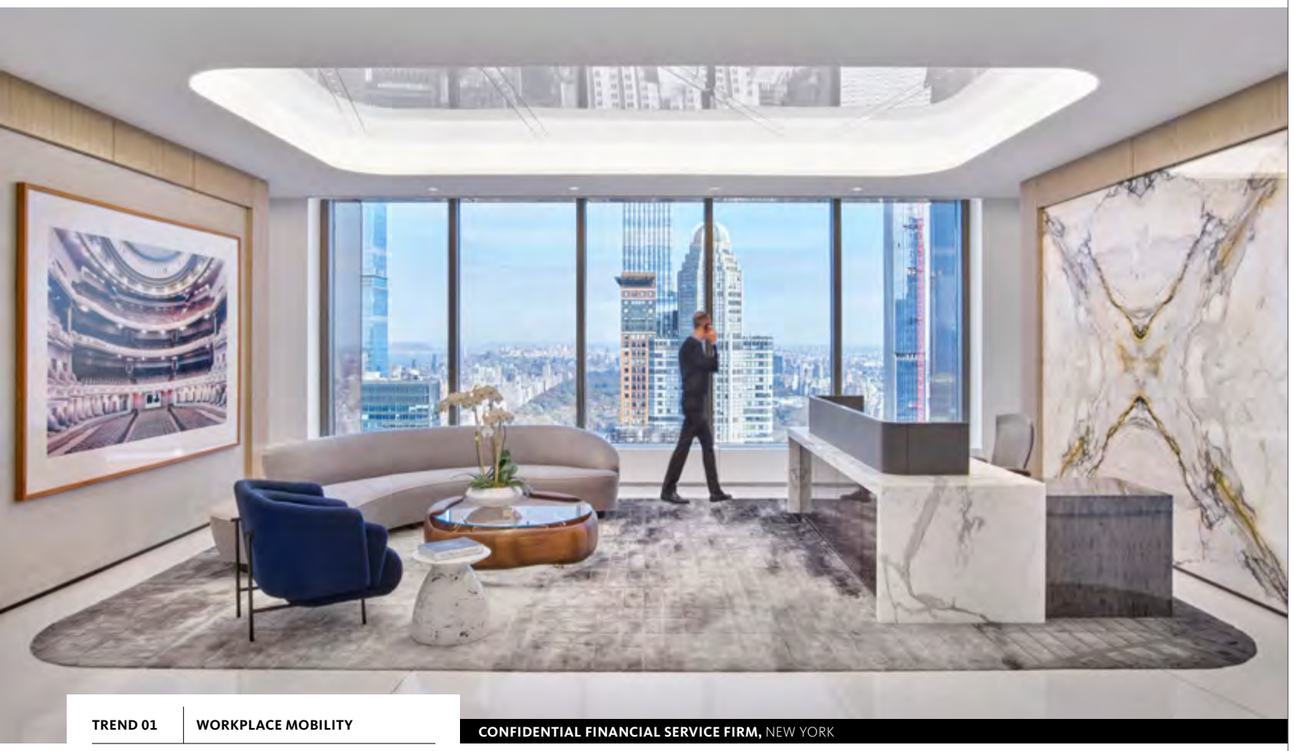
THE POST-PANDEMIC WORKPLACE MUST ENCOURAGE SOCIAL INTERACTIONS

U.S. energy workers overwhelmingly note that working in-person and connecting with colleagues are the most important reasons to come to the office. The workplace will need to provide both ample private spaces and spaces that promote collaboration and social connection. To serve myriad functions, workplace strategy and planning must focus directly on the needs of workers across each hybrid work model.



FINANCIAL SERVICES

Many financial services companies have thrived working — and even trading — from home. Now, for the first time, they are embracing the idea of remote work in pursuit of a deeper, richer workplace experience. The design of new work environments should balance technology with irreplaceable human connection; the right mix will prove transformative.



CONFIDENTIAL FINANCIAL SERVICE FIRM, NEW YORK

TREND 01 | WORKPLACE MOBILITY

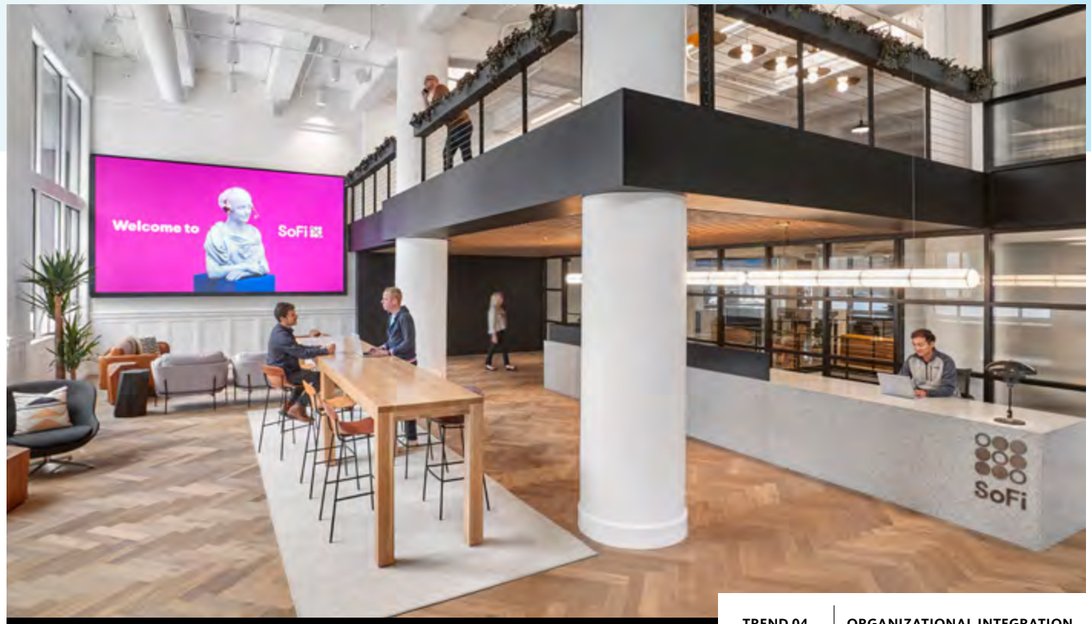
WORKPLACE MOBILITY IS AN OPPORTUNITY

Changes brought by the pandemic will endure for the business value that they have unlocked; workplace mobility is one of them. After seeing the benefits of remote-work programs, financial services companies are boldly redefining the office as a destination. Dedicated individual space is giving way to new and varied multi-use space types to drive employee connection, spark innovation, and embrace flexibility. As clients and customers face ongoing financial anxiety, the ability to foster intimate human connections will differentiate the most successful companies.

TREND 02 | THE HYBRID OFFICE

THE HYBRID OFFICE PRESENTS OPPORTUNITIES TO MAXIMIZE PERFORMANCE

Financial workers have emerged from the pandemic with new ways of working and utilizing technologies. These new practices must be embraced in the workplace itself to facilitate ongoing hybrid working and to support an even higher-performing workforce than had existed before. Increased flexibility and opportunity for local community presence come as banks reconsider networks of private wealth management offices, retail branches, and business continuity sites as alternative workplaces.



SOFI HEADQUARTERS, SAN FRANCISCO

TREND 03 | PROMOTING EQUITY

NEW SPACE TYPES CAN AND SHOULD PROMOTE EQUITY

Hospitality-inspired, welcoming workplaces generate a sense of belonging, safety, and engagement with the brand. As mobility for all frees up space, employers are investing in designs to support collective activities, such as learning and development, onboarding, and training. With the exploration of these new space types, financial firms have an opportunity to promote equity by assessing how supportive their physical and virtual environments are of underrepresented talent groups.

ADDRESSING EMPLOYEE NEEDS PAYS OFF WITH LOYALTY

Job loyalty rises as businesses address employee needs, from diversity and inclusion to sustainability and reskilling. In the survey, more millennials said they'd like to stay with their employers for at least five years than would prefer to leave within two years.

—DELOITTE GLOBAL MILLENNIAL SURVEY 2020

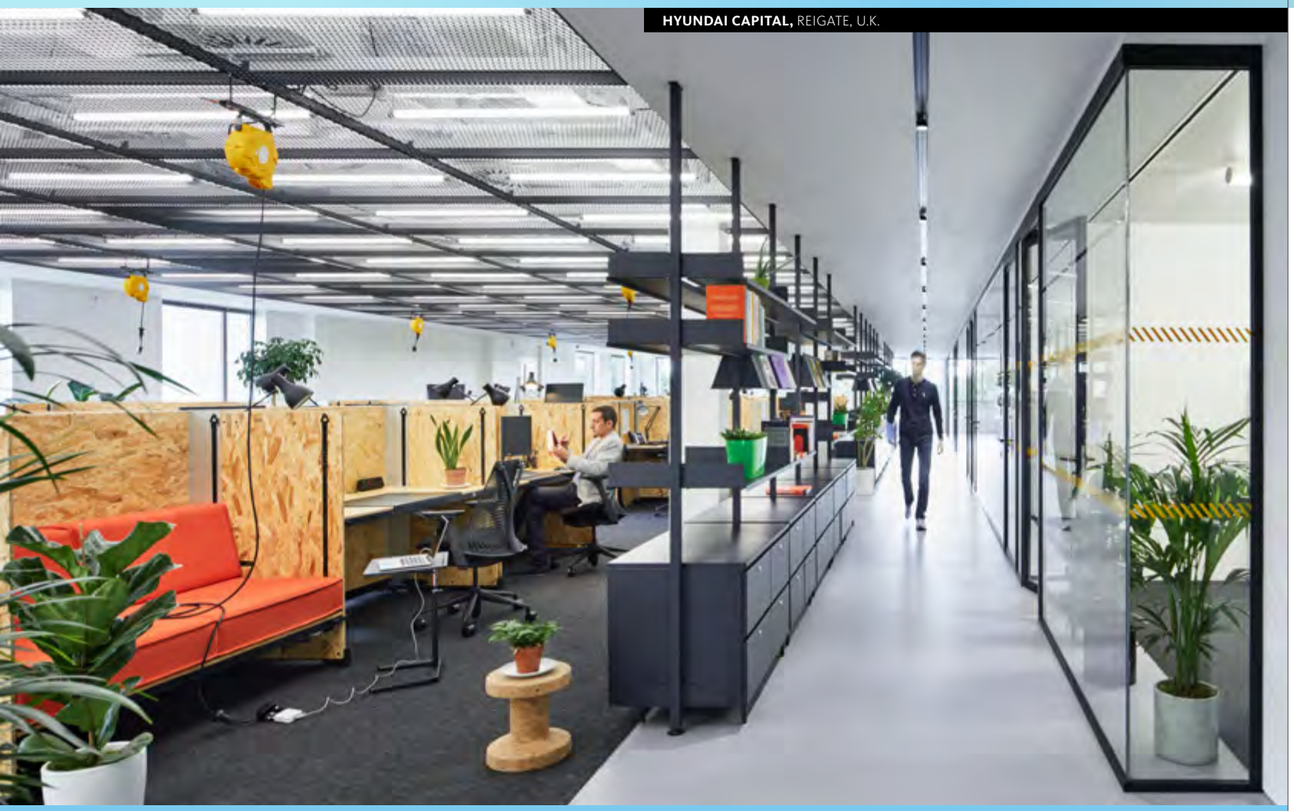
TREND 04 | ORGANIZATIONAL INTEGRATION

ORGANIZATIONAL INTEGRATION CREATES OPPORTUNITIES FOR FIRMS TO SHARPEN STRATEGIES

One of the chief successes of bank responses to the pandemic was the alignment of real estate, facilities, HR, IT, and other departments in making decisions about workplace design and experience. Seeing an organization as an integrated system opens new possibilities. Collecting and sharing data across this system will inform better decision-making. Smart technologies are of the utmost importance in this process to support real estate and facilities teams in making occupancy decisions, especially as the roles of AI and automation grow.

"WITH SOME MAJOR BANKS ALREADY RETURNING TO THE OFFICE WITH HYBRID IN-PERSON/REMOTE WORKING MODELS AND PLANNING TO DO SO AS THEIR LONG-TERM STRATEGIES, IT'S AN OPPORTUNE TIME FOR BANK BRANDS TO REEVALUATE THEIR REAL ESTATE PORTFOLIOS AND REDISTRIBUTE AND REINVEST FOR THE LONG-TERM BENEFIT OF THEIR LOCAL COMMUNITIES."

— GENSLER DIALOGUE BLOG, "BANKS IN BETA MODE: REPOSITIONING A PLACE IN THE COMMUNITY"



HYUNDAI CAPITAL, REIGATE, U.K.

FLEXIBILITY AND TALENT DEVELOPMENT GO HAND IN HAND

Flexible work arrangements can also be a powerful recruiting tool, especially for seasoned workers. A well-thought-out flexible work policy can help expand workforce diversity, foster collaboration from an expanded talent pool, and enhance resiliency in meeting future crises.

—2020 PwC U.S. REMOTE WORK SURVEY

ROUNDPOINT MORTGAGE HEADQUARTERS, FORT MILL, S.C.

AI IS ACCELERATING

"WHILE EXECUTIVES IN ALL SECTORS REPORT INCREASED ADOPTION OF DIGITIZATION AND AUTOMATION, THOSE IN THE FINANCIAL SERVICES AND TECHNOLOGY SECTORS HAVE SEEN THE GREATEST ACCELERATION OF SUCH TECHNOLOGIES SINCE THE COVID-19 OUTBREAK."

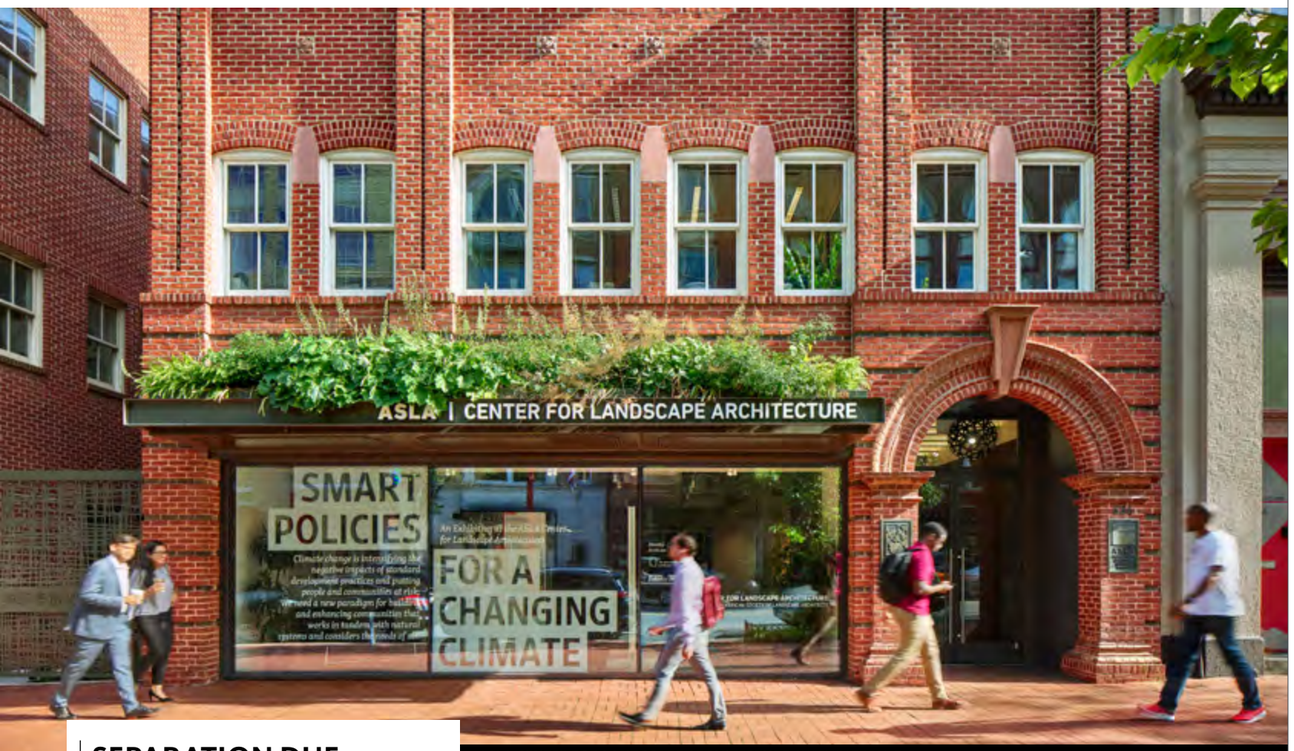
—McKINSEY GLOBAL BUSINESS EXECUTIVE SURVEY

TRAXYS NORTH AMERICA RELOCATION, NEW YORK

CONFIDENTIAL CLIENT, AUSTIN, TEXAS

FOUNDATIONS, ASSOCIATIONS & ORGANIZATIONS

Mission always comes first for organizations founded to create meaningful social change. Thoughtful and transformational design is necessary to create spaces where civic leaders can learn, converse, and do purposeful work. Such spaces will only garner more attention as the nonprofit sector takes on a bigger role in supporting communities challenged by recent events.



ASLA CENTER FOR LANDSCAPE ARCHITECTURE, WASHINGTON, D.C.

SEPARATION DUE TO THE PANDEMIC HAS HIT NONPROFIT EMPLOYEES HARD

74%

OF ASSOCIATION AND NONPROFIT EMPLOYEES SAY THAT WHAT THEY MISS MOST ABOUT NOT BEING IN THE OFFICE IS THE PEOPLE.

—GENSLER U.S. WORK FROM HOME SURVEY 2020 SUMMER/FALL

TREND 01 | EMPLOYEE HEALTH

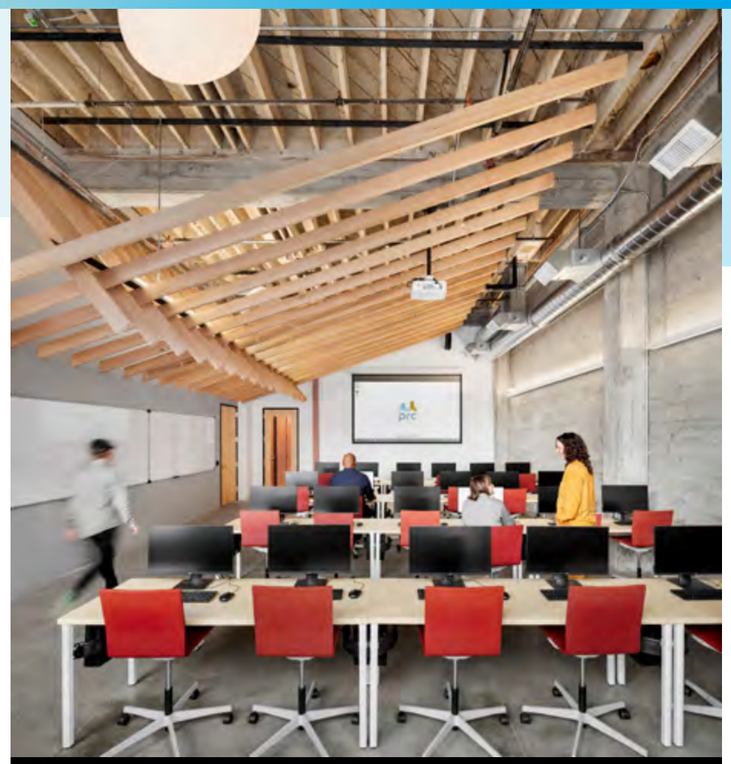
CONSCIENTIOUSNESS WILL EXTEND TO EMPLOYEE HEALTH

Foundations, organizations, and associations are highly focused on their employees' well-being. This approach will extend beyond the pandemic, leading to the design of workplaces focused on the employee's health. Such workplaces will reinforce improved work-life balance, accommodating an uptick in working from home and providing greater attention to mental and physical well-being. The office will become a place of rejuvenation, adaptable to future cultural, economic, and public health developments.

TREND 02 | BOLSTERING THE MISSION

MISSION-DRIVEN ORGANIZATIONS WILL DOUBLE DOWN ON WHAT THEY DO BEST

Organizations in all sectors are heeding new calls for equity, community, and inclusive organizational culture, but nonprofits are perhaps best prepared to set the new standard because the sector's prior performance in these areas has been relatively high. In-person connection and collaboration will remain the lifeblood of nonprofit organizations in the long run. Aligning physical space with values is only a first step; organizations seeking to maximize effectiveness will do so by using space to actively bolster their mission.



PRC, SAN FRANCISCO

THE NOT-FOR-PROFIT SECTOR LEADS THE WAY TOWARD EQUITY AND INCLUSION

"Our not-for-profit organizations put empathy first and build unity in the face of division. Leaders at these foundations acknowledge that a healthy civic commons is the key to recovery, allowing cities to rebuild social capital and create more equitable and resilient communities."

—GENSLER DIALOGUE BLOG, "WHAT NOT-FOR-PROFITS CAN TEACH US ABOUT EQUITY AND INCLUSION"

DIGITIZATION ALLOWS NONPROFITS TO BE MORE AGILE

82%

OF NONPROFITS REPORTED DIGITALIZING SOME OR ALL OF THE PROGRAMS AND SERVICES THEY OFFERED. THIS TREND GENERALLY HELD ACROSS ALL SUBSECTORS. AS ONE RESPONDENT WROTE, THE PANDEMIC "INSPIRED US TO BE MORE AGILE, TO PIVOT AND APPROACH ISSUES MORE INNOVATIVELY, AND CHALLENGED US TO LOOK AT OUR WORK DIFFERENTLY GOING FORWARD."

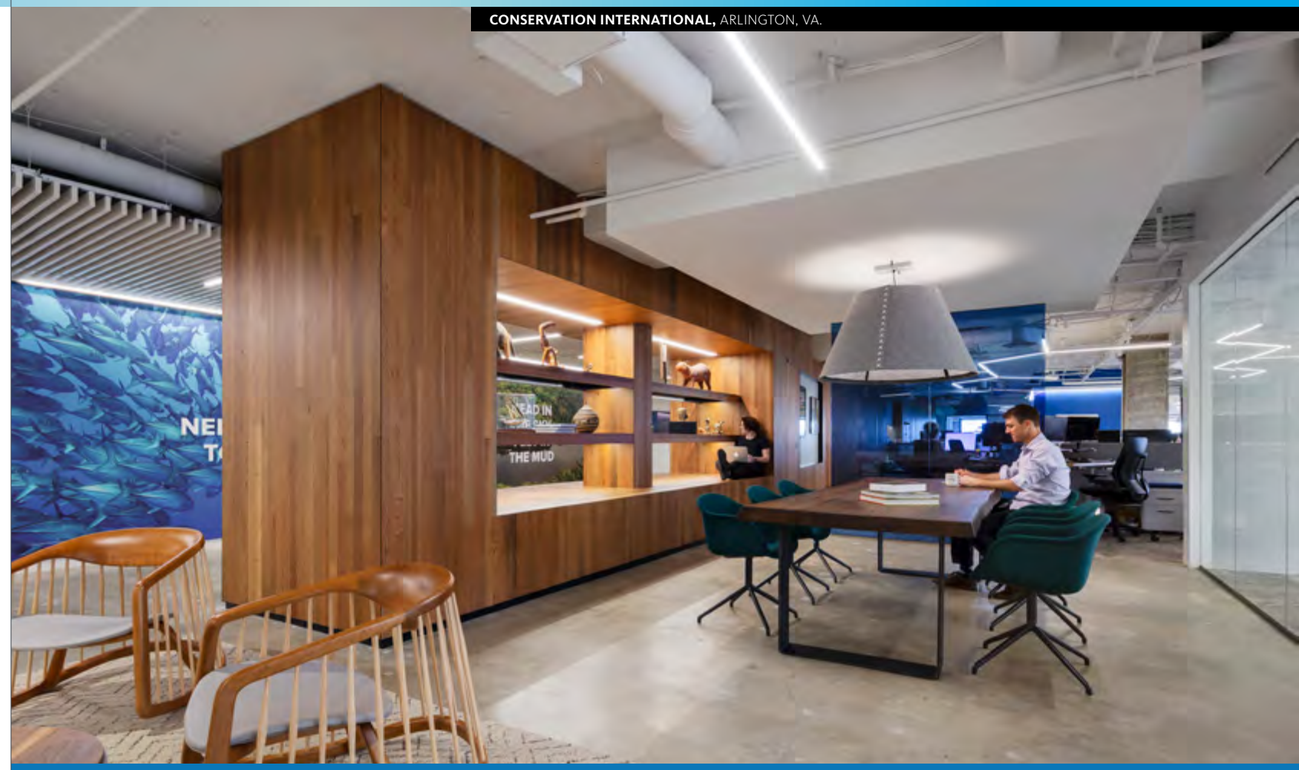
—STANFORD SOCIAL INNOVATION REVIEW

TREND 03 | PIVOTING TO DIGITAL

DIGITAL FUNDRAISING AND ENGAGEMENT WILL TAKE THE DRIVER'S SEAT

The economic downturn has affected endowments and reduced funding for many foundations and associations. As a result, traditional revenue sources are being challenged, forcing teams to recalibrate their programming into the virtual realm and explore new value propositions for their constituents and members. Short-term experiments of this nature are likely to lead to long-term programs. Physical space strategies that supported in person storytelling will pivot to hybrid physical and digital platforms incorporating technology to drive engagement, focusing on the idea of citizenship and the ability to take the mission anywhere.

PLYWOOD PEOPLE, ATLANTA



CONSERVATION INTERNATIONAL, ARLINGTON, VA.

Association and not-for-profit employees are heavily reliant on in-person collaboration, and value impromptu face-to-face connection as a main reason for going into the office. With an emphasis on in-person collaboration, not-for-profit workers were least experienced in virtual work prior to the pandemic.

—GENSLER GLOBAL WORKPLACE SURVEYS 2020

AMERICAN KENNEL CLUB HEADQUARTERS, NEW YORK

GOVERNMENT & DEFENSE

Driven by the shift to hybrid work, governments are increasingly reimagining the office to emphasize more efficient use of space, promote collaborative work, and accommodate increased remote work. In addition, governments worldwide have taken the lead on designing resilient facilities, which now also encompasses health and wellness.

CONSUMER GOODS
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FINANCIAL SERVICES
FOUNDATIONS, ASSOC. & ORGANIZATIONS
GOVERNMENT & DEFENSE
MEDIA
OFFICE BUILDINGS: DEVELOPER
OFFICE BUILDINGS: REPOSITIONING
PRODUCT DEVELOPMENT
PROFESSIONAL SERVICES
REAL ESTATE SERVICES & CONSULTING
TECHNOLOGY

LA COUNTY DEPARTMENT OF MENTAL HEALTH, VERMONT CORRIDOR, LOS ANGELES

TREND 01 | PRIORITIZE HEALTH

HEALTH HAS BECOME A GOVERNMENTAL PRIORITY

The pandemic has increased demand for a healthy workplace. Public health has become a key governmental priority. As health agencies receive more resources, they need to plan for additional office, laboratory, clinic, hospital, and storage space. Some of that space will be permanent and some on-call, available to be adapted for emergency use. For workplaces that provide in-person citizen services, governments need to know how to design public spaces that safeguard the health of visitors and employees.

State and local government revenues are estimated to decline $167 billion in 2021 and $145 billion in 2022 — about 5.7% and 4.7%, respectively.

—BROOKINGS INSTITUTION

WHEATON TOWN CENTER, WHEATON, MD.

TREND 02 | CLIMATE-RESILIENT DESIGNS

CLIMATE-RESILIENT DESIGNS ARE CRITICAL AND URGENT

Governments are increasingly focused on combating climate change in their facilities and, at the same time, making their facilities resilient to climate-related events. Sustainable design strategies that reduce the use of non-renewable resources, and design that counteracts extreme weather events and sea level rise are necessary. Across the globe, many governments have taken the lead on designing resilient facilities. Resilient design should now also embrace health and wellness.

ALMOST HALF OF GOVERNMENT WORKERS WOULD PREFER A HYBRID WORK MODEL

—GENSLER U.S. WORKPLACE SURVEY SUMMER/FALL 2020

62% OF GOVERNMENT WORKERS WANT TO WORK FROM HOME FOR PART, OR ALL, OF THE WEEK.

38% OF GOVERNMENT WORKERS WANT TO RETURN TO WORK FULL TIME IN THE OFFICE.

HOW MANY DAYS WOULD YOU PREFER TO WORK FROM THE OFFICE VS. FROM HOME?

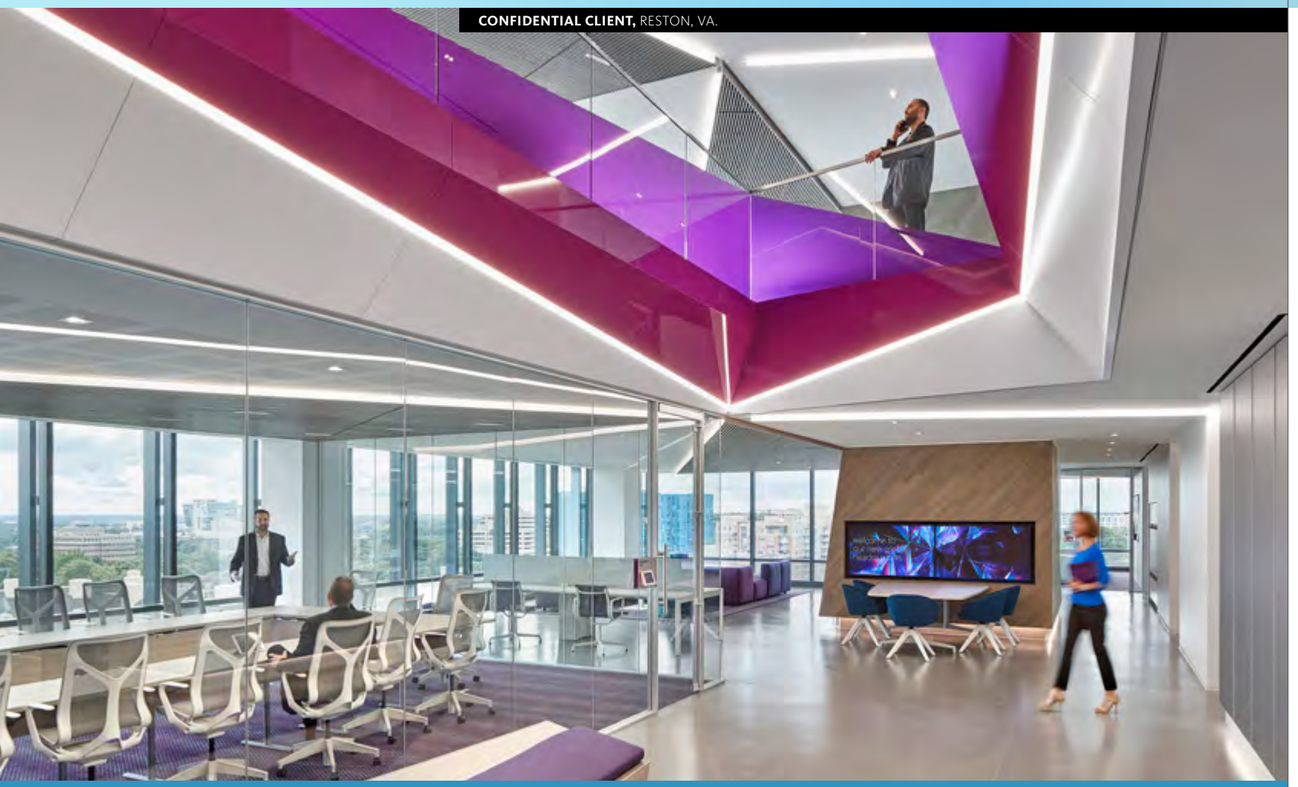
FULL TIME IN THE OFFICE	1 OR 2 DAYS AT HOME	3 OR 4 DAYS AT HOME	FULL TIME AT HOME
38%	24%	24%	14%

48% PREFER A HYBRID WORK MODEL

TREND 03 | SAFETY AND ACCESSIBILITY

DESIGN PUBLIC BUILDINGS FOR SAFETY AND ACCESSIBILITY

Governments need public buildings that are inspiring symbols of democracy that welcome citizens as valued visitors while also securing the safety of the public servants within them. Design has a key role to play in maintaining the balance between openness and security, in promoting both security and democratic values. For public buildings to be safe, while remaining open for business, they must be designed to respond to proven threats and anticipate new ones.



CONFIDENTIAL CLIENT, RESTON, VA.

DESIGNING GOVERNMENT OFFICES FOR A POST-COVID WORLD

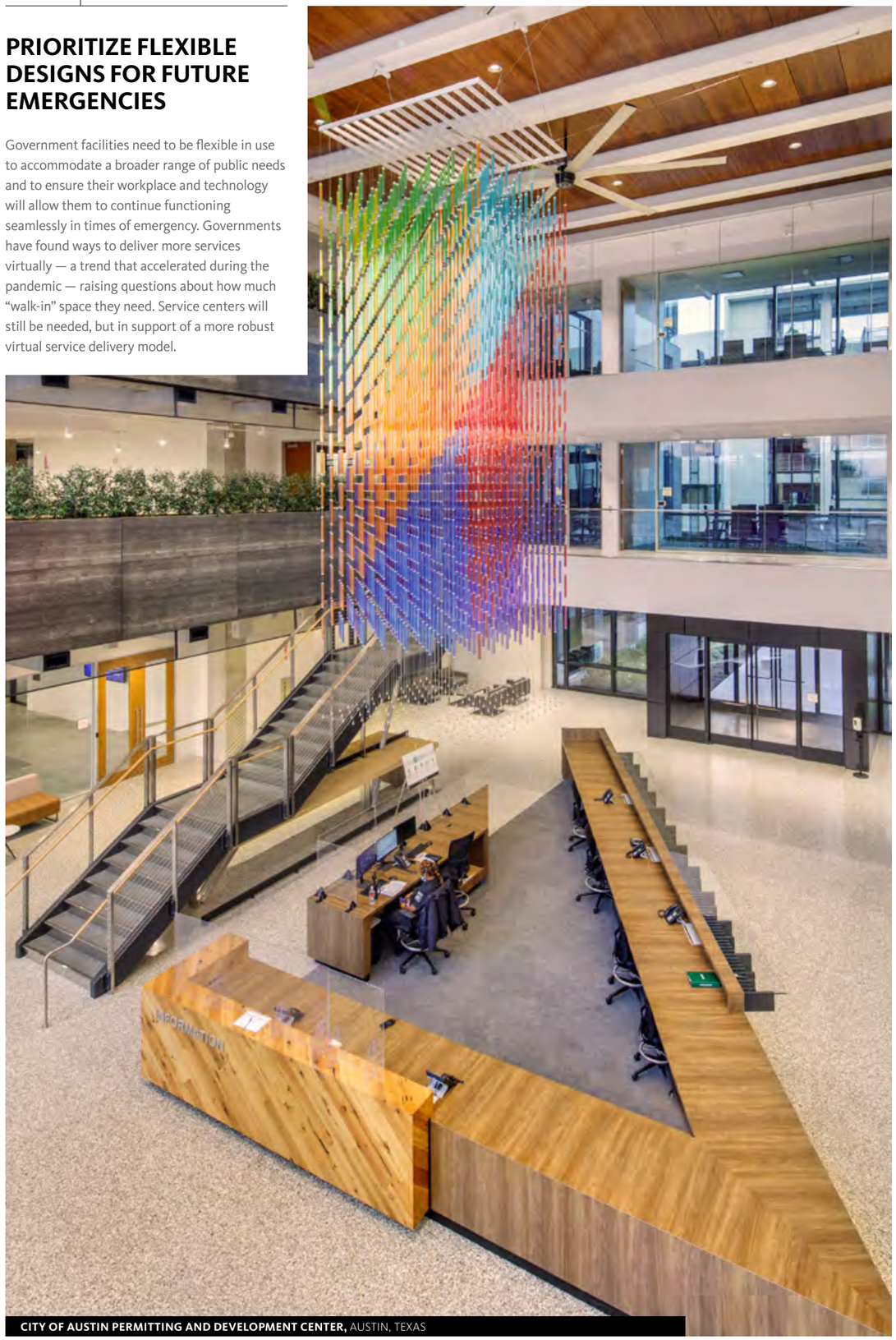
"The new normal is for our facilities' design, maintenance, and operations to inspire a sense of health, safety, and trust in our government employees and the public they serve."

—GENSLER DIALOGUE BLOG, "DESIGNING GOVERNMENT OFFICES FOR THE POST-COVID ERA"

MECKLENBURG COUNTY COMMUNITY RESOURCE CENTER, CHARLOTTE, N.C.

PRIORITIZE FLEXIBLE DESIGNS FOR FUTURE EMERGENCIES

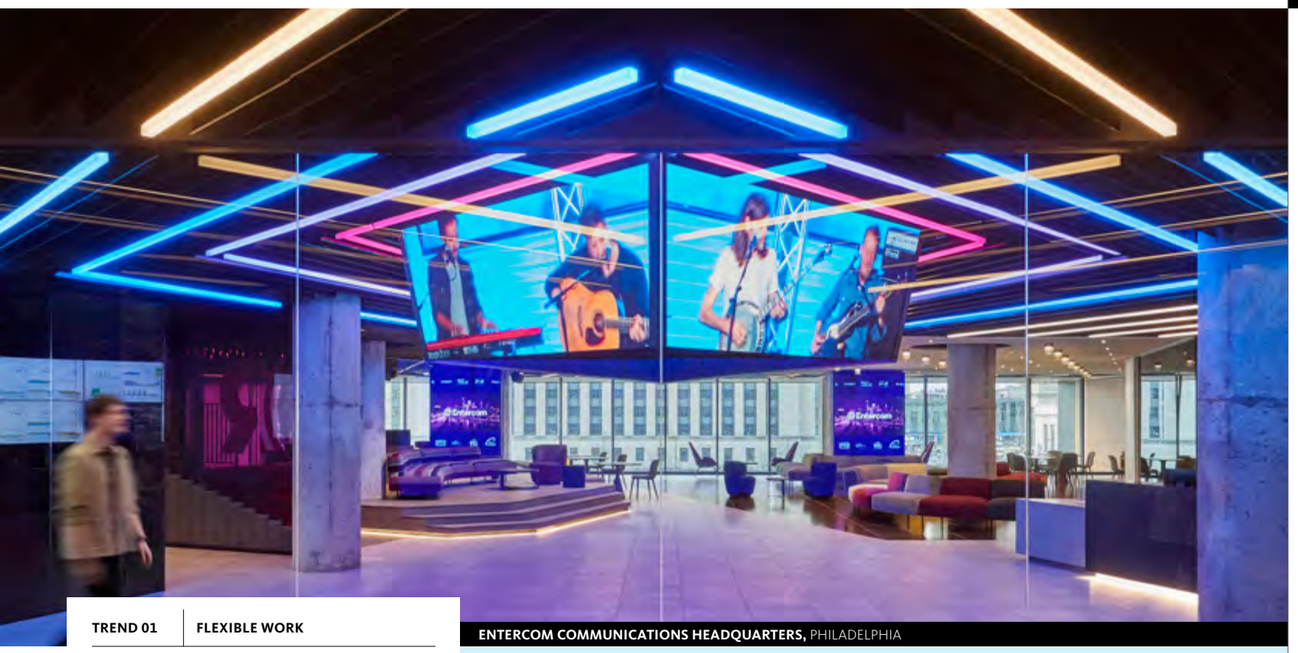
Government facilities need to be flexible in use to accommodate a broader range of public needs and to ensure their workplace and technology will allow them to continue functioning seamlessly in times of emergency. Governments have found ways to deliver more services virtually — a trend that accelerated during the pandemic — raising questions about how much "walk-in" space they need. Service centers will still be needed, but in support of a more robust virtual service delivery model.



CITY OF AUSTIN PERMITTING AND DEVELOPMENT CENTER, AUSTIN, TEXAS

MEDIA

The rate of change in the media industry has accelerated with the increased adoption of streaming services and 5G, mobile technologies, consolidation, and increases in the speed and volume of content creation. The velocity of change is impacting the spaces media companies inhabit as the industry considers flexible work options, new settings, and digital technologies.



ENTERCOM COMMUNICATIONS HEADQUARTERS, PHILADELPHIA

TREND 01 | FLEXIBLE WORK

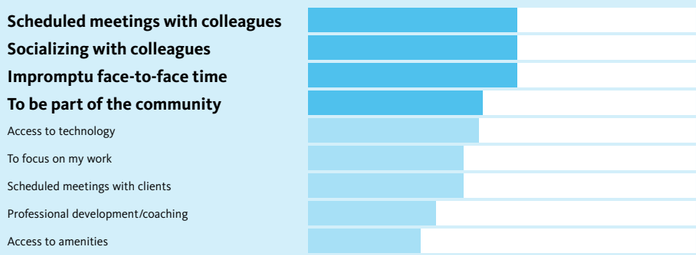
HEALTH CONCERNS HAVE PUSHED THE INDUSTRY TO EMBRACE FLEXIBLE WORK

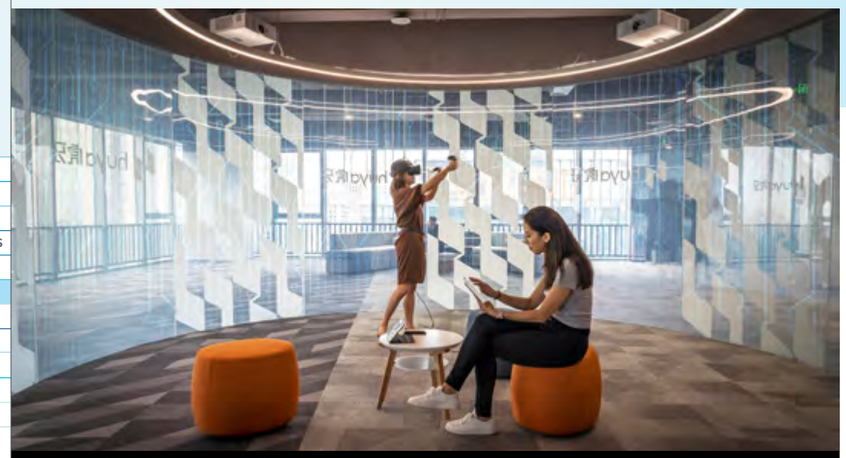
The media industry has traditionally not embraced flexible work; however, media and entertainment companies are now increasingly considering flexible work options such as unassigned seating, work-from-home, and flexible arrangements. With the pandemic, the industry has also rapidly adopted technologies that were previously in beta cycles, making it possible to seamlessly shift to distributed production workflows enabling remote content creation and distribution. While studios for video and audio content creation will not go away, the media workplace and campus will be designed to support content capture and distribution.

THE TOP REASON EMPLOYEES WANT TO COME TO THE OFFICE: THE PEOPLE

Employees see the office as most important for what's hardest to do at home: socializing and connecting.

—GENSLER U.S. WORK FROM HOME SURVEY 2020 SUMMER/FALL





HUYA HEADQUARTERS, GUANGZHOU, CHINA

TREND 02 | CONTENT CREATION

THE WORKPLACE REMAINS CRITICAL FOR CONTENT CREATION

The pandemic prompted a shutdown at entertainment and media facilities across the globe and necessitated the move toward virtual and remote production and editing. Despite this shift, the physical workplace remains integral; in a highly relationship-driven creative industry, the workplace can foster human connections and evoke honesty, transparency, and egalitarianism. Such qualities are critical for an industry at the heart of a healthy, civil, and equitable public discourse. Media employees will return to the workplace not just for access to content creation spaces, but also to cultivate trust.

TREND 03 | EMERGING BUSINESS MODELS

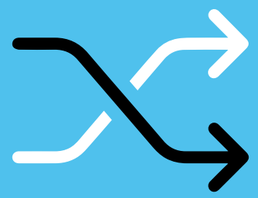
THE PANDEMIC INTRODUCED NEW BUSINESS MODELS

While COVID-19 has upended some segments of the Media industry, others have thrived, including on-demand video and streaming services. Companies that were already moving toward home-based entertainment are well positioned for this shift. To open up new revenue opportunities, some businesses are creating new business models to meet consumers where they are — at home and online. Gaming platforms are integrating e-commerce and digital platforms are hosting live events that deliver immersive home entertainment experiences. In China, for example, rising e-commerce use via live streaming has amplified in the lockdown period, according to PwC. Designing cohesive digital and physical experiences is important to drive customer loyalty.

MEDIA WORKERS DEMAND CHOICE AND FLEXIBILITY

Media workers seek a high degree of flexibility and see the workplace as a center for collaboration.

—GENSLER U.S. WORK FROM HOME SURVEY 2020



With disruption as the constant, the only way to survive and thrive in exceptional circumstances is to build systemic agility.

—EY

REINVENTION IS VITAL

1/3

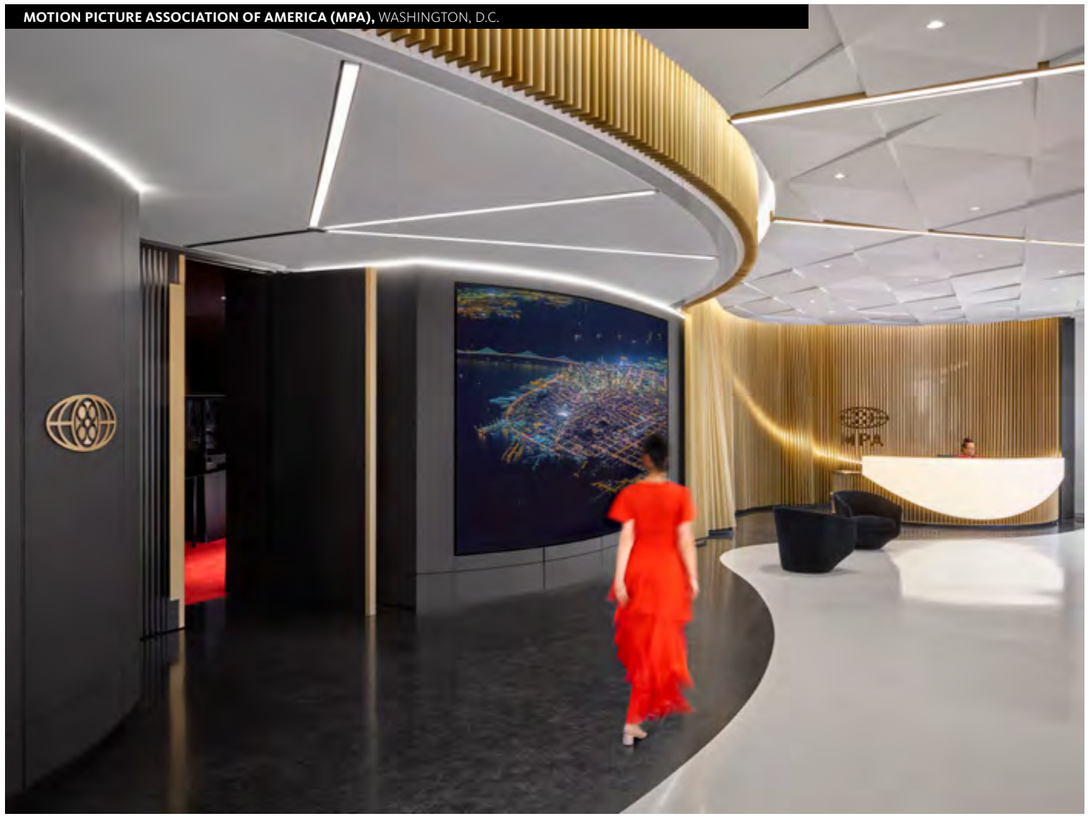
OVER A THIRD (34%) OF MEDIA AND ENTERTAINMENT COMPANIES WILL CEASE TO EXIST WITHOUT REINVENTION.

—EY

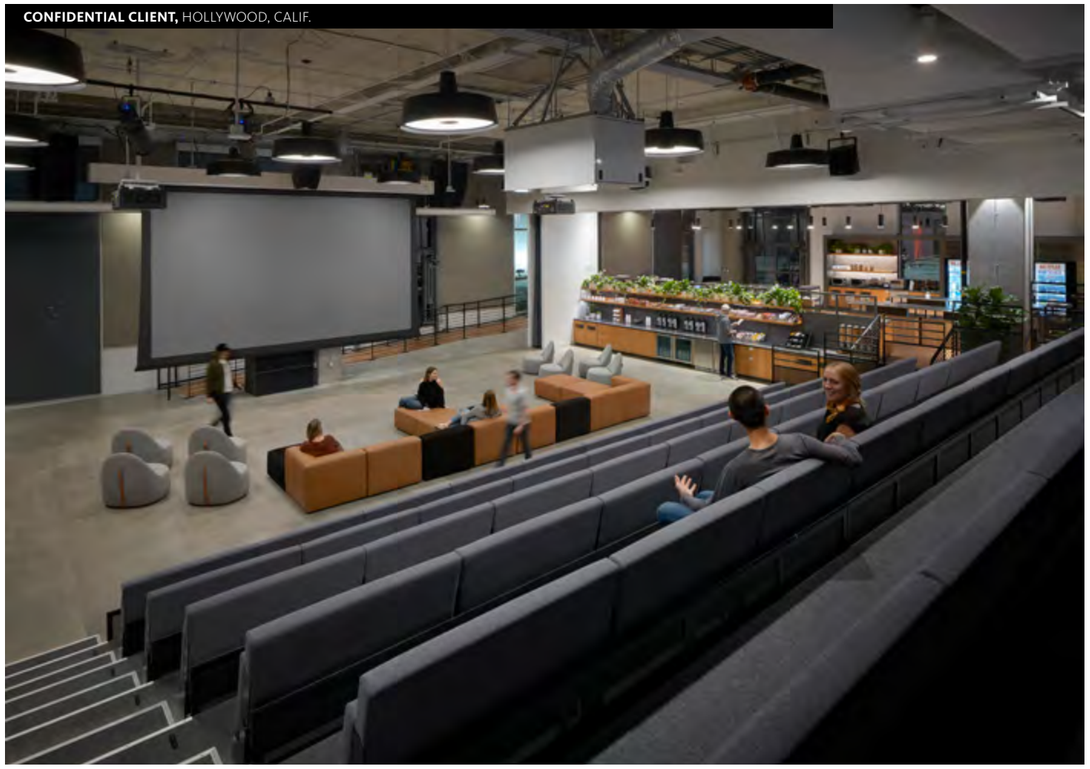
BROADBAND AND DATA CONSUMPTION GROWTH CONTINUES

Despite global disruption, fixed broadband reached 1 billion households in 2020, with unique mobile internet subscribers nudging past 3.4B at the end of the year. In 2021, data consumption will see strong growth, and usage via smartphone will see the largest jump, especially as 5G is adopted.

—PwC



MOTION PICTURE ASSOCIATION OF AMERICA (MPA), WASHINGTON, D.C.



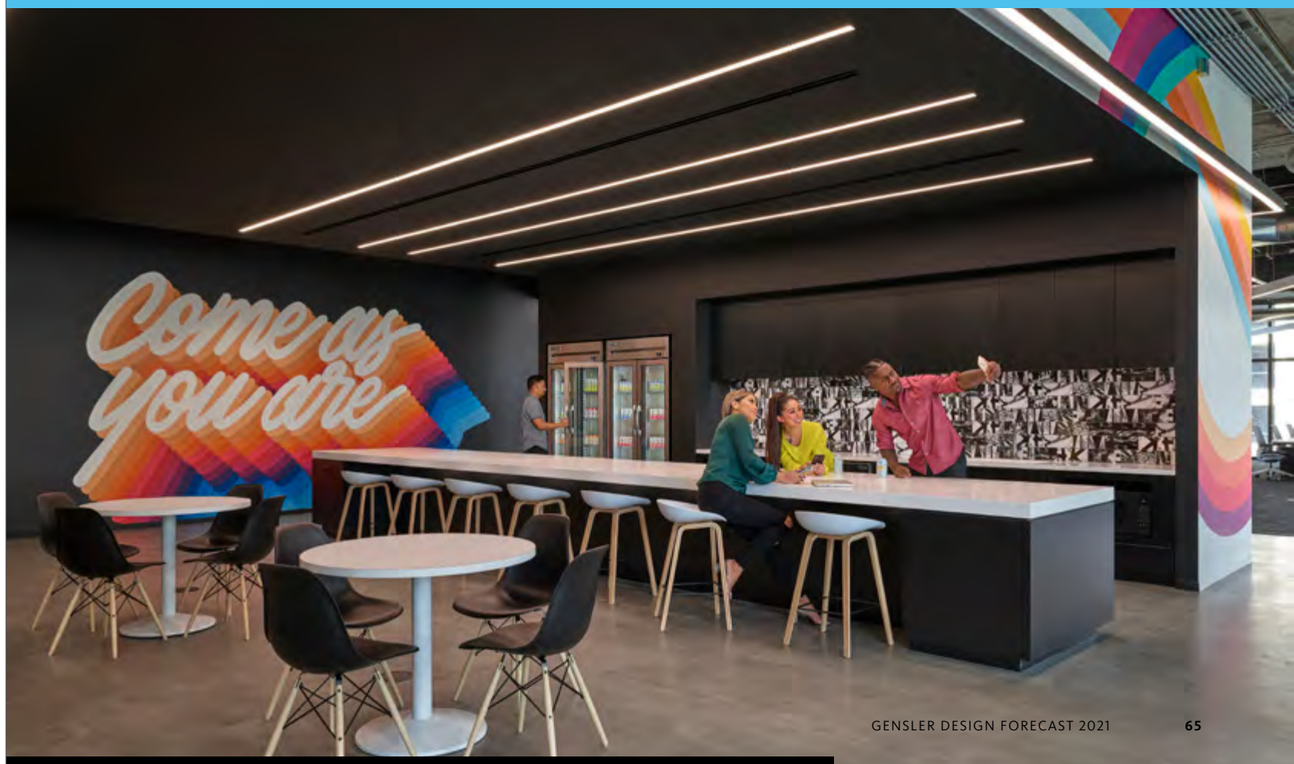
CONFIDENTIAL CLIENT, HOLLYWOOD, CALIF.

AT&T XANDR HEADQUARTERS, NEW YORK

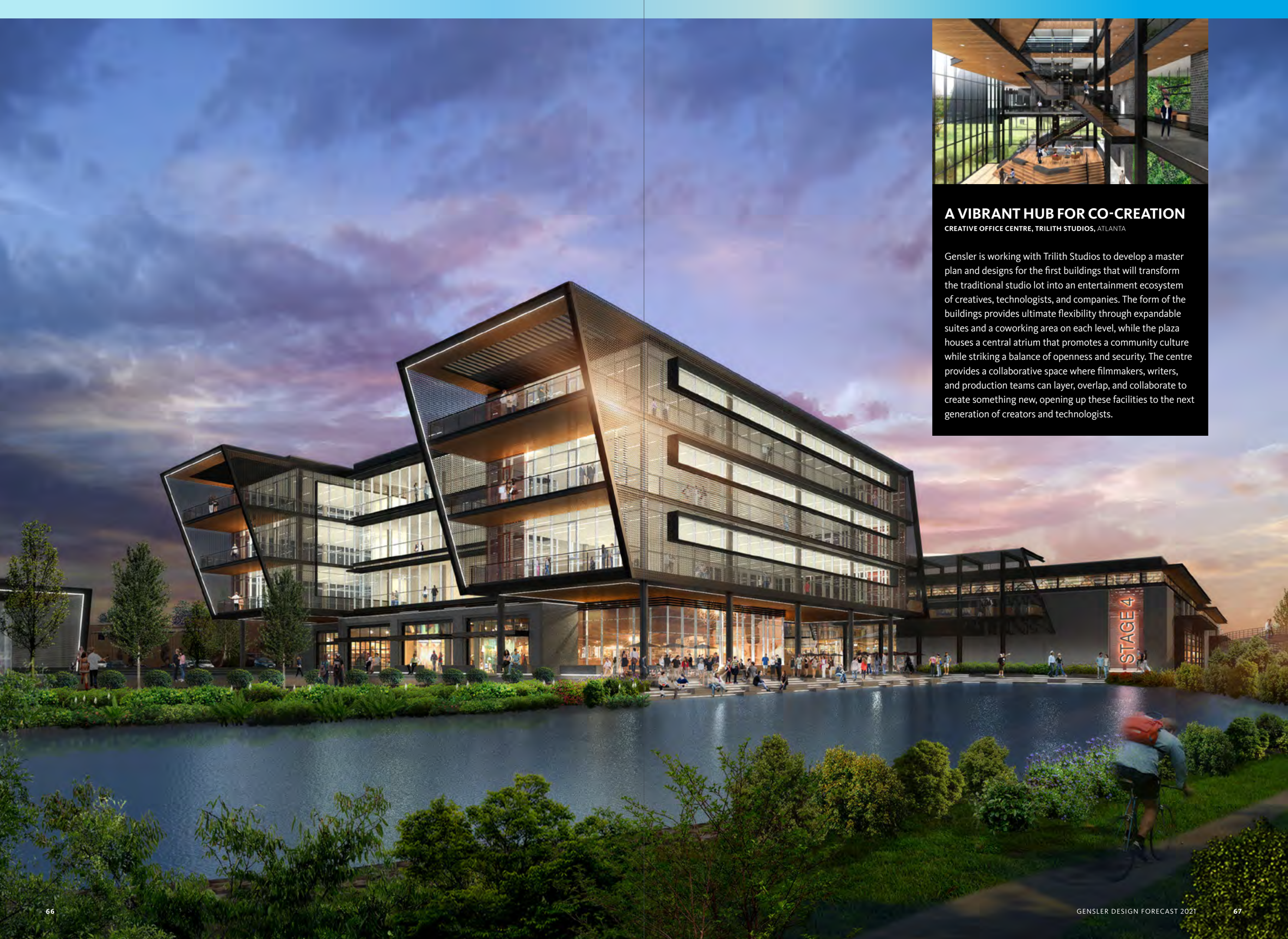
TREND 04 | **WORKPLACE EQUITY**

THE POST-PANDEMIC HYBRID WORKPLACE CAN PROMOTE EQUITY

The future workplace must evolve to serve new needs; support flexible, hybrid working styles; and promote equity for all workers. If working from home is a regular part of the emerging hybrid work model, we must acknowledge that not all homes are equal. Many homes do not have strong internet access, enough space for a desk, ergonomic chairs, or enough silence to accommodate focused work. By creating a workplace for a hybrid future that prioritizes equity, companies have an opportunity to engage with and support a broader range of new and diverse talent.



TIKTOK HEADQUARTERS, LOS ANGELES



A VIBRANT HUB FOR CO-CREATION

CREATIVE OFFICE CENTRE, TRILITH STUDIOS, ATLANTA

Gensler is working with Trilith Studios to develop a master plan and designs for the first buildings that will transform the traditional studio lot into an entertainment ecosystem of creatives, technologists, and companies. The form of the buildings provides ultimate flexibility through expandable suites and a coworking area on each level, while the plaza houses a central atrium that promotes a community culture while striking a balance of openness and security. The centre provides a collaborative space where filmmakers, writers, and production teams can layer, overlap, and collaborate to create something new, opening up these facilities to the next generation of creators and technologists.

OFFICE BUILDINGS:

DEVELOPER

What are tenants looking for in the post-pandemic office? As hybrid work styles are paramount and office workers are looking for a more purposeful trip to the office, today's workplace is a place where health and wellness, sustainability, and social responsibility are the essential drivers. These are the elements that will attract talent and make investments go further.

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REAL ESTATE SERVICES & CONSULTING
TECHNOLOGY

HINES RIVERWALK MASTER PLAN, SAN DIEGO

TREND 01 | INVESTMENT OPPORTUNITIES

TENANTS WANT OFFICES THAT HAVE A POSITIVE IMPACT

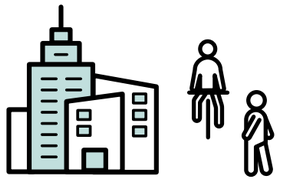
Developers are looking to invest in projects that make a measurable difference in environmental, social, and governance terms. Some amenities conversations will be driven by a desire to impact the social equity of communities, introducing elements such as healthy food grocers. Emphasis on universal design will tick upwards, going beyond baseline ADA requirements to maximize ease of use for all ages, sizes, and abilities. Alternative construction methods will also be on the table. Mass timber offers a highly renewable resource that removes carbon from the atmosphere. The combination of fire resistance, structural integrity, and environmental attributes makes new wood buildings an attractive option.

15–20%

REPLACING STEEL WITH MASS TIMBER WOULD REDUCE CARBON DIOXIDE EMISSIONS BY 15% TO 20%.

—THINK WOOD

ALMADEN BOULEVARD TOWER, SAN JOSE, CALIF.



THE 20-MINUTE CITY IS A FINANCIAL BOON

DEVELOPMENTS IN "WALKABLE URBAN PLACES" DEMANDED 75% HIGHER RENT OVER THE METRO AVERAGE IN THE NATION'S 30 LARGEST CITIES, ALL WHILE INCREASING EQUITY AND INVESTMENT OPPORTUNITIES.

—BLOOMBERG CITYLAB

TREND 03 | OFFICE EXPERIENCE

THE ROLE OF THE OFFICE BUILDING HAS CHANGED

The office building is no longer just a container for workers; it will become less important to maximize density. As we adapt to a hybrid lifestyle where the workforce is split between the office and home, the role of the workplace will be to strengthen relationships, teach others, and build community, culture, and purpose. Since tenants feel safer and healthier outdoors, they will want their workplaces to offer easy connections to outdoor space. Articulated terraces and balconies along with interconnecting outdoor stairs will offer cohesive new social experiences. Rather than open-plan floors, the future office will be "open section," providing multilevel settings where views, movements, and ideas are not constrained by walls and windows.

TREND 02 | COMMUNITY IMPACT

OFFICE BUILDINGS WILL ATTRACT NEW TENANTS BY BEING PART OF THE COMMUNITY

Even when workers are not present, office buildings should be contributing to their surrounding neighborhoods. Their ground levels will become the anchors of the 20-minute city. Community-oriented programs like health centers, libraries, coworking spaces, and classrooms can serve both building tenants and neighbors at different times, keeping the space activated for at least 18 hours per day. The future office will also be site-specific, culturally sensitive, and responsive to the local climate. Wherever possible, the integration of greenery with building skins and balconies will become more common. The use of regional design languages and locally sourced materials will bolster authenticity.

545WYN, MIAMI

THE MORPHABLE OFFICE, BALTIMORE

4

Strategies for Attracting New Tenants to Your Buildings

Here are four strategies that building owners and developers can leverage to have more informed conversations with prospective tenants in the post-pandemic market.

These insights are agnostic to aesthetics or any current stylistic trends, keeping the focus on the fundamental value and experience of commercial real estate properties.

1 FOR SPEC WORK, TAILOR BUILDING DESIGN TO INDUSTRY-SPECIFIC SECTORS.

In these uncertain times, tailor office building designs to the industry sectors currently seeing investment and growth. Life sciences, government, and medical tenants are more likely to be active in certain markets, and they each have specific requirements not easily met by existing office inventory. Design with flexibility to accommodate a broad range of sectors, providing flexibility for a wider variety of tenants.

2 CREATE LIGHT, AIR, AND SPACE AS AN ARCHITECTURAL STRATEGY.

These timeless base building attributes are now even more essential for tenants to feel comfortable and safe. Tenant spaces with abundant natural light, enhanced air filtration, and generous common areas for circulation, waiting, and staging will be the most desirable.

3 STAND UP VISUALIZATION TOOLS SUCH AS DIGITAL TWINS TO CONVEY THE TENANT EXPERIENCE.

Prospective tenants are already expecting virtual walkthroughs, so augmented reality or virtual reality experiences will be helpful for unbuilt designs. The ability to help tenants imagine something that they might not yet see for themselves is the key to unlocking value in any real estate asset.

4 FOCUS ON WELLNESS AS AN AMENITY STRATEGY.

Amenities are not going away — they are simply evolving to support our physical and mental well-being. Office buildings will incorporate biophilia, heathy food choices, and multiple opportunities for movement. Providing easy access to comfortable outdoor spaces is key for working, meeting, and socializing at a safe distance.

GUANGZHOU SHIMAO QIANHAI TOWER, SHENZHEN, CHINA

WORKPLACE JOURNEYS SPARK CREATIVITY

"If we're trying to spark creativity at work, we should think of the office less as a single destination and more as a journey of discovery."

—GENSLER DIALOGUE BLOG, "THE OFFICE BUILDING OF THE FUTURE SHOULD BE AN ESSENTIAL PART OF ITS COMMUNITY."

VIETTEL GROUP HEADQUARTERS, HANOI, VIETNAM

OFFICE BUILDINGS:

REPOSITIONING & LANDLORD SERVICES

Flexibility, adaptability, and well-being are driving the next chapter of building repositioning. Viewed through this lens, repositioned real estate is increasingly being understood as a reimagined experience that will serve an inclusive role in the surrounding community. A building's performance on health measures will be a key differentiator.

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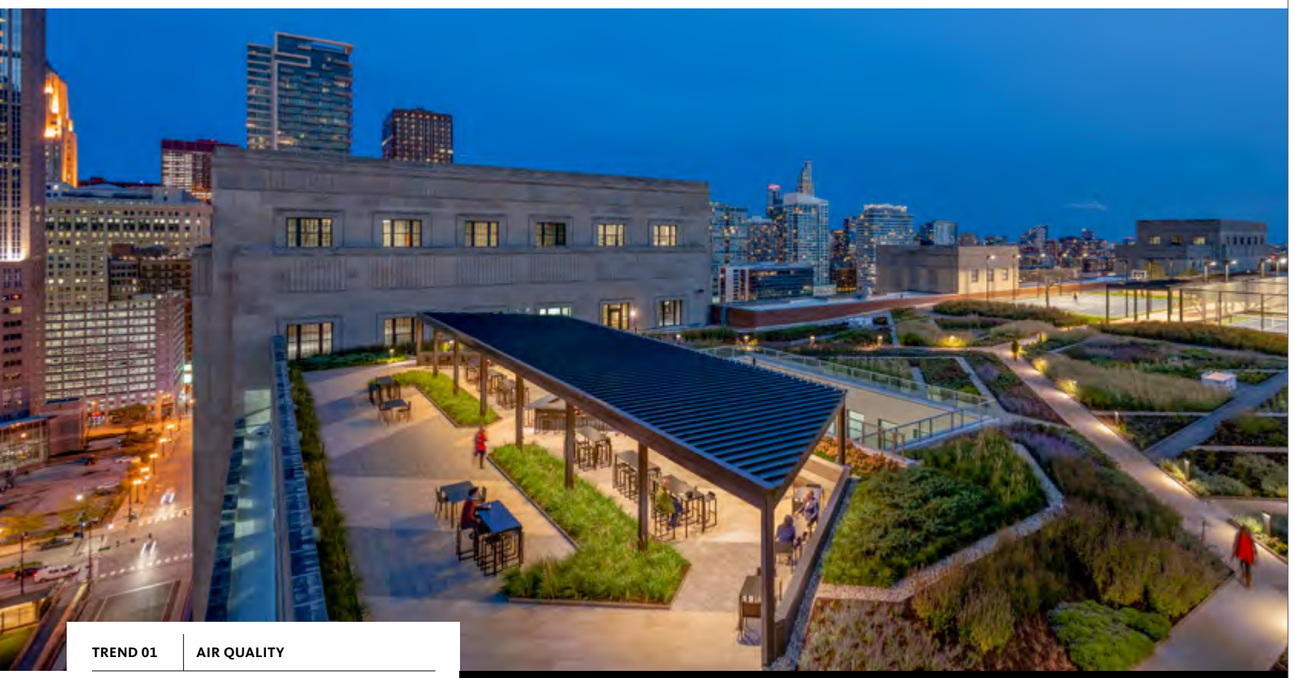


THE POST OFFICE, CHICAGO

TREND 01 | AIR QUALITY

ACCESS TO FRESH AIR AND HVAC UPGRADES WILL ATTRACT TENANTS

The pandemic put a renewed focus on health and well-being, so buildings that have connections with the outdoors, environmental control, mixed-use environments, Indoor Air Quality (IAQ) monitoring, and anti-pathogen HVAC upgrades will appear more attractive to tenants. Never has access to fresh air been more important; fully mechanical ventilated buildings may become a thing of the past. As the pandemic increases support for third-party health certifications and reveals the need for an independent building cleanliness rating system, owners may choose to get ahead of upcoming requirements.

THE ARCHITECTURE AND PUBLIC HEALTH CONNECTION

"We've designed buildings for 100-year floods. Now we have to learn to design for the 100-year flu."

—KEVIN VAN DEN WYMELENBERG, DIRECTOR OF THE INSTITUTE FOR HEALTH IN THE BUILT ENVIRONMENT

ONE EMBARCADERO CENTER, SAN FRANCISCO

TREND 02 | POLYCENTRIC WORK

BUILDINGS MUST ADAPT TO POLYCENTRIC WORKING

The notion of the single headquarters office may become a thing of the past as tenants take a hard look at things like commute times during the pandemic. What could emerge is the concept of "homing from work," in which people spend longer hours around the office on fewer days per week, and exercise a far more meaningful combination of work and play. Approaches like this maximize comfort and convenience within and around the workplace and can help minimize the commuting burden by depressurizing rush hour. In anticipation of the changes, developers are creating highly flexible buildings that can work for many different industry types and can adapt to changes in shared spaces versus tenant-only spaces.

OLDER OFFICE BUILDINGS ARE RIPE FOR IMPROVEMENT

1/3

ONE COHORT OF OFFICE BUILDINGS, THOSE BUILT BETWEEN 1946 AND 1979, IS STILL OPERATING WITH A HIGHER EUI [ENERGY USE INTENSITY] THAN OTHER GENERATIONS. CONSTITUTING NEARLY A THIRD OF THE NATION'S OFFICE STOCK, THIS COHORT IS FERTILE GROUND FOR FURTHER IMPROVEMENT.

—AMERICAN INSTITUTE OF ARCHITECTS

TREND 03 | HOSPITALITY AND WELLNESS

HOSPITALITY-ORIENTED OFFICES WILL BE IN HIGH DEMAND POST-COVID

What will make someone go into the office in a post-pandemic world? Offices that are hospitality- and wellness-oriented and buildings that are able to engage on the street level with their communities will be key differentiators. As office environments become less about individual desks and more about creating shared experiences, the buildings with more and better stair connections will win out.

PARK POINT BUSINESS PARK, DURHAM, N.C.

"THE STITCH," OUTLET MALL CONVERSION, MORRISVILLE, N.C.

ADAPTIVE REUSE CAN MITIGATE EMISSIONS AND COSTS

"Adaptive reuse stands as a method to cut back enormously on both the emissions and the construction and demolition waste — not to mention the associated costs — that come with building something new."

—GENSLER DIALOGUE BLOG, "ADAPTIVE REUSE STRATEGIES FOR A NET-ZERO FUTURE"

INDIANAPOLIS CREATIVE OFFICE, INDIANAPOLIS

HOUSTON CENTER REPOSITIONING, HOUSTON

5

Ways Developers Can Reposition Office Buildings for the Future

Existing office building stock represents a massive opportunity to reimagine our communities without maximizing our footprint. Rather than allowing buildings to remain insular and self-contained, office building developers can transform tower blocks into integrated, socially responsible buildings that contribute to the surrounding community. Here are five ways to make that happen:

1 INTEGRATE THE GROUND FLOOR INTO THE COMMUNITY.

Building owners will need to expand their definition of "ROI" and become invested neighbors, working together with governing agencies to make the buildings in their communities active, self-supporting, and inviting. The streetscape will evolve into building lobbies with front porches, all offering something unique to support a community that is invested in its success.

2 EMBRACE GREENERY.

Fresh air, water, sun, and shade are always desirable, and by converting hard surface plazas into designated pocket parks or city gardens, we can bridge the gap between the office and nature, work, and play.

3 MAKE SPACE FOR THE NEW MOBILITY.

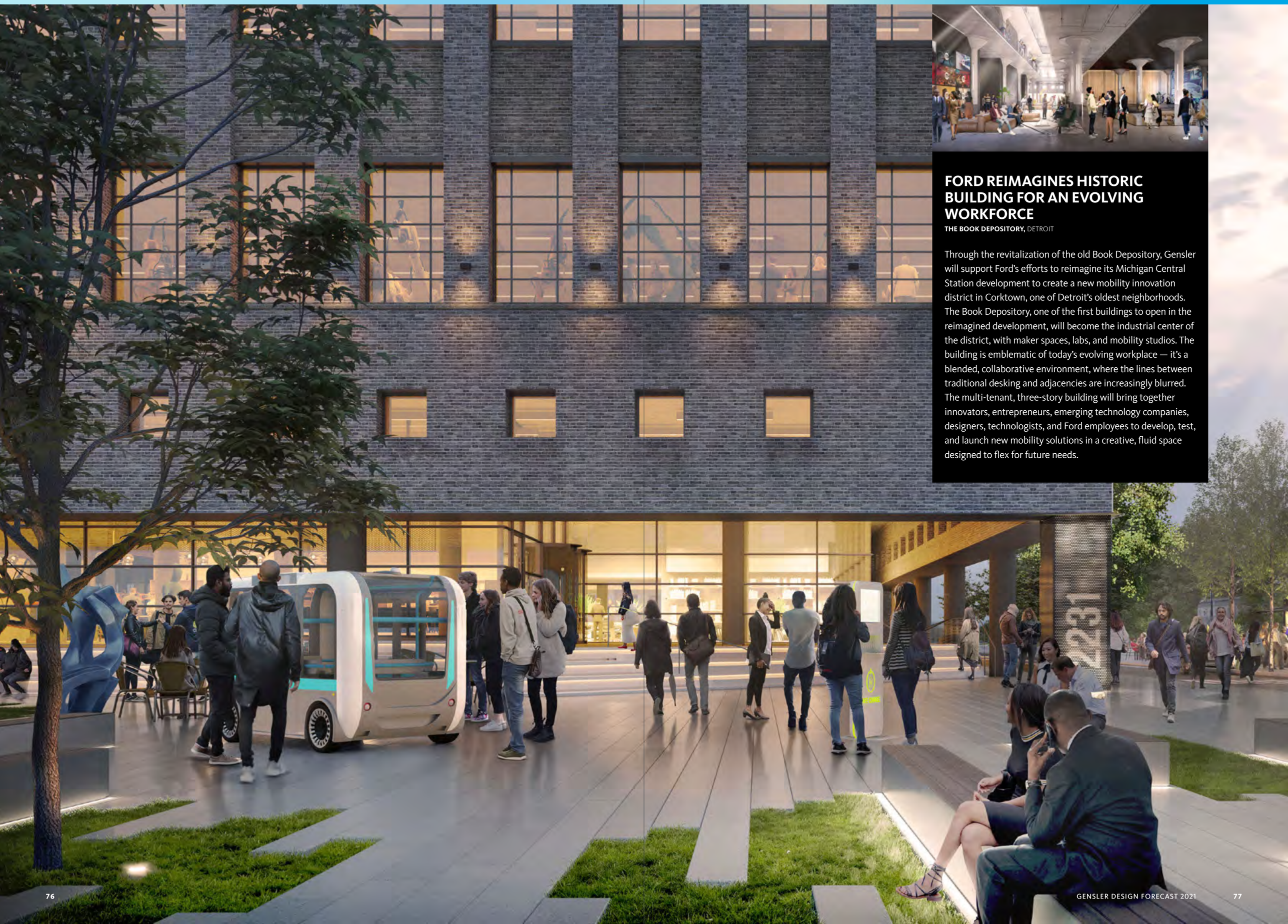
The acceleration of micro-mobility, delivery services, and electric vehicles has created the need to offset traditional parking with bike and scooter depots, shower or locker room facilities, and charging infrastructure.

4 CREATE OPPORTUNITIES FOR USERS TO PERSONALIZE THEIR JOURNEYS.

Personal devices are beginning to replace building ID, security card, and elevator access systems. Tenants will expect their devices to be integrated into the environment and enable them to reserve amenities, conference space, micro-mobility valets, and other services.

5 SEEK OUT A DIVERSE SET OF NEW OFFERINGS.

Landlords will need to find different financial models that support tenants' needs, such as shorter-term leases, support spaces, and new programming. On-site or easily accessible nearby conveniences like medical clinics, grocery shopping, ghost kitchens, production spaces, and embedded technology will be valuable offerings.



FORD REIMAGINES HISTORIC BUILDING FOR AN EVOLVING WORKFORCE

THE BOOK DEPOSITORY, DETROIT

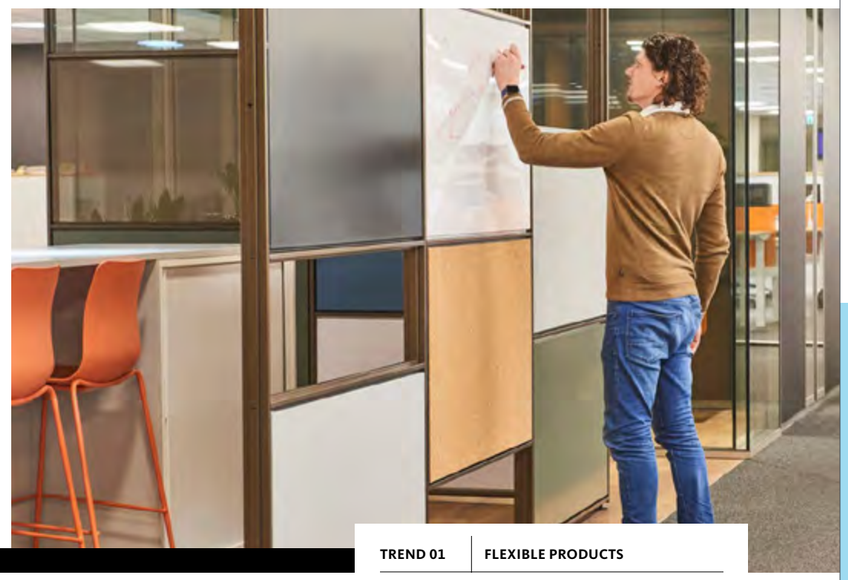
Through the revitalization of the old Book Depository, Gensler will support Ford's efforts to reimagine its Michigan Central Station development to create a new mobility innovation district in Corktown, one of Detroit's oldest neighborhoods. The Book Depository, one of the first buildings to open in the reimagined development, will become the industrial center of the district, with maker spaces, labs, and mobility studios. The building is emblematic of today's evolving workplace — it's a blended, collaborative environment, where the lines between traditional desking and adjacencies are increasingly blurred. The multi-tenant, three-story building will bring together innovators, entrepreneurs, emerging technology companies, designers, technologists, and Ford employees to develop, test, and launch new mobility solutions in a creative, fluid space designed to flex for future needs.

PRODUCT DEVELOPMENT

The fundamentals of great product design haven't changed, but the landscape in which they operate has. The optimized end-user experience will be more flexible, hygienic, and sustainable. Manufacturers can set themselves apart by pursuing product designs that are informed by a deep understanding of how relevant market sectors are adjusting to the new playing field.

- CONSUMER GOODS
- ENERGY
- FINANCIAL SERVICES
- FOUNDATIONS, ASSOC. & ORGANIZATIONS
- GOVERNMENT & DEFENSE
- MEDIA
- OFFICE BUILDINGS: DEVELOPER
- OFFICE BUILDINGS: REPOSITIONING
- PRODUCT DEVELOPMENT
- PROFESSIONAL SERVICES
- REAL ESTATE SERVICES & CONSULTING
- TECHNOLOGY

MAARS LIVING WALLS M923.



TREND 01 | FLEXIBLE PRODUCTS

MORE WORKPLACE FLEXIBILITY? THAT MEANS MORE FLEXIBLE PRODUCTS

The need for a reimagined office, prompted by greater remote working, has caused companies to pursue the development of products that support flexible workspace. Widespread adoption of work-from-home policies is likely to make the office less of a daily touchdown space and more of a place to promote organizational culture and innovation. Spaces therefore need to be nimbler; they need to allow for shared desking and rotating activities in the same area. Employees with split office shifts will be sharing dedicated workspace, putting a premium on adjustability. Designs of this nature are intentionally geared toward the long term, providing lasting solutions well after the pandemic is over.

HAWORTH RESONATE

TREND 02 | HYGIENIC STRATEGIES

HYGIENIC STRATEGIES ARE HERE TO STAY

Personal protection and safety have become a greater concern in risk assessment within the work environment. The pandemic has caused companies to rethink user interfaces, favoring touch-free alternatives. It has also caused companies to rethink materiality, favoring more hygienic options that can be easily cleaned. Such concerns go beyond the pandemic itself, as a renewed societal focus on well-being leads employees to express expectations for healthier spaces in general. Related demands for more inclusive spaces could prompt increased adoption of universal design principles to ensure a consistent user experience among all groups.

HALCON HALO HAND SANITIZER STATION

AN OFFICE SPACE LANDSCAPE IN TRANSITION

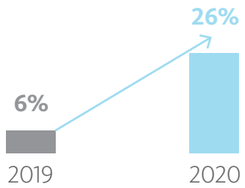
Office space decision makers expect the percentage of time worked in main and satellite offices to decline by 12% and 9%, respectively, while flex office space will hold approximately constant and work from home will increase to 27% of work time, from 20%.

—McKINSEY

AS THE HOME OFFICE RISES, PRODUCT DEMANDS FOLLOW SUIT

SHARE OF RESIDENTIAL INTERIOR DESIGN SALES RELATED TO OFFICE PRODUCTS: 6% IN 2019 AND 26% IN 2020.

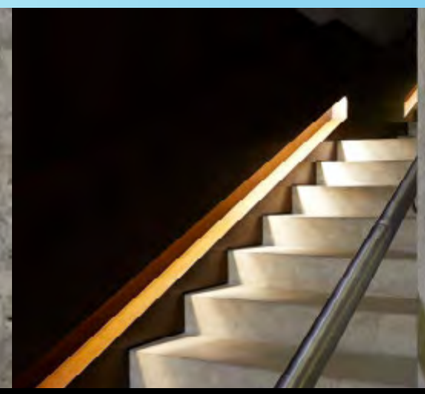
—HAVENLY SPOKESPERSON



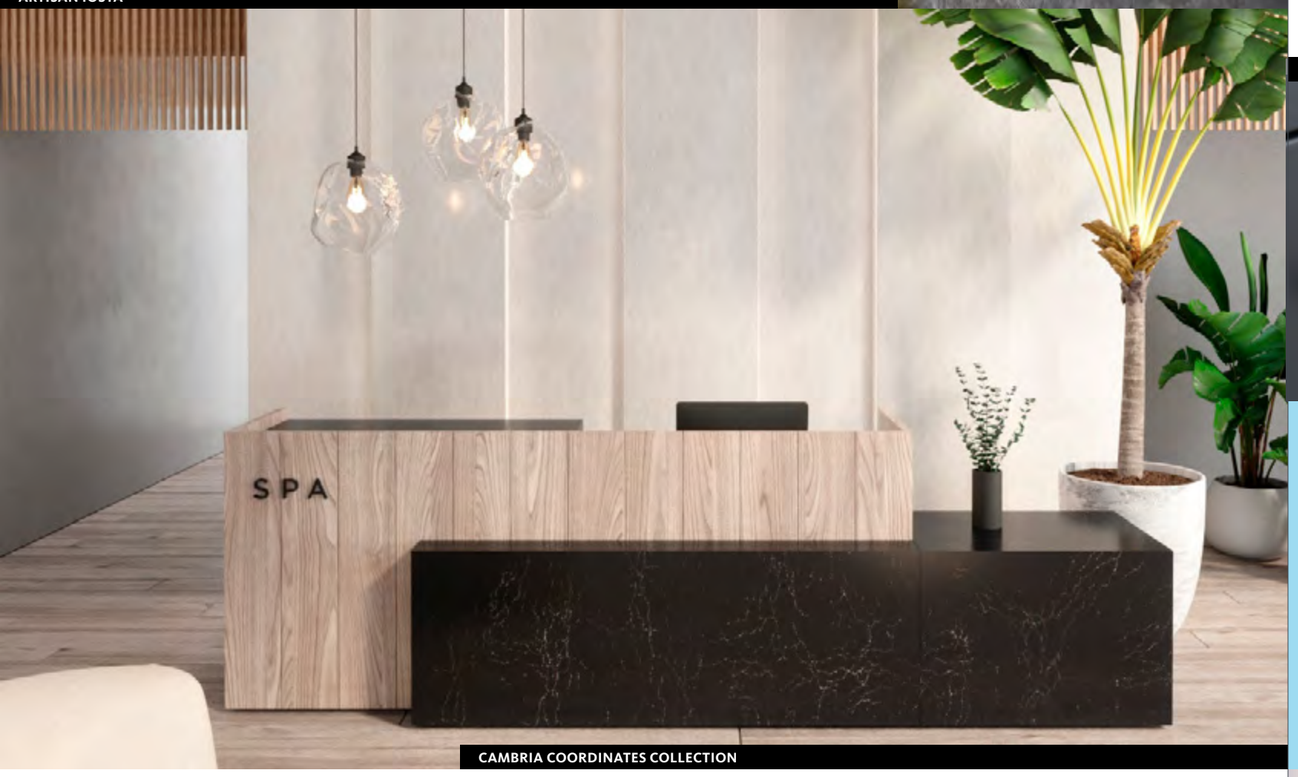
TREND 03 | THE HOME OFFICE

AS THE HOME OFFICE FLOURISHES, ITS ENVIRONMENTAL UPSIDE GETS CLEARER

The pandemic has accelerated home office usage, a trend that will persist for the long term. Companies that have typically focused on commercial product solutions are now pursuing residential alternatives. The companies that do this most successfully will equip their employees to be as productive at home as they were in the office — or even more so. In the process, they will boost retention and morale and position themselves well in the war for talent. This approach also enables companies to significantly reduce their carbon footprint. As they pivot, they can invest in products that are carbon neutral and designed for disassembly.

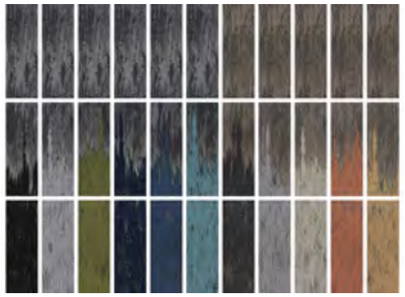


ARTISAN IOSTA

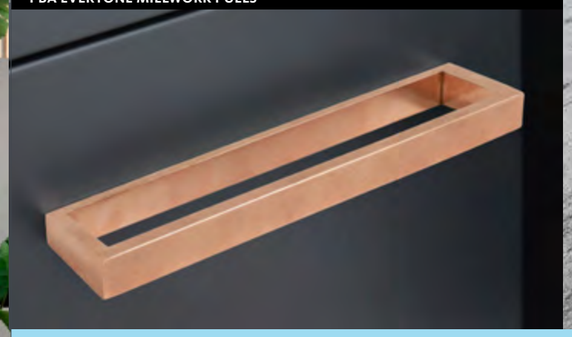


CAMBRIA COORDINATES COLLECTION

MOHAWK GROUP NUTOPIA 2.0



PBA EVERYONE MILLWORK PULLS

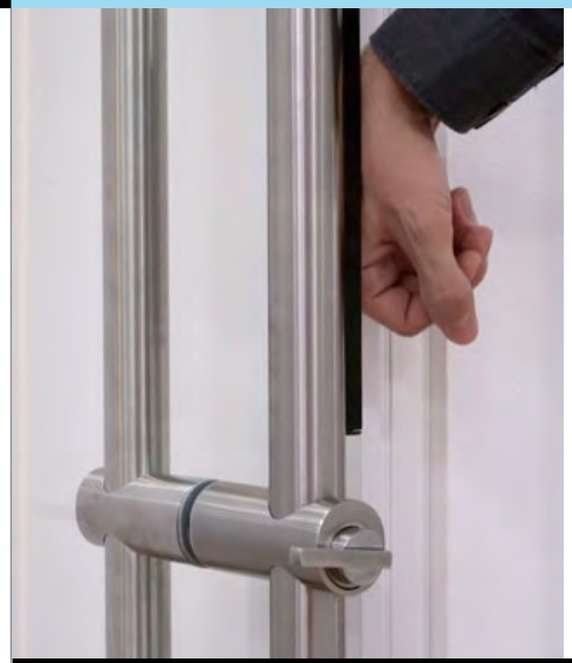


DESIGN BEYOND THE CRISIS

"Product design in times of crisis must be especially farseeing in its conception, because while the investment in development (for the manufacturer) and acquisition (for the end user) is concrete and significant, the future is less than certain. The shifting imperatives of a fast-changing landscape can make today's necessity tomorrow's closeout. As such, the product should make sense beyond the crisis and be purposeful, regardless of circumstance."

—DIALOGUE BLOG, "PRODUCT DESIGN IN TIMES OF CRISIS"

STYLEX FREE ADDRESS



PBA SINGLE-MOTION UNLOCKING DOOR PULLS

PROFESSIONAL SERVICES

Professional services firms are transforming their offices into magnets for professionals and clients. Management advisors are implementing immersive, tailored experiences to motivate a highly mobile, multitasking workforce, while legal firms are introducing new elements to spur interaction, collaboration, and a shared sense of purpose.

CONSUMER GOODS
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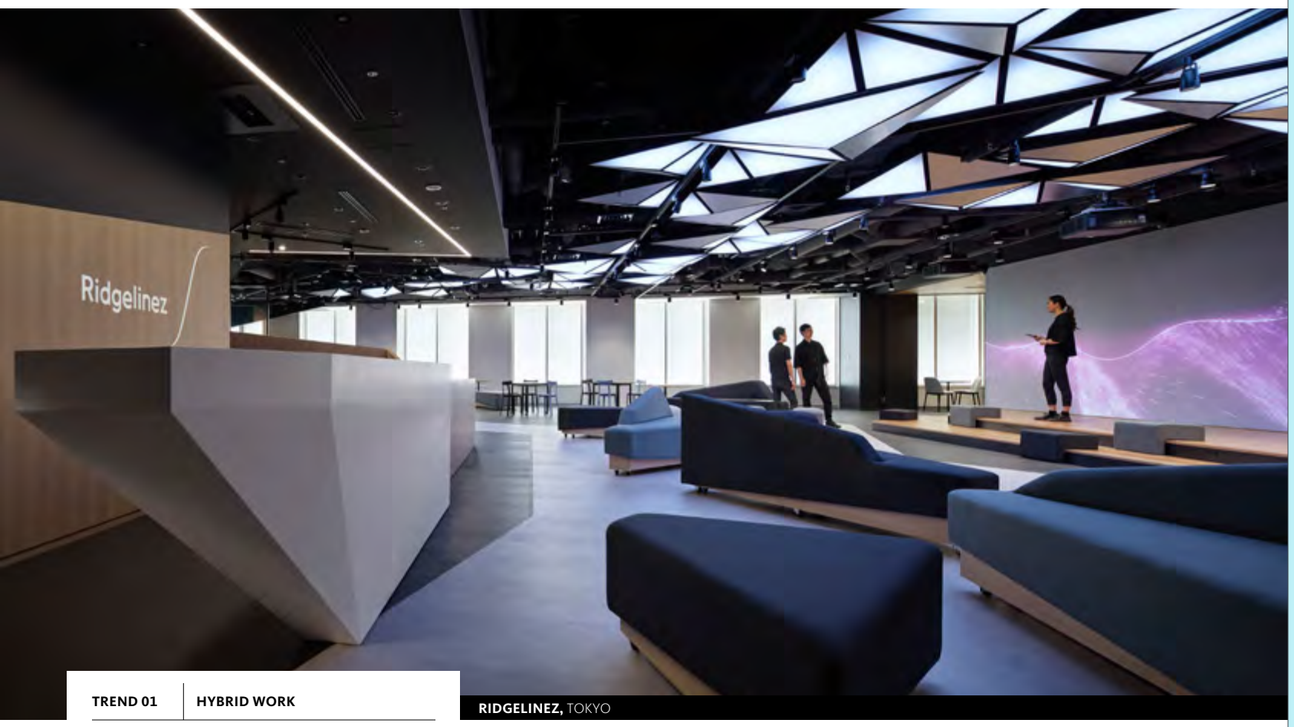
FINANCIAL SERVICES
FOUNDATIONS, ASSOC. & ORGANIZATIONS
GOVERNMENT & DEFENSE
MEDIA
OFFICE BUILDINGS: DEVELOPER
OFFICE BUILDINGS: REPOSITIONING
PRODUCT DEVELOPMENT
PROFESSIONAL SERVICES
REAL ESTATE SERVICES & CONSULTING
TECHNOLOGY



RIDGELINEZ, TOKYO

TREND 01 | HYBRID WORK

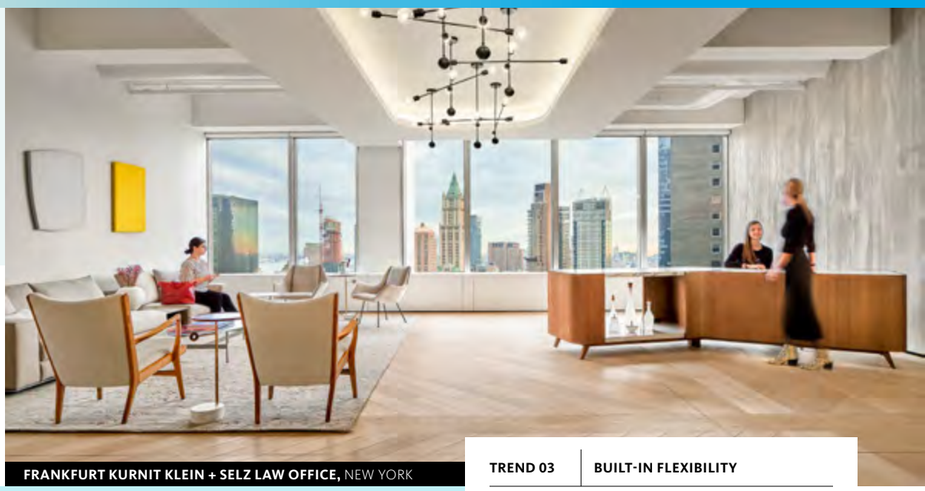
ADOPT NEW COLLABORATIVE SETTINGS FOR HYBRID WORK

The pandemic has encouraged new forms of collaboration and nontraditional working. Management advisory firms are seeing a reduction of open workstations in exchange for more collaborative settings. Firms should also implement policies and design strategies that help employees work in a new hybrid model that combines face-to-face interactions with virtual collaboration. This can extend chance encounters and informal collisions to the virtual realm.

TREND 02 | UNIVERSAL DESIGN

EMBRACE UNIVERSAL DESIGN WITH A LOCAL APPROACH

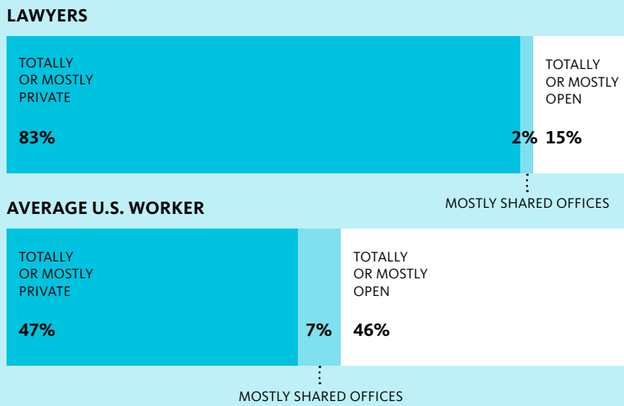
Some management advisory firms are taking a universal design approach, where a large percentage of workplace design is globally prescriptive, but a meaningful amount is reflective of local culture and materials. Universal design makes facilities more functional for a wider range of people, recognizing that there's no such thing as the "average" user, and creating an environment that has a collective benefit for all people who need to use it.



FRANKFURT KURNIT KLEIN + SELZ LAW OFFICE, NEW YORK

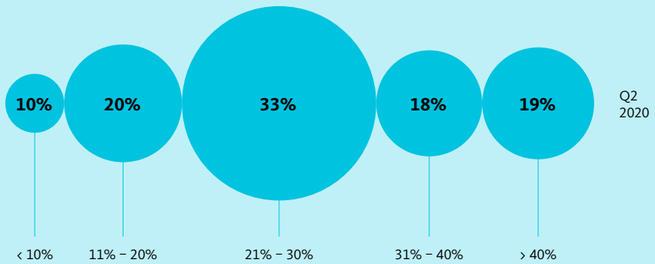
MORE SO THAN ANY OTHER INDUSTRY, LAWYERS CONTINUE TO PREFER PRIVATE ENVIRONMENTS.

—GENSLER U.S. WORKPLACE SURVEY 2020 SUMMER/FALL



IN TWO YEARS, WHAT PERCENTAGE OF YOUR ATTORNEYS WILL WORK REMOTELY MORE THAN TWO DAYS A WEEK?

—CUSHMAN & WAKEFIELD



TREND 03 | BUILT-IN FLEXIBILITY

THE PANDEMIC IS INSPIRING A MORE FLEXIBLE CULTURE

The COVID crisis and the shift to remote work have prompted some law firms to rethink their real estate requirements. Dynamic seating, along with flexible amenities and alternative choices like hoteling suites, is an emerging paradigm that can help some firms achieve significant space savings. Recognizing that lawyers can be engaged and productive no matter where they are, the industry has an opportunity to build a more flexible culture by making remote working a permanent part of their operations.

HOME ENVIRONMENTS ARE EFFECTIVE WORK ENVIRONMENTS

Few lawyers had worked from home regularly prior to COVID-19. Most now see home environments as effective environments for working.

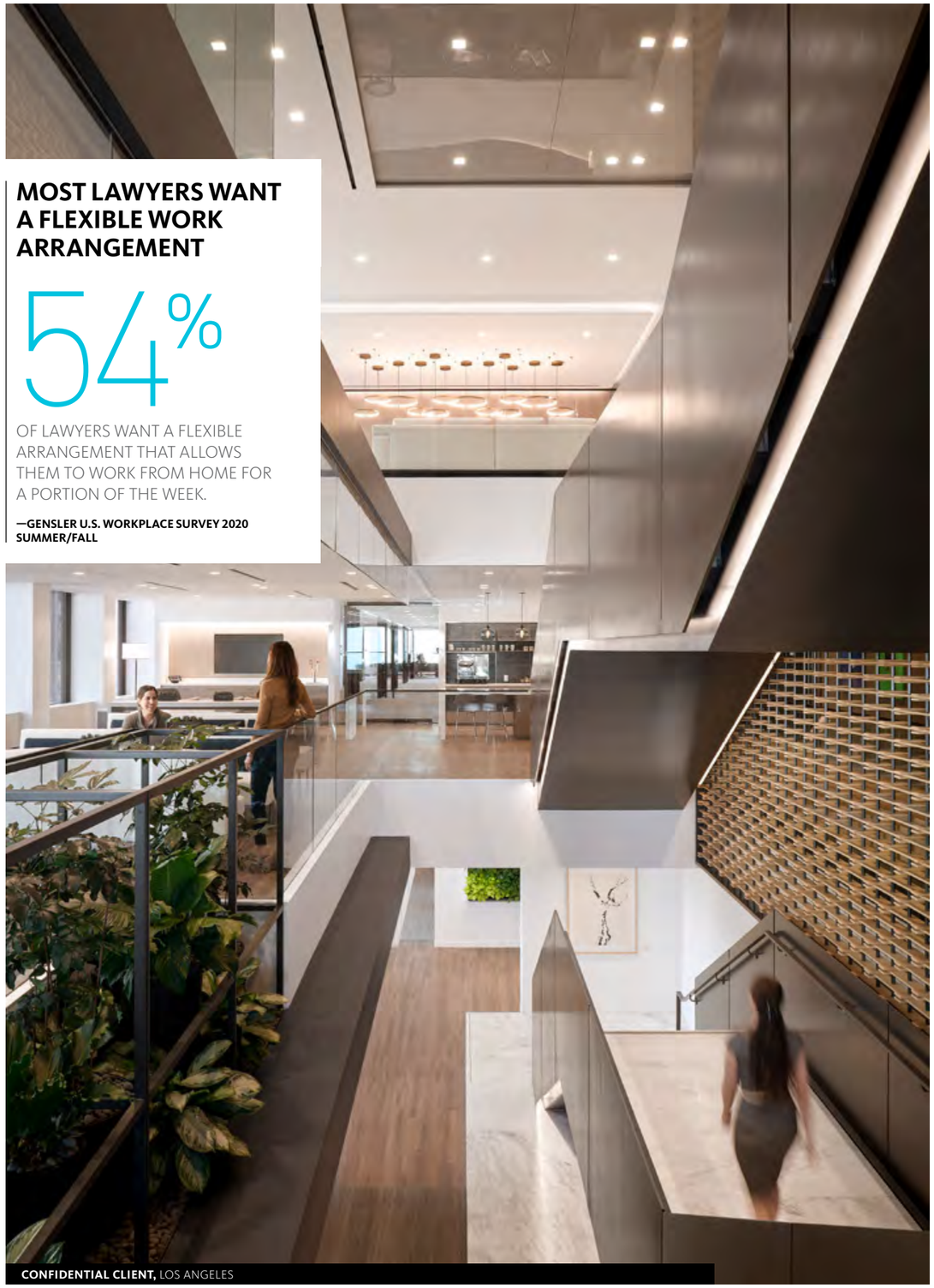
—GENSLER U.S. WORK FROM HOME SURVEY 2020 SUMMER/FALL

EASTON URBAN, COLUMBUS, OHIO

TREND 04 | **IN-OFFICE NETWORKING**

NETWORKING IN THE OFFICE BECOMES EVEN MORE CRITICAL

As events and conferences resume, firms will look for new and creative ways to grow their networks, engage with their clients, and reconnect with each other. As offices reopen, the ability to host events in offices will become even more important. Firms should enlarge and enhance social spaces that can be areas of work during the day, but are reconfigurable for client and employee events for day or evening.



MOST LAWYERS WANT A FLEXIBLE WORK ARRANGEMENT

54%

OF LAWYERS WANT A FLEXIBLE ARRANGEMENT THAT ALLOWS THEM TO WORK FROM HOME FOR A PORTION OF THE WEEK.

—GENSLER U.S. WORKPLACE SURVEY 2020 SUMMER/FALL

CONFIDENTIAL CLIENT, LOS ANGELES

REAL ESTATE SERVICES & CONSULTING

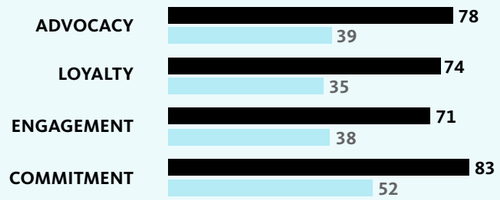
As companies address complex challenges, they can find a path forward by fusing research, strategy, and design thinking. This strategy can also build trust and increase competitive advantage. Everyone from employees to clients are paying closer attention to how companies operate, and they want to align with values that work for them.

- CONSUMER GOODS
- ENERGY
- FINANCIAL SERVICES
- FOUNDATIONS, ASSOC. & ORGANIZATIONS
- GOVERNMENT & DEFENSE
- MEDIA
- OFFICE BUILDINGS: DEVELOPER
- OFFICE BUILDINGS: REPOSITIONING
- PRODUCT DEVELOPMENT
- PROFESSIONAL SERVICES
- REAL ESTATE SERVICES & CONSULTING
- TECHNOLOGY

TO LEAD WITH TRUST IS RARE — AND A MASSIVE OPPORTUNITY

"When there is more trust in the workplace, employees are 23% more likely to offer more ideas and solutions."

—SHRM



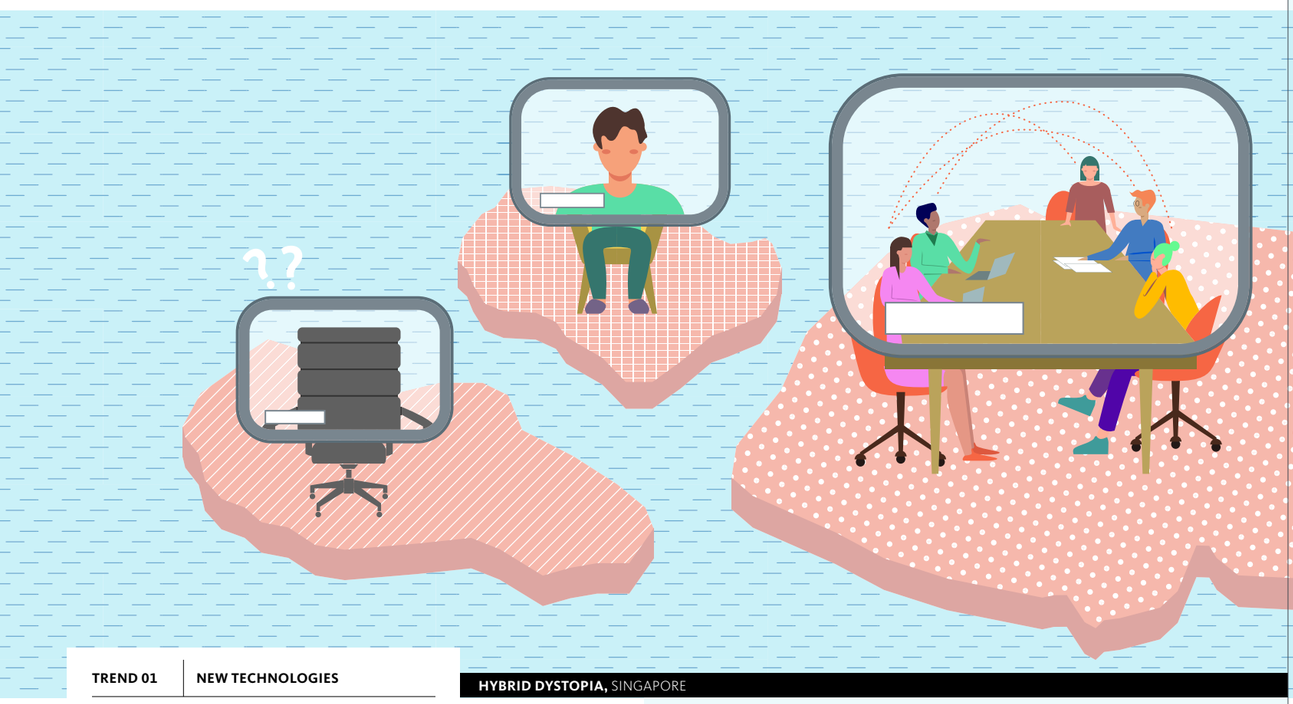
Employee trust cements the employer-employee partnership

Percent of employees who engage in these types of behaviors on behalf of their employer

DO NOT TRUST THEIR EMPLOYER

TRUST THEIR EMPLOYER

—EDELMAN, 2020 TRUST BAROMETER



HYBRID DYSTOPIA, SINGAPORE

TREND 01 | NEW TECHNOLOGIES

USE TECHNOLOGY TO DEFINE NEW REAL ESTATE STRATEGIES

Reservation systems, sensors, smart building systems, touchless solutions: Companies are adapting to a vast array of new technologies that have major implications for workplace norms and cultures. Employees of different generations and backgrounds will have varying comfort levels with such changes, and it will be up to employers to facilitate universal adoption. Beyond the personal psychological adjustments, new technology will drive how companies craft their real estate strategies. As industries such as healthcare and banking become further immersed in technology, employees will expect the same from workplaces in other sectors — and employers will expect benefits to follow.

DIGITAL SOLUTIONS HAVE DEMOCRATIZED ACCESS TO EXPERIENCES AND CONVENIENCES FOR INDIVIDUALS AND COMPANIES.

—McKINSEY BLOG, "REIMAGINING THE REAL ESTATE INDUSTRY FOR THE NEXT NORMAL"

TREND 02 | HYBRID WORK CULTURE

HYBRID WORK REQUIRES NEW CULTURE STRATEGY

Companies are reevaluating every business process to support both remote and in-person work. This will lead to a need for organizational design and culture strategy services. Whether companies return to the office in full or in part, the amenities conversation will focus on creating a shared sense of purpose via physical space. For companies that choose to stay remote, the future will demand novel strategies on a mass scale to help workers stay engaged. This will entail policy changes, as will many employers' decisions to pursue new equity and inclusion goals. Getting an organization to operate in lockstep could be this decade's most underrated challenge.

TREND 03 | RESILIENCE AND FLEXIBILITY

HEALTH AND ECONOMIC DISRUPTIONS ARE BECOMING MORE UNPREDICTABLE

We now understand the range of disruptions to be wider than once thought; widescale public health concerns and economic uncertainty will be a part of our reality for years to come. Companies must cast a wide net in determining their preparedness. The full secondary impacts of the economic crisis are unknown, including the impact of a "K" shape recovery, so industry leaders are more interested than ever in resilience and flexibility in their operations and real estate. Economic impacts vary greatly between individuals, cities, and countries, so companies need to stay nimble as they adapt to the many "new normals" in which they operate.

555 COLLINS, MELBOURNE, AUSTRALIA

4

Ways Data Can Inform a Healthier Workplace

In today's rapidly changing world, employers must learn and adapt quickly, and data is helping define adaptations and new design solutions. Currently, many organizations are focused on providing a healthy workplace. Here's how data can help:

1 USE SPATIAL ANALYTICS TO ASSESS RISKS OF VIRAL TRANSMISSION.

A well-designed healthy workplace has always boosted wellness and productivity, but now there's demand to design systems that can limit viral transmission risk. This might include understanding flows and integrating smart materials that notify when things have been touched but not cleaned, automation and voice activation tools, and advanced air purification systems.

2 LEVERAGE VIRTUAL WORKING HABITS AND TECHNOLOGIES TO REMAKE THE OFFICE.

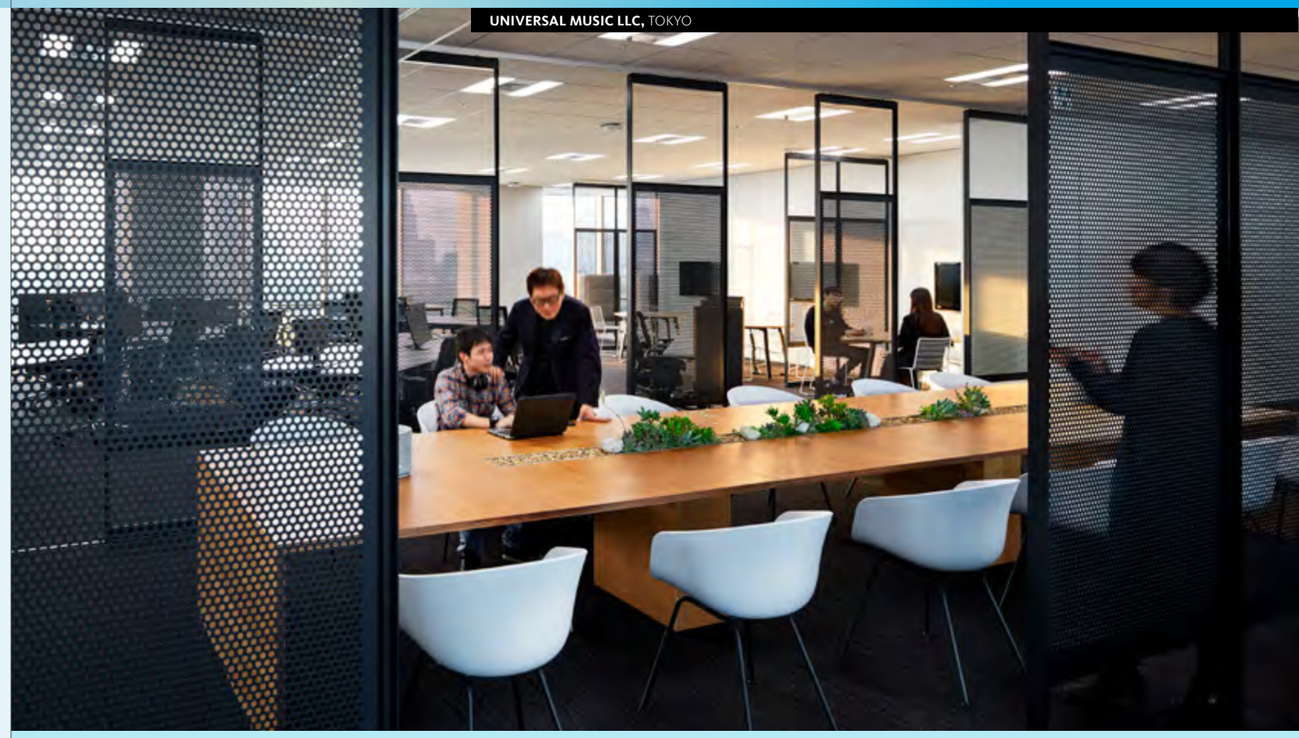
The shift to remote work presents an opportunity to collect data on emerging collaboration patterns and translate these behaviors to physical spaces. Insights into new habits, software, and workstyles can help us take a closer look at everything from real estate assets and IT to human resources and policies.

3 WIRE THE BUILT ENVIRONMENT TO UNDERSTAND BEHAVIORAL PATTERNS.

A workspace is no longer just real estate. It's critical for developers, building owners, and employers to set up workplaces to be environments that offer the opportunity to learn about behavior to create positive outcomes, including a healthier workplace.

4 DESIGN FOR EXPERIMENTATION IN WORKPLACE FLOOR PLANS.

The next frontier in workplace design will be intelligent placemaking — the design of smart systems that allow us to learn more about a space and how people use it. Companies should set aside a percentage of square footage to test and learn. At Gensler's New York office, we've dedicated an entire floor to act as a living lab where our team tests sensor technologies to ensure the data we're collecting is reliable. This is how we can de-risk a million square feet.

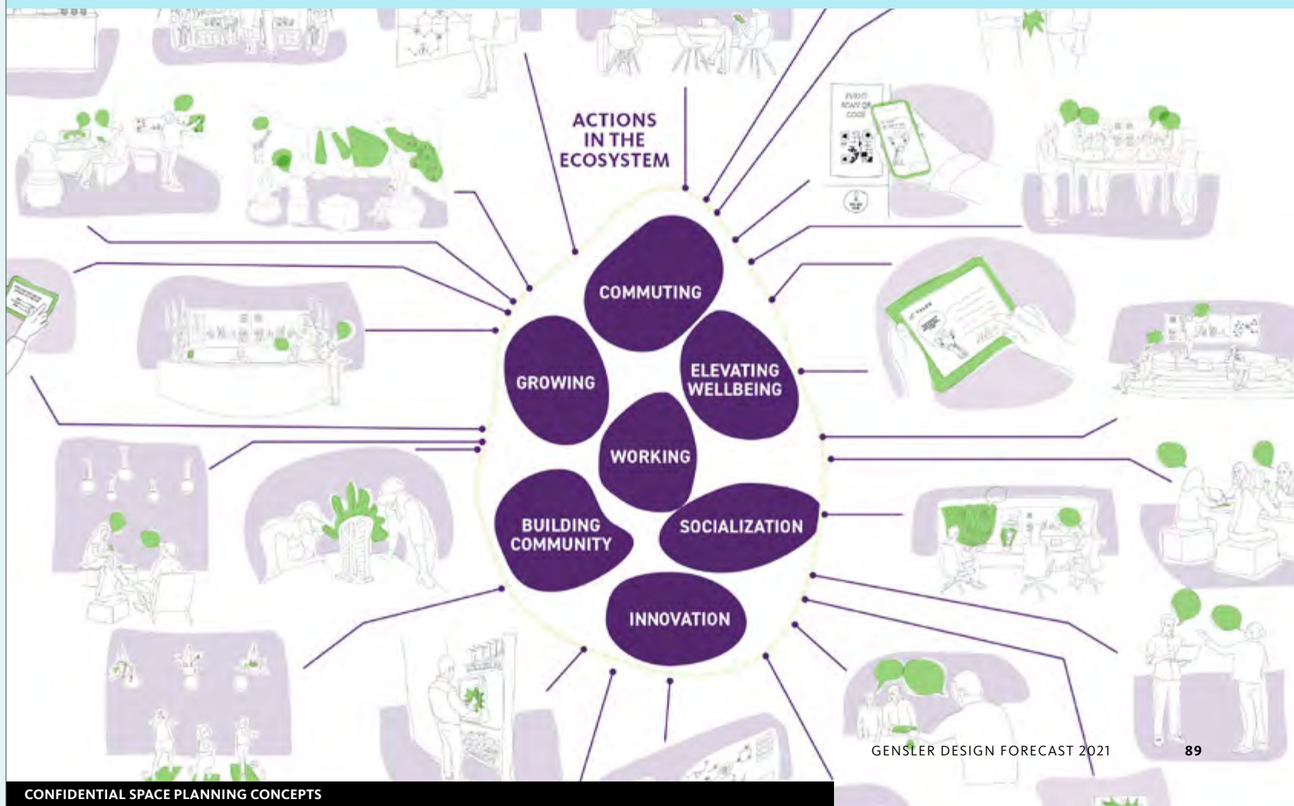


UNIVERSAL MUSIC LLC, TOKYO

EMPLOYERS AND EMPLOYEES ALIKE WANT PURPOSE-DRIVEN WORKPLACES

"Employees want to keep the coffee lounge and they want to know whether the farmers were paid fairly. They expect a safe, clean, sustainable building. They want to be around colleagues socially and they want to work when and where they're most productive. For those providing workplace amenities, there is an opportunity to completely rethink your employee or tenant value proposition around change, choices, and control."

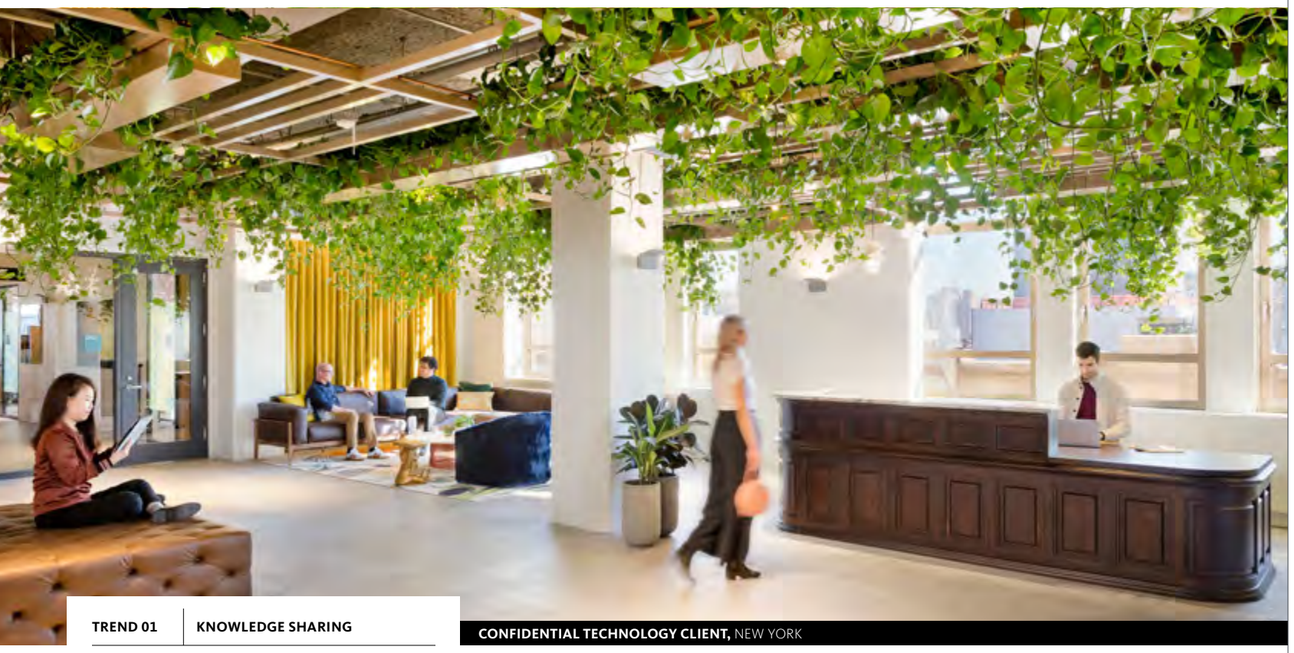
—GENSLER DIALOGUE BLOG, "THE WORKPLACE AMENITIES GAME ISN'T OVER — THE PLAYING FIELD HAS SHIFTED"



CONFIDENTIAL SPACE PLANNING CONCEPTS

TECHNOLOGY

People have always been at the center of the tech workplace. Now, as a hybrid model for work emerges, the office will be centered on purpose and informed by data. Community, equity, reuse, well-being, and balance have emerged as vital components of the new work experience, regardless of where work happens.



CONFIDENTIAL TECHNOLOGY CLIENT, NEW YORK

TREND 01 | KNOWLEDGE SHARING

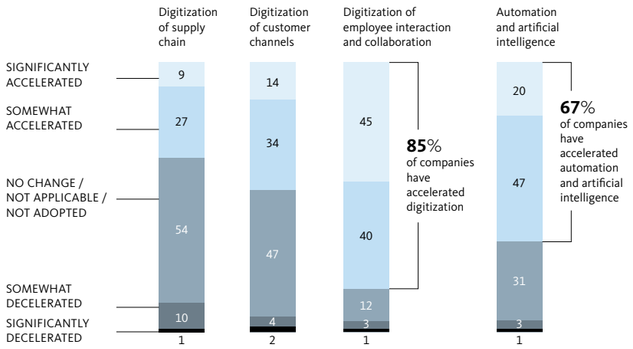
HEALTH CONCERNS ARE PRIORITIZING KNOWLEDGE AND DATA

As worker safety has become a priority, the need for data and knowledge has come to the forefront. Now, tech companies want to create data about how people work and learn from it. Knowledge (and access to it) is the new amenity. In a post-pandemic world, companies will need to invest in tools to keep their workforce informed — from building and safety protocols, to scheduling coordination, and company updates. Data and content sharing with employees will be key.

COVID HAS ACCELERATED THE AUTOMATION AND DIGITIZATION OF THE WORKPLACE

Executives say they have accelerated the deployment of digitization and automation during the COVID-19 pandemic.

—McKINSEY



222 SECOND STREET OFFICE TOWER, SAN FRANCISCO

TREND 02 | COMMUNITY SPACES

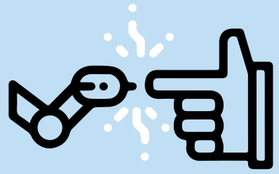
ENGAGE THE COMMUNITY THROUGH THE "FIRST FLOOR"

Tech companies are looking to extend their reach into the surrounding neighborhood by investing in the "first floor" — creating street-level spaces and workplace amenities that can be enjoyed by the community in new ways. By reinventing sidewalk-facing storefronts and office lobbies, companies can design spaces and programs that bring people and local organizations into the building or extend their culture from the workplace to the street. In doing so, they can serve more people in the community beyond just the daytime workforce and reimagine the ground floor of our cities.

TREND 03 | OFFICE EQUITY AT HOME

INVEST IN EQUITY BETWEEN HOME AND OFFICE WORK ENVIRONMENTS

As remote work accelerates, companies will need to reckon with disparities in people's home environments. Organizations can extend principles of office equity to people's homes by investing in tools and resources to optimize WFH setups, such as monitors, improved Wi-Fi, and office furniture. Within the hybrid office, redesigned conference rooms can create equality among participants, regardless of physical or virtual presence. By focusing on equity and inclusion, the workplace can strengthen company culture and form new connections.



Work in the future will necessitate new norms where humans are positioned alongside technology to create value.

—GENSLER, "THE FUTURE EXPERIENCE OF WORK"

5G

WAS NOT SLOWED AT ALL BY COVID-19 AND WILL ONLY CONTINUE TO BOOM IN THE COMING MONTHS. 2021 SHOULD BE A MASSIVE YEAR FOR 5G TECHNOLOGY.

—FORBES

TREND 04 | DECENTRALIZATION

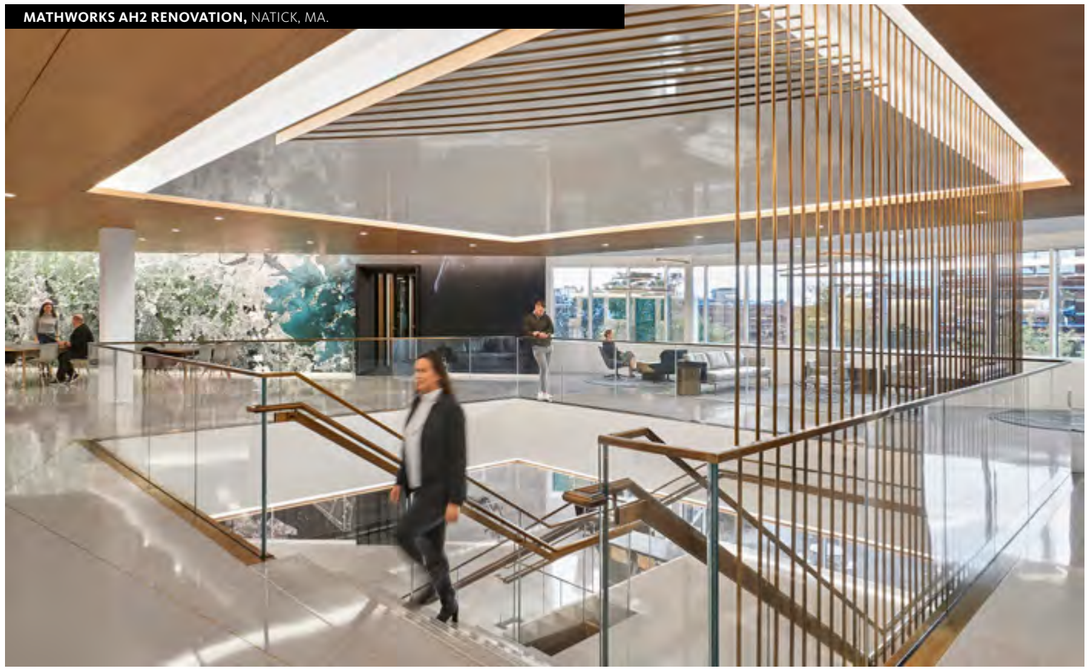
HUB-AND-SPOKE MODELS GAIN MOMENTUM

The pandemic has acted as a catalyst for companies to rethink their space and operational needs. One idea that is rapidly gaining traction with commercial real estate investors is the "hub-and-spoke" model, in which companies are looking to move away from a single centralized headquarters in favor of multiple, smaller satellite offices that are strategically located in new and emerging markets. As tech companies explore a decentralized approach to the workplace, the hub-and-spoke model may allow them to adapt and prepare for an uncertain future.

TREND 05 | COLLABORATION-DRIVEN WORK

REALLOCATE SPACE TO MEET PURPOSE

The allocation of square footage will be the same — it's how we use it that will be different. An emphasis on design and how we use/reuse the spaces will be even more important because the office will have greater purpose. A redesign of meeting and collaboration spaces will be needed to accommodate hybrid meeting modes. As the office becomes more of a collaboration hub, planning will evolve from a space-by-desk basis to account for the higher ratio of collaboration-driven work that's expected to bring people back into the office.

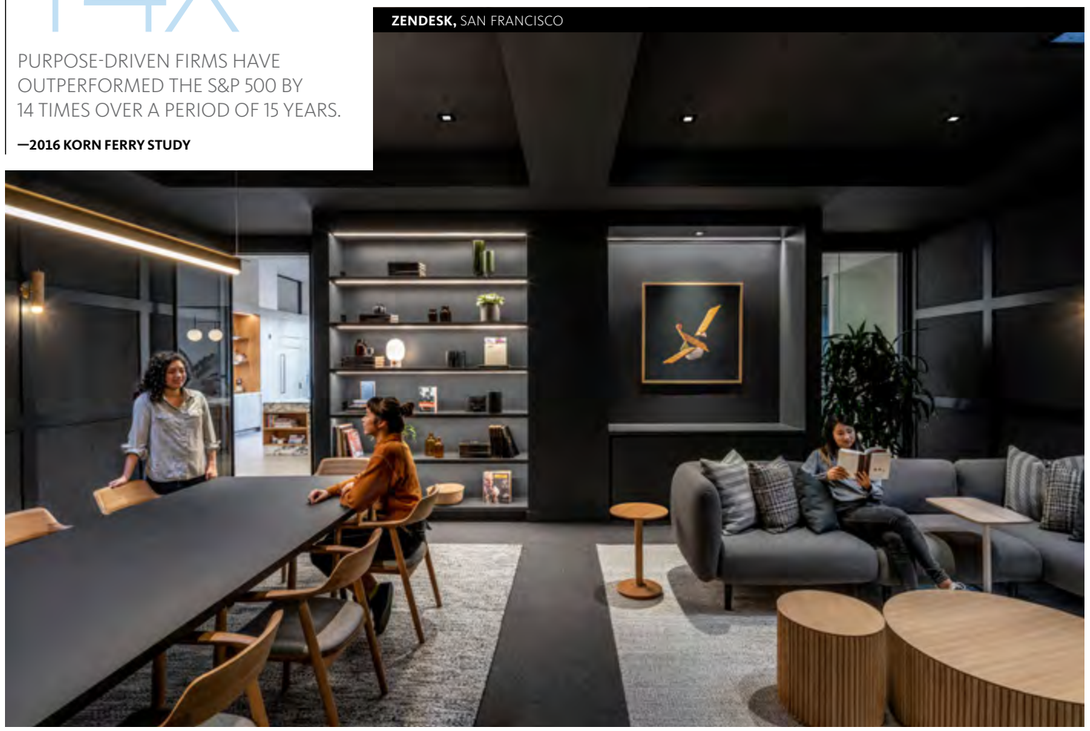


MATHWORKS AH2 RENOVATION, NATICK, MA.

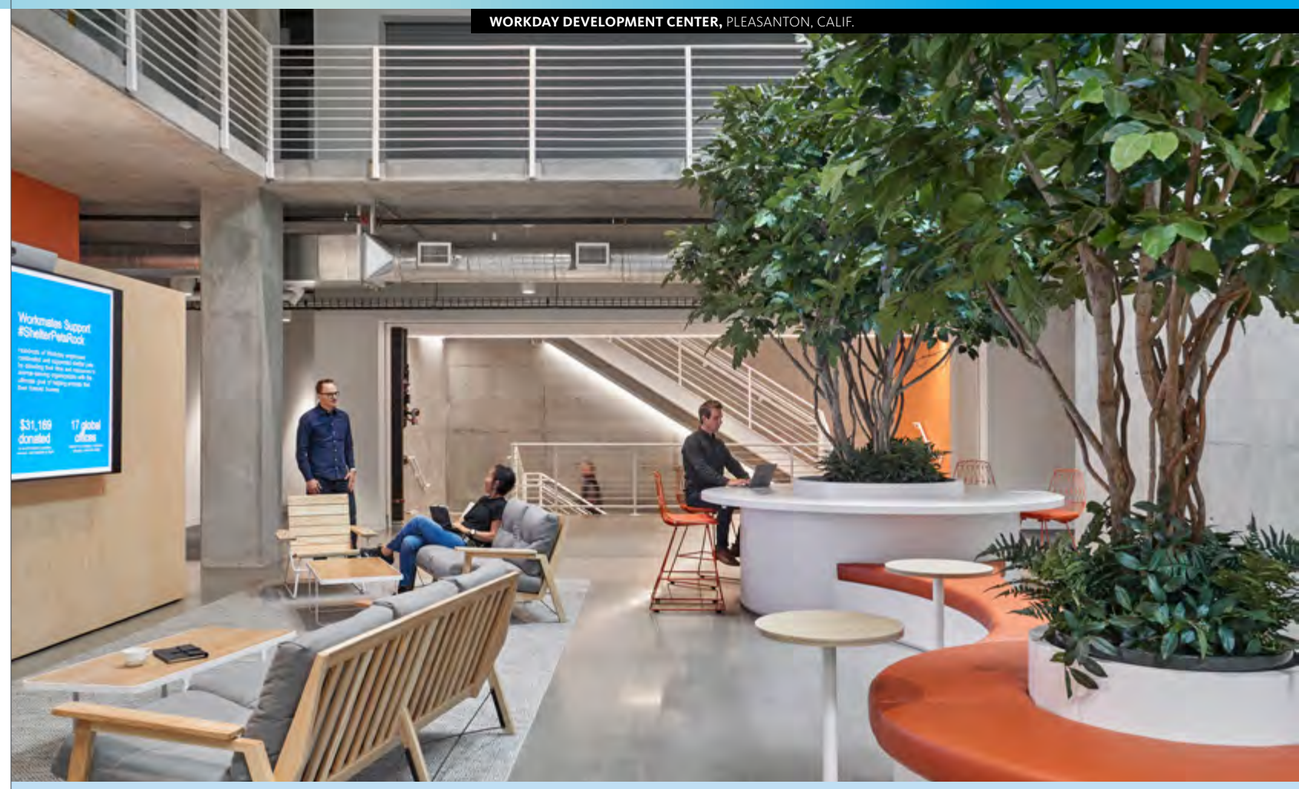
14x

PURPOSE-DRIVEN FIRMS HAVE OUTPERFORMED THE S&P 500 BY 14 TIMES OVER A PERIOD OF 15 YEARS.

—2016 KORN FERRY STUDY



ZENDESK, SAN FRANCISCO

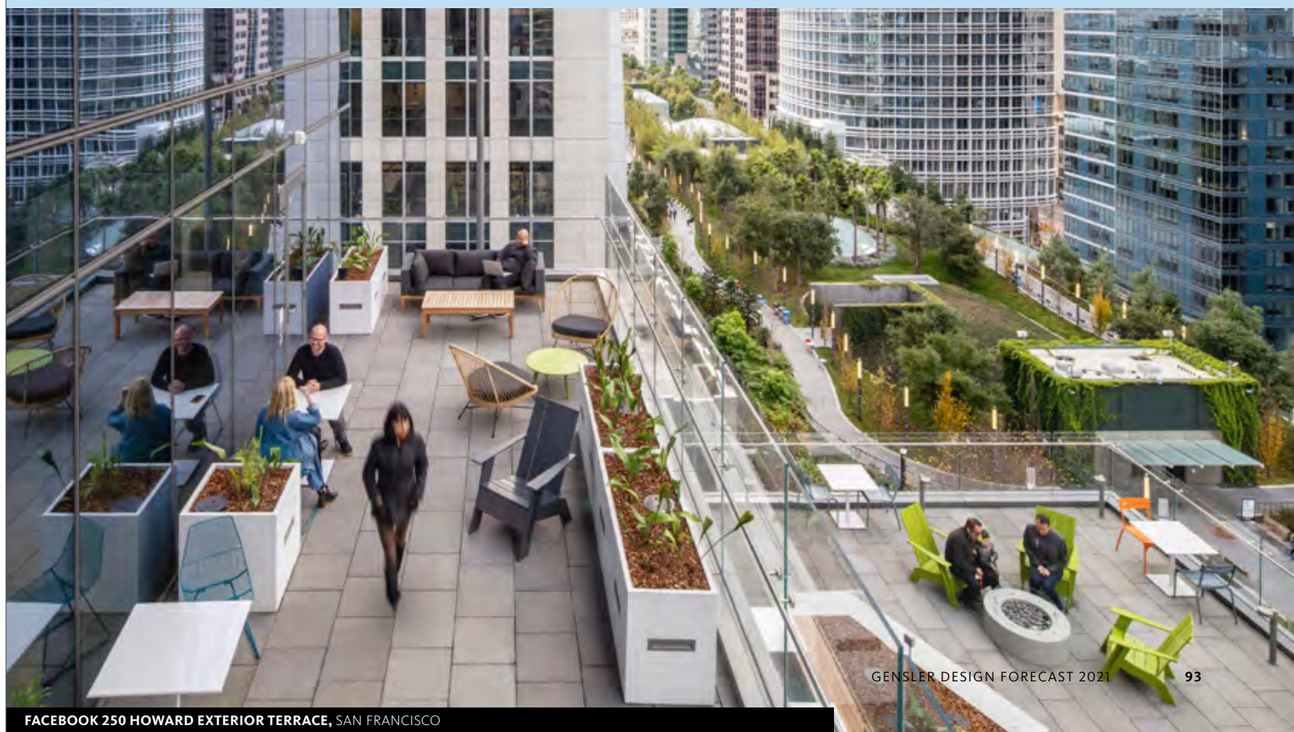


WORKDAY DEVELOPMENT CENTER, PLEASANTON, CALIF.

TREND 06 | **MID-DOOR SPACES**

INTEGRATE OUTDOOR AND INDOOR SPACE

Tech companies are looking to the addition of outdoor spaces, such as terraces or balconies, to address workers' concerns with indoor air quality and to offer more choice and diversity in space. Mid-door (not fully outdoor/not fully indoor) spaces are becoming more prevalent. People enjoy having a seamless indoor-outdoor connection, and these spaces can serve as third places where work happens outdoors. Developments that integrate indoor and outdoor space will be more desirable to prospective tenants and building occupants.



FACEBOOK 250 HOWARD EXTERIOR TERRACE, SAN FRANCISCO

REIMAGINING THE FUTURE OF LIFESTYLE

The world is experiencing a reset unlike anything anyone has ever seen. The landscape for retail stores, hotels, restaurants, sports venues, and entertainment centers is evolving quickly. Thankfully, we have clarity around one thing: People are craving meaningful, authentic connections, and we will never again take the value of social interaction for granted. The Lifestyle sector is poised to answer the call by creating spaces that bring people together, enhancing each and every experience with a human-centric vision.

P.98 BRAND DESIGN
P.100 CULTURE & MUSEUMS
P.104 DIGITAL EXPERIENCE DESIGN (DXD)
P.108 HOSPITALITY
P.114 MIXED USE & RETAIL CENTERS
P.118 RESIDENTIAL
P.122 RETAIL
P.128 SPORTS

5 CONSIDERATIONS FOR THE POST-PANDEMIC DESTINATION OF THE FUTURE

COVID-19 has transformed retail, restaurants, hotels, and mixed-use destinations around the world, prompting these industries to pivot away from single-use facilities to a hybrid model with a mix of offerings. Establishing meaningful, authentic consumer connections and new concepts that restore our sense of closeness and community will define the next phase of recovery.

Here are five guiding principles to consider for future hybrid destinations:

1 EXPRESS YOUR PURPOSE THROUGH PLACE.

Today's consumers are driven by purpose and the belief that what a brand stands for is more important than what they sell. Brands should strive to build communities; give brand enthusiasts a prominent voice; and create branded environments that communicate the brand's core values, beliefs, and mission to customers.

2 PIVOT FROM BEING A TRANSACTION HUB TO A CULTURE HUB.

Reshaping the role of the hybrid destination will require a pivot from being a hub of transactions to being a hub of culture. Public spaces will play a central role in strengthening customer engagement and building a platform for belonging.

3 EMBODY LOCAL OFFERINGS AND EMBRACE LOCAL CULTURE.

To differentiate your offering, it's essential to have a curated, unexpected, and unique mix of tenants and offerings that feels specifically local. Partner with local creatives and community leaders to curate public space programming that's dialed into customers' lifestyles.

4 PROMOTE HEALTH AND WELL-BEING.

Health and well-being will become the standard of a guest visit. By supporting food, exercise, beauty, and spirituality to model healthier lifestyles and promote well-being, property managers can create higher value for time-strapped guests.

5 EMBRACE THE HUMAN ELEMENT.

While technology has disrupted traditional cycles, consumers still want in-person connections. One of the biggest differentiators in the future hybrid experience will be changes and augmentation to property service professionals. Guest loyalty and success metrics will be driven by the level and quality of customer service that consumers receive.

The complete renovation of the Oakridge Centre will revitalize Vancouver's most visited retail center from an outdated mall into a vibrant, mixed-use, hybrid destination integrated into its surrounding community.

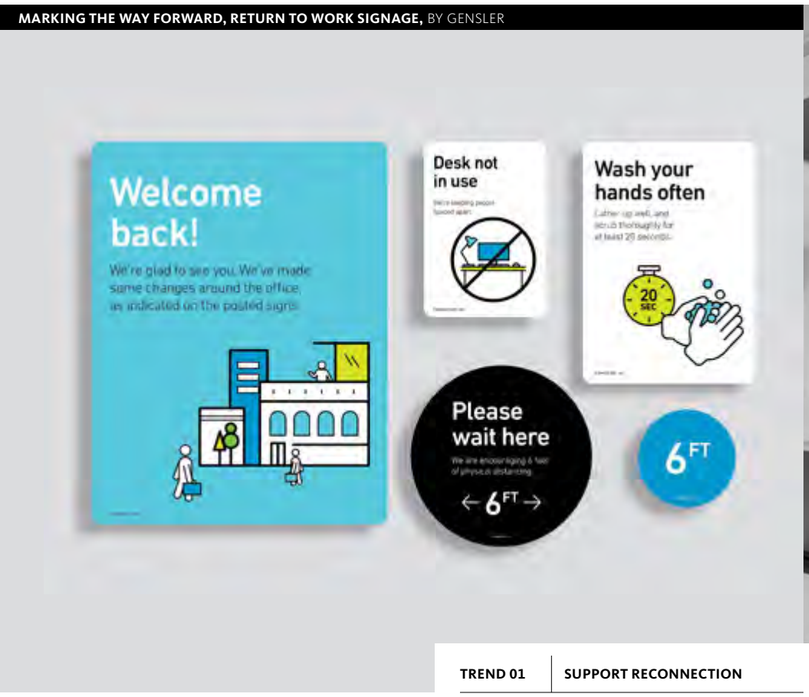
Oakridge Centre, Vancouver, B.C.

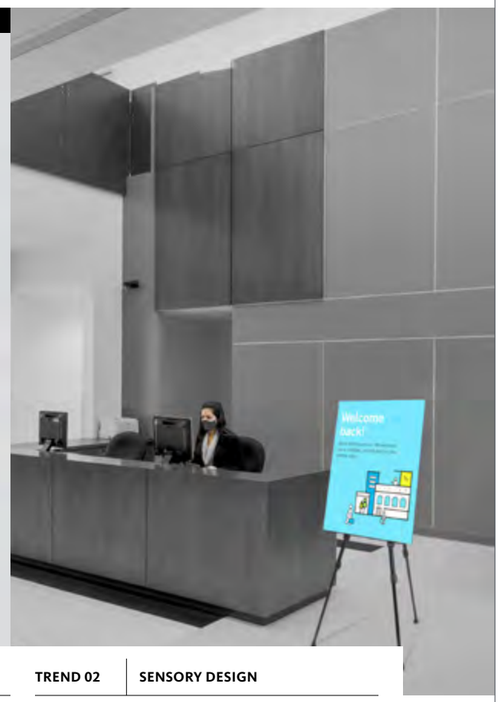
BRAND DESIGN

From the isolation of the pandemic to demands for social justice, organizations have been grappling with complex social issues. Brands long to reconnect in person with their communities, but in the meantime they have been celebrating diversity and charting a path forward through employer branding, information design, and purposeful communications.

BRAND DESIGN
CULTURE & MUSEUMS
DIGITAL EXPERIENCE DESIGN
HOSPITALITY
MIXED USE & RETAIL CENTERS
RESIDENTIAL
RETAIL
SPORTS

MARKING THE WAY FORWARD, RETURN TO WORK SIGNAGE, BY GENSLER





TREND 01 | SUPPORT RECONNECTION

BELONGING DRIVES PERFORMANCE

93%

THE MAJORITY OF PEOPLE (93%) BELIEVE A SENSE OF BELONGING DRIVES ORGANIZATIONAL PERFORMANCE.

—DELOITTE 2020 HUMAN CAPITAL TRENDS

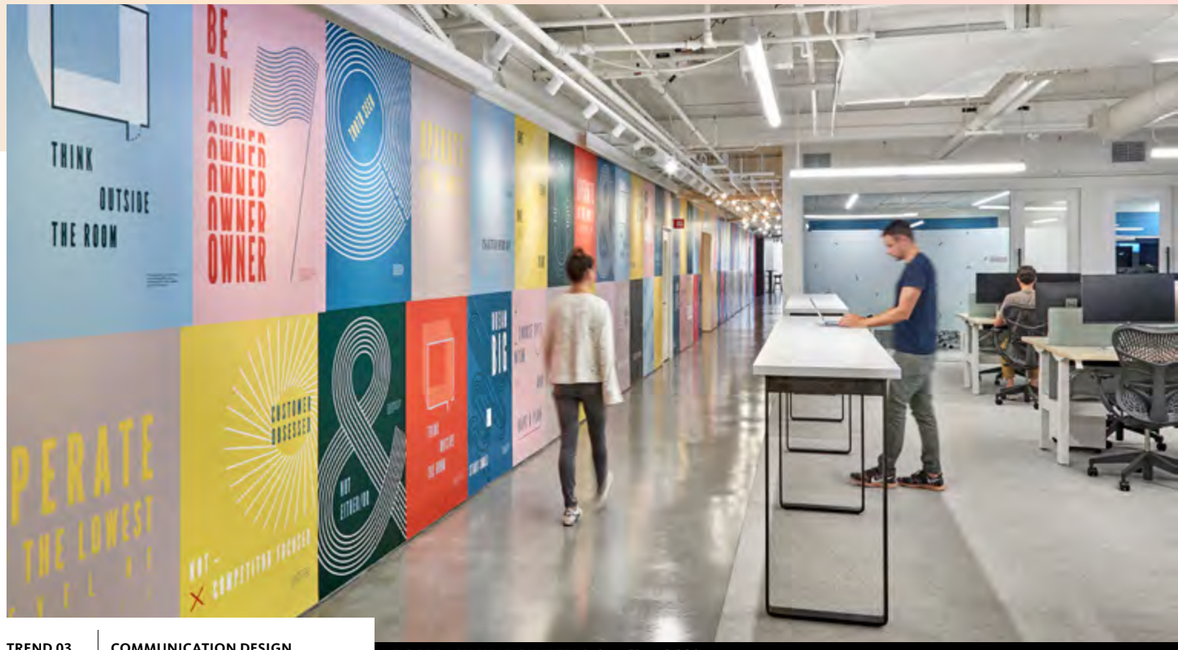
DESIGN SOLUTIONS CAN HELP PEOPLE RECONNECT AFTER COVID

As remote workers return to the office, they're seeking to reconnect with their organizations. Investing in culture by building your employer brand — an organization's reputation as an employer, as seen by its employees — is critical for reconnecting with returning workers. People are craving reconnection — with each other and their company culture — so organizations should focus on design solutions that encourage human connection and communicate shared values and a collective mission.

TREND 02 | SENSORY DESIGN

SENSORY DESIGN CAN HELP REENGAGE PEOPLE AS THEY RETURN

As consumers reconnect with brands and each other in person, they're looking for new ways to engage and have fun. Brands can tap into consumers' latent desires to enjoy experiences that are enriching, rejuvenating, and sensorial. Understanding how sight, sound, smell, touch, and taste affect emotions and behaviors is a powerful aspect of a sensory design experience. Sensory design allows brands to create human experiences that are engaging and highly valued.



DOORDASH HEADQUARTERS, SAN FRANCISCO

TREND 03 | COMMUNICATION DESIGN

COMMUNICATION DESIGN IS KEY TO REBUILDING TRUST

While the COVID-19 vaccine may help to address health concerns as consumers return to shops and other destinations, communication design that's both informative and comforting is essential to rebuilding trust. Brands can reinforce this through communication campaigns that resonate and inspire. By connecting personal beliefs, aspirations, and stories to organizational goals and actions, organizations can build stronger, purpose-led brands that foster belonging and support a community based on shared values.

WHY YOUR EMPLOYER BRAND MATTERS

2x

A STRONG EMPLOYER BRAND — AS INDICATED BY AN INDIVIDUAL HAVING A POSITIVE IMPRESSION OF YOUR COMPANY AS A PLACE TO WORK — IS TWICE AS LIKELY TO DRIVE JOB CONSIDERATION AS A STRONG COMPANY BRAND.

—LINKEDIN WHITE PAPER "WHY EMPLOYER BRAND MATTERS"

COMCAST TECHNOLOGY CENTER, PHILADELPHIA

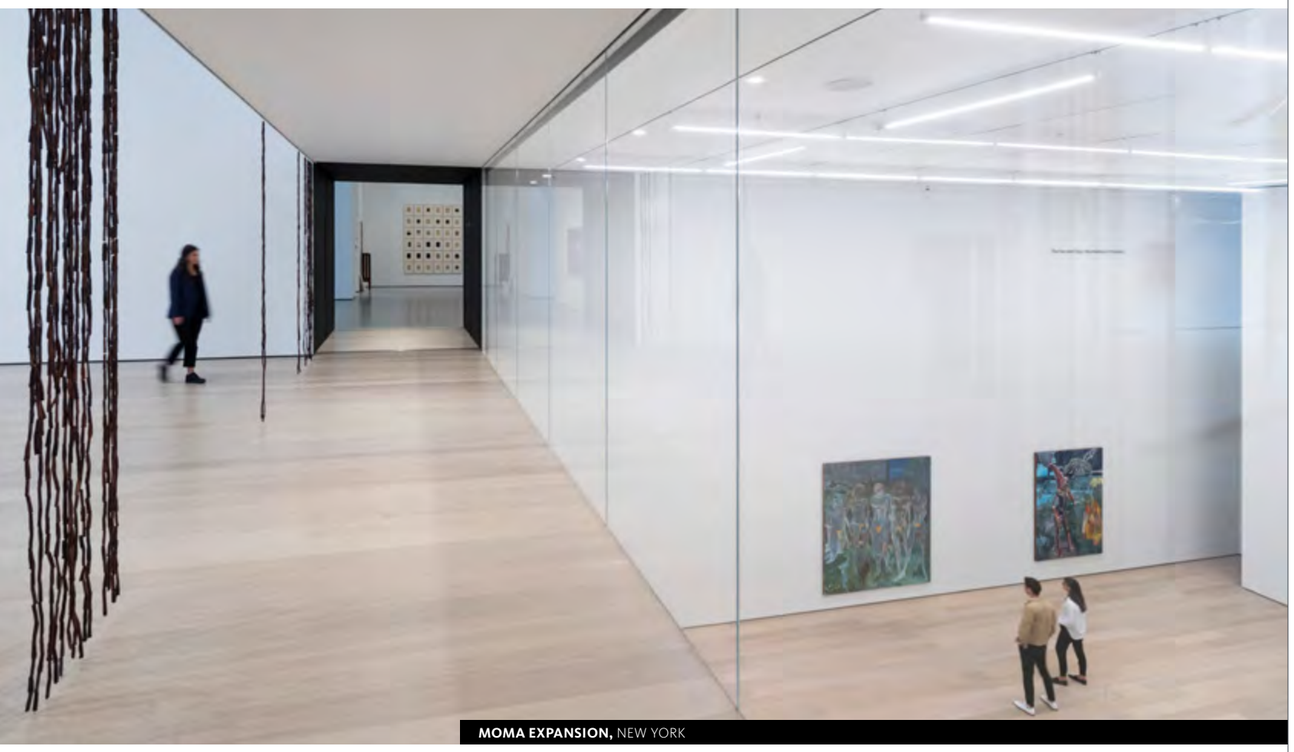
"Human senses have been shown to increase connection, create long-lasting memories, and make spaces more accessible."

—GENSLER "BEYOND THE SENSES" RESEARCH 2020

CULTURE & MUSEUMS

As we emerge from the pandemic, rebuilding our sense of community and sense of belonging is vital. Our cultural institutions are the infrastructure of community and can play a major role in our return. These institutions impact diverse communities through purposeful designs and user experiences that resonate with donors, staff, and the public.

BRAND DESIGN
CULTURE & MUSEUMS
DIGITAL EXPERIENCE DESIGN
HOSPITALITY
MIXED USE & RETAIL CENTERS
RESIDENTIAL
RETAIL
SPORTS



MOMA EXPANSION, NEW YORK

TREND 01 | FLEXIBLE SPACES

MUSEUMS CAN CREATE SPACES FOR MORE THAN EXHIBITIONS

Museum visitors bring high expectations but unstructured intentions — they expect to be able to do everything in one place, and rarely visit with a specific itinerary in mind. Institutions should create spaces that support a variety of intentions, encourage dialogue, and foster a sense of community — mixing places for interaction with places for reflection. With a range of flexible spaces, institutions can help ensure long-term operational sustainability.

$33M

MUSEUMS IN THE U.S. ARE LOSING AT LEAST $33 MILLION PER DAY AS A RESULT OF CORONAVIRUS-RELATED CLOSURES.

—THE AMERICAN ALLIANCE OF MUSEUMS

DEBBIE ALLEN DANCE ACADEMY, LOS ANGELES

TREND 02 | SPACES FOR DIALOGUE

CULTURAL PLACES BECOME PLACES FOR DIALOGUE AND HEALING

As society emerges from a time of social unrest, uncertainty, and isolation, cultural institutions are leading the way because they intuitively understand that their mission-driven work is part of something greater. Rather than taking a passive role as collectors and exhibitors, museums should become dynamic places of democracy that house spaces for dialogue around issues of race and social justice, while growing their collections to broaden and reflect their diverse audiences.

TREND 03 | AMBIENT TECHNOLOGIES

TOUCHLESS AND DIGITAL TECHNOLOGIES CAN CREATE BETTER EXPERIENCES

Museums face a contradiction of expectations — visitors expect technology integration but also see value in a reflective, offline experience. Innovative technologies should be woven through exhibits without compromising the authenticity and intimacy of the visitor experience. With touchless technology and other advancements, museums will need to rethink digital engagement by developing more ambient technologies that deepen the visitor experience and make it more inclusive.

TREND 04 | REMOTE-BASED INTERACTION

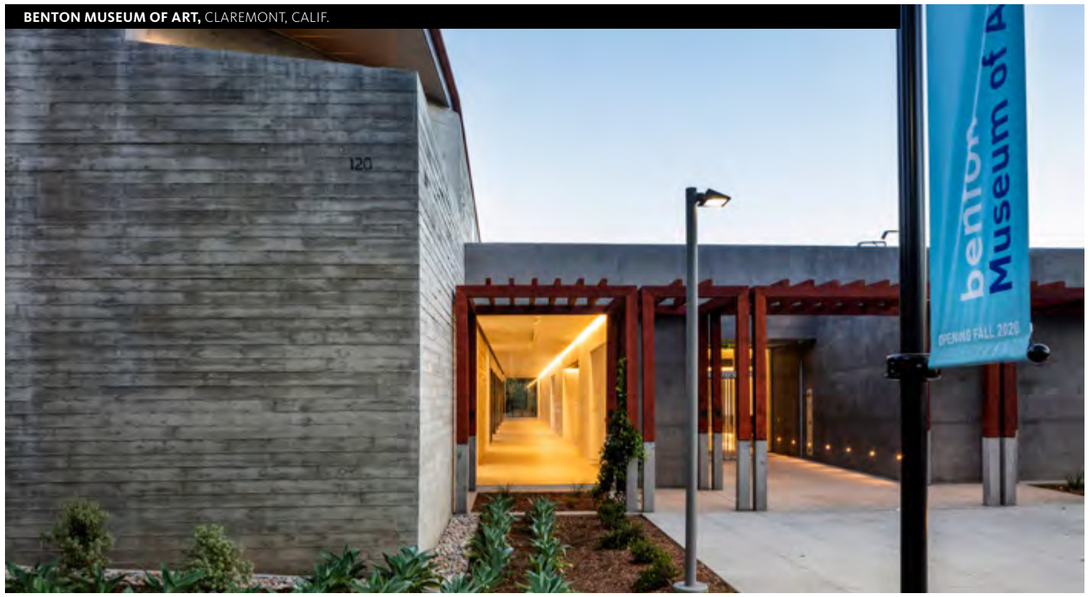
MUSEUMS FIND NEW WAYS TO CONNECT WITH COMMUNITIES

Institutions are finding new ways to connect through online communities and better engage with their congregants. Museums and galleries have embraced social media to provide virtual tours and artist interviews, distance learning, and other remote-based interaction to maintain a relationship with their visitors. With improved Wi-Fi access, they are also expanding outdoor programming around the museum to connect with a wider community. Religious institutions have shifted their focus to outdoor limited gatherings, as well as online Zoom services. Virtual engagement can be aided by further connecting physical and digital experiences.

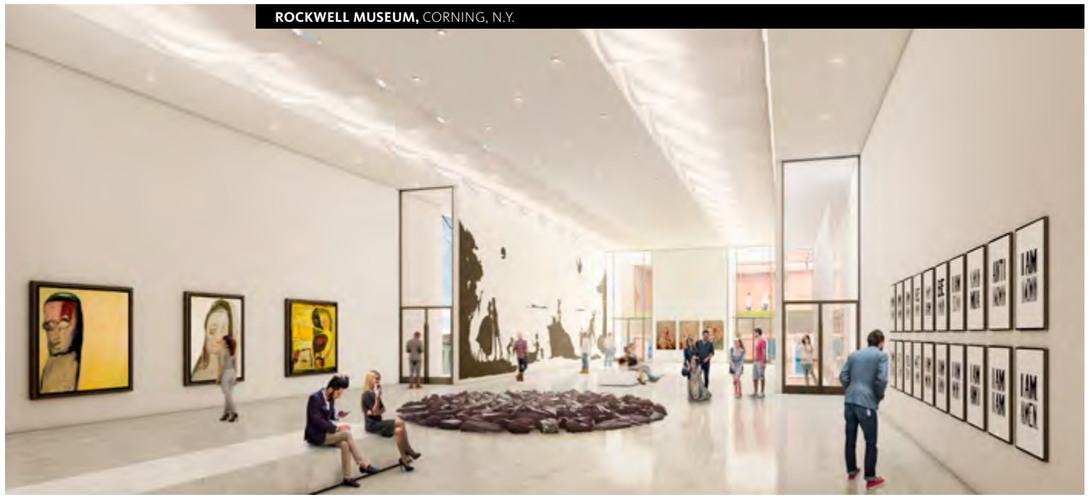
HOW DIVERSITY AFFECTS THE MUSEUM EXPERIENCE

Museum visitors who self-identify as having a disability rated their overall visitor experience less satisfying in a recent Museums Experience Index survey, showing how vital inclusive design is for museums.

—GENSLER MUSEUM EXPERIENCE INDEX℠

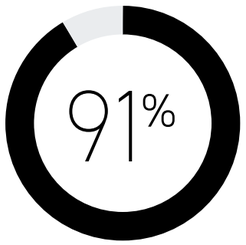


BENTON MUSEUM OF ART, CLAREMONT, CALIF.

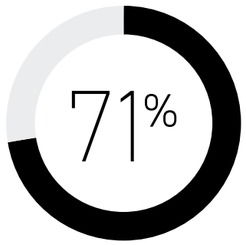


ROCKWELL MUSEUM, CORNING, N.Y.

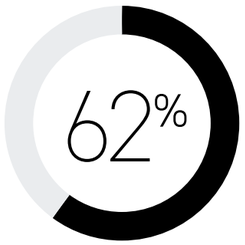
MUSEUMS ARE PLACES OF INTEGRITY AND INCLUSIVITY



BELIEVE THAT MUSEUMS ARE TRUSTWORTHY SOURCES OF INFORMATION



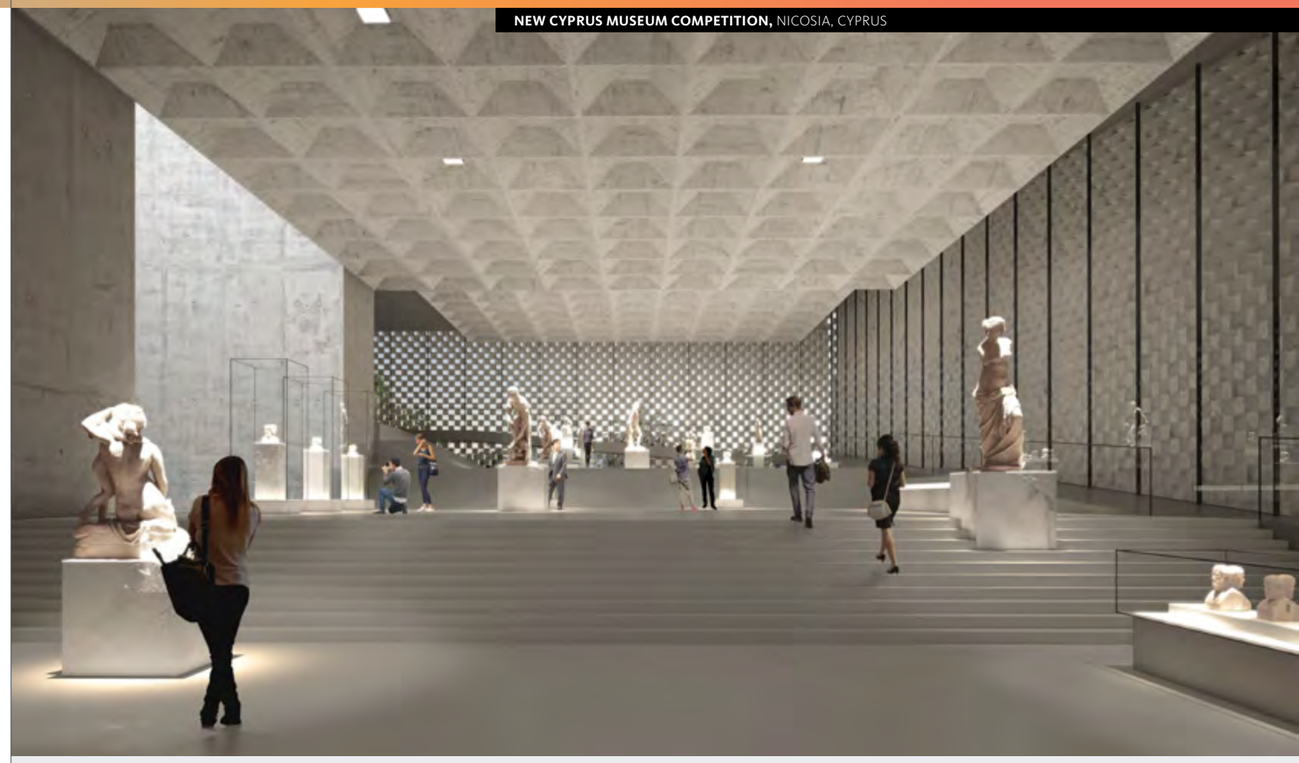
BELIEVE THAT MUSEUMS FOSTER FEELINGS OF COMMUNITY



BELIEVE THAT MUSEUMS CAN BE PLACES OF SOLACE OR REFUGE

BELIEVE THAT MUSEUMS WELCOME ALL TYPES OF PEOPLE

—GENSLER MUSEUM EXPERIENCE INDEXSM

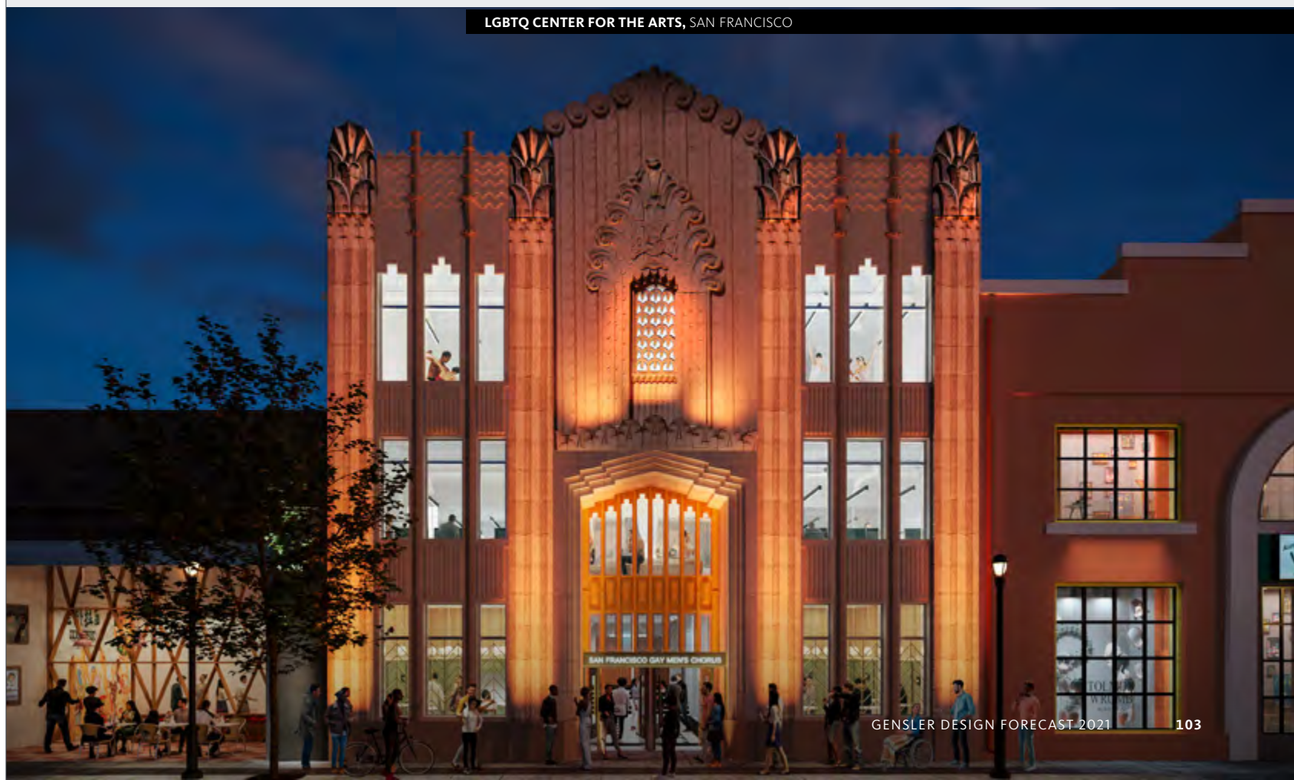


NEW CYPRUS MUSEUM COMPETITION, NICOSIA, CYPRUS

TREND 05 | **A SAFE PLACE FOR ALL**

INCLUSIVITY AND ACCESSIBILITY HAVE BECOME VITAL

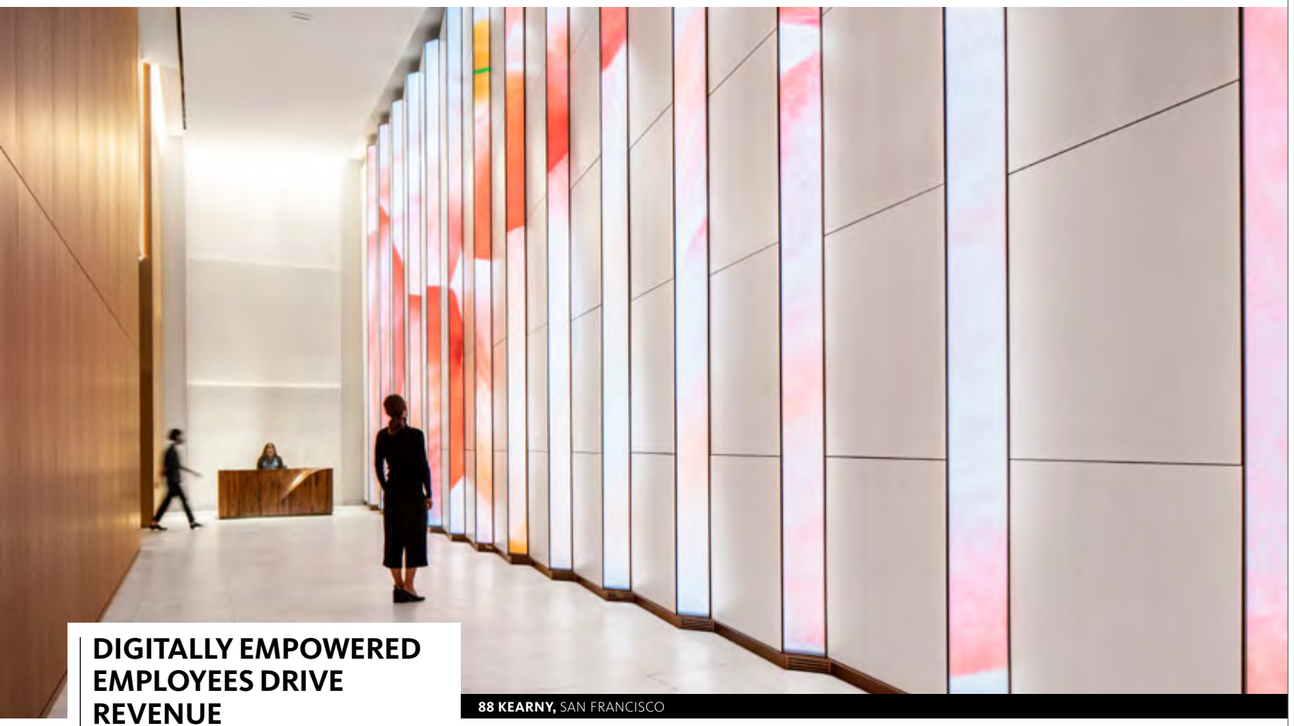
Museums must maintain their role as safe places for all — focusing on this responsibility will keep them relevant. Visitors expect museums to foster an environment of inclusivity and accessibility. In order to achieve this, institutions must be accessible for people with a range of disabilities, meet the needs of different generations, and welcome people of diverse backgrounds. Institutions that are inaccessible or don't cater to a diverse audience consistently rank lower in key metrics.



LGBTQ CENTER FOR THE ARTS, SAN FRANCISCO

DIGITAL EXPERIENCE DESIGN

The pandemic accelerated the digital transformation of the built environment significantly and showed many what a digital-physical reality looks and feels like. Now that employers, educators, and others are emerging from the worst of the crisis, many now see a hybrid future in which physical spaces merge more seamlessly with digital ones.



88 KEARNY, SAN FRANCISCO

DIGITALLY EMPOWERED EMPLOYEES DRIVE REVENUE

87%

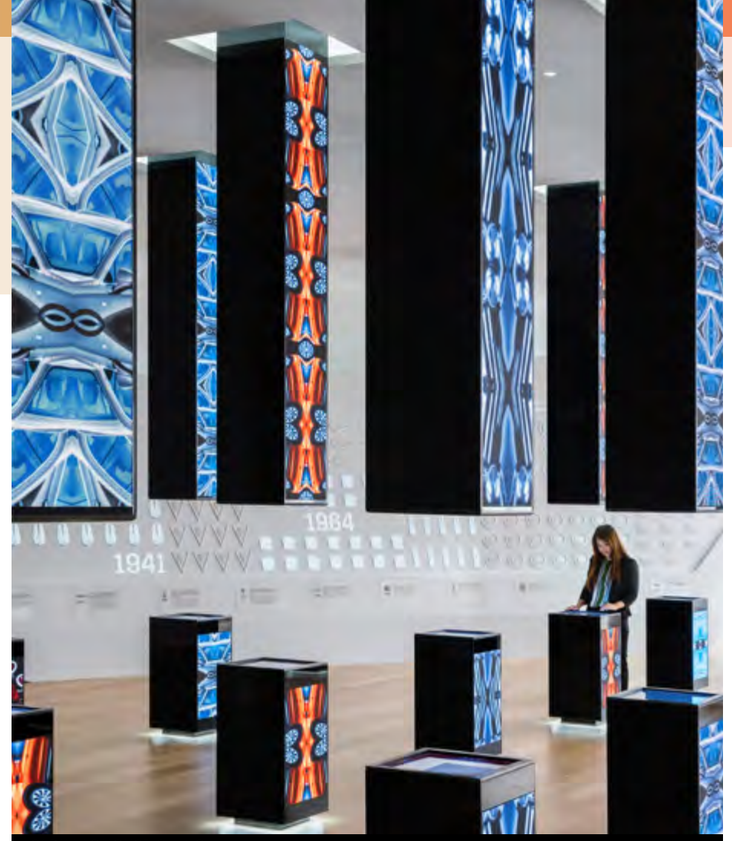
OF CIOs BELIEVE DIGITALLY EMPOWERING THEIR EMPLOYEES CAN DRIVE AT LEAST 5% ADDITIONAL REVENUE GROWTH OVER 3 YEARS.

—VMWARE, "THE IMPACT OF A DIGITALLY EMPOWERED WORKFORCE"

TREND 01 | IMMERSIVE EXPERIENCES

IMMERSIVE EXPERIENCES CAN GIVE PEOPLE A REASON TO RECONNECT AFTER COVID

Immersive experiences give people a reason to reconnect and reengage. These audio-visual experiences — in person or virtually — envelope people in a sensory experience of sights and sounds. For brands, immersive experiences can provide a competitive edge. For example, sports teams can use digital displays, audio elements, and augmented reality to create a virtual experience that mimics the in-person experience. For physical environments, digital technologies can create experiences that support people's desire to "stay and play" while still allowing them to feel safe and secure.



CADILLAC HOUSE, SHANGHAI

TREND 02 | HYBRID WORKPLACE

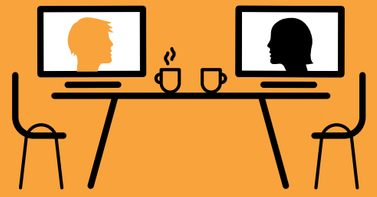
THE HYBRID WORKPLACE WILL NEED SPACE FOR DIGITAL INTERACTION

The shift to hybrid work has disrupted typical modes of office planning and operation and created new opportunities to redesign the workplace. The office will no longer be a single physical place, but a collection of connected physical and digital spaces that will serve as a trusted network for business continuity, social engagement, and continued professional growth. The hybrid workplace is urgent, necessary, and critical for providing safety, equity, and productivity.

DIGITAL ADOPTION IS ACCELERATING

The need for digital platforms and experiences will continue to accelerate in the future, as businesses and consumers seek alternatives to in-person gatherings in a post-COVID world.

—ACCENTURE, "COVID-19: POST-CORONAVIRUS TECHNOLOGY TRENDS"



THE VIRTUAL ECONOMY IS BOOMING

"PLAYERS SPEND AN AVERAGE OF 7 HOURS A WEEK ON GAMES AND COLLECTIVELY DROP AN ESTIMATED $100 BILLION ON VIRTUAL GOODS."

—FAST COMPANY

TREND 03 | TOUCHLESS ENVIRONMENTS

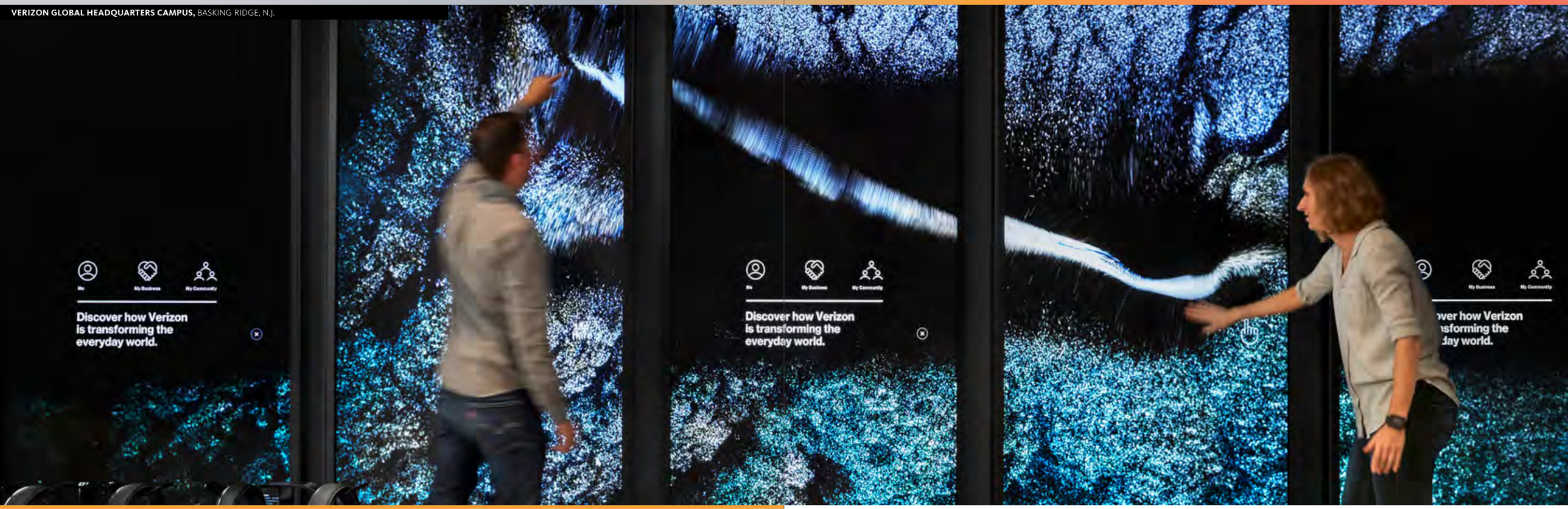
TOUCHLESS ENVIRONMENTS GAIN TRACTION

While valuable for health and wellness, touchless environments ultimately create a more seamless, frictionless, and sophisticated user experience. To limit the use of shared interfaces that rely on touch, personal devices will become increasingly central to employee interactions. These devices and their operating systems already include much of what's needed to support biometric screening, voice-activated applications, contactless transactions, and other touch alternatives. Combined with building sensors and location-based information, personal devices are a key component in the frictionless experience.

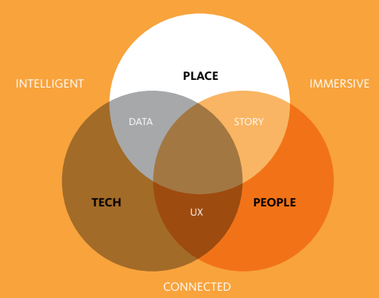
TREND 04 | DATA INTELLIGENCE

LEARN AND EVOLVE WITH DATA INTELLIGENCE

An explosion of sensor technologies, dashboards, and big-data analytics are flooding design and operations in the built environment. To drive wellness, resilience, and optimal operations requires a technology and data strategy to realize the intelligence you need for the performance you want. Advanced building technologies, spatial analytics, big data, and machine learning are making typical metrics like per-square-foot, occupancy, or utilization antiquated. Next-generation metrics reveal much more about user experience, behavior, and design to better optimize a building, campus, or portfolio and help drive business performance.



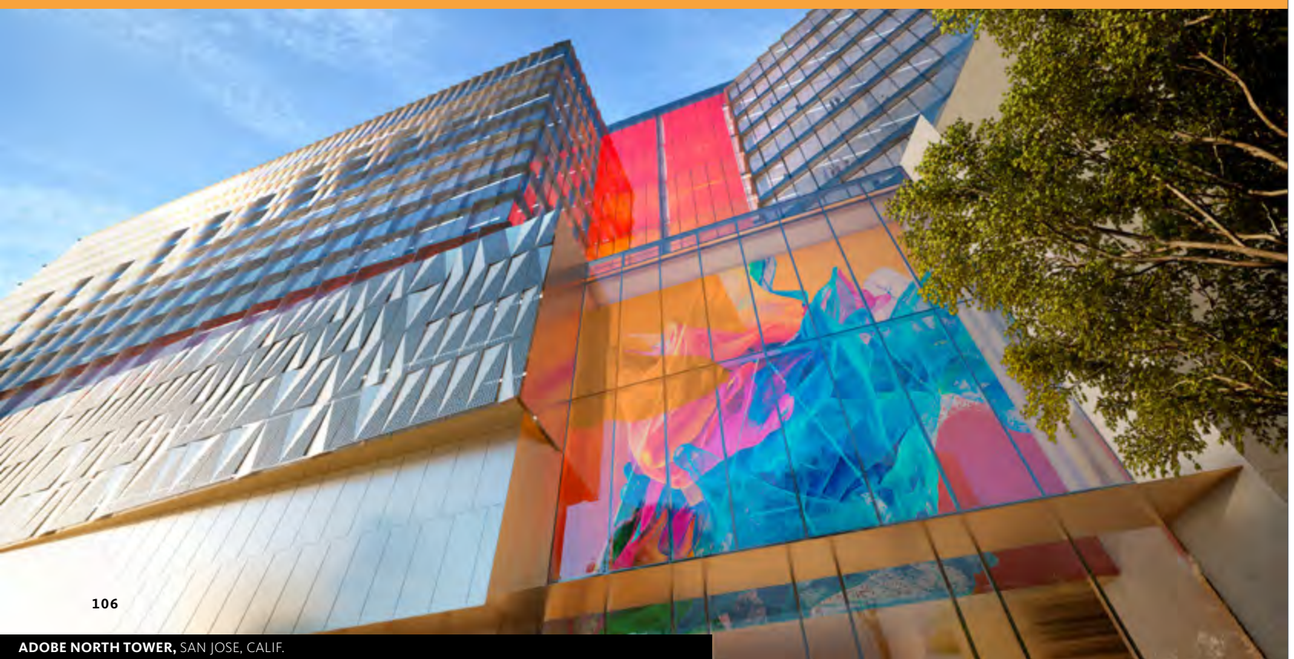
VERIZON GLOBAL HEADQUARTERS CAMPUS, BASKING RIDGE, N.J.



DIGITAL EXPERIENCES HELP BRIDGE TECHNOLOGY TO PEOPLE AND PLACES

Digital experience design connects the worlds of physical and digital design, from immersive brand experiences and exhibits to connected customer experiences and intelligent buildings.

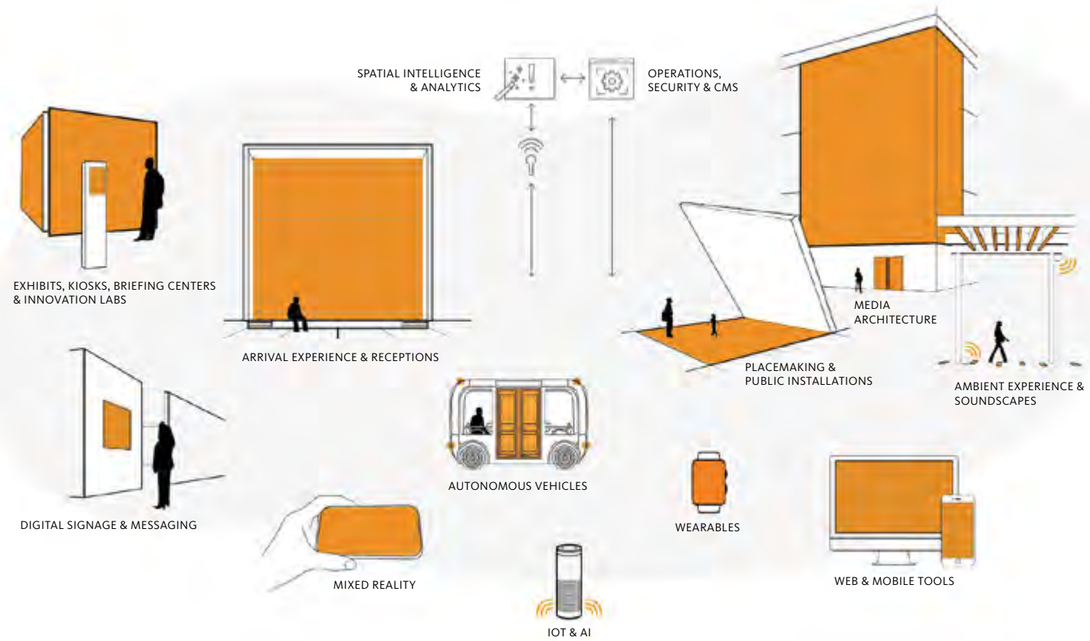
—GENSLER DIGITAL EXPERIENCE DESIGN | LEARN MORE: https://dxd.gensler.com/



ADOBE NORTH TOWER, SAN JOSE, CALIF.

DIGITAL MASTER PLANNING TO DE-RISK TECHNOLOGY INVESTMENT

Digital master plans address the full range of technology needs across clients' portfolios and projects in order to create a cohesive user-centric vision. By identifying and defining an ecosystem of digital touchpoints, these master plans help form a holistic view of how people experience a space while helping to identify future opportunities to improve that experience.



HOSPITALITY

The hospitality industry has suffered greatly during the pandemic because of the dramatic slowdown in business and leisure travel. And yet, the ongoing challenges of global wellness and the climate crisis have pushed the industry to ask what else hotels can be for people and communities. This year, the hospitality industry has an opportunity to reinvent itself through resilient, human-centric designs that connect people with place.

BRAND DESIGN
CULTURE & MUSEUMS
DIGITAL EXPERIENCE DESIGN
HOSPITALITY
MIXED USE & RETAIL CENTERS
RESIDENTIAL
RETAIL
SPORTS

HOTEL SAN LUIS OBISPO, SAN LUIS OBISPO, CALIF.

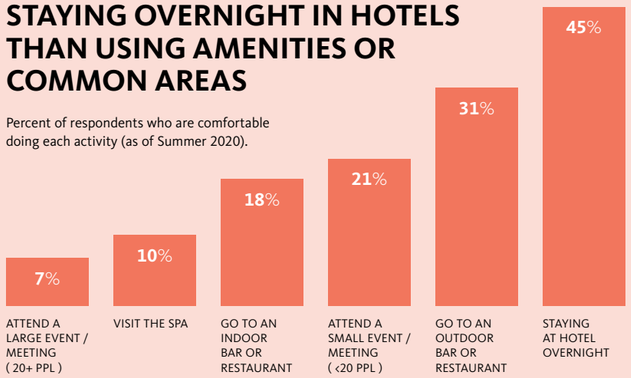
TREND 01 | FOCUS ON HEALTH & WELLNESS

WELLNESS HAS BECOME TABLE STAKES BECAUSE OF THE PANDEMIC

Hoteliers must balance safety measures with a sensibility that helps guests feel welcome and at ease. The primary focus should be on the guest's health and wellness at both the macro and micro levels. Incorporating wellness-focused changes for health and well-being should become the standard of any hotel stay, and that includes a focus on sustainable design elements. To measure and communicate their wellness value proposition to guests, hospitality companies are incorporating the WELL Building Standard to certify their hotels.

PEOPLE ARE MORE COMFORTABLE STAYING OVERNIGHT IN HOTELS THAN USING AMENITIES OR COMMON AREAS

Percent of respondents who are comfortable doing each activity (as of Summer 2020).



—GENSLER HOSPITALITY PULSE SURVEY 2020

TREND 02 | WORK-FROM-HOTEL

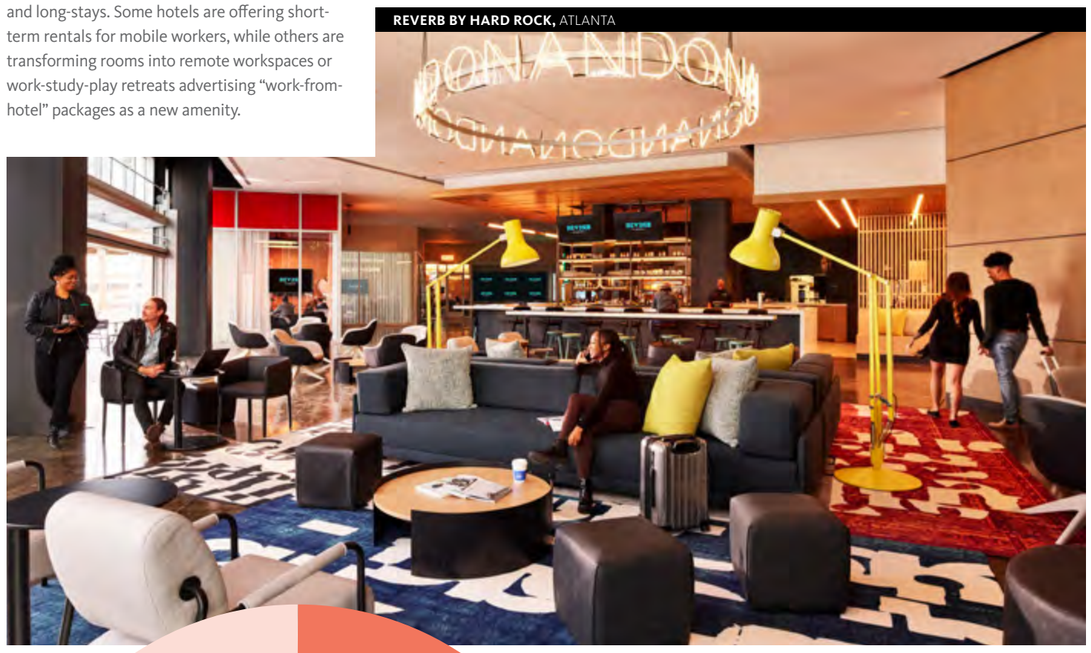
ATTRACT GUESTS BY EMBRACING THE WORK FROM ANYWHERE MOVEMENT

Hotels will become an extension of our work-from-home experience as travel resumes. Work/life boundaries have blurred, and untethered workers will extend vacations and travel to work from anywhere. This shift is expanding the market for "adjacent space" (adjacent to the traditional hotel), such as serviced apartments, aparthotels, and long-stays. Some hotels are offering short-term rentals for mobile workers, while others are transforming rooms into remote workspaces or work-study-play retreats advertising "work-from-hotel" packages as a new amenity.

"IT'S BECOMING MORE APPARENT TO THE TRAVEL INDUSTRY THAT THE WELL-BEING OF THE INDIVIDUAL IS INTRINSICALLY TIED TO THE WELL-BEING OF THE ENVIRONMENT."

—LAURA POWELL, SKIFT

REVERB BY HARD ROCK, ATLANTA



12%

JUST 12% OF RESPONDENTS WANT HOTELS TO OPERATE HOW THEY DID BEFORE THE PANDEMIC.

—GENSLER HOSPITALITY PULSE SURVEY 2020

TREND 03 | RESPONSIVE TO FUTURE NEEDS

HOTELS CAN FIND NEW REVENUE BY REPURPOSING EMPTY ROOMS

With lower occupancy rates due to the pandemic, hotels are generating income by refurbishing, reinventing, and repurposing underutilized spaces. During the height of the pandemic, empty guest rooms have been reimagined as temporary hospitals, recovery facilities, or student housing. Post-pandemic, we can expect hotels to embrace an even stronger sense of social responsibility as they engage and welcome back their communities. Spaces within hotels, such as lobbies and amenities, should be flexible and responsive to future needs. Guest rooms will double as gyms, dining rooms, and offices. This agility can provide real value for hotels and their communities.

AC MARRIOTT, FAIR OAKS, SUNNYVALE, CALIF.

4

Ideas Hotels Can Use to Bring Back Guests

Now that we think about human contact differently, how can hotels rethink the guest experience so that guests feel comfortable again?

Here are four ways hotels can meet new expectations and deliver an exceptional guest experience in a post-COVID era:

1 REVIVE AND RETHINK ROOM SERVICE

Over the past few years, self-serve options and grab-and-go markets have reduced the demand for room service. With heightened focus on health, room service could be rethought into a wellness service that provides access to healthy produce and locally sourced ingredients.

2 SUPPORT SAFETY THROUGH CLEANLINESS AND CONTACTLESS TECHNOLOGY

There are a number of strategies hotels can consider to demonstrate their commitment to safety through cleanliness. The industry is expected to increasingly implement contactless or touchless technologies, such as self-service check-in, mobile room keys, and touchless faucets for a higher standard of cleanliness.

3 REQUIRE NEW STANDARDS FOR MEETINGS AND EVENTS

As we've become more accustomed to remote connectiveness, we won't rely on face-to-face meetings as much as we used to. What will this mean for meeting and event bookings — and the associated revenue? For one, hotels can position themselves as remote offices or as virtual event hosts. Videoconferencing suites with purposeful lighting, green screens, and audio-visual infrastructure, and digitally fluent concierges could become the new differentiators. To minimize physical contact between attendees, meeting spaces will need to be reconfigured to de-densify the floor space.

4 INTEGRATE DIGITAL EXPERIENCES

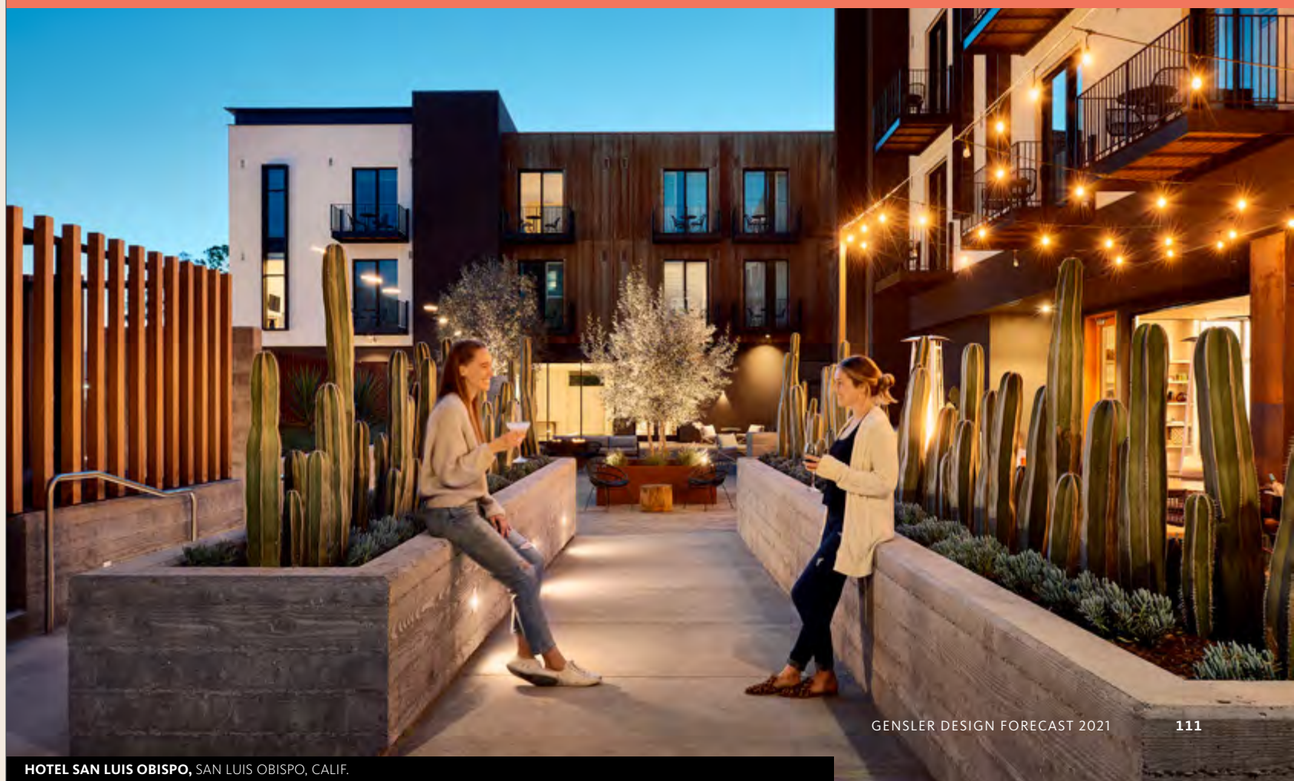
With digital technologies, hotels can customize the guest experience — from preset arrival lighting, music, and room configuration to content based on past behaviors or preferences. Digital experiences allow guests to monitor and adjust their own sound, temperature, and ventilation levels, while aiding communication between guests and hotel operators for room service and amenities reservations.

CITIZENM, SEATTLE

TREND 04 | SUSTAINABILITY ADDS VALUE

SUSTAINABLE DESIGN CAN BE A DIFFERENTIATOR AND A DRAW

While the pandemic is first and foremost an issue of human health and safety, it has also created an awareness of the industry's role in sustainability. Eco-conscious travelers are looking to "slow travel," or sustainable tourism where guests can connect with nature while minimizing their environmental impact. Of commercial buildings, hotels are among the highest per square foot energy and water users. According to the Urban Land Institute, sustainable building practices are increasingly being incorporated throughout the hotel sector to add value and provide a competitive edge.



HOTEL SAN LUIS OBISPO, SAN LUIS OBISPO, CALIF.

A NEW DESTINATION HOTEL FOR GAMING FANS

ATARI HOTELS, LAS VEGAS

When tasked by GSD Group with translating the legendary gaming brand into an immersive hospitality experience, Gensler created an experience-driven hospitality, esports, and entertainment destination that celebrates Atari's legacy while welcoming modern gamers, esports fanatics, and their families. Gensler's multidisciplinary team of Hospitality, Brand Design, Sports, and Digital Experience designers created a hospitality design concept rooted in gaming nostalgia with retro elements juxtaposed with state-of-the-art features, immersive experiences, future-cast vernacular, and front-edge embedded technology. The result is a hyperconnected hospitality experience, from booking to checkout. Atari Hotels is a destination where past, present, and future meet at the intersection of interactive, virtual, augmented, and IRL experiences.

MIXED USE & RETAIL CENTERS

Mixed-use districts and retail centers are seeing opportunities to support diverse, equitable, and healthy places at the heart of their communities. Through artful placemaking and the integration of a variety of complementary spaces, mixed-use environments can be the new hybrid spaces of our cities.

BRAND DESIGN
CULTURE & MUSEUMS
DIGITAL EXPERIENCE DESIGN
HOSPITALITY
MIXED USE & RETAIL CENTERS
RESIDENTIAL
RETAIL
SPORTS

OAKRIDGE CENTRE, VANCOUVER

TREND 01 | TRANSFORMATION OF THE MALL

MALLS HAVE NEW OPPORTUNITIES TO BECOME COMMUNITY ASSETS

The global pandemic has greatly accelerated several trends in the conversion, repurposing, and transformation of existing retail malls, such as rethinking big-box anchors, leveraging parking for higher/better uses, and reestablishing the mall as the center of a vibrant, inclusive community. Through creative adaptive reuse, struggling malls are being repurposed to align underutilized real estate assets with growing community needs, from senior living or multifamily housing developments, to community college campuses, healthcare facilities, or mixed-use centers.

TREND 02 | SMART DENSITY

SMART DENSITY AND SHARED URBAN EXPERIENCES REMAIN VALUABLE

Mixed-use developers should look to create "smart density" — hybrid spaces that take advantage of density by creating shared urban experiences and installing new programming where people already congregate. As cities smartly densify, public spaces, hybrid places, and city streets will play a critical role in supporting the new types of connected spaces and live/work/play communities that are designed for people.

MOST THINK ARTS AND CULTURE SHOULD BE PART OF THE MIX

85%

OF VISITORS WHO SELECTED ARTISTIC AND CULTURAL EVENTS AS MUSTS FOR A GREAT MIXED-USE PROJECT THINK THAT ART EXHIBITIONS ARE IMPORTANT.

—GENSLER "MIXED-USE EXPERIENCES IN LATIN AMERICA" RESEARCH 2020

RIVER OAKS DISTRICT, HOUSTON

"THE TRANSFORMATION OF REAL ESTATE THAT HAPPENED DURING THE PANDEMIC HAS OFFERED HUGE OPPORTUNITIES TO REPOSITION RETAIL CENTERS AND UNLOCK LATENT VALUE."

—J.F. FINN, MIXED USE & RETAIL CENTERS LEADER, GENSLER

TREND 03 | OPEN SPACE

OPEN SPACE IS NOW A VALUABLE AND HEALTHY AMENITY

The pandemic has provided an unprecedented focus on our public and open space, and demand for these spaces has grown exponentially. That demand won't stop once the vaccine is widely distributed. Designing healthy environments with access to fresh air, outdoor amenities, and integrated wellness platforms is top of mind for tenants, residents, and developers. The activation and integration of open space are being driven by the community and the private sector. Environments with ample outdoor meeting and focus spaces will become critical leasing amenities. Retail centers with a distributed network of public spaces will thrive.

TREND 04 | RECLAIMING OUR STREETS

STREETS AND SIDEWALKS CAN BE PART OF THE RETURN PLAN

City streets, parking spaces, and sidewalks represent opportunities to convert space previously dedicated to motor vehicles back to people. Some cities have expanded "slow streets" where vehicles, pedestrians, and cars can safely commingle. Others are reallocating street space from cars to cycling and walking. These spaces can provide outdoor dining and social space, and can accelerate a conversion to pedestrian-centric environments, supported by micro-mobility and alternative transportation. These new hybrid places will be more accessible, inclusive, and activated when given back to city residents.

WEST END ATLANTA — MASTER PLAN STUDY, ATLANTA

EASTLINE, OAKLAND, CALIF.

REAL ESTATE THAT PROVIDES MULTIPLE USES WILL GROW IN VALUE

"We need a 'multiplace' life to be fully human, and real estate is critical to meeting that. Looked at that way, real estate post-pandemic has more value than current valuation models allow. This realization could reshape the way we design our workplaces, hotels, retail, schools, and cities."

—DIANE HOSKINS, GENSLER CO-CEO, "REAL ESTATE MUST OFFER HUMAN EXPERIENCES, AS WE ESCAPE VIRTUAL LOCKDOWN LIVING," WORLD ECONOMIC FORUM'S AGENDA BLOG

6 X GUADALUPE, AUSTIN, TEXAS

THE CENTRAL PARK, PHOENIX

5

"Out of the Box" Strategies for Underutilized Retail Real Estate

As store and mall closures continue, developers and cities are facing the reality that there will be thousands of square feet of available space in prime locations in their communities. What should they do with it?

Here are five strategies for retail reuse to align underutilized real estate with community needs:

1 REIMAGINE RETAIL CENTERS AS MULTIFAMILY HOUSING DEVELOPMENTS.

A persistent shortage of affordable housing exists in every U.S. state. Many retail centers are located near major thoroughfares or public transit corridors, making these sites logical locations for new multifamily housing developments.

2 TRANSFORM MALLS INTO COMMUNITY COLLEGE CAMPUSES.

Continuing demands are increasing for community colleges to support satellite locations for next-generation workforce training. By utilizing existing mall infrastructure, developers could make higher education more accessible to the community.

3 EXTEND THE OFFICE TO WORKPLACE MEETING HUBS.

To meet the desire for in-person connection, localized workplace meeting hubs may emerge as centers for connectivity. Convenient locations at previous retail settings within a few minutes of home could help workers avoid crowded mass transit and lengthy commute times.

4 BRING HEALTHCARE TO CONSUMERS THROUGH LOCALIZED "HEALTH HUBS."

Healthcare is becoming more distributed and accessible as health systems extend their reach to places where people can connect and stay healthy outside of a hospital. While consumers might still seek primary or specialty care from healthcare providers, local hubs in retail settings could connect patients and practitioners through virtual care or telehealth.

5 REPURPOSE VACANT RETAIL AS SENIOR HOUSING.

As the demand for senior housing grows, residents will be drawn to new developments with desirable, amenity-rich social activities and entertainment, along with fitness and healthcare offerings. Large big-box retail stores could be well-positioned for this kind of transition.

RESIDENTIAL

The need for affordable and workforce housing was a reality before 2020, but social justice movements, the pandemic, and climate events have put a new spotlight on the pressing need for innovative, effective housing solutions. We must identify meaningful, insightful solutions to address housing shortfalls and the severe costs of delivering housing for a diverse society.

URBAN AWNING, LOS ANGELES

TREND 01 | AFFORDABLE HOUSING

AFFORDABLE HOUSING NEEDS A NEW APPROACH

The cost to deliver much needed housing is rising at unsustainable rates, exacerbating the housing crisis in cities around the globe. To change this course, we need to develop innovative, affordable, and inclusive housing solutions. Identifying ways to reduce the cost of housing through construction techniques, regulatory reform, and operating expenses will be key. Prefabricated modular construction will be an industry game-changer, potentially cutting production time in half and reducing costs by 20% compared to conventionally built projects.

THE RENTAL STOCK IS UNAFFORDABLE TO LOW-INCOME RENTERS

<10%

SINCE 2010, FEWER THAN 10% OF RENTAL UNITS ARE AFFORDABLE TO U.S. RENTER HOUSEHOLDS EARNING 50% OF MEDIAN RENTER INCOME (MRI).

—FREDDIE MAC MULTIFAMILY

ONECENTRAL, SEATTLE

TREND 02 | WORK HAPPENS ANYWHERE

CONTINUED WFH WILL INFLUENCE RESIDENTIAL DESIGN

As working from home gains traction and the lines between live, work, and play increasingly blur, spaces inside and out of residential units will need to be designed for increased versatility while promoting productivity. Increased demand for remote work will introduce new types of common areas and more flexibility in amenity spaces. Since work now happens anywhere, residential common areas should become versatile, transformable social spaces — addressing multiple work "modes," such as collaboration and socializing.

2/3

ROUGHLY TWO-THIRDS OF WORKERS ACROSS OUR GLOBAL SURVEYS WANT A HYBRID OF HOME WORK AND OFFICE WORK. VERY FEW WANT TO WORK FROM HOME FULL TIME POST-PANDEMIC.

—GENSLER GLOBAL WORKPLACE SURVEYS 2020

TREND 03 | INCLUSIVE HOUSING

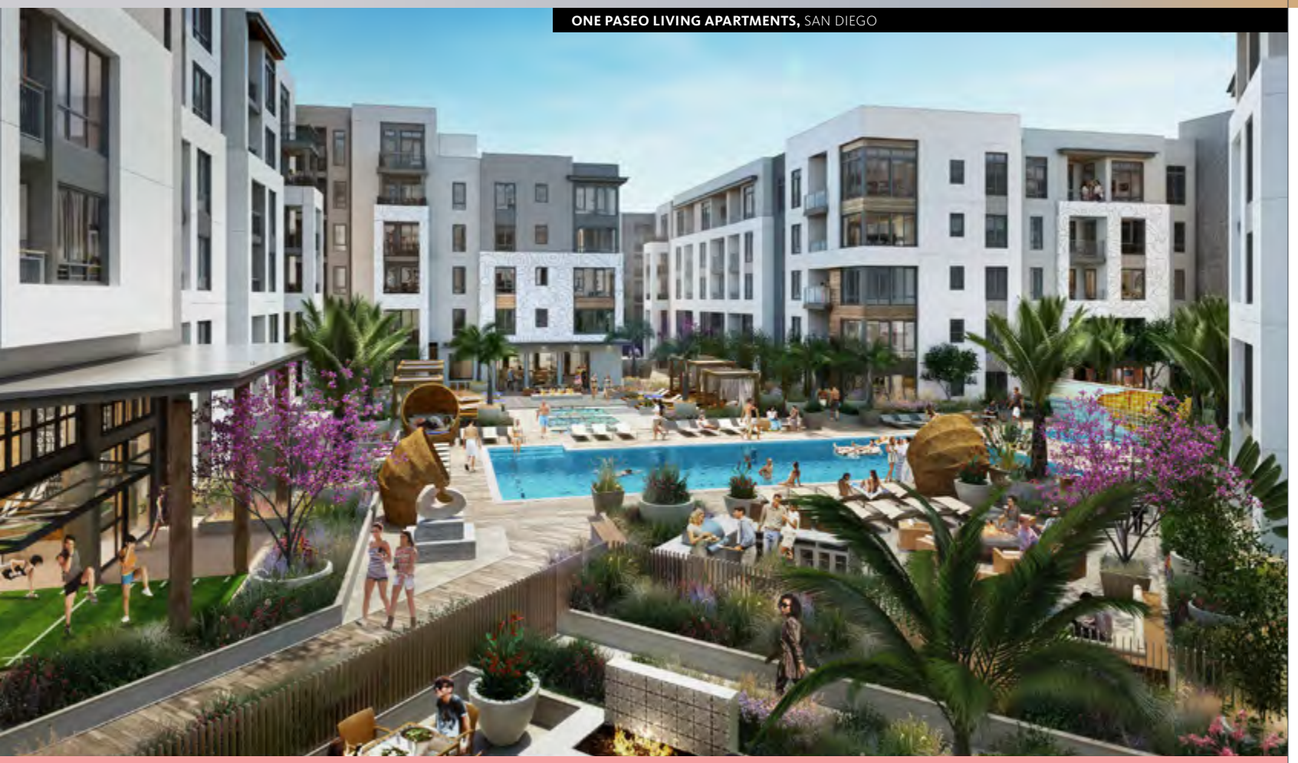
INCLUSIVE HOUSING DRIVES INCREASED ACCESS TO OPPORTUNITY

The global void of affordable and subsidized housing, on top of decades of discrimination, has created real strains. The growing desire for social equity will help drive the need to build more inclusive housing. To increase opportunities in historically marginalized communities, designers and developers should look to infill housing, including "missing middle" housing — diverse, affordable housing options, such as duplexes, fourplexes, cottage courts, and multiplexes — in job-rich and education-rich neighborhoods.

THE GREAT AMERICAN MOVE

A significant single-family-housing market trend emanating from the COVID-19 pandemic is '**The Great American Move**.' People (and businesses) are moving in all sorts of ways — to different geographies, from denser cities to the suburbs, from an apartment to a home, and, for some, back "home" to live with family members.

— PwC, "EMERGING TRENDS IN REAL ESTATE 2021



ONE PASEO LIVING APARTMENTS, SAN DIEGO

TREND 04 | CONNECTION TO THE OUTDOORS

INCREASED APPRECIATION FOR HEALTHY FRESH AIR IS BLURRING THE LINE BETWEEN INDOORS AND OUTDOORS

In the wake of a global health crisis, people are craving increased connection to the outdoors, including private outdoor open space for dwelling units. This will drive increased demand for private balconies and outdoor open space, especially in dense and high-rise multifamily residential projects. Residential developments that address key aspects of healthy living, such as increasing fresh air through natural ventilation and access to nature through biophilic design strategies, will have an edge.

CONFIDENTIAL CLIENT, THE NETHERLANDS

8TH GRAND & HOPE, LOS ANGELES

RETAIL

Savvy retailers have remained agile amid changes accelerated by the pandemic, economic crisis, e-commerce growth, and supply chain disruption. To remain resilient, many are right-sizing portfolios, optimizing for new market conditions, and growing differentiated offerings through a linked ecosystem.

FAR EASTERN GROUP A13 DEPARTMENT STORE, TAIPEI, TAIWAN

TREND 01 | TAKE A STAND

TAKE A STAND

Today's customers seek inspiration from authentic brands and emotionally invest in their success. Customers develop affinity with brands that are faithful toward themselves, true to their consumers, keep their promises, do good in support of their communities, and lead with conviction. From social responsibility to ethical sourcing and hiring practices, to transparent supply chains, consumers hold brands accountable for their actions — they expect brands to "walk the talk." Proud consumers reward brands with brand loyalty and brand trust — the ultimate currency in an ever changing retail landscape.

TREND 02 | TEST, LEARN, AND ADAPT

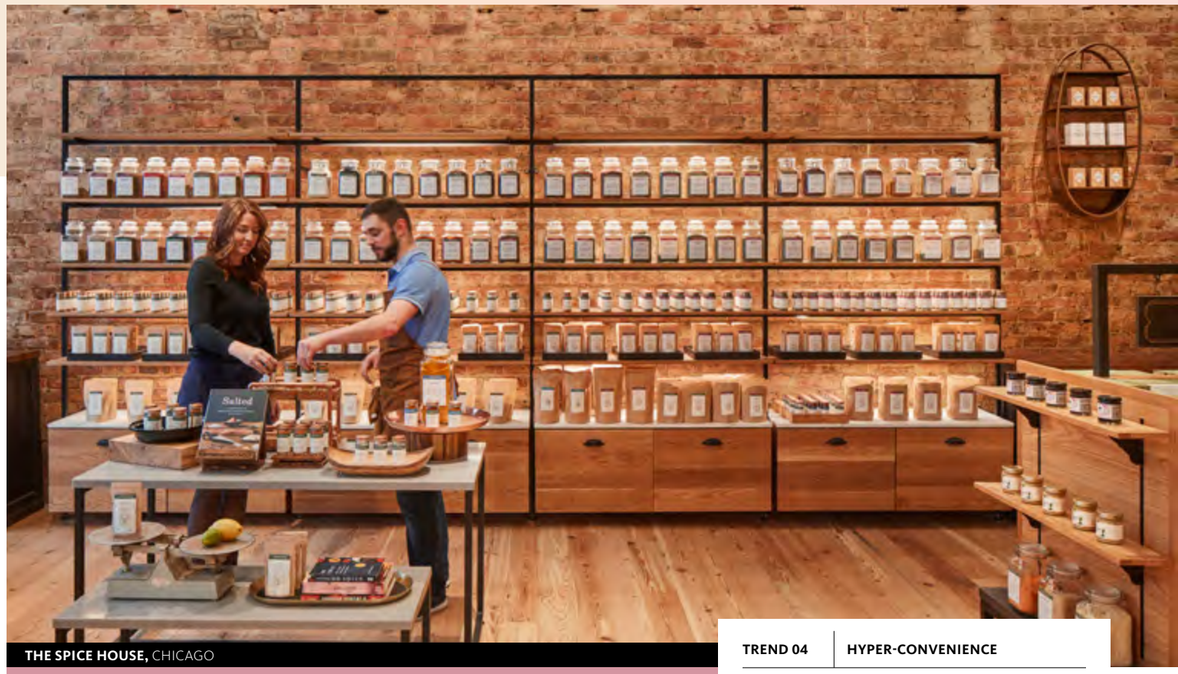
TEST, LEARN, AND ADAPT TO REMAIN RELEVANT

Consumer behavior is constantly changing, challenging retailers to adapt to engage their consumer in the most meaningful ways. To thrive amid uncertainty, retailers should adopt a "test and learn" approach to evaluate how shopper engagement is evolving and how performance measurements may be affected. The insights gleaned from these tests can help retailers make informed decisions about operations, activations, cross-channel engagement, and real estate portfolio diversification strategies, providing retailers with insights that can help them pivot and adapt to maintain relevance.

TREND 03 | BRAND PARTNERSHIPS

NEW BRAND PARTNERSHIPS CAN DELIVER AN EDGE

As retailers reposition for the future, brand partnerships enable differentiation and flexibility. Consumers are switching brands at unprecedented rates, looking for alignment with their lifestyles, convenience, product availability, and value. Retailers that want to elevate their brand perception should explore partnerships with brands that complement their consumers' lifestyles. From retailers with large portfolios of physical space who partner with digitally native brands to leverage their capabilities, to brands aligning to those with similar causes, curated partnerships can drive value in growing consumer relationships.



THE SPICE HOUSE, CHICAGO

INVESTING IN SERVICE PAYS OFF

In past recessions, companies that invest in and deliver superior customer experience during a downturn emerge far stronger than their peers once the economy rebounds.

—McKINSEY

TREND 04 | HYPER-CONVENIENCE

FOCUS ON LAST-MILE DELIVERY FOR HYPER-CONVENIENCE

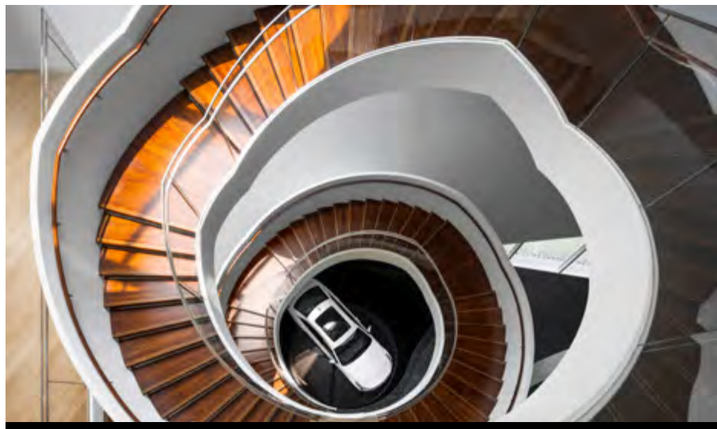
Consumer demands for same-day or faster delivery, accelerated by the pandemic, are poised to continue to grow. "Last mile" logistics — the final step in delivering product from a distribution point to the end user — is a critical factor to meeting the needs of the consumer while also reducing operating costs. By leveraging stores as distribution hubs or converting shuttered big-box retail into last-mile logistics centers, retailers can get products to consumers faster and in a more cost-effective and sustainable manner.

CONSUMERS ARE WILLING TO PAY FOR CONVENIENCE

88%

OF CONSUMERS ARE WILLING TO PAY FOR SAME-DAY OR FASTER DELIVERY.

— PwC, "GLOBAL CONSUMER INSIGHTS SURVEY 2020"



CADILLAC HOUSE, SHANGHAI

DETROIT IS THE NEW BLACK, DETROIT

6

Considerations for the New Retail Environment

While the retail landscape continues to evolve, the key to recovery is to not solely focus on the physical or virtual experience. Instead, retailers must create meaningful engagement across channels to meet new customer expectations.

Here are six considerations for retailers to rethink the new retail environment:

1 GET THE BASICS RIGHT: FOCUS ON CONVENIENCE AND EASE FIRST.

To attract and retain customers, retailers must first get the basics right. Retail brands shouldn't just focus on delivery and convenience outside the store; focusing on the proper merchandise, navigation, and service inside the store should be a priority.

2 EMBRACE FLEXIBILITY AND ADAPTABILITY.

As retailers may need to change the purpose of their environments on a dime, they're asking for spaces that are more flexible and adaptable to allow them to respond without incurring significant capital expenditures.

3 FOCUS ON CONNECTING WITH THE CUSTOMER, RATHER THAN PUSHING PRODUCT.

Getting customers to cross the threshold is the hard part; after that initial step, use the ecosystem of product, brand messaging, service, and technology to enable brand engagement, whether that be reaffirming brand relevance to the customer or converting a purchase.

4 TAP INTO THE CUSTOMER'S DIGITAL FOOTPRINT.

Consumers are taking advantage of new ways of learning, socializing, and discovering and connecting with brands online. Leverage their digital footprints to create better opportunities for engagement.

5 IT'S A CHANGING WORLD — TEST AND LEARN TO SEE WHAT WORKS.

Consumer expectations have been suddenly reset, creating an opportunity to experiment and initiate change. Brands can experiment with store formats with the help of spatial data. Connecting data to decision-making through sensors, IoT technology, and direct customer feedback provides greater insights into better retail experiences.

6 CREATE A COMMUNITY THAT FOSTERS BELONGING.

Retailers can no longer focus solely on delivering experience. Stores need to function as places that bring people together and forge connections. Understand what the right brand experience is for the location to create a community where customers feel they belong.

HERITAGE BANK, NEW SOUTH WALES, AUSTRALIA

40%

CONSUMERS ARE SWITCHING BRANDS AMID UNCERTAINTY

Rather than sticking to familiar patterns and brands, consumers have embraced change amid great uncertainty; 40% of consumers said they have tried new brands or retailers.

— McKINSEY, "THE REINVENTION OF RETAIL"

ANTA SPORTS GEN 10 SHANGHAI FLAGSHIP STORE, SHANGHAI

A DEPARTMENT STORE EXPERIENCE

FAR EASTERN GROUP A13 DEPARTMENT STORE, TAIPEI, TAIWAN

Far Eastern Department Store is a brand deeply rooted into Taiwan's history. For the new A13 department store in Taipei, the client tasked Gensler to refresh and reposition the store with a modern design and a retro and nostalgic feel. Vintage materials, coupled with innovative digital experience design integrated throughout the space, inspire the seamless coexistence of old and new, past and future, without sacrificing authenticity. The new store aims to attract both loyal customers and a new millennial audience through an unparalleled consumer experience.

SPORTS

Sports can be relied upon as a focal point and bellwether for positive change. People yearn for sports as an inclusive and accessible pastime that unites their passion. To adapt, venues must prioritize comfort and safety, while enhancing the fan experience. Sporting leagues have an opportunity to design resilient, flexible venues to thrive in the next era.

CHASE CENTER, SAN FRANCISCO

$83B

IN NORTH AMERICA, THE SPORTS MARKET WILL GROW AT 3% ANNUALLY, FROM $71.1 BILLION IN 2018 TO $83.1 BILLION IN 2023.

—PwC 2019 SPORTS OUTLOOK

TREND 01 | **A FRICTIONLESS EXPERIENCE**

FOCUS ON HEALTH TO PROVIDE THE BEST GAME DAY EXPERIENCE

Sports venues must focus on a frictionless experience that prioritizes fan safety. New and updated amenities should strike a balance between cost and value in innovative ways. Screening and cleaning protocols, touchless entry and retail experiences, and open concourses actively reduce risks for fans. Ample graphic and signage communications help to transparently build confidence so attendees know their safety is being valued. Building this awareness will center around trust and reliability, encouraging extended engagement and visibility while continuing to increase in-venue revenue potential.

GUANGZHOU EVERGRANDE SOCCER STADIUM, GUANGZHOU, CHINA

TREND 02 | **TAPPING INTO ESPORTS**

EMBRACE THE RISE OF ESPORTS

The fan interest and accessibility to gaming as sport has only accelerated over the last year. This popularity translates to big revenue opportunities across a range of related areas of focus, from competition arenas, collegiate training facilities, and dedicated broadcast/production studios, to untapped sponsorship and retail opportunities. The digital nature of the sport requires a new type of hybrid arena engaging both in person and online fans. This sport format fuels global accessibility and profits beyond other comparable professional sports.

Sports & entertainment stakeholders must accelerate their digital transformation journey, or face losing fans' attention for good.

—ATOS

ROCKET MORTGAGE FIELDHOUSE, CLEVELAND

40%

OF GAMERS WATCH ESPORTS EVENTS AT LEAST ONCE A WEEK. IN 2020, THE GLOBAL ESPORTS MARKET IS EXPECTED TO GENERATE $1.5 BILLION IN ANNUAL REVENUES, PRIMARILY FROM SPONSORSHIPS AND ADVERTISING TO AN ESTIMATED GLOBAL AUDIENCE OF 600 MILLION FANS.

—DELOITTE 2020 SPORTS OUTLOOK

TREND 03 | **BLENDING DIGITAL AND PHYSICAL**

PLAN FOR DIGITAL EXPERIENCE INTEGRATION

Signage can be as much about performance as it can about wayfinding. Digital Experience Design (DXD) integrations in-venue offer a flexible take on how surfaces can share information, promote sponsors, or set a mood. The human experience is now completely synced up with technology for a truly immersive experience. What this means for the future of our venues is that those human experiences will begin to blend the digital and physical beyond anything in our imaginations currently, and the facilities need to be able to adapt to remain relevant.

THE UNIVERSITY OF TEXAS AT AUSTIN, MOODY CENTER BASKETBALL AND EVENTS ARENA, AUSTIN, TEXAS

MILWAUKEE ENTERTAINMENT BLOCK, MILWAUKEE

TREND 04 | TAKE IT OUTSIDE

SPORTS CAN ANCHOR A NEIGHBORHOOD AND A COMMUNITY EXPERIENCE

The cost model for large sporting venues has changed. Sports-anchored districts create an opportunity to extend the guest experience and game day profits beyond the game. A district approach has the potential to reach a variety of visitors with different interests, creating multiple potential revenue streams. This larger footprint extends the brand beyond the venue, taking advantage of outdoor activation and creating an attractive opportunity to grow sponsor involvement.

SAN DIEGO ARENA DISTRICT, SAN DIEGO

REIMAGINING THE FUTURE OF COMMUNITY

The pandemic, inequality, and the climate crisis have challenged us to redefine the urban experience of our cities and rethink them through the lens of human experience. Cities have expanded the public realm, creating walkable, safe places. More streets have been given back to people-first activities, and we are rethinking the built environment to ensure our spaces are open for anyone to use. The focus now is to create urban environments, community institutions, and infrastructure that are more resilient, equitable, and responsive to people's needs as we emerge from a global health crisis.

P.138 AVIATION
P.144 CITIES & URBAN DESIGN
P.148 CRITICAL FACILITIES
P.152 EDUCATION

9 STRATEGIES FOR URBAN REVITALIZATION

1 CREATE A SUSTAINABLE, INCLUSIVE, REGENERATIVE URBAN ENVIRONMENT.

For a resilient future, we must evolve from a linear city to a circular, regenerative one, where outputs from one process can be used as inputs for another. Reducing, reusing, and recycling are part of a platform for a circular city metabolism.

2 EMBRACE ECONOMIC AND GENERATIONAL DIVERSITY TO CREATE INCLUSIVE CITIES.

We must address economic and generational gaps within cities. We can do so by expanding opportunities and encouraging affordable intergenerational living and connections.

3 ENCOURAGE POLYCENTRICITY, DENSITY, AND COMPACTNESS.

Dense environments, when done right, provide multiple benefits. Cities will continue to attract people because of their ability to create connections and build community.

4 LEVERAGE TECHNOLOGY TO CREATE INTELLIGENT CITIES.

By linking technology, people, processes, and data, we can create intelligent cities that make informed decisions with people at the heart of the process.

5 RESPOND TO CHANGING NEEDS THROUGH FLEXIBILITY IN THE PUBLIC AND PRIVATE REALMS.

From increasing access to outdoor space to allowing businesses to use city streets, more adaptable, flexible public and private realms are fundamental to creating more inclusive, equitable places for all.

Centre District on Pittsburgh's historic Lower Hill anchors a large-scale public-private effort to revitalize a neighborhood scarred by urban renewal. With activated green spaces, pedestrian-friendly retail corridors, and multimodal urban environments, this mixed-use destination embodies the "20-minute neighborhood" with vibrant, inclusive places to work, live, celebrate, and play.

Lower Hill District Mixed-Use Redevelopment, Pittsburgh

6 ACTIVELY ENGAGE IN PUBLIC POLICY AND URBAN DESIGN.

To be effective in reshaping cities, designers, planners, and policymakers need to actively engage *with* cities and communities, rather than design for them.

7 REIMAGINE THE CENTRAL BUSINESS DISTRICT.

Central business districts (CBDs) are particularly susceptible to the impacts of pandemics. To keep CBDs vibrant, we must reimagine our urban cores as walkable, affordable, and diverse mixed-use environments.

8 BUILD 20-MINUTE NEIGHBORHOODS.

The "20-minute neighborhood," in which residents' needs can be met within a 20-minute walk, is gaining momentum. Rethinking this concept through the lens of equity, the focus should be on affordable and mixed-income housing, neighborhood-based retail and employment, and accessible health and wellness.

9 INVEST IN PUBLIC TRANSPORTATION AND TECHNOLOGY INFRASTRUCTURE.

Cities should explore alternative modes of mobility and public-private partnerships to make transit more accessible. Cities should also ensure more equitable access to internet infrastructure.

Community input was vital in crafting a revitalization plan for this public housing site on the edge of the city's emerging downtown. The plan calls for 440 units of mixed-income housing with a broad range of housing types, including rowhouses, townhomes, and stacked flats.

Austin Homes Redevelopment Plan, Knoxville, Tenn.

AVIATION

AVIATION
CITIES & URBAN DESIGN
CRITICAL FACILITIES
EDUCATION

Airports are a reflection of our cities, and in a post-COVID world, airports will encompass more of the functions we find common in cities. As airports grow into small cities with a wide range of functions, such as healthcare, hospitality, retail, and workspaces, the need for purpose increases. With this, a new town square emerges at the heart of our airports.

TORONTO PEARSON CONCOURSE CONCEPT, ONTARIO, CANADA

TREND 01 | TOUCHLESS TECHNOLOGY

THE TOUCHLESS PASSENGER JOURNEY WILL EXPAND

Airport operations and facility functionality are being redefined to create consumer confidence based on health and safety. Technology will drive innovation in the passenger processing areas, with a focus on touchless technologies and the use of personal devices. For example, smartphone technology could help pre-map the traveler's journey, allocating a preset timeslot to pass through security. For the airport, this means access to data that can help manage passenger loads and staffing. For the traveler, the journey would feel safer and more personalized.

TREND 02 | EMBRACE DIGITAL STRATEGIES

DIGITAL SIGNAGE AND WAYFINDING WILL EVOLVE TO ADDRESS NEW CRISES

Analog signage strategies proved to be too static in the face of a crisis like COVID-19. As we emerge from the pandemic, the industry must embrace digital strategies as the new normal, a change that has been in the works for some time. The reasons why are clear: such strategies enable airports to adjust to new circumstances quickly. They give airports more flexibility, allowing for fast gate changes in ways that simply were not possible before. Applied to queueing, digital signage will be coupled with queue monitors to deliver data in real time. By using digital strategies to the fullest, and in an immersive manner, the delivery of the information can be aligned with a passenger's smartphone and completely personalized. This evolution could create a more tailored, empathetic, and personalized messaging strategy to enhance the traveler's journey.

TREND 03 | AIRPORTS AS COMMUNITY HUBS

AIRPORTS WILL BECOME TOWN SQUARES

Airports are already cities unto themselves. As society increases its focus on a sense of place and local culture, so will airports — just like the cities they serve. With a curated mix of local retail, food and beverage, healthcare, and hospitality functions, the airport experience can become more of a tailored journey for travelers and locals alike. This opens possibilities for greater integration with the outdoors to help ease the stress of traveling and gives the airport a repurposed role as a place where people want to gather, not necessarily tied to arriving or leaving.

TREND 04 | SMALLER FACILITIES

SMALL WILL BE ATTRACTIVE FOR HEALTH-CONSCIOUS TRAVELERS

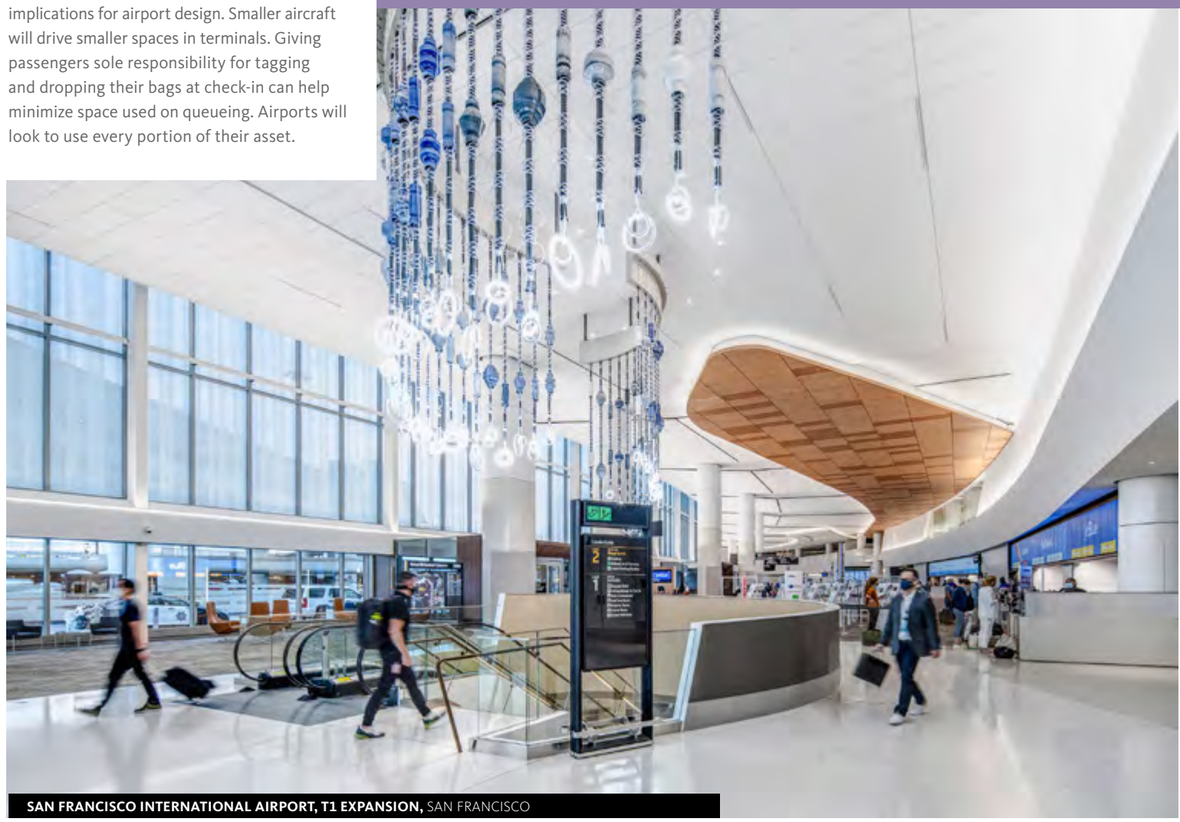
As passenger traffic resumes, people will still be drawn to smaller crowds, which will have implications for airport design. Smaller aircraft will drive smaller spaces in terminals. Giving passengers sole responsibility for tagging and dropping their bags at check-in can help minimize space used on queueing. Airports will look to use every portion of their asset.

AUSTIN-BERGSTROM INTERNATIONAL AIRPORT, AUSTIN, TEXAS

FULL RECOVERY IS COMING — BUT IT WILL TAKE TIME

The forecast recovery back to pre-pandemic passenger volumes is late 2023 or early 2024.

—AIR TRANSPORT ASSOCIATION



SAN FRANCISCO INTERNATIONAL AIRPORT, T1 EXPANSION, SAN FRANCISCO

SAN FRANCISCO INTERNATIONAL AIRPORT, T1 EXPANSION, SAN FRANCISCO

DESIGN CAN HELP RESTORE PASSENGER CONFIDENCE POST-COVID

"We believe that by investing in design that can make passengers feel more confident, airports can accelerate the rate of travel by up to eight months."

—GENSLER DIALOGUE BLOG, "HOW AIRPORT DESIGN CAN RESTORE PASSENGER CONFIDENCE"

LAX MIDFIELD SATELLITE CONCOURSE, LOS ANGELES

4

Strategies for Airports to Revitalize Their Facilities in a Post-Pandemic World

Passenger traffic levels are likely to lag for several years, which means it's the perfect time for airports to prepare for future demands. These four key strategies should guide the way:

1 TEST AND LEARN.

Spaces within a terminal are typically assigned and rented based on long-term lease agreements. Rethinking that lease strategy to get quicker turn spaces will allow for experimentation. The facilities could then benefit from more common use space for airlines or more rotational retail. Airports need not follow the traditional playbook — they should use such opportunities to test and learn.

2 MAXIMIZE THE BUILDING, NOT THE PASSENGER AND AIRCRAFT COUNT.

With passenger volumes in flux, airports should rebalance the airside space by removing a gate and making up that passenger volume through better gate management. By layering in a more efficient gate utilization system with quicker aircraft turns, airports could overcome the reduction in gate capacity via technology, unlocking a more impactful use of space.

3 EXPRESS YOURSELF.

The opportunity to build a new facility or reimagine a passenger terminal may only happen once in a generation, so ensuring that design is anchored in the context of the city is critical to an airport's long term success. Cities should reimagine their airports as modern gateways, connecting people, building resiliency, and reinforcing local identity.

4 WHEN IT COMES TO COMMUNITY CONNECTION, DIG DEEPER.

The incorporation of regional materials, local makers, restaurants featuring local chefs, and live entertainment brings authenticity and excitement, making the airport a vibrant destination in and of itself. Airport authorities can experiment with programming and partnerships by creating an artist-in-residency program or partnering with local universities for public health research studies.

AN AIRPORT DEFINED BY ITS SENSE OF PLACE

EAGLE COUNTY REGIONAL AIRPORT, GYPSUM, COLO.

A reimagined concourse accommodates current and future enplanements, while enhancing the overall passenger experience. The design reflects the region's aesthetic and enhances its operational function through peak tourism seasons. One of the key strategies to right-sizing the concourse was accomplished through the creation of "blended space," which includes concession dining, casual seating, a long banquette, a bar, and high-top tables. The airport was named a Prix Versailles 2020 winner in the Interior Airports category.

CITIES & URBAN DESIGN

AVIATION
CITIES & URBAN DESIGN
CRITICAL FACILITIES
EDUCATION

Urban areas are a bigger part of the global conversation than ever before. The events of 2020 highlighted issues that will take decades to fully address. The interplay between urban designers, public policy makers, and community voices thus takes on new meaning, as they strive in unison toward equitable and sustainable cities.

PITTSBURGH LOWER HILL MIXED-USE REDEVELOPMENT, PITTSBURGH

TREND 01 | A MIXED-USE MINDSET

CITIES DON'T HAVE TO SACRIFICE DENSITY

To get ahead of the next public health crisis, build resilience, and promote equity, cities should counterbalance perceived negative effects of density by improving access to essential services such as water, affordable housing, education, open space, technology, and healthcare. Repurposing existing buildings to new functions will form a significant part of such efforts. It's possible to make cities healthier places without sacrificing the density that fuels their economies.

TREND 02 | PARKS AND FLEXIBLE STREETS

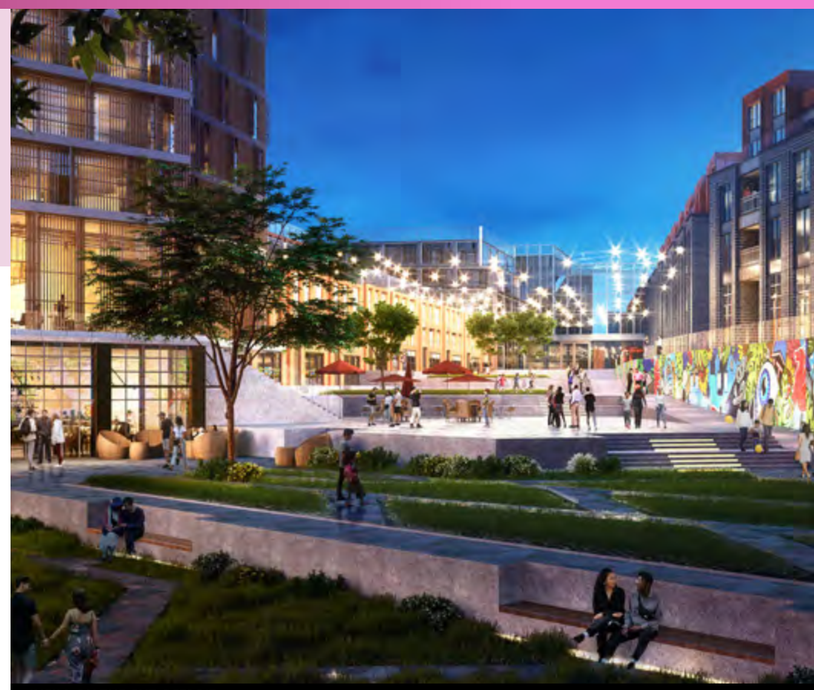
URBAN PARKS AND FLEXIBLE STREETS MAKE HEALTHIER, MORE PURPOSEFUL CITIES

New approaches to city-making should bring open spaces, watersheds, infrastructure, forests, and parks into the heart of how we plan and reshape our cities in the face of climate change and future pandemics. Likewise, we are witnessing a new widespread acknowledgment of the advantages of flexible streetscapes. In the long term, reducing street widths to expand sidewalks will become more commonplace.

THE CENTRAL BUSINESS DISTRICT SHOULD EMBRACE A WIDER PURPOSE

"TO RESHAPE THE CBD, A CHANGE OF MINDSET IS CRITICAL TO CREATE ZONING AND DEVELOPMENT REGULATIONS THAT PROMOTE WALKABILITY, RESILIENCY THROUGH ADAPTIVE REUSE, AND INCLUSIVITY THAT WOULD ALLOW THE CBD TO BE ENJOYED BY ALL."

—DIALOGUE BLOG, "THE FUTURE OF THE CENTRAL BUSINESS DISTRICT: RESETTING OUR DOWNTOWN CORES"



INFILL ON THE CUT, DETROIT

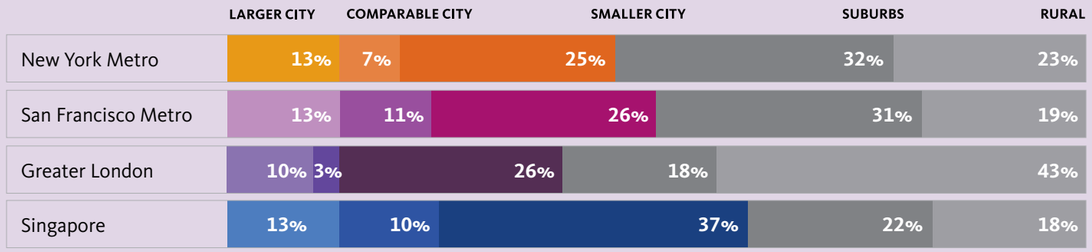
TREND 03 | SECOND-TIER CITIES

SECOND-TIER CITIES WILL PROVIDE COMPELLING ALTERNATIVES

Technology has erased the need for physical proximity for many of our daily activities. Now, work can be done from anywhere. The pandemic caused many city dwellers who are no longer tethered to a downtown office to rethink life in large urban areas in favor of smaller, less dense second- and third-tier cities. Through a confluence of lower costs of living, more accessible amenities, and improved overall quality of life, the appeal of these second- and third-tier (or "18 hour") cities is increasing — and they must respond accordingly. Meanwhile, larger cities have an opportunity to preserve their vibrancy by increasing the permanent population and diversity of functions in their urban centers.

A MAJORITY OF RESIDENTS OF MAJOR CITIES AROUND THE WORLD ARE CONSIDERING MOVING, MANY FOR SMALLER, LESS POPULATED AREAS.

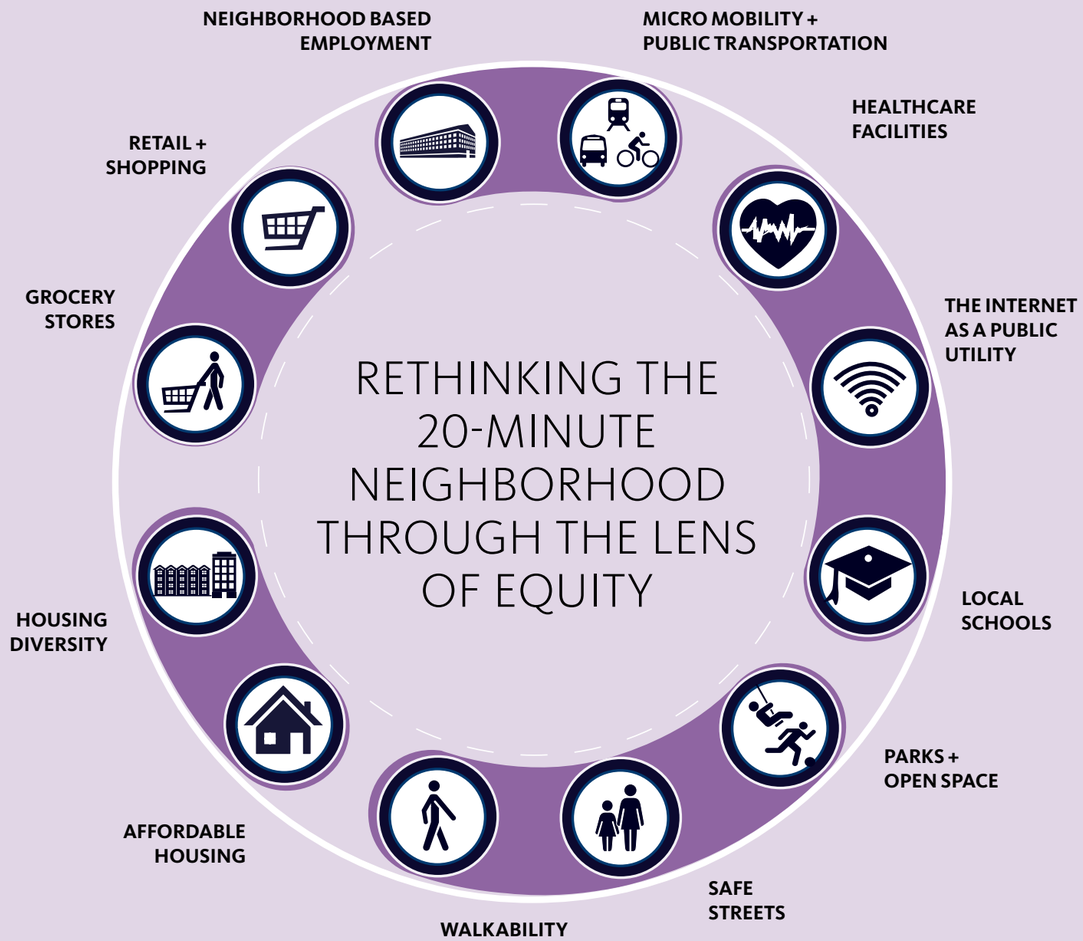
—GENSLER CITY PULSE SURVEY 2020



EQUITY AND THE 20-MINUTE NEIGHBORHOOD

"We're seeing a ripple effect in our neighborhood storefronts — and well before this pandemic, many of those storefronts, especially in our neighborhoods, were already vacant. There's an opportunity to start to think about how these spaces can be repurposed, and how they can fill some gaps in healthcare — how we can populate these spaces to address some of these overdue needs in the community."

—ANDRE BRUMFIELD, GENSLER CITIES & URBAN DESIGN LEADER



TREND 04 | **PRIORITIZE ACCESSIBILITY**

EQUITY SHOULD FRAME THE 20-MINUTE NEIGHBORHOOD CONVERSATION

To make a 20-minute neighborhood work, it must first be infused with the necessary services to support residents' quality of life, including healthcare, affordable housing, education, healthy food, retail, and greenspace. Access for all residents must be an absolute priority. This becomes especially important as shortages in revenues are affecting investment in updates to ailing transportation infrastructure. Over time, this will increase reticence to use mass transit in major cities, which amplifies the importance of creating cities where all residents can find what they need within walking distance.

AUSTIN HOMES REDEVELOPMENT PLAN, KNOXVILLE, TENN.

ENVIRONMENTAL FACTORS MATTER MORE THAN WE REALIZE

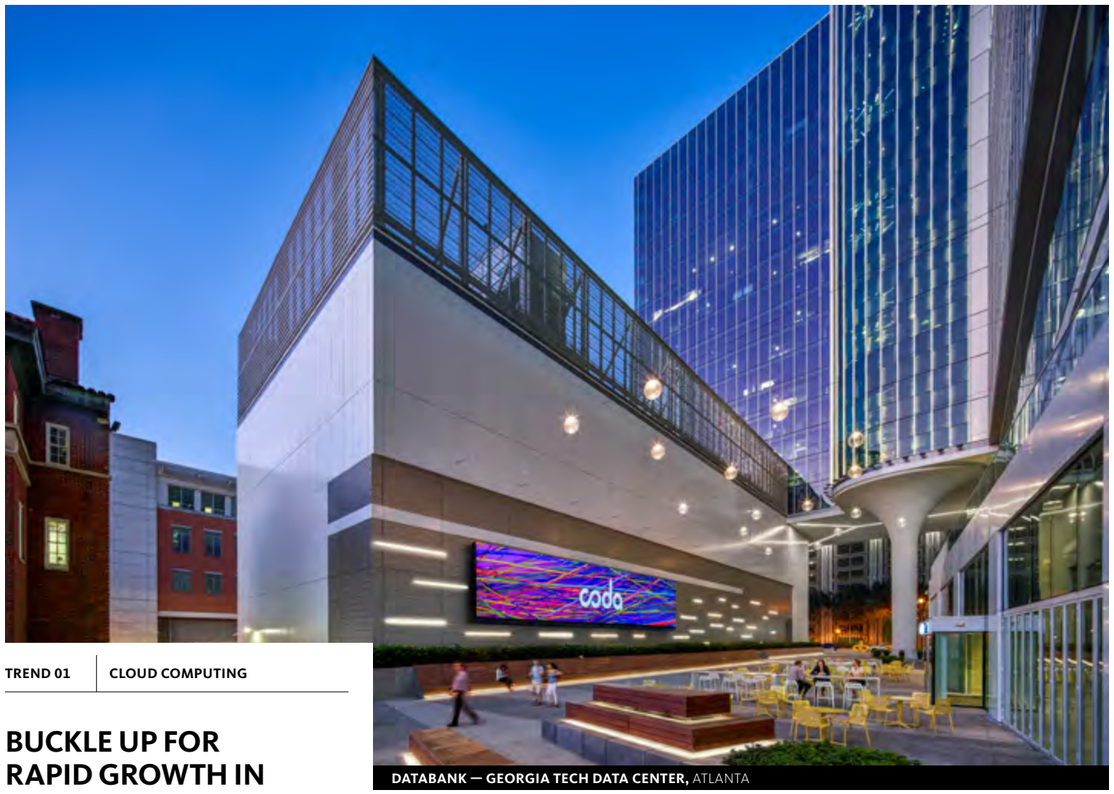
We must seriously consider the fact that the pandemic is a product of the alterations we've made to the natural landscape and the lack of harmonization of our cities with nature. We have to start adapting cities to the landscape, to nature, and not the other way around.

—GENSLER DIALOGUE BLOG, "A Q&A WITH A COSTA RICAN MAYOR ABOUT THE FUTURE OF CITY DESIGN"

BINH QUOI THANH DA, VIETNAM

CRITICAL FACILITIES

The demand for data took center stage during the pandemic and underscored the critical importance of the data center. Once anonymous and isolated, these critical facilities have now become celebrated and integrated as communities embrace equal access to data.



DATABANK — GEORGIA TECH DATA CENTER, ATLANTA

TREND 01 | CLOUD COMPUTING

BUCKLE UP FOR RAPID GROWTH IN HYPERSCALE AND CLOUD COMPUTING

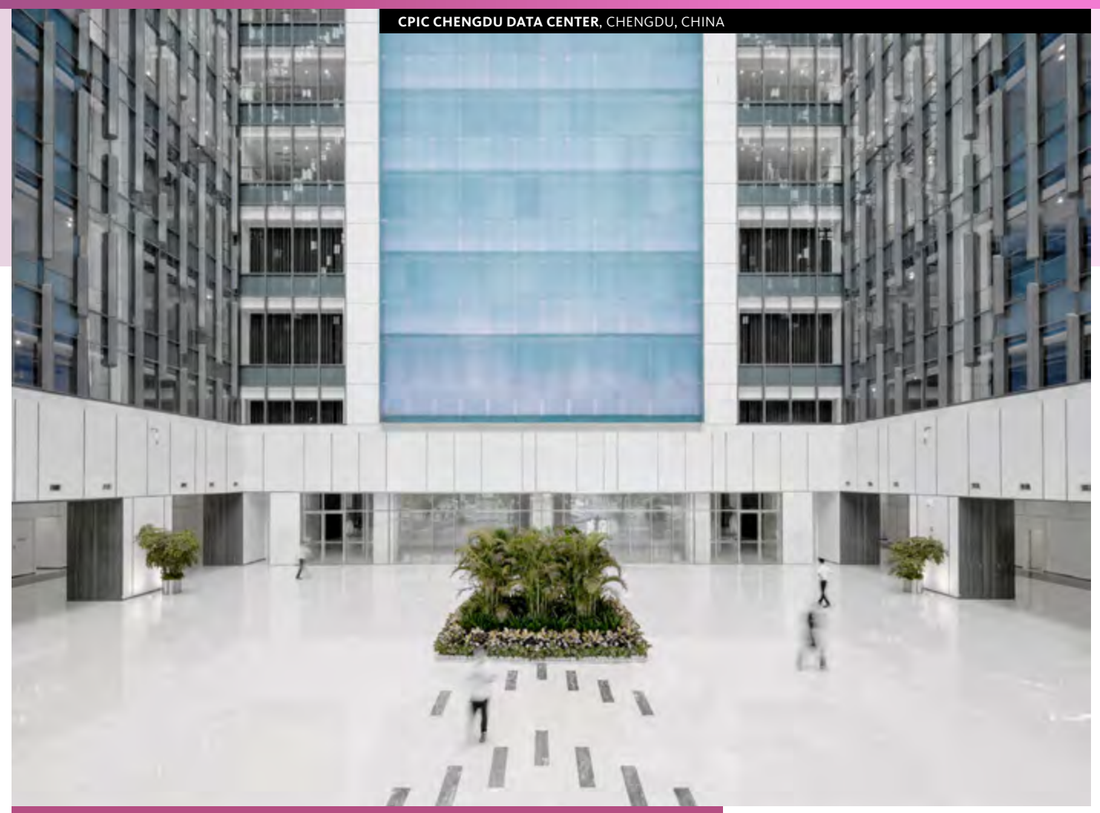
COVID-19 has increased demand for cloud services, such as PaaS, SaaS, and IaaS — a demand that will continue in the foreseeable future. Clients offering cloud services are experiencing rapid growth. On top of that, consumers are demanding unprecedented access, reliability, and speed. This leads to increased demand for suitable locations for data centers in both mature and developing markets around the world. Big Cloud (hyperscale) is on the rise.

THE CLOUD COMPUTING MARKET IS BOOMING

$832B

THE CLOUD COMPUTING MARKET IS PROJECTED TO BE WORTH $832 BILLION BY 2025.

— MARKETSANDMARKETS



CPIC CHENGDU DATA CENTER, CHENGDU, CHINA

VIRTUAL AND HYBRID EDUCATION PUTS A SPOTLIGHT ON UNEQUAL INTERNET ACCESS

12 million: The number of children in the U.S. estimated to live without broadband connectivity.

—THE GUARDIAN

TREND 02 | INTERNET AS UTILITY

THE PANDEMIC HAS ACCELERATED THE INTERNET AS AN ESSENTIAL UTILITY

Access to data as well as fast and reliable connections have become critical to many clients' operations. The hybrid workstyles we've been experimenting with since the start of the pandemic have exposed gaps and limitations in current internet accessibility. While access to data is sound in affluent urban and suburban America, there are far too many locations with low or no available internet. As people continue to work from anywhere and reassess their living priorities, access to quality data services will shape our cities in the 21st century.

DATABANK — GEORGIA TECH DATA CENTER, ATLANTA

TREND 03 | SUSTAINABLE ENERGY

URBAN DATA CENTERS CHANGE THE SUSTAINABLE ENERGY LANDSCAPE

New technologies are allowing data centers to aid in sustainability goals. Incorporation of data centers into campus plans allows the heat generated from server racks to be utilized in central district heating. Power generation technologies are becoming more cost effective, allowing power to be created on-site. This helps reduce the demand on the power grid and lessens the reliance on fossil fuels. Additionally, data centers are seeing greater power densities per square foot, allowing for energy-efficient technologies, like immersion cooling, to be deployed. This helps the building footprint to shrink and thereby become more energy efficient.

BROOKHAVEN NATIONAL LABORATORY, SUSC, UPTON, N.Y.

200ZB

DATA GROWTH IS EXPLODING

The world will store 200 zettabytes of data by 2025. With this exponential data growth, the opportunities — for innovation, and for cybercrime — are incalculable.

—CYBERSECURITY VENTURES

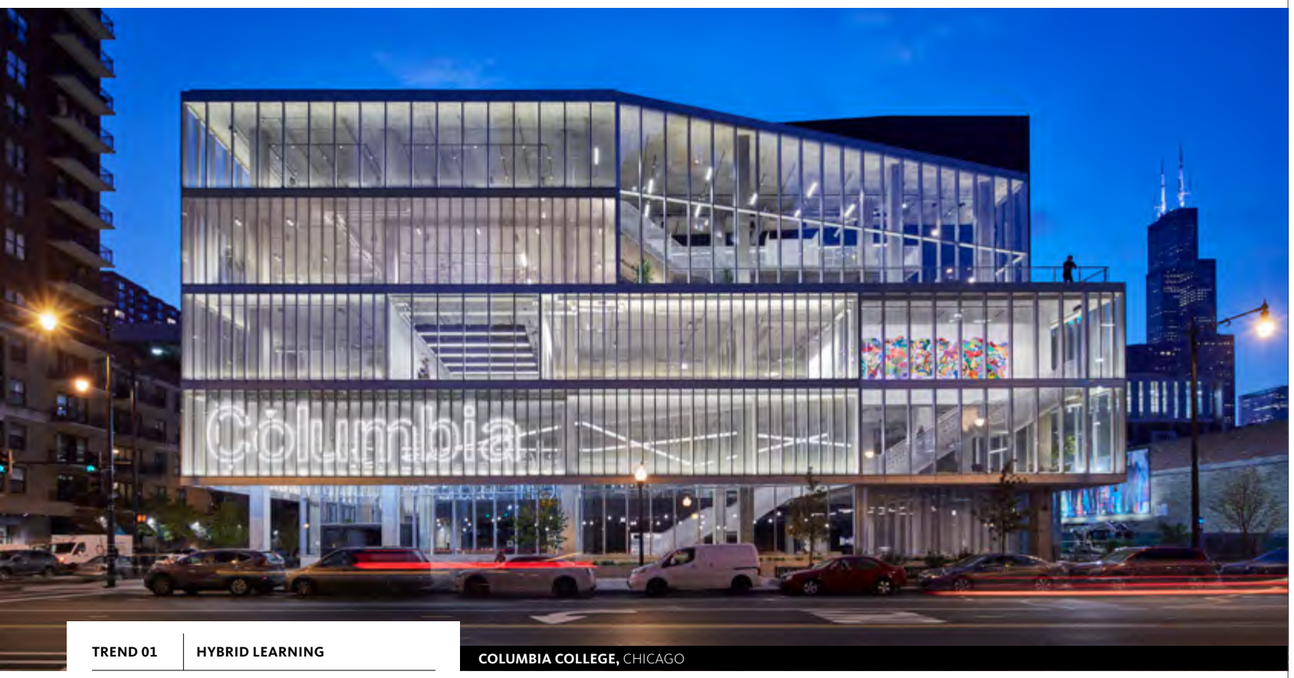
NATIONWIDE CHILDREN'S HOSPITAL DATA CENTER + CONFERENCE FACILITY, COLUMBUS, OHIO

FERMILAB PROTON IMPROVEMENT PLAN-II, BATAVIA, ILLINOIS

EDUCATION

AVIATION
CITIES & URBAN DESIGN
CRITICAL FACILITIES
EDUCATION

While the pandemic required educational institutions to switch to remote learning nearly overnight, it also revealed those challenges that need to be addressed. A position of determined optimism creates an opportunity for institutions to leverage lessons learned and plan for a future that is more agile, resilient, and equitable.



COLUMBIA COLLEGE, CHICAGO

TREND 01 | HYBRID LEARNING

PROVIDING CHOICE BETWEEN VIRTUAL AND PHYSICAL IS PARAMOUNT

Learning environments that support equal access to seamless digital and physical experience will become the norm. Hybrid environments must be adaptable to support every learner, while keeping up with constant change. Single-use spaces will be a thing of the past; spaces will have multiple lives as they evolve and adapt.

TREND 02 | DESIGN TO THE EDGES

DESIGN FOR MULTIPLE, DIVERSE PATHWAYS

Institutions must move away from designing one optimal experience for all students and instead focus on designing multiple, diverse pathways so that every learner is welcome and feels a sense of belonging. Instead of designing to the mythical "average learning" and adapting to accommodate outliers, it's time we design to the edges and provide space for all learners.

TREND 03 | TALENT DEVELOPMENT

A TALENT DEVELOPMENT RENAISSANCE IS UNDERWAY

The repositioning of the talent pool toward marketable and adaptable skills is accelerating. To drive economic vitality, education is taking cues from industry to incubate talent and boost job placement. The emergence of unlikely collaborations across fields of study, industries, and departments has expanded the definition of interdisciplinary culture and will better equip institutions to tackle complex challenges operationally and academically.

TREND 04 | DATA-INFORMED DECISIONS

DATA-INFORMED DECISION-MAKING IS ESSENTIAL

As competition for students and funding increases, institutions are focused on measurable success and impact. A focus on the user experience facilitates an increase in resource allocation, enhancing opportunities for student and faculty recruitment and retention, grants, funding, academic performance, and partnerships. Interpreting diverse perspectives and synthesizing qualitative and quantitative information are key to making impactful, informed, long-term decisions that drive student, institutional, and facility development success.

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

36%

INCREASE IN ADULT LEARNERS OVER THE PAST 15 YEARS. INSTITUTIONS ABLE AND WILLING TO DEVELOP NEW LEARNING MODELS ARE OPENING THEMSELVES TO A VAST MARKET OF PROSPECTIVE STUDENTS.

—McKINSEY

TREND 05 | RESILIENT CAMPUS AND COMMUNITIES

MEASURE SUCCESS WITH SOCIAL, ECONOMIC, AND ENVIRONMENTAL IMPACT

Gone are the days of the campus as an isolated bubble. The triple bottom line for educational institutions — social, economic, and environmental — will require a holistic approach to resilience related to sustainability, wellness, and operational and technological preparedness. Integration with communities, cities, business, and industry will enhance the institution value as a social infrastructure and economic catalyst.

FINANCIAL UNCERTAINTY IS A GIVEN

Financial pressures on institutions have mounted in recent decades. Now, however, financial health is even more unpredictable, and the challenges have increased in complexity, seemingly overnight. Rising labor costs, decreased public funding, suppressed tuition revenue, and demographic changes are straining the college business model.

—CHRONICLE OF HIGHER EDUCATION

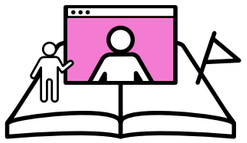
TREND 06 | VALUE OF PLACE

IN-PERSON EXPERIENCES ARE ESSENTIAL TO THE POST-PANDEMIC MIX

Virtual access to knowledge continues to evolve, but in-person experiences are essential for cognitive skills, social and emotional relationship-building, and igniting inspiration. As learning moves online, visceral in-person experiences and culture must be even more impactful for students connecting with each other, faculty, and the larger world context.

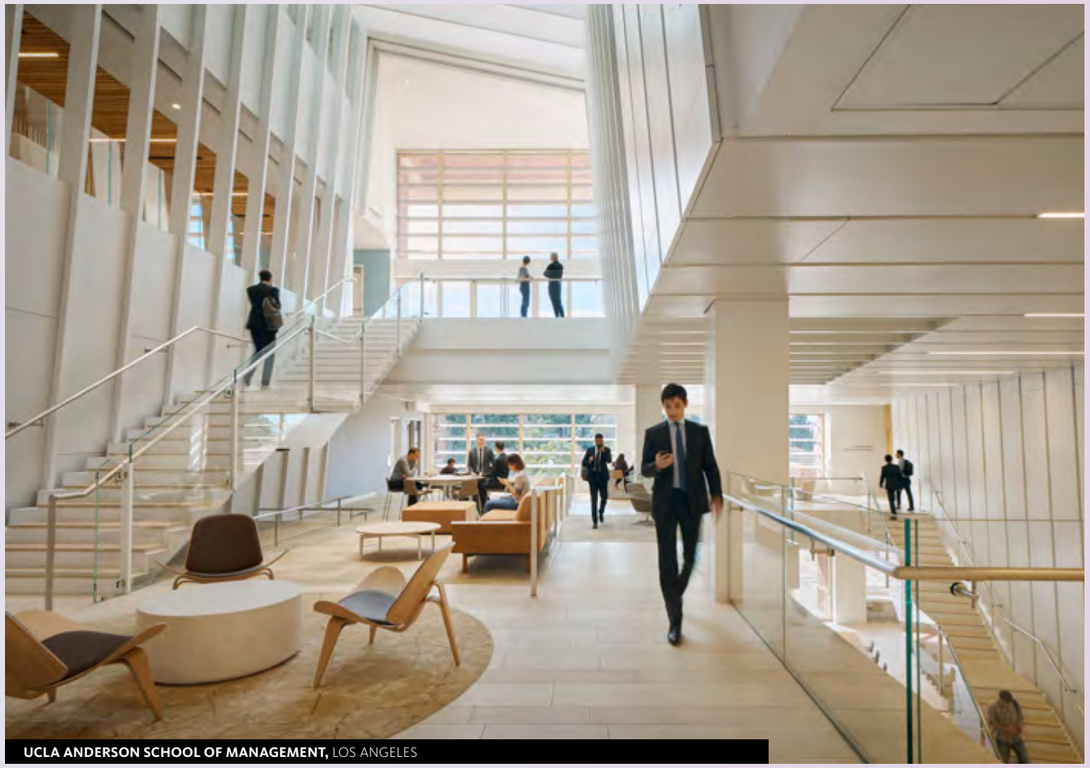
DISTANCE LEARNING IS NOT CUTTING IT

53%



OF STUDENTS REPORT THAT REMOTE LEARNING (OR DISTANCE LEARNING) IS HAVING A NEGATIVE EFFECT ON THEIR SENSE OF CONNECTION WITH THEIR SCHOOL COMMUNITY.

—GENSLER "HYBRID LEARNING IN EXTREME TIMES" RESEARCH 2020



UCLA ANDERSON SCHOOL OF MANAGEMENT, LOS ANGELES

4

Spaces We Need to Redefine the Student Experience

After spending months studying the shifting space needs at colleges and universities during the pandemic, we see several trends shaping the next generation of campus buildings. Here are four key design strategies to enhance learning and success:

1 COMMUNITY, CONNECTION, AND WELLNESS SPACES

Campuses must support the "whole student" and prioritize programs that target physical, social, and emotional well-being. Providing spaces to support interaction and collaboration, and locating services to maximize visibility and accessibility are paramount. A combination of digital platforms integrated with physical space will bring the most value for human connection and enhance the learner's sense of belonging.

2 MULTIDISCIPLINARY INCUBATORS

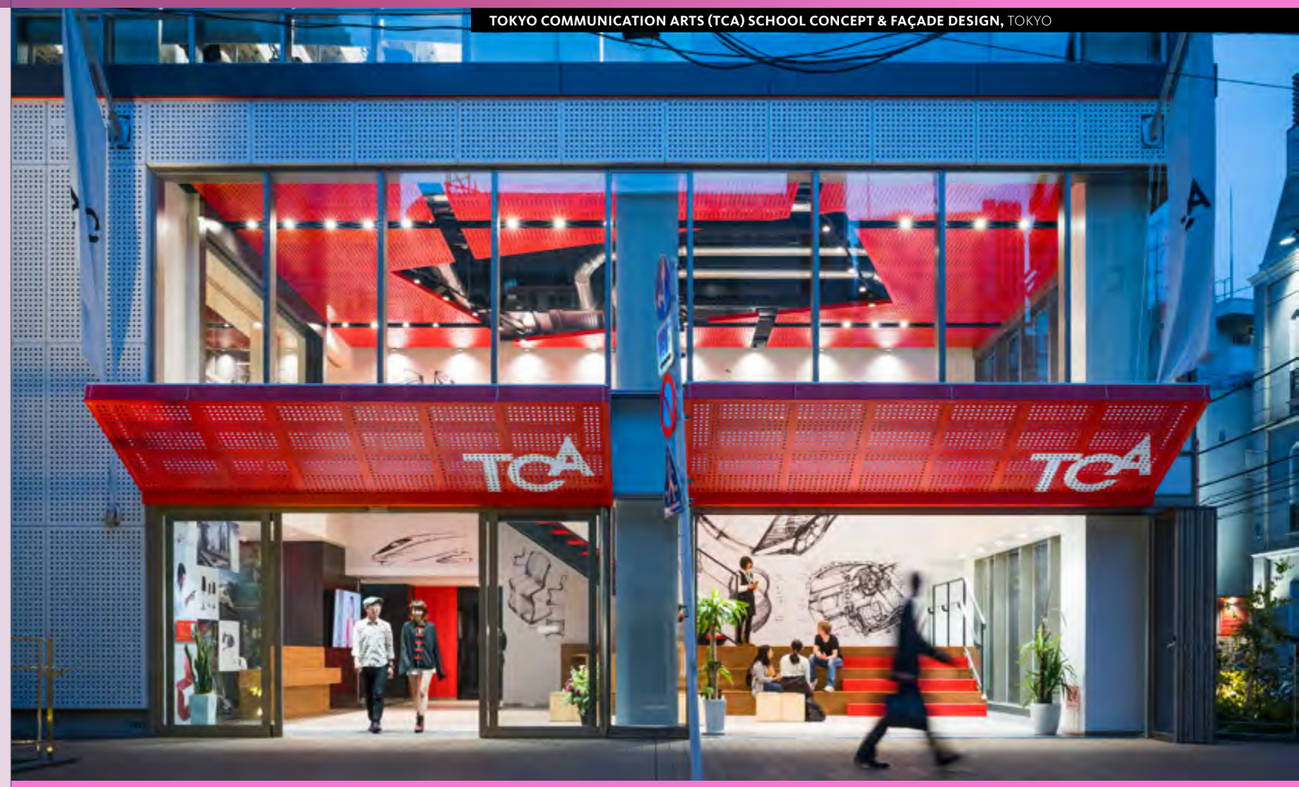
Academic incubators and interdisciplinary spaces support entrepreneurship. These environments and support networks will continue to evolve and will be even more vital in order to diversify the economy and provide an engine for growth in the community. Spaces that bridge industry and academia and fuel workforce development, R&D, and innovation will continue to pervade education.

3 TECH-ENABLED COLLABORATION AREAS

Despite advancements with online communication and whiteboarding programs, face-to-face collaboration sessions are still supreme. Academic buildings will transition into places of gathering, where groups can meet, learn, and create together. Flexible "hackable" space supports dynamic, in-person collaboration. These hyper-flexible and tech-enabled learning environments provide choice based on how learners and educators best engage between virtual and physical space.

4 REIMAGINED LECTURE FORMATS

"Flipped classrooms" started trending from a unique pedagogical question: Why pull students together in a 1,000-seat lecture hall to sit in a non-interactive environment when you can record (or live broadcast) it, and have those students instead listen to the lecture from their dorm room and use alternating class periods for smaller, in-person groups? The shift to remote learning places a renewed focus on repurposing lecture halls into collaborative environments, hyper-personalizing hands-on learning in smaller cohorts.



TOKYO COMMUNICATION ARTS (TCA) SCHOOL CONCEPT & FAÇADE DESIGN, TOKYO

THE FUTURE OF LEARNING IS HYBRID

Despite the challenges of our current times, 51% of students and 56% of educators want the option for remote (or distance) learning in the future. Benefits of learning/teaching from home include convenience, school/life balance, and environmental characteristics like natural light, comfortable furniture, and the ability to adapt space. The most important aspects of being on campus are in-person collaboration, impromptu interactions, hands-on activities, access to amenities, and social/community activities.

—GENSLER "HYBRID LEARNING IN EXTREME TIMES" RESEARCH 2020

DWIGHT-ENGLEWOOD VILLAGE & MIDDLE SCHOOL, ENGLEWOOD, N.J.

Hollywood Blvd Walk of Fame Streetscape, Los Angeles

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